



CHILDREN IN FRONT OF THE TELEVISION: THE ADULTISATION AND DIGITISATION OF AUDIOVISUAL CONTENT

A comparative analysis
according to age and
gender in Spain

EL PÚBLICO INFANTIL FRENTE A LA TELEVISIÓN: LA "ADULTIZACIÓN" Y DIGITALIZACIÓN DE LOS CONTENIDOS AUDIOVISUALES

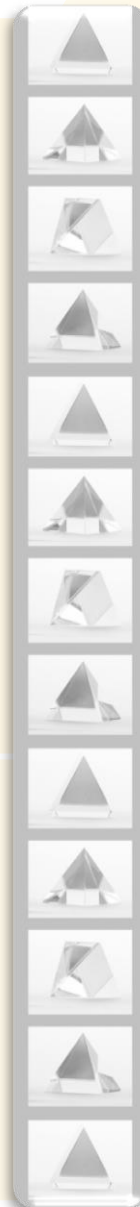
Un análisis comparativo por
género y edad en España

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RESUMEN

La publicidad necesita conocer en detalle los hábitos comunicativos de sus públicos para ser eficiente. Uno de los targets que mayores desafíos plantea es el infantil, definido habitualmente sin atender a diferencias de género y con una horquilla de edad demasiado amplia, lo que enmascara comportamientos muy diversos.

Para identificar las principales diferencias en el consumo televisivo por parte de los más pequeños según las variables edad y género, se realizó un estudio basado en tres fuentes: Kantar Media, EGM y una encuesta específica a 23 niños y niñas. Los resultados muestran una progresiva "adultización" del consumo televisivo hacia canales no exclusivamente infantiles. Un consumo de contenidos audiovisuales que ya no es exclusivo de la televisión y pasan a ser las disciplinas digitales la primera opción de entretenimiento, especialmente en los mayores de 11 años.

Palabras clave

Niños y niñas; publicidad; televisión; género; edad; Internet; mobile marketing; social marketing.

ABSTRACT

In order to be efficient, advertising needs to show familiarity with the communication habits of its target audience. As an audience group, children pose huge challenges, particularly since they constitute a target whose gender is not taken into consideration and which has an excessively broad age range, thereby masking a highly varied spectrum of behaviour.

To identify the main differences in television viewing by Spanish children depending on age and gender, a study was prepared using three sources as its basis: Kantar Media, the EGM and a specific survey on 23 children. The results show a gradual adultisation of television viewing in favour of channels not intended solely for children. Audiovisual content is not viewed merely on a television set. Digital media have taken pole position as an entertainment choice, particularly among children over the age of 11.

Keywords

Children; advertising; television; gender; age; Internet; mobile marketing; social marketing.

1. Introduction

As a particular group, children often determine a purchasing decision either as the buyers or direct deciders, or as the motivators in the family or among a group of friends (Stoltman, 1999: 292). Advertisers are well aware of this and they adopt communication strategies and measures addressed to this age group in particular (Freeman & Shapiro, 2014) that in Spain is defined as boys and girls aged between 4 and 12 years inclusive, accounting for 9.34% of the Spanish population, i.e., 4,346,381 people (National Statistics Institute, 2014).

Common behavioural patterns are disappearing in the current social climate; accordingly, it is essential to analyse and act with regard to small groups of the population in order to ensure that advertising campaigns achieve effective, efficient results. Advertising and media agencies need to be highly acquainted with their target audiences. In addition, they also need to “anticipate trends” (Martín-Guart & Fernández-Cavia, 2014: 22) as far as possible. The youngest age group constitutes the most difficult cluster when it comes to studying their behaviour with respect to advertising as their tastes and preferences are highly different depending on whether we are dealing with boys or girls and according to the age range (Laczniak & Carlson, 2012).

Along these lines, this research project focuses on children as a target audience and their television viewing habits, and it addresses the differences between several socio-demographic groups: boys vs girls, and toddlers as young as 4 years up to 12 year-old pre-teens. In order to reach the goals established, a triangulation methodology was chosen, combining two techniques performed on the same study target one after

the other: firstly, an in-depth analysis was carried out on the data from the longitudinal television audience study by Kantar Media based on its panel formed by a permanent sample of 4,625 homes fitted with people meters and housing 11,758 individuals representing the population universe. For each group, television viewing in Spain was studied according to a range of variables such as programmes, audience figures, audience share, and the time and day of the broadcast. The analysis makes it possible to identify the key differences between the groups and gain a firm retrospective overview. Given the fast growth in viewing and the activities of children online, we also drew information from the General Media Study (EGM) of the Association for Media Research (AIMC) as it asks parents with children aged between 4 and 13 years about how their children use the Internet. The results of the EGM convey a clear progression with age. Indeed, 60.8% of children had logged onto the Internet in the past month, a percentage which rises to 87.2% in the case of 13-year-old children and an average of 94% for children aged between 14 and 19 years. Then, a number of questionnaires were administered to find out about interviewees' opinions and thus anticipate potential developments in a more prospective manner.

The results show a wide range of behaviours according to gender and age groups. Channels that are thematically addressed solely to children have greater coverage among the lower age group; whereas, children aged 10 years or over tend to show increasing interest in channels that are not solely addressed to them, such as FDF and Neox. The pattern also differs between boys and girls and, for instance, it can be observed that Boing attains better results for boys than girls, whereas the results for Disney Channel are entirely the opposite. The results lead to highly relevant conclusions for advertisers, advertising agencies and the media, as well as for the academic community, parents and teachers.

2. Goals

Children, as an audience, are actively involved in the decision-making process linked to a purchase and should not be analysed as a single group of individuals aged between 4 and 12 years because their behavioural patterns differ between the youngest and the older pre-teens and between genders. Therefore, we set out with the general study goal of examining the differences in children's television viewing habits according to socio-demographic variables such as gender and age. To do so, we laid out the following specific aims:

- To compare variations between television channels in terms of average viewers, audience share and programmes according to the above variables.
- To classify children's television channels in Spain and the programmes they broadcast according to the above variables.
- To identify the main trends and anticipate potential developments in a more prospective manner.

3. Methodology and sources

A triangulation methodology approach was chosen for analysing children as a target audience and their television viewing habits. Firstly, an in-depth analysis was performed on television programme audiences using the figures provided by Kantar Media in order to gain a firm retrospective overview. Secondly, 23 questionnaires were administered to children to gain a perspective on the future from the viewpoint of those surveyed in a more prospective manner (Rubin & Rubin, 1995). Lastly, an

analysis was performed on several multimedia sources such as the General Media Study to gain deeper insight into the trends observed in the results of the interviews.

3.1. The Kantar Media people meter panel

Kantar Media is the research institute entrusted with measuring television audiences in Spain. The universe is formed by individuals aged 4 years or over and its size is 44,444,000 individuals who live in Spanish homes with televisions, with the exception of the autonomous cities of Ceuta and Melilla. With regard to the sample, the data analysed stem from a permanent panel of 4625 homes equipped with people meters in which 11,758 individuals representing the study subjects live. It is important to point out that the size of the sample is one of the foremost in the world as it is the sixth largest of its kind. Moreover, it is also in sixth place in a ranking that takes into account the sample as a proportion of a country's population. The margin of error varies between 1% and 5%.

The people meter referred to is a device linked to each home television set which determines the channel being watched at any time and who is watching it. Consequently, each day, audience figures are obtained minute by minute for the previous day along with programming and advertising data, and socio-demographic variables on the panel. The link between the people meter and the viewers is via a remote control: each person in a home is assigned a letter and that person has to press the letter each time they turn the television on or off or whenever they start to watch a programme or stop watching it.

3.2. The General Media Study

Although the primary source of statistics on audiences is Kantar Media in the case of television, for the remaining media formats the General Media Study (EGM) of the Association for Media Research (AIMC) provides statistics on audiences of Spaniards aged 14 years or older. Given that the presence of the Internet among younger children is growing at a fast pace, the EGM also asked the parents of 4 to 13-year-olds about their children's use of the Internet. For this reason, we also resorted to this source because the activities and viewing habits of children on the Internet are becoming increasingly more important, as we will see.

The universe is formed by individuals aged 14 years or over who live in single-family dwellings in the Spanish Peninsula, the Balearic Islands and the Canary Islands. The autonomous cities of Ceuta and Melilla are excluded from the sample. According to the last mobile year available at the time of preparing this article (October 2014 to May 2015), the size of the universe is 39,725,000 people. The annual sample of the multimedia study is 32,325 people, divided into three waves of equal size and design. The fieldwork for each wave was carried out between January and March (first wave), April and June (second wave) and September and November (third wave), excluding holiday periods. Likewise, for certain media there are sample expansions that add to the multimedia surveys. The size of the EGM sample makes it one of the largest audience studies in the world. It uses a random stratified, multistage sample defining the strata according to the province-habitat association. The home is chosen according to random routes on census sections and the individual from the home based on a simple random procedure. It is important to point out that, as opposed to a panel, the same sample is not always questioned.

3.3. Questionnaires as a qualitative technique

Although the analysis of Kantar Media was conclusive, a number of half-structured questionnaires were administered and turned out to be an excellent option to achieve data triangulation as they made it possible to compare, expand on and better understand the quantitative results of the previous stage (Gillham, 2005; Mason, 2002). They also afforded a perspective on the future from the standpoint of the interviewees (Rubin & Rubin, 1995). 23 participants were chosen based on a non-probabilistic sample of convenience. Figure 1 shows the classification of the sample according to age, gender and city. Answers were compiled anonymously, a standard procedure for research of this kind. The questionnaires were sent by email to the parents or legal guardians of the participants who helped and supervised them in the process of filling them in.

Figure 1. Distribution of the sample according to socio-demographic variables

Socio-demographic variables	Boys		Girls		Total	
	n	%H	n	%H	n	%V
Gender						
Total	11	48%	12	52%	23	100%
Age range						
4 to 6 years	3	43%	4	57%	7	30%
7 to 9 years	4	57%	3	43%	7	30%
10 to 12 years	4	44%	5	56%	9	39%
Total	11	48%	12	52%	23	100%
City						
Barcelona	4	44%	5	56%	9	39%
Madrid	6	55%	5	45%	11	48%
Valencia	1	33%	2	67%	3	13%
Total	11	48%	12	52%	23	100%

Source: Compiled by the authors

According to Merton & Kendall (1946), and bearing in mind the in-depth previous analysis carried out on the subject referred to, it was decided to administer the questionnaire via email using simple questions that could easily be understood by the interviewees (Kvale, 1996; Wengraf, 2001). Respondents were required to answer questions on activities they carried out during term time and school holiday periods. Questionnaires were administered between 15 September and 15 October 2015, when children were back at school in Spain following the summer break. They were issued via email, the most commonly used channel for this kind of qualitative research, as an alternative to face-to-face contact (Fontana & Frey, 2005; Lichtman, 2006; Meho, 2006; Oltmann, 2011).

4. Results

4.1. The baby boom in children's television channels

With the advent of Digital Terrestrial Television in Spain in 2010 and the increased number of frequencies, communications groups revised their funding strategies (García, Plana & Ferrer, 2014) and increased the number of television channels they offered (Martín-Guart & Fernández-Cavia, 2014) to secure the largest audience share possible. They opted to specialise, leading to the creation of channels intended for specific audiences with particular content, such as Nova and Divinity which are addressed to female audiences, Energy for men, FDF and Neox specialising in fictional series, Discovery Max and Mega focussing their programming on documentaries and Paramount for film enthusiasts: an extensive range of channels in addition to the traditional, freely available national channels such as La1, La2, Telecinco, Antena3,

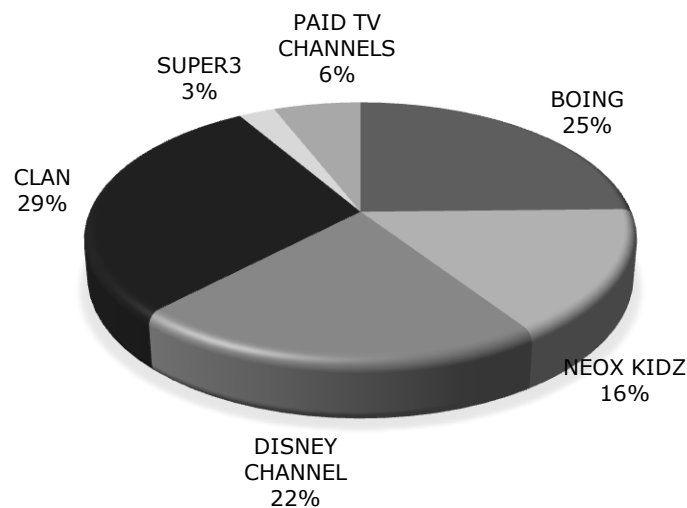
Cuatro and Lasexta; regional and local channels; and television channels over subscription-based platforms. This phenomenon – fragmentation of the range of television options available – also affected children’s television channels when general television channels began removing series and programmes addressed to their youngest audiences. Nowadays, Spanish children have available to them channels that broadcast cartoons and other children’s programmes non-stop, morning, noon and night.

According to a report from the European Audiovisual Observatory, in recent years the number of children’s channels in Europe has increased threefold. At the end of the 1990s there were merely 38 and now there are in excess of 280. Spain has followed this trend and if we add subscription channels to the free-to-air ones there are more than fifteen channels exclusively for children. Specifically, there are five free children’s channels owned by major communications groups: Clan (the leading channel since 2005, belonging to the public group RTVE); Boing (owned by Mediaset, which in turn owns other channels such as Telecinco, FDF, Cuatro, Divinity and Energy); Neox Kidz (a channel integrated into Neox’s morning programming specialising in children’s programmes, broadcasting from Monday to Sunday, which belongs to the Atresmedia group along with Antena3, Mega, Nova and Lasexta); and Disney Channel and Super3 (the latter belonging to the Catalan Audiovisual Media Corporation and aired regionally), which complete the range of free-to-air channels offered in Spain.

Figure 2 shows the share of each children’s channel. Clan is in first place with an audience share of 29%; in other words, 3 in every 10 children watching children’s programmes watch Clan. Nonetheless, the enactment of Law 8/2009, of 28 August, on funding for the Spanish Radio and Television Corporation meant that “after 54

years, in 2010 public television launched a new funding system, and for the first time since it was set up, it ceased broadcasting advertisements” (Fernández, 2013: 724). Accordingly, the channels belonging to the public body (which include Clan along with La1, La2, Teleduarte and 24Horas) do not allow advertisements. Therefore, from an advertising standpoint the advertising share (Figure 3) was used, where Boing, belonging to Mediaset, held pole position with a 35% audience share, followed by Disney Channel with 31% and Neox Kidz with 23%. It can also be seen that all children’s channels broadcast on pay-per-view platforms – including Cartoon, Nick, Panda and Disney pay channels – account for 6% of the share. Super3, broadcasting in Catalan for Catalonia, is the top channel in its region and holds 3% of the national audience share, as shown in the chart below.

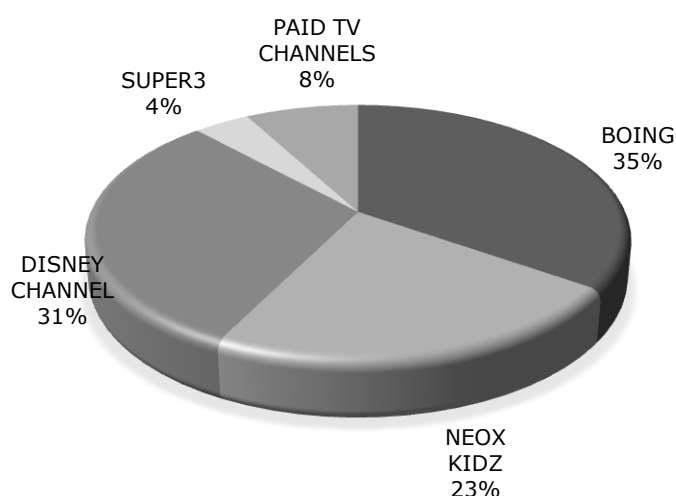
Figure 2. Audience share of children’s channels in Spain



Source: Kantar Media. From Nov 2014 to Mar 2015. Compiled by the authors

Target: Children 4-12 years

Figure 3. Audience share of children's channels in Spain with advertisements



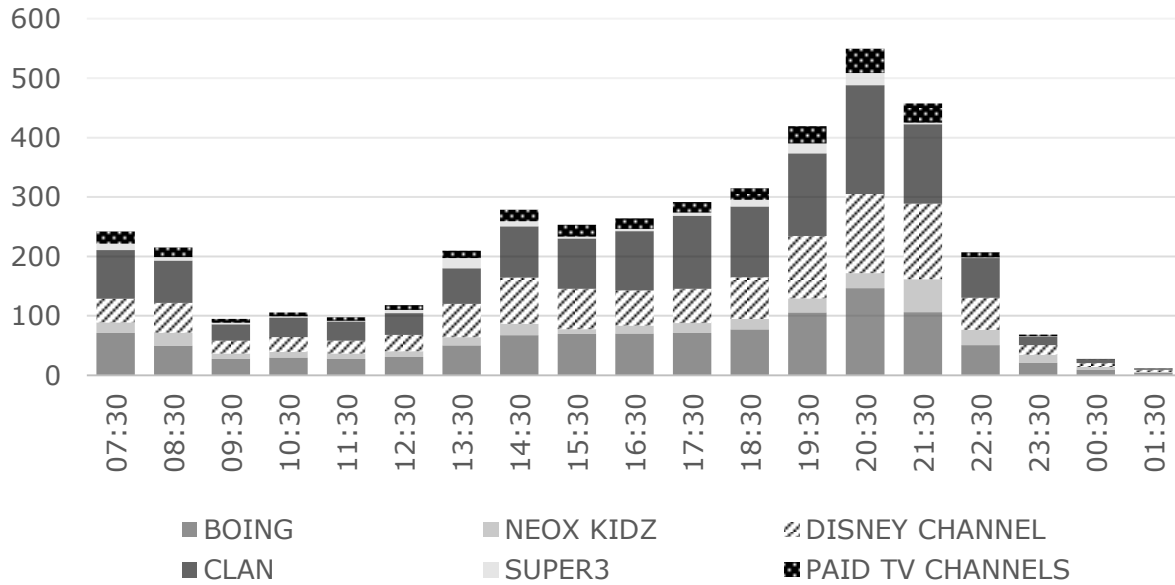
Source: Kantar Media (without Clan). From Nov 2014 to Mar 2015. Compiled by the authors

Target: Children 4-12 years

4.2. Children watch 3 hours of television every day in Spain

The time children spend watching television every day continues to rise and has stood at an average of 180 minutes of television daily over the past decade (Moreno, 2014). These 3 hours a day are essentially packed together on mornings between 7.30 and 9.30 am and evenings up to 8.30 pm from Monday to Friday, as shown in Figure 4. The specific time 9.30 pm is also noteworthy on weekdays as it is when 457 thousand children are watching television, and it is even more surprising that at 10.30 pm there are still 200 thousand children tuned in. Football broadcasts and specific programmes like Master Chef (a cooking programme), La que se avecina (Spanish fictional series) or Your face sounds familiar and The Voice (both talent shows) manage to draw in a significant share of the child audience as we will see further on when we examine the television audiences programme by programme and not just channel by channel as we have done thus far.

Figure 4. Number of children (thousands) watching children's channels according to the time of day from Monday to Friday

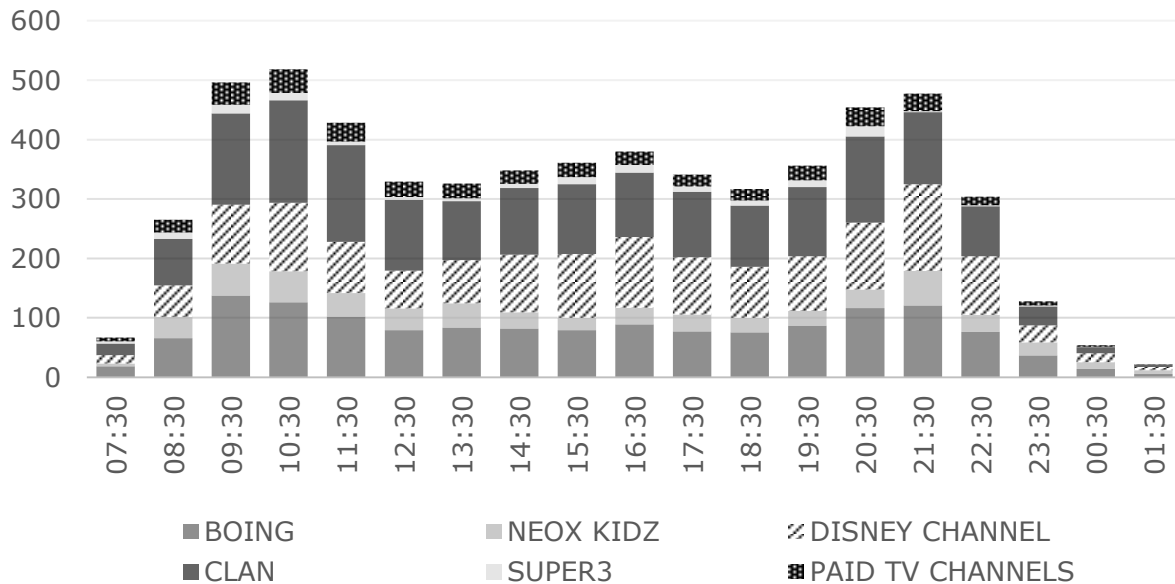


Source: Kantar Media. Compiled by the authors

Target: Children 4-12 years // From Nov 2014 to Mar 2015

Audiences on weekends (Figure 5) tend to be more homogeneous. There is a peak audience between 9.30 and 11.30 in the morning and the evening extends as far as 10.30 pm with 304 thousand children still watching the television.

Figure 5. Number of children (thousands) watching children's channels according to the time of day on weekends



Source: Kantar Media. Compiled by the authors

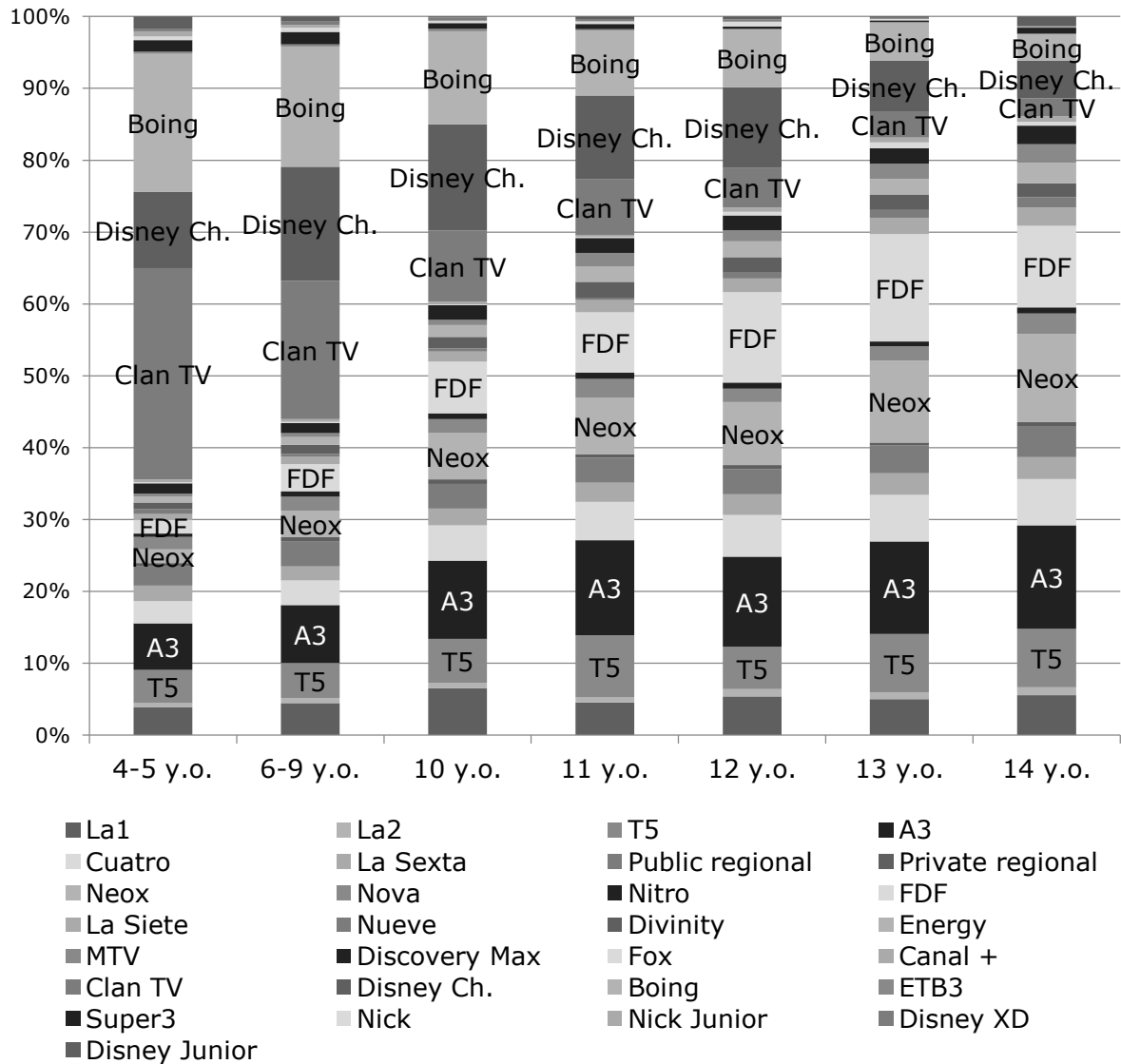
Target: Children 4-12 years // From Nov 2014 to Mar 2015

4.3. Understanding children as a single group of individuals does not suffice

Thus far these charts and tables have not detailed the differences between boys and girls and between the youngest and older pre-teens. At this juncture, we shall demonstrate why it is not enough to study children as a single group of individuals aged between 4 and 12 years. The television audience share analysis shows clear differences according to age and gender. Television viewing habits are not homogenous; there are differences between boys and girls, and between younger children and teens. This is not always taken into consideration by marketing and communication professionals.

The following figures set out the share held by all channels, not just those specifically addressed to children, broken down by age and gender. Specifically, Figure 6 does not distinguish between boys and girls; Figure 7 shows the share according to the age of girls; and Figure 8 shows the share according to the age of boys. Based on this in-depth analysis, it can be seen that the pattern also differs between boys and girls; for instance, Boing achieves better results for boys than girls, whereas the results for Disney Channel are entirely the opposite. We have also observed that channels that are specifically addressed solely to children attain greater coverage among the lower age group, whereas children who are 10 years or older show increasing interest in channels that are not only addressed to them, such as Neox and FDF, broadcasting series such as *The Simpsons* which, on the basis of its characteristics in terms of colour and animation, is typical of a cartoon series appealing to children, although its content is more suited to adults (Fernández & Díaz-Campo, 2014, Moreno, 2014).

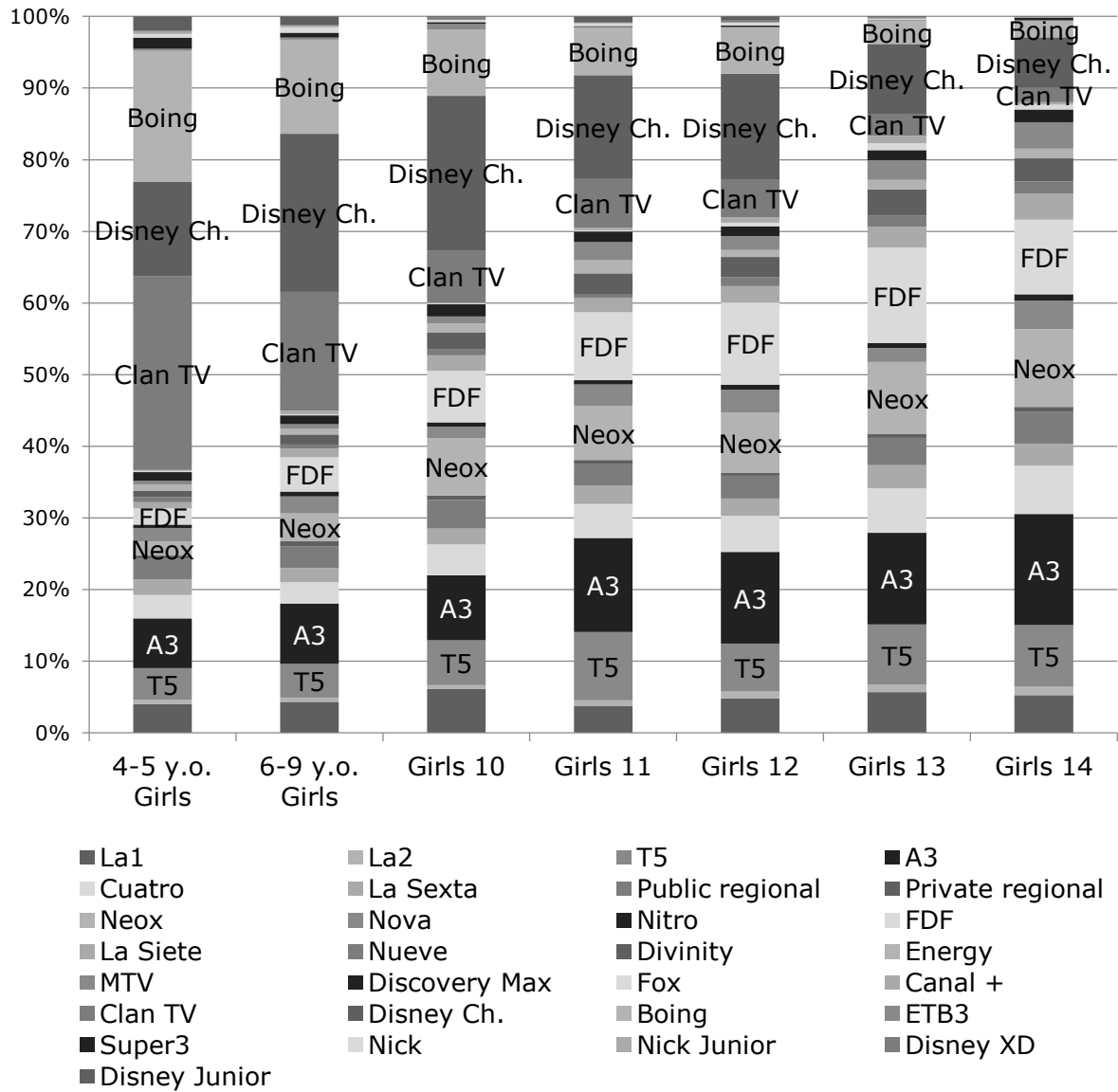
Figure 6. Audience share of television channels in Spain based on age range



Source: Kantar Media. Compiled by the authors

Target: Children 4-12 years // From Nov 2014 to Mar 2015

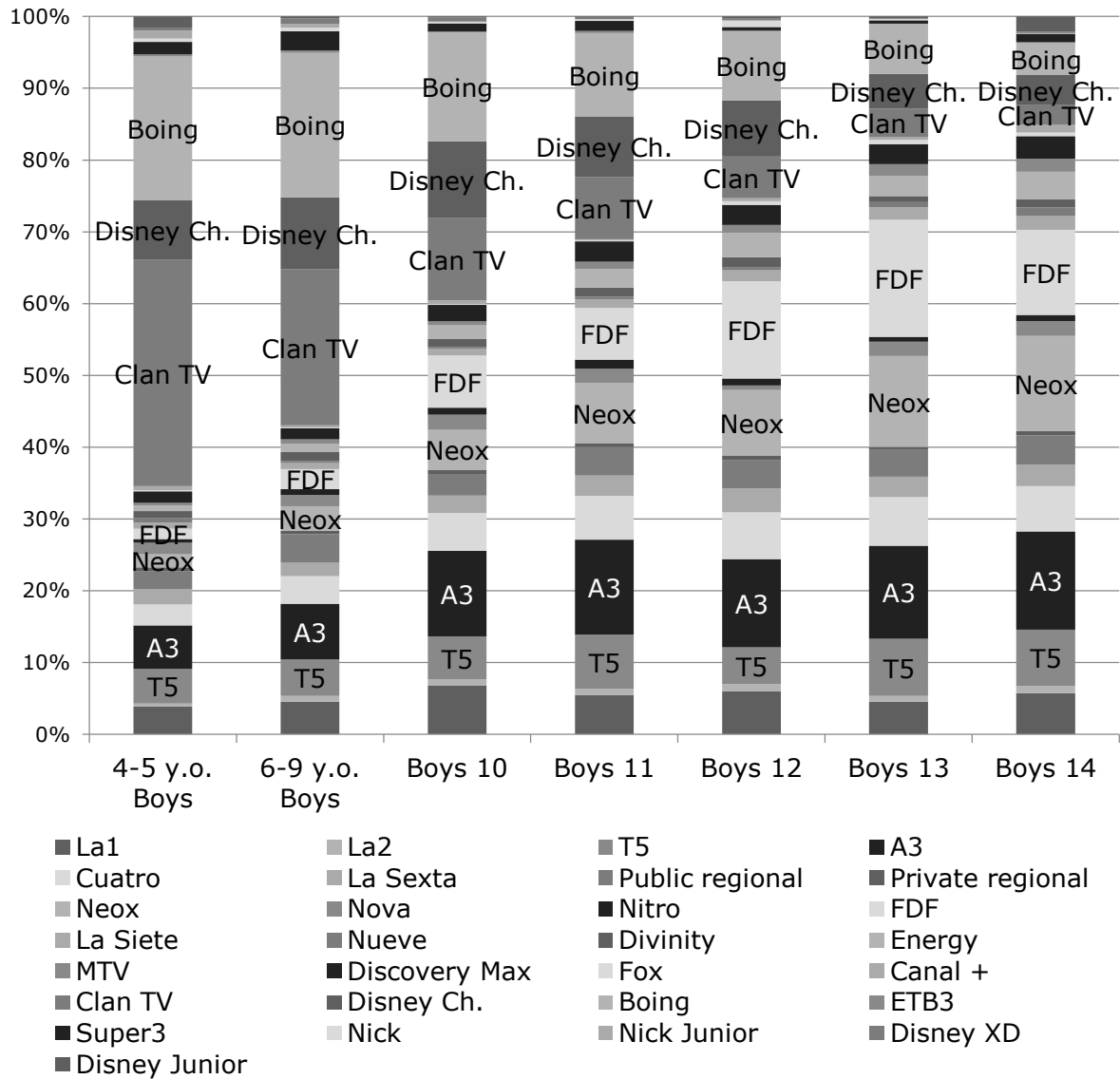
Figure 7. Audience share of television channels in Spain based on age range; girls only



Source: Kantar Media. Compiled by the authors

Target: Girls 4-12 years // From Nov 2014 to Mar 2015

Figure 8. Audience share of television channels in Spain based on age range; boys only



Source: Kantar Media. Compiled by the authors

Target: Boys 4-12 years // From Nov 2014 to Mar 2015

In order to gain a better overview of these results we have set them out in order of popularity by age group using the channel logos, distinguishing girls (Figure 9) from boys (Figure 10):

Figure 9. Girls' favourite television channels according to age range



Figure 10. Boys' favourite television channels according to age range



Figures 9 and 10: compiled by the authors using data from Kantar Media

Target: Children 4-12 years // From Nov 2014 to Mar 2015

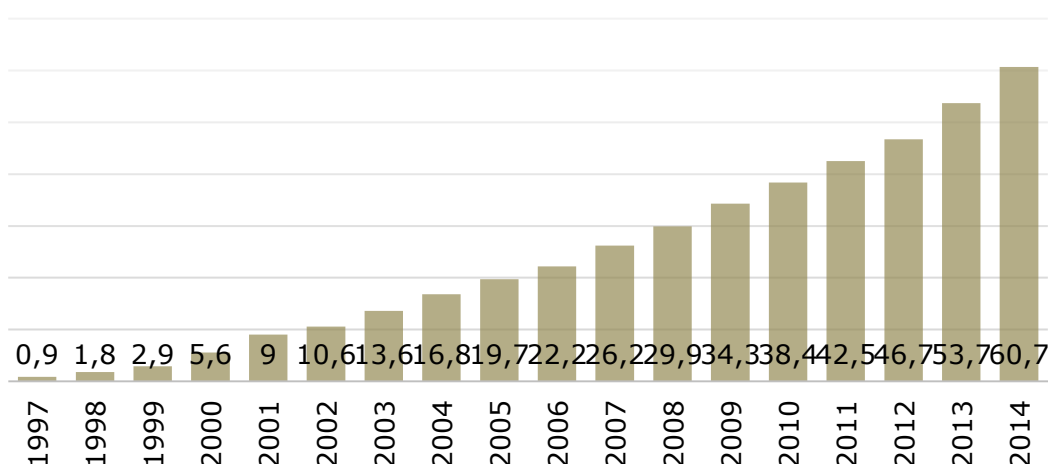
The results show that studying children as a single group of individuals aged between 4 and 12 years will not suffice in order to engage in efficient, effective planning. Thus far, we have examined television viewing in terms of audience by channel, and we have gone further by looking at children as a television audience in terms of the share by programme. This is a necessary distinction because, oftentimes, children are fans of specific programmes regardless of the platform on which the content is broadcast, and age and gender are patently discriminatory variables. According to Bermejo (2011), children aged 5 to 8 years already begin to watch programmes addressed to older individuals and indeed the analysis of the average audience by programmes among each target group shows that Disney Channel, Clan and Boing broadcast programmes with the highest audience share among the youngest children, with cartoons and music programmes appealing particularly to them, although football on Tele5 also has many fans among the youngest children; for instance, the Confederations Cup was seen by 7.4% of children aged 4 to 5 years and by 14.1% of children aged 6 to 9 years. In addition to football, the Roland Garros tennis championship (with an average audience of 8.2% of children aged 10 years) and Formula 1 dominate the top positions in the ranking of programmes. These audience numbers are high if we compare them with the ratings of series specifically for children. Girls tend to prefer the series on Disney Channel and EuroBasket which achieved a share of 7.9% among 11-year-old girls. There is thus a clear shift in audiences from channels and programmes addressed to children in favour of programmes broadcast by general channels and not merely in favour of sporting broadcasts, which we can classify as universal programming. Also noteworthy are certain films and the Spanish fictional series "La que se avecina" broadcast on Tele5 at

prime time, the content of which is considered suitable for adults, as we mentioned earlier with regard to The Simpsons.

4.4. A new media ecosystem where digital disciplines are the stars in the entertainment of children

A clear transformation is unfolding in today's media ecosystem and traditional mass communication can be seen as being replaced by networking communication (Cardoso, 2011). Research sources like the EGM, Comscore and IAB are clearly revealing this occurrence. The EGM reveals that the use of the Internet in Spain is undergoing constant growth and by 2014 had reached a total of 24 million users, 13% more than in the previous year, a trend which would point to 60.7% of Spaniards above 14 years having logged onto the Internet yesterday (Figure 11), a figure which comes to 69.3% in terms of the number of people who logged in over the past month.

Figure 11. Trend in Internet use according to user numbers since 1997 (use for yesterday as a percentage)



Source: EGM. 2014. Compiled by the authors

Target: Individuals aged 14 years and over

This is a growing trend that is heightened among the younger groups for whom there is no digital gap. In order to see how their use of the Internet varies according to age, the EGM provides us with information showing that the use of the Internet rises among children as age increases, whereby use stands at 25% among 4-year-olds and rises to almost 90% among 13-year-olds, as shown in Figure 12. Differences between genders can also be seen and the numbers for girls are slightly higher than for boys when it comes to use of the computer and logging onto the Internet.

Figure 12. Access to the Internet over the past month (use in the past month as a percentage)

Age range	4-13	4	5	6	7	8	9	10	11	12	13
Total children	60.8	24.7	34.1	41.0	55.4	58.4	71.0	70.0	81.6	83.8	87.2
Boys	59.5	24.8	33.0	38.4	54.9	58.5	72.2	68.1	77.7	83.3	81.9
Girls	62.1	24.5	35.3	43.7	56.0	58.3	69.9	72.1	86.2	84.3	92.9

Source: EGM 1st wave 2015. Compiled by the authors

Target: Individuals aged 4 to 13 years

In order to supplement the retrospective results of Kantar Media and the EGM, and to gain a better understanding of television viewing and Internet use habits among children, as well as to identify the key trends in relation to the study area in a more prospective manner, we shall refer to the questionnaires. We currently know that audiences view audiovisual content in varying contexts, known as the ATAWAD phenomenon: anytime, anywhere, any device. The results of the questionnaires are not the key object of study; however, it would be interesting to set out the primary results because viewing of audiovisual content is no longer exclusive to television, and this gives rise to an interesting future line of research. We have discovered a new reality, a new ecosystem of media relations where digital disciplines are the stars in

the entertainment of children. Most children, particularly those over 11 years, responded indicating that digital disciplines, such as chat rooms, emails, blogs, social networks, online games and YouTube took up most of their free time. Differences can also be seen between boys and girls, and between the youngest and pre-teens: with regard to content, the results of Kantar Media can indeed be extrapolated; in relation to activities, girls for instance prefer artistic activities and dancing, aspects that also reveal themselves in Internet browsing, while boys tend to opt for sports, superheroes and online games.

However, the results do not show preference for mobile devices and how they take over from the “idiot box” among younger children. Being able to watch “what they want, where they want” is part and parcel of children’s media lives, and social networks are the stars of this phenomenon affording access to content that is often generated – or at least shared – by the users themselves. Lastly, we should highlight a phenomenon that would draw the attention of academics, marketing professionals, teachers and parents; namely, how children combine both media (traditional television and the Internet), and the reality is that children over 8 years old prefer to surf the Internet to watch television as indicated in Figure 13.

Figure 13. Television viewing vs the Internet. Preference (in %) by age



Source: Target Infantil Online 2014 study. Publicidad.net¹

5. Conclusions and prospective viewpoint

This article reveals how a study of television from the standpoint of audiences requires more specific analyses focussing particularly on the target audience between 4 and 12 years of age because often children are dealt with as a single group. However, behavioural patterns between the youngest and the oldest, and between boys and girls, differ greatly as the results show. Moreover, children are taking on an ever increasingly important role in the decision-making process for purchases, according to Inés Ramos, programming director for Disney Channel in Spain and Portugal: “children dictate many family decisions. We know they are influential in the

¹ This study shows the results of the survey on habits in terms of use and browsing on the Internet by parents and children according to the age and gender of the users. The study, audited by PwC, was conducted in the first quarter of 2014 on a sample of more than 11,000 users.

purchase of a car, in what to eat for breakfast, in how and where families spend their holidays and, of course, in the toys they want for Christmas or birthdays". Accordingly, audience analyses must be in-depth and at least take into consideration the socio-demographic variables of age and gender.

The goals raised in this study were reached following an in-depth analysis of the results obtained from the Kantar Media people meter panel, providing us with a firm retrospective overview. Applying a triangulation methodology made it possible to gain a more prospective view of the study object and begin to explore new forms of interactive communication via a range of devices that are sometimes used simultaneously. Even though traditional television remains the most commonly used medium by children, and also the format that is most widely studied from a range of standpoints (economic, communicational, social, educational, etc.), a new communication ecosystem still scarcely known to us is coming to the fore.

It has been demonstrated that children as young as 4 and 5 years old begin viewing content on a range of platforms and thanks to their parents they begin to develop a familiarity with games on smartphones and tablets. Nevertheless, television is still the preferred medium for younger children, with Clan and Boing being their favourite channels. The questionnaires also revealed that the preferred online activities of children in the younger age group were drawing and, to a lesser extent, playing games online.

The phenomenon of digitisation is becoming more widespread among children aged 6 to 9 years. Video games on a range of platforms such as consoles and apps are gaining traction, especially among boys. Television is still highly important and differences begin to emerge depending on age and gender, with Disney beginning to

gain popularity among girls. In this age group, football plays a prominent role for boys both as a sport they engage in and one of their favourite audiovisual contents to watch.

Children aged 10 to 12 years can be defined as the subject of change. Major differences begin to arise between age groups and genders in relation to both their preferred channels and their programmes, and television viewing becomes ever more complex at this stage as they abandon children's channels gradually in order to steer towards more adult content, as observed earlier. The questionnaires also illustrate the important role played by social networks for this age group, along with the use of mobile telephones, widely so among those aged 13 years and over, with chatting constituting their favourite online activity.

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