

Consultation response form

Boom Cymru.

Boom Cymru is one of the largest producers of children's programmes in the UK with a long track record of creating broadcast content for children. The company delivers over 200 hours of multi-genre children's output annually for S4C, made up of various series' and continuity links. Our content is designed to appeal to children from the pre-school age group right through to early teens and to facilitate this we employ 50 full time staff at our children's department to originate, create and deliver our work.

Your response

Question 1: What characteristics do (i) children and (ii) parents/carers most value about content aimed at children? How does this vary depending on the age of the child?

Confidential? – N

For pre-school aged children, the content provided by S4C's pre-school brand, Cyw offers original programming that stimulates both children's imaginations and also their natural desire to learn.

Given S4C's children's output is broadcast through the medium of Welsh, it not only helps children develop their language skills, but it also provides non-Welsh speaking parents with the opportunity to engage with the Welsh language alongside their children which offers families a great shared experience.

For children between 7 and 13 who are more naturally drawn to comedy and drama, output is designed to be reflective of their lives. Diversity, social groups and locations all play a role in ensuring that these children are represented on screen.

Alongside content created specifically for TV, it has become a priority for Boom Cymru to increase the digital footprint which offers opportunities for audience engagement with programme brands digitally and online.

For parents, there is the peace of mind of knowing that the content their children are consuming is not only safe and trustworthy, but it is also pitched at a level that fits with

	<p>their emotional and social development. In essence, they look for programming from a trusted source that not only engages but also informs and entertains.</p>
<p>Question 2: Are there certain genres within children’s (e.g. live action, animation) that children or parents/carers particularly value and watch, and if so why?</p>	<p>Confidential? – N</p> <p>For children of pre-school age, animation rates highly. In the case of the Welsh language, often this can be seen through a national/international programme brand being re-versioned for Welsh speaking audiences, making it not only accessible to Welsh speakers but also helping to ground the content in the Nation.</p> <p>At Boom Cymru we produce S4C’s pre-school continuity service Cyw, which includes a significant amount of 2D animation. This animation has become the cornerstone of this established and highly valued brand for S4C. Like many of the other ‘big brands’, Cyw has the associated benefit of marketing visibility, through the off-air merchandise that children are often familiar with before they first see the brand’s characters on television.</p> <p>For older children – the comedy and drama genres are the key drivers in this demographic - though not exclusively. Re-versioned national/international animated brands can play a role here too, as well as non-scripted content, including live interactive programmes.</p>
<p>Question 3: Do children or parents/carers have different expectations in terms of quality or other characteristics depending on the format (e.g. long-form vs. short-form/broadcast vs. online), or the provider/brand (e.g. BBC/ITV vs. Netflix vs. YouTube etc). Do they value content in these different formats or from these different providers differently? Do these different formats or providers meet different needs for children?</p>	<p>Confidential? – N</p> <p>For Parents/Carers, quality is key. This quality is driven by our editorial guidelines, the standards around the correctness of the language and the reassurance that the content is appropriate for the age group.</p> <p>Audiences trust S4C to deliver against these principles and as such, Boom Cymru ensures everything the company produces measures up to these exacting standards.</p> <p>For very young children, research has shown that the pre-school Cyw brand is of significant value to the broadcaster, S4C. And Boom Cymru, as custodians of the brand, has a</p>

	<p>responsibility to ensure values are maintained in everything that is created by the company.</p> <p>Conversely, the expectations of younger audience members are often 180 degrees in opposition to their parents/carers. For children it is often short form, less regulated output that is a driver of consumption.</p> <p>Production values or technical standards have little or no influence on their choice of viewing, and short form is often seen as more attractive because it comes with an element of risk/danger in its consumption.</p> <p>Children are also the ultimate arbiter of choice, not driven by schedules, as they prefer to watch on platforms such as YouTube. At any point, they can gain access to content, which given the proliferation of digital devices could as easily be at school or at home.</p>
<p>Question 4: When and why do children and parents/carers choose online or streaming services (for instance iPlayer, Netflix, YouTube) instead of watching TV on a TV set? Is this for particular sorts of programmes? Do you have any evidence in support of your view?</p>	<p>Confidential? – N</p> <p>Audiences are often driven to streaming services as they are unencumbered by the restrictions placed upon the more traditional TV schedules that ‘linear’ broadcasters offer. This is also true of younger audiences.</p> <p>Quick access to favourite programmes and the opportunity to series stack or ‘binge’ on a particular show is popular. Given we learn through repetition, for younger audiences, the repeated watching of the same content can help cement ideas into the psyche. The accessibility of these services is also due to the marked growth in digital devices and digital downloads.</p> <p>No longer restricted to traditional ‘linear’ TV, it’s now possible for children to consume their favourite shows on a range of digital devices in just about any location at any time.</p> <p>Sometimes a streaming service may offer these audiences content that is unavailable elsewhere, and today broadcasters are keen to explore how best to increase the size of their digital footprint and the availability of elements of their content with each new commission.</p>

	<p>Often ‘supporting’ content can explore or expand on themes or ideas that are found in the associated ‘parent’ programme and can be educational as well as entertaining.</p>
<p>Question 5: How do children discover programmes and decide what to watch? What role do broadcasters, platforms, parents, and friends play, and does this change as children get older?</p>	<p>Confidential? – N</p> <p>Children pick up trends quickly and can often discover programmes in a variety of different ways - coming across a new show in a schedule or via a streaming service, through word of mouth at school or through peer pressure that makes them feel as though they are missing out if they’re unable to discuss a particular programme or content with their contemporaries.</p> <p>Web surfing can sometimes lead them to try a new programme or lead them to pick up on a particular trend. For their parents – the discovery of something new tends to be related to a more traditional marketing mix – promos, live events, etc.</p> <p>Broadcasters have a responsibility to observe the rules around pre and post watershed in order to safeguard children and young people. Parents also place their trust in the observance of these regulations to ensure their children are not able to view broadcast marketing materials or programmes that might be unsuitable for an audience in a certain age group.</p>
<p>Question 6: Are there specific genres within children’s content (on any platform) where demand or audience need is not currently matched by supply from PSBs, commercial channels, or on-demand and streaming services, or a combination of the former? What supports your view on this?</p>	<p>Confidential? – N</p> <p>Drama content through the medium of Welsh is under-represented in schedules due to budgetary constraints. Drama not only offers the opportunity to reflect the issues that matter to younger audiences, but it can also help hot house future creative talent.</p> <p>7 – 13 year olds would be better served with a more comprehensive schedule. S4C’s service for older children (Stwnsh) is shown for an hour a day and consequently it is difficult to satisfy the entire needs of this age group within this limited slot. CBBC in comparison broadcasts 14 hours every day.</p>

	<p>Given the desire from broadcasters to genuinely engage with younger audiences and grow their numbers and brand loyalty, there is clearly a need to better represent the children's genre in Wales in both languages and for content from a Welsh perspective to be seen on wider networks.</p> <p>The BBC Annual report for 2016/17 highlighted there was no BBC expenditure on children's content from Wales for that financial year, in contrast to the other UK Nations (Scotland over £10m and Northern Ireland over £4m).</p>
<p>Question 7: What is the role and importance of first-run UK-originated programming for audiences? For broadcasters? Does this vary by sub-genres or by age group?</p>	<p>Confidential? – N</p> <p>The review has acknowledged the steep decline in original children's content and clearly sets its aim at protecting and encouraging original children's production from sources across the UK. As a public service broadcaster, part of S4C's remit is to provide Welsh language programming to all ages, including children. Consequently, S4C is one of the UK's largest investors in original content for children and the channel should be applauded for its long-standing and ongoing commitment to commissioning and broadcasting content targeted at this underserved audience.</p> <p>S4C's original content reflects the lives and experiences of Welsh children, giving an opportunity for them, their school and local area to appear on screen, which also helps reflect the diversity of our nation.</p> <p>All S4C's programmes are in Welsh and it is fundamental that minority language programmes are supported despite the inherent non-commercial nature of the content.</p> <p>Cyw, S4C's pre-school service, has a critical role to play in the promotion and learning of Welsh and as such, is regarded as one of S4C's most valued brands.</p> <p>It is also crucial that children can enjoy quality content in any language and on all platforms.</p>

	<p>Boom Cymru's Welsh language productions are made in Wales with Welsh cast and crew that serves to bring real economic benefits to the Welsh nation, but more needs to be done to ensure that content produced from Wales reflecting the diversity of the nation is seen on the wider UK networks.</p>
<p>Question 8: How are on-demand and streaming services changing the nature of competition in children's content? Is this impacting on the range or quality of content available to UK audiences?</p>	<p>Confidential? – N</p> <p>The rapid and far reaching development of online services has meant that the range of platforms now available to audiences have increased exponentially. There is now a near universal accessibility to a wide range of output, and this has created real competition for the UK's Public Service Broadcasters.</p> <p>YouTube empowers its users with the ability to create and publish content in a way that traditional broadcasters cannot, at present, offer. The success of the Youtube phenomenon has resulted in all broadcasters now increasing their offering of short form content, and a desire for the audience to be as much an on screen presence as off screen, which is having an extremely beneficial impact on the improved representation of diverse audiences as well as the plurality of content.</p>
<p>Question 9: How have funding models and investment in children's content changed over the last five to ten years? Do you have evidence you can share with this to support your view?</p>	<p>Confidential? – N</p> <p>During the past 10 years, S4C's programme budgets have been reduced significantly, and this has meant that the broadcaster has not been able to include adequately-funded Children's drama in its schedules for some years.</p> <p>However, the recent introduction of Children's Tax credits has offered a welcome boost to the development of more ambitious and high end productions in drama, factual and entertainment across the UK.</p>
<p>Question 10: If certain genres within children's content (for instance news, factual, or drama) are becoming increasingly difficult to obtain funding for, what are the reasons for this? Are</p>	<p>Confidential? – N</p> <p>S4C's programme budgets are lower than network tariffs and this is also true for Children's programmes on the channel. With</p>

certain genres more difficult to generate financial returns from, and if so, why?

such financial constraints, it has led to a marked dearth of Welsh language children's drama in particular – a sub-genre that is so critical to the engagement of young audiences.

The less-commercial suitability of some Welsh language content has also had an impact on the ability to attract 3rd party funding. The ultimate outcome is that a large proportion of the audience is not only underserved but also under-represented on screen.

Question 11: Are there other incentives and disincentives you think we should consider as part of the review?


Confidential? – N

There are many aspects of funding that bring significant benefits for commissioners and producers alike – in particular the introduction of the Children and Animation Tax Credits has greatly helped the development and creation of scripted and non-scripted children's productions that more adequately reflects both the audience and nation's culture. It is crucial that these tax incentives remain in place and ideally, are further improved, particularly in the case of animation, to allow the British sector to remain competitive with its counterparts in other countries, especially Ireland.

The Public Service Contestable fund can also provide an additional boost in terms of the much needed increase in the creation of original children's content and we look forward to hearing more about the plans for this fund in the near future.

The increasingly non-linear nature of the current fragmented broadcast market and new players such as Netflix, Amazon, YouTube, Google and Facebook should provide greater opportunities for all, and OFCOM's PSB Children's programming commitments show a desire to get behind the children's production sector to ensure young audiences can access more high quality programmes that best reflect their lives.

This review shows a firm commitment to those audiences and it's one that must continue if we are to ensure the best possible output for all.



The time frame between this and the last review has seen an enormous change in viewing habits, engagement and availability of content. We therefore suggest that Ofcom undertake a further review of this fast changing genre within the next five years as further technical advances are made and the broadcasting landscape continues to change.