making communications work
for everyone

Personal Manager's Association

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?	We are only responding to the questions in which we have experience, i.e. questions 7 - 11
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?	We are only responding to the questions in which we have experience, i.e. questions 7 - 11
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?	We are only responding to the questions in which we have experience, i.e. questions 7 - 11
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?	We are only responding to the questions in which we have experience, i.e. questions 7 - 11
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?	We are only responding to the questions in which we have experience, i.e. questions 7 - 11
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?	We are only responding to the questions in which we have experience, i.e. questions 7 - 11

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?	Confidential? – N Our answers will generally split between animation and live action, which have different creative and financial models. Animation: Animation series on PSBs tend to have British voiceovers, whether originated in the UK or not. The nature of animation means adding different voice tracks is relatively easy and allows for a sense of cultural specificity even when there isn't one, so for audiences this is less important. Some animation shows, such as Gumball, are UK originated but only show with their US voiceover. Nonetheless animation settings and characters which reflect the audience's world remains hugely important whether preschool or for older children. There is a British style and tone of storytelling which is cherished by its audiences. Live action: Live action comedy and drama cannot be adjusted in the same way (usually) for different languages and cultures, so good availability of UK-originated first run drama series is hugely important to audiences in informing how they see themselves culturally and to how they engage with British culture in the future. If today's young audiences are provided for, they will grow into engaged adult audiences. For broadcasters, drama has always been how they define themselves and as kids programming becomes split off from the main channels, we believe it is imperative that channels have a clear and culturally specific UK offering to their audiences. Live action comedy and drama used to be made for ages 7+, but recent years have seen pre-school live action commissioning increase on the BBC; it does not exist on any other channel, PSB or otherwise, at the moment. For the animation and live action industry and for UK broadcasters, financially and creatively UK originated programming is key not only to supporting the vibrant UK creative industries but also is a great training ground for the writers and directors of high-end mainstream television, as it is one of the few places where shorter form content (15-30') is made.

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?	Confidential? – N In live-action, on-demand and streaming services have increased the amount of material available to UK audiences, but the majority of it is US originated. High end drama commands higher budgets than UK originated programming and this can lead to unrealistic expectations even from child audiences about what UK programming can achieve. This is not a new problem. These services are starting to commission UK originated material, although at the moment it tends to run at one series per service per annum (e.g. THE LODGE on Disney, FREE REIN on Netflix, nothing on Amazon). However, this is a growing opportunity for the British creative industry should these channels elect to commission more from the UK industry. In animation, again there is a great range of material available to audiences but our experience of writers being commissioned and the territories these shows are being sold to indicates that quality remains high in both UK originated animation and non-UK originated animation.
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?	Confidential? – N On the whole the funding models have become more fractured in that in animation there will typically need to be at least two broadcasters committed, along with a distribution deal and possible licensing sales – although usually these don't kick in until 2nd or 3rd series. Our experience as agents shows that getting companies to commit to the writers who have developed the material before they know the funding model is increasingly difficult, as each part of the finance will bring with it different commitments e.g. requiring Canadian or French or Belgian writers. On the whole, investment in animation has gone up in that more content is being commissioned, but budgets have stayed the same. Script fees for animation have been static for over 10 years. In live action, there was a big drop off in investment @ 2000 when ITV stopped making

	live action drama and comedy; apart from the few on-demand service and pay TV commissions, the BBC is the only investor in live action drama and comedy in the UK, and increasingly they need those programmes to be co-productions rather than fully funded (e.g. Wolfblood was a co-pro with BBC and ZDF, Creeped Out with BBC and DHX Media in Canada). New series The A List (Kindle for BBC) is sourcing a proportion of funding from Scottish regional investment funding. BBC has tested some live action material by commissioning short runs (e.g. Jamie Johnson) but other broadcasters may not have the scheduling / streaming structure to support that. We note in the consultation document that Channel 4 has had a PSB commitment to providing content for 10-14s and 14-19s since 2010. This is a surprise to us and we do not see the evidence of this commitment, especially in the 10-14 age group. Children's BBC is starting to develop material for the 12+ age range but there is no current evidence of any other PSBs doing so.
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 certain genres more difficult to generate financial returns from, and if so, why?	Confidential? – N Drama always has been, and remains, very difficult to obtain funding for and to get strong financial returns on. Not only is it more expensive – shooting either in studio or on set with actors is an expensive process compared to factual entertainment or news – and writers' and actors' deals are structured differently for live action compared to animation. It is also more difficult to sell internationally because it tends to be culturally specific. Some more genre-based series, such as Wolfblood, do sell internationally, but others, such as The Dumping Ground, are very particularly British. We note that branding is becoming more and more important in getting broadcasters and financiers interested in projects and so many programmes, across live action and animation, are being based on books or existing IP.

Question 11: Are there other incentives and disincentives you think we should consider as part of the review?	Confidential? – N We believe that without a compulsion to provide a range of live-action comedy and drama for kids, specifically aged 12-15, the PSBs will not commission or schedule this material. Ofcom could consider extending the high-end television tax break to include drama or comedy specifically made for children.