

Australian Children's Television, Discoverability and Prominence on Connected TV Devices

A submission to the Prominence Framework for Connected TV Devices
Proposals Paper

Authored by the Australian Children's Television Cultures research group:

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Introduction:

Children's Content and the Demand and Discoverability Disjuncture

Since the 1982 establishment of the national children's television production and policy hub — the Australian Children's Television Foundation — there has been a carefully balanced combination of regulation, investment, and strong national and international distribution pathways to scaffold Australia's internationally celebrated children's television sector (Balanzategui 2022). Australian children's TV meets children's "best interests" by situating local child audiences within their own socio-cultural context (Potter 2015, ix).

Our research has found that while increasing numbers of children watch most of their television content via streaming platforms, they usually watch on their household TV device (Burke, McIntyre, Balanzategui & Baker 2022). Yet current policy infrastructure does not support the *provision*, *prominence* or *discoverability* of Australian children's television on smart TV devices, nor on the streaming platforms themselves.

We therefore welcome the opportunity to contribute to the design of a prominence framework, given that the policy around children's television is no longer 'fit-for-purpose' in the era of on-demand streaming. As this submission details, discoverability of local content on streaming platforms and smart TVs is an increasingly pressing issue for child audiences, their parents, and for the wider Australian children's television sector.

This submission outlines evidence that while there is strong *demand* for home-grown children's television, child and adult audiences find it hard to *discover* and *identify* local children's content on streaming platforms and on smart TVs. This disjuncture between *demand* and *discoverability* has serious socio-cultural implications, because it indicates that the current TV distribution environment is not meeting Australian children's "best interests". In addition, the demand and discoverability disjuncture further threatens an already precarious Australian children's television sector. TV programs that attract few viewers are unlikely to be renewed for subsequent seasons or lead to future commissions in a highly competitive, streaming dominated landscape. Future flow-on effect for the broader Australian screen industry may be serious because, as our research has found, the children's television sector is uniquely well-positioned to provide opportunities for talent development and industry renewal, and also industry growth outside of metropolitan production hubs (Balanzategui, Baker, Burke & McIntyre 2022, 3).

Yet while Australian children's television is vital to the wider screen industry and to Australian audiences, there are currently *no* concrete requirements for any TV broadcasters or streaming video services to invest in or screen Australian children's TV. As a result, the total hours of Australian children's content were 32% below the 5-year average in 2021-2022 (Screen Australia 2022). The current state of peril is attracting global attention: for instance, *The New York Times* reported that despite its strong global reputation, "the future of children's television in Australia is far from assumed" (Frost 2022).

Issues of discoverability and prominence of Australian children's television on smart TVs and streaming platforms thus exacerbate existing challenges. During a time when it is harder to get local children's content *made*, our research reveals that is also hard to get it *seen*. As Screen Australia identified in their submission to the National Cultural Policy, "children's content is especially important: it helps children to understand the world and their place in it, acquire language and other

skills, and gain age-appropriate guidance on complex issues” (2022, 15). They note that new streaming service regulation should thus account for this “at risk” but “culturally valuable” content type (18).

In their submission, Screen Australia also raise the issue of “discoverability” on streaming platforms: “discoverability is a fast-evolving policy area that will become more crucial as time passes. It is important that audiences are presented with Australian options, including for content that algorithms may not necessarily present” (19). Concerningly, these issues have been developing for some time: they were recognised in the Federal Government’s 2017 Australian and Children’s Screen Content Review and the 2022 Streaming Services Reporting and Investment Scheme. The 2022 inquiry deemed the extant regulatory framework “out of date and unbalanced” (Gov. Discussion Paper). The 2017 review identified “securing children’s content” as one of three key policy priorities, noting that “future policy settings will need to more closely align with the changing consumption habits of children” and consider how children engage with “different content genres online” (Gov. Consultation Paper, 9).

The current landscape around children’s content is *more* precarious now than it was at the time of these reviews. The Federal Government recognise in the recently released National Cultural Policy that “some content sub-genres, especially children’s content, are at serious risk” and that “it is important that streaming services invest in key genres, including children’s content” (2023, 87-8). As well as investing in the *production* of content, it is vital that policy design takes into account how Australian children’s content is *distributed* and *accessed*. Policy intervention around prominence on smart TVs presents a valuable opportunity to address the challenges of discoverability of Australian children’s content on streaming platforms and on smart TV interfaces.

As this submission details, it is vital that the child audience is accounted for in legislation around a prominence framework that supports “home-grown content, regardless of which platform” Australians are using (Australian Government 2023, 87).

Our research:

Australian Children’s Television Cultures

Australian Children’s Television Cultures (ACTC) is a research group based at Swinburne and RMIT Universities conducting a four-year project on the impacts of local children’s television upon audiences, education, and the screen industry. The project is funded by the Australian Children’s Television Foundation. This policy submission was prepared by Chief Investigator Dr Jessica Balanzategui (RMIT University) on behalf of the ACTC team: Chief Investigators Dr Djoymi Baker (RMIT University), Associate Professor Liam Burke (Swinburne University), and Dr Joanna McIntyre (Swinburne University).

This submission mostly draws from ACTC’s four-year program of audience research. This research includes nationwide surveys and semi-structured interviews with parents, guardians, and their children. The research responds to a pressing need for audience research to understand how Australian children’s content is accessed, identified, and understood in the streaming era.

Industry audience research, such as that led by the Australian Communications and Media Authority (2023), illuminates habits around media consumption in the streaming era. However, data is very limited when it comes to children’s viewing and habits on streaming platforms and smart TVs, research which necessitates mixed-methods approaches. More broadly, as leading Australian streaming video researchers have identified, there is a lack of research on “how users actually respond to recommendation algorithms” (Khoo 2022, 12), creating a “gap in our knowledge” (Turner 2019, 222) because there is “surprisingly little empirical research on audience attitudes to discoverability and

prioritisation, with the effect that these attitudes are not well understood” (Lobato & Scarlata 2022, 222).

In an era when smart TV and streaming interfaces operate as a “a new and evolving locus of media circulation power” (Hesmondhalgh & Lotz 2020, 389), it is vital that children’s navigation and negotiation of smart TV and streaming interfaces is better understood. The outline below of the research projects that have produced the data in this submission outlines how the ACTC team are developing these understandings.

“Children’s Perspectives on Australian Children’s Television in the Streaming Era”

This mixed-method study involving 44 children aged 7–9 and one of their parents aims to illuminate how children find, discover, identify, and relate to local content on streaming platforms. This study combines live-streamed observation of children using streaming platforms – both alone and with a parent present – with semi-structured interviews with children and their parent, first alone and then together. The study also includes an app-based diary that captures children’s daily television habits over a two-week period.

The study illuminates children’s perspectives on streaming platforms, smart TVs, and content discoverability. The research reveals what children perceive as the key benefits and challenges of finding content they enjoy in the streaming era. Data collection was completed in January 2023, with analysis still underway. The data in this submission thus consists of *early findings* from the study.

“Parents’ Perspectives on Australian Children’s Television in the Streaming Era”

As well as the child-centred audience research, the ACTC team has been conducting audience research centred on parents’ perspectives. This research includes nationwide surveys and semi-structured interviews with parents and guardians. This audience research was carried out over the same six-week period (late August to early October) in 2021 and 2022. It will be repeated in 2023 and 2024 to enable the longitudinal tracking of viewing practices and interests. Topics covered include perceptions of what makes “good” Australian children’s television, how families use different media platforms, and the importance parents place on diverse representation.

In 2021, the survey received 240 completions, and 12 extended semi-structured interviews were also carried out with select survey respondents. In 2022, the survey received 333 completions. Only 10% of the 2022 sample had previously completed the 2021 survey. The largely fresh sample for the 2022 survey ensured that familiarity with the topics and questions would not have a significant influence on responses. To track viewing habits longitudinally, the 2022 survey repeated many questions from the first survey. It also included new questions on topics such as lockdown viewing habits and streaming platform features and functionality.

The survey data collected was statistically robust enough for the research team to be confident that the conclusions made are likely to mirror the Australian parent population at large.

The scale of the problem

Discovering Australian Children's Content

Increasing numbers of children in Australia watch most of their television content via streaming platforms, with US-based platforms Netflix, Disney+, and video sharing platform YouTube being amongst the most popular (Burke, McIntyre, Balanzategui & Baker 2022). Our research suggests that despite the availability of movies and short-form video content across these platforms, children generally watch TV shows (57.1%, ACTC Research Overview 2022). They also most often watch on a TV set even though they usually watch on-demand, streamed content. For example, our Children's Perspectives study found that 62.4% of the 7–9-year-old participants mainly watched content on a television device, and the Parents' Perspectives survey found that 94% of households mainly use TV sets to watch children's content, even though they are typically streaming this content (Burke, McIntyre, Balanzategui & Baker 2022).

These viewing habits make clear the importance of prominence and discoverability mechanisms to support visibility of local children's content on not just the streaming platforms themselves, but also on smart TV devices.

Our research has found that in this crowded and fragmented landscape, Australian content for children is becoming increasingly difficult to find and identify for both children and their parents. In the observational component of our study on children's streaming habits, children were free to select whatever content they liked on a touch-screen tablet featuring all the major streaming services available in Australia (BVOD and SVOD). They were alone in the room during this 15-minute session, but were being observed by the researchers via video-link.

Only 15% of children selected Australian content as their first choice during this observation session. However, in the subsequent semi-structured interviews, children often explained that they would like to see more Australian content on these platforms, but that it was difficult for them to find.

"[Netflix and YouTube] don't have much Australian shows [...] I try looking for Australian shows and when I recognize it's not Australian I just turn it off instantly. And then I'll find another Australian show."

– 7-year-old boy

"Well, there's not much Australian things on my things [TV and Ipad]. But yeah, I do [like watching Australian shows]. *Bluey* is Australian. I'm not sure about the other ones 'cause most of the things that are on the TV or on iPad they're not much Australian. Unless I look up 'Australia.'"

– 9-year-old girl

Researcher: "Can you think of any Australian shows off the top of your head?"

Child: "Oh no, no. I can't think of any. Like I don't watch much. All the YouTubers I watch are basically American. Maybe *Australian Ninja Warrior*? I watched that last night. I'm a big fan of that."

– 8-year-old girl

Father: “The Australian shows are good to watch, especially because they’ve got the sort of themes that line up with our culture, whether that’s Indigenous or otherwise. But just the culture in general. The way in which people interact with each other. You can tell.”

Child: “Like *Little Lunch!*”

Father: “Yes! You see, I would prefer *Little Lunch*, well and truly, over the American sitcom version of a similar sort of thing. Because it’s more about what really happens in our society. [...] So I think it’s more meaningful, and that’s what I prefer.”

– *Father and his 7-year-old son*

Identifying Australian Children’s Content

Our research with children found not only that children find it hard to *discover* local content, but that it was also hard for them to *identify* which content was Australian on platforms dominated by international and particularly North American content.

Unless the program tile on the streaming interface displays Australian animals or what children often termed “the Australian Outback”, children in the 7–9 age group regularly struggled to identify which shows were Australian. This led to confusion about the cultural identity of shows.

Notably, a key Action in the Federal Government’s new National Cultural Policy is to “invest in digital and media literacy to empower Australian children and young people to become critical, responsive and active citizens online” (2023, 85; 105). Our research shows that to implement this Action in regard to children and streaming, Australian children’s content needs to be easier for children to identify and discover on smart TVs and across streaming platforms.

Researcher: “Do you like watching Australian shows?”

Child: “Not really, I think. I don’t really know about any Australian shows that I really watch.”

[Later in the interview, child identifies *InBESTigators* and *Little Lunch* as two shows they most enjoy after seeing them in a streaming interface]

Researcher: “Did you know that *InBESTigators* and *Little Lunch* are Australian?”

Child: “They are!?”

–*7-year-old boy*

Child: "I watch a lot of American. [...] They always show the flag and speak American. America's a crazy place. Mr Beast [YouTube personality] is American and he does crazy stuff like give away all this money and then he just gets MORE money. It's weird. [...] I do like American shows a lot, but not really Australian shows."

Researcher: "But what about *Little Lunch* and *InBESTigators*?" [two Australian shows the child had previously identified as his favourites].

Child: "*Little Lunch* is definitely American."

Researcher: "No, that one's an Australian show!"

Child: [Shocked pause] "Well... *InBESTigators* is American!"

Researcher: "*InBESTigators* is Australian too!"

Child: [Shocked pause] "WHAT!?"

[Later in interview]

Researcher: "Do you think streaming platforms could do anything to make finding Australian content easier?"

Child: "Yes. Some apps should be all Australian. Or all American"

– 8-year-old boy

As in the above child's suggestion, in our interviews both parents and children often articulated the need for clearly demarcated "Australian" children's sections on their smart TVs or streaming platforms.

Our nationwide parents' survey similarly found that streaming platforms with child-specific versions or well demarcated "kids" sections are most used: Netflix and Netflix Kids (77%), YouTube and YouTube Kids (69%), and Disney+ (56%). Platforms that don't have a clearly demarcated "kids" section are not as frequently used: Amazon Prime (13%) and Apple TV+ (6%). Indeed, ABC's success is partly linked to its variety of trusted streaming options: iView (65%), ABC Kids (62%), ABC ME (29%) (Burke, McIntyre, Balanzategui & Baker 2022).

Results from the 2022 Parents' Perspectives survey and our Children's Perspectives study show that "parental settings and controls" and a "separate children's section/version" – particularly one that clearly identifies *Australian* children's content – are among the most important streaming platform features for parents and their children.

"There is a separate section for 'Australian content' on one of the platforms, but I don't think it's on all. So it would help to have 'home-grown' or something like that on all so you can easily look and browse through."

– **Mother interviewed with 9-year-old daughter speaking about the difficulties of finding Australian content**

Child: “ I wish there was just ‘a button.’”

Father: “You’ve got Smart TVs internal menus, and they’ve got baked in Netflix and all this other stuff, and then you’ve got boxes, [...] So this is my point, what these people could do to make it easier to find content, is there are so many boxes within boxes within boxes, [...] I think if some smart cookie came along and aggregated all of this and just put it alphabetised on one tier, they’re going to make millions. Because at the moment there’s just too many options. [...] There’s just too many scattered sort of items all over the place.”

Researcher: “And what about Australian content specifically?”

Child: “If it’s streaming, it doesn’t really tell you if it’s Australian or not. It’ll just tell you ‘it’s on, it’s this episode, it’s G or it’s PG, and it’s on for this long.’”

– *Father interviewed with 9-year-old-daughter speaking about difficulties of navigating smart TV interfaces.*

Mother: “It would be great if [Australian content] was ‘sectioned’ within the streaming platform. Most definitely. Rather than all mixed in. I would really like that.”

Researcher to child: “Do you feel the same?”

Child: “I would go to an Australian section.”

– *Mother interviewed with 9-year-old son*

Digital Fluency and Identifying Age-Appropriate Content

Another significant issue in relation to the discoverability and prominence of children’s content is how to identify *age-appropriate* content on smart TVs and across streaming platforms. Our research has found that this is often a complicated process for parents and children, as children must learn to navigate different smart TV and streaming platform interfaces, and in tandem become adept at interpreting different means of labelling and separating children’s content from adult content.

In this variegated and complex context, our research finds that children develop their own highly individualised work-arounds to navigate classification display systems across the interfaces of different platforms and smart TVs. In the process, they are heavily reliant on a combination of parental guidance, as well as digital access and opportunity, to develop fluency with streaming platforms and smart TV devices.

Those children *without* active parental guidance and with limited streaming access are at risk of being left behind. To achieve the Federal Government’s aim to improve digital access and literacy by “using and building accessible digital platforms” (2023, 45), policy intervention into prominence on smart TVs should endeavour to facilitate ease of navigation for children on smart TVs.

The issue of clear demarcation of children’s content is compounded by the fact that our research indicates that children tend to choose their own content. Our Parents’ survey found that across all age bands most parents allow children to choose most/all of what they watch (54%). This freedom becomes particularly pronounced from age five (Burke, McIntyre, Balanzategui & Baker 2022).

In accordance with this finding, our child audience research found that 7–9-year-olds tend to select what they watch (59.2%), followed by their siblings choosing the content (22.3%) and then their parents (16.5%) (ACTC Research Overview, 2022). These results suggest that children have a great deal of agency when it comes to the content they select, underscoring the importance of a prominence framework that supports healthy content selection and navigation habits, including clear demarcation of child-appropriate local content.

“Usually I can choose myself, but sometimes if my Mum and Dad’s not there I have to choose ‘G’ or something that I’ve watched before so that I know it definitely isn’t scary.”

– 8-year-old girl

Conclusion and Recommendations

Ultimately, children and their parents face many challenges identifying and discovering age-appropriate Australian content on streaming platforms and smart TVs. Leading streaming researchers point out that “regulation of discoverability is inherently controversial because it appears to involve intervention into private choices of citizens and consumers” (Lobato & Scarlata 2022, 222). However, when it comes to children, such issues around the regulation of choice take on a very different dimension. It has long been an expectation in Australia – as well as in other developed countries – that policy around children’s content supports and structures children’s access to age-appropriate and local content.

Thus, it is vital that the child audience is accounted for in a Prominence Framework. Prominence regulation that considers the child audience will help to build children’s content policy that is ‘fit-for-purpose’ in the streaming era by facilitating discoverability of home-grown children’s content in a crowded streaming landscape and across smart TV devices.

The ACTC team present the following recommendations in response to the Proposals Paper:

- 1.** While most Australian children watch TV via streaming platforms, the vast majority stream on a television device. As a result, prominence policy is certainly justified and should account for the child audience. We support regulatory intervention in the form of Proposal 8.3, a “must-carry” framework.
- 2.** In a confusing landscape crowded with multiple streaming platforms, children and their parents value clearly demarcated children’s sections or platforms. A ‘one-stop shop’ for Australian children’s content on smart TVs, potentially in the form of an aggregated app, would greatly simplify the challenging process of discovering age-appropriate local content for children and their parents. We therefore support regulatory intervention in the form of points 2 and 3 in Proposal 8.3: a dedicated “‘local TV service’ tile, or multiple tiles” (37) – one of them dedicated to local children’s content – with the applications available in any relevant app store or library.

3. While children and their parents value Australian children's content, children find it difficult to find and even identify, which is leading to cultural confusion about what is and isn't Australian content. It would therefore be useful for policy intervention to make clear where and how Australian children's content can be found on smart TVs. We therefore support a "must-promote" framework in line with Proposal 8.4 in relation to local children's content, in which Australian children's content is "prominently positioned on the primary user interface of the device" (40).
4. Children have a great deal of agency over their content choices, particularly from the age of five onwards. However, they have various levels of digital experience and fluency, including with streaming interface classification display systems and search functions. A prominence framework that accounts for the child audience should thus support prominence mechanisms and interface design strategies that simplify children's ability to find age-appropriate local content. We therefore support a "must-promote" framework in line with Proposal 8.4 in relation to local children's content, in which Australian children's content is "prominently positioned on the primary user interface of the device" (40).

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