



Mediametrie



Glance

Global Audience &
Content Evolution

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2024: Children's TV Audience Grows in Key Markets, Driven by Original Content and New Programming Trends



Médiamétrie's international department **Glance analyses the kids' shows market** at MIPJunior and **reveals global content trends**.

“As children's television continues to evolve, new trends reflect an increasing emphasis on originality and meaningful content, driving viewership across diverse markets and increasing audience on children's channels.”

Candice Alessandra, Client & Research Director at Glance

Children's television channels have seen a positive shift in viewership during the first half of 2024 across several key European markets. In Germany, Spain, and Italy, audience shares for children's channels among younger viewers rose compared to H1 2023, leading gains in Germany (**+1.6 pts**), Spain (**+2.1 pts**), and Italy (**+0.6 pts**). In France they maintained a steady audience share, while the UK saw a decline.

Another noticeable development this year is that the TFOU children's block in France, now airing on both TF1 and TFX, has increased its airtime and expanded its audience.

New Shows and Original Content Dominate Successful Launches

In H1 2024, **21** new children's shows launched successfully, with over half being original creations*. Highlights include **1000 Bornes Challenge** on TF1, **Mystery Lane** on Rai Gulp, and **Vida the Vet** on Treehouse. These original programs resonate with young audiences, further cementing the demand for fresh content.

Among broadcasters, top-rated programs for this period reflect familiar favorites: **The Loud House** led viewership with **46.8 million** hours watched by children while **Bluey** followed with **44.3 million** hours. **Paw Patrol** held the third spot, amassing **40.5 million** hours watched - a **3.6 million** hour increase from H1 2023.

On SVOD platforms, among households with kids, **Bluey** continued to lead as the most-watched show with **59.3 million** viewed hours on Disney+.

*Methodology: in national top 20 or top 3 by channel rankings in either the children's or pre-school demos.



Programming Trends Highlight New Themes in Children's Content

Three major programming trends have emerged this year, marking shifts in the types of narratives captivating young audiences.

Environmental Awareness and Citizenship

Shows like **Audrey's Shelter** (France 4) and **Vida the Vet** (Treehouse) nurture environmental consciousness. **Groep 8 aan de macht** in the Netherlands and **De raad van Soekie** in Belgium inspire viewers with themes of democracy and community responsibility, achieving substantial audience share increases among their target age groups.

Heritage and Self-Discovery

Programs exploring identity and heritage resonate strongly, as seen with Netflix's Brazilian series **Luz**, where an adopted girl embarks on a journey of self-discovery. In Canada's **Gangnam Project**, the young Canadian-Korean Hannah flies to Korea to teach English to K-pop stars while reconnecting with her Korean heritage. In Italy, **Clan** on Rai Play explores a character's journey away from a criminal environment. These programs engage audiences with their unique cultural perspectives.

Reinventing the Classics

Familiar brands and themes get fresh spins with shows like the Spanish toy-related **SuperThings Rivals of Kaboom**, continuing its media expansion on **Clan**, and **Max and the Midknights**, adapted from the books by Lincoln Peirce, a comedy series with a distinctive soundtrack. These programs help to expand brands diversification with new storytelling angles, appealing to young audiences while reinvigorating classic comedies.



About the Kids TV Report

Twice a year, **the Kids TV Report offers a comprehensive view of the whole European audiovisual sector dedicated to young audiences.** It combines both an overview of each market, as well as detailed channel-by-channel analysis.

This report studies the **5 major European countries** (France, Germany, Italy, Spain, United Kingdom). More than 20 additional territories can be studied on request.

About Glance

Part of Médiamétrie, Glance is the specialist of international TV markets and leading provider of official TV ratings for over 7000 channels in more than 120 territories and insight analyses based on a global expertise. Glance tracks the latest TV and online contents and trends in nearly 50 territories. With more than 230 flagship clients, Glance is market leader in TV and video market intelligence

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About Médiamétrie, a trusted third party for fair and objective measurements

Médiamétrie is committed to providing its customers with joint and sovereign standard audience measurements. As a data leader and media expert, the company applies its know-how to video, audio and cross-media behaviour measurements, as well as advertising effectiveness measurement. Every day, some 800 employees design and produce the right measure for today and tomorrow to support the free decision-making of the company's customers in France and abroad. In 2023, the Médiamétrie Group achieved a turnover of €104.1 million and processed over one billion data every day.

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