

BBC Trust

Review of the BBC's children's services

Summary Report

September 2013

Introduction	2
At a glance	4
Executive Summary	5
Key findings	6

Introduction

Scope of this review

1. This report presents the findings of our second service review of the BBC's children's services. Our first report was published in 2009. Annex 1 summarises the main findings and conclusions of that review.
2. Part 1 of this report considers how well CBeebies and CBBC are now performing against their service licences (figure 1).

Figure 1: Service licence remits of CBeebies and CBBC

CBeebies

To offer high-quality, mostly UK-produced programmes to educate and entertain the BBC's youngest audience. The service should provide a range of programming designed to encourage learning through play in a consistently safe environment for children aged 6 or under.

CBBC

To provide a wide range of high-quality, distinctive content for 6-12 year olds, including drama, entertainment, comedy, animation, news and factual. The great majority of this content should be produced in the UK.

CBBC should provide a stimulating, creative and enjoyable environment that is also safe and trusted. The service should have a particular focus on informal learning, with an emphasis on encouraging participation.

Note: The full service licences can be found on the BBC Trust website at www.bbc.co.uk/bbctrust/our_work/services/television/service_licences.html

3. We have reviewed the extent to which the BBC's children's services are being used by their target audience, provide a range of high-quality content, and contribute to the BBC's public purposes. Under the Royal Charter the BBC has six public purposes. These are:
 - Citizenship - sustain citizenship and civil society
 - Learning - promote education and learning
 - Creativity - stimulate creativity and cultural excellence
 - Diversity - represent the UK, its nations, regions and communities
 - Global - bring the UK to the world and the world to the UK
 - Emerging communications - help to deliver to the public the benefit of emerging communications technologies and services
4. We also examine the progress the BBC has made with the initiatives approved by the Trust in 2010 to support children's radio provision. CBeebies' audio content can be downloaded through its website but the responsibility of providing radio that appeals to older children rests with Radio 4 Extra.

5. Part 2 considers how well-placed BBC Children's is to meet the key strategic challenges it faces over the next few years in the run-up to the end of the current BBC Charter in 2017. We identify these as:
 - The financial challenge: Safeguarding the BBC's position as the cornerstone of UK-produced children's content
 - The technological challenge: Being where children expect the services to be;
 - The pan-BBC challenge: How other relevant BBC Services (TV, radio and online) plan to serve children under the age of 16.

Approach

6. We have used the following methods to collate evidence to inform this report:
 - **Public consultations:** We have received 8,143 responses from children to a specifically tailored children's questionnaire on CBBC and radio listening and 2,783 responses from parents, carers and other stakeholders to the 'adult' version covering CBeebies and CBBC as well as radio listening habits. A [detailed analysis of the consultations](#) can be found on our website.
 - **Qualitative audience research:** A specialist children's research agency held focus groups with children and their parents in a sample of households across the UK to understand better their media consumption habits on TV, radio and online. We sought their views on how CBeebies and CBBC are performing against their service licences and in particular how well they deliver the public purposes. The [full research report](#) can be found on our website.
 - **Performance analyses:** We reviewed audience viewing figures for CBeebies and CBBC comparing their performance against other broadcasters. The figures were broken down by different demographic groups and the nations and regions of the UK, where sample sizes allowed. We also reviewed online usage figures for CBeebies and CBBC as well as children's radio listening figures.
 - **Audience Council submissions.** The Trust's four Audience Councils in Northern Ireland, Wales, Scotland and England submitted responses to the review on the performance of the services based on local outreach work with audiences and surveys of their members.
 - **Interviews** with senior BBC executive staff and external stakeholders, including document submissions to the public consultation.

At a glance

Performance

The BBC's services for children on television and online perform very well and make strong contributions to the public purposes. CBeebies and CBBC are the most watched children's channels in the UK for their respective target audiences. Overall feedback from children, parents, the Trust's Audience Councils and stakeholders on the services is very positive. CBeebies received overwhelming praise for its high-quality content that stimulates learning and development. CBBC is commended for its range of distinctive UK programmes, particularly drama and factual content, and for achieving a good balance between education and entertainment.

The key performance challenge for BBC Children's is to maintain the reach and impact of both CBeebies and CBBC in an environment where older children's consumption of media in particular is increasingly fragmented and where there is more choice than ever before.

The Executive's strategy to serve children's audio and radio listening has had some success. CBeebies pre-school audio downloads available online are relatively popular but we found there was very low audience awareness of the BBC's dedicated radio provision for older children on Radio 4 Extra. Comparatively large numbers of children are, however, listening to BBC Radio 1 and Radio 2.

Strategic challenges

BBC Children's is taking action to address the challenges it faces over the remainder of the current BBC licence fee settlement period to 2016-17.

- **The financial challenge:** Like all other BBC services, BBC Children's needs to make financial savings and operate on a reduced budget. We expect this to be achieved with minimal impact on the audiences of CBeebies and CBBC.
- **The technological challenge:** BBC Children's is developing plans to improve the services' online and interactive offers to meet the fast-changing media consumption habits of children. We believe that CBeebies and CBBC output should be made available on all the platforms that children and their families expect.
- **The pan-BBC challenge:** Following the decision to remove dedicated children's programming from BBC One and BBC Two, BBC Children's is working with other parts of the BBC to promote and develop content for children. The Trust expects the BBC's mainstream services to take account of children as a potential audience and for BBC Children's to form strong partnerships with these services so the needs of children are accommodated.

The Trust is supportive of BBC Children's plans to meet these challenges and the actions in this report are to help the Executive ensure that the quality and scope of children's output is protected and the profile and accountability of the services enhanced. We will monitor the implementation of the Executive's plans so they are delivered effectively and efficiently.

Executive Summary

The BBC's contribution to children's public service broadcasting in the UK

1. The BBC Trust regards the provision of outstanding children's programming made in the UK as being at the heart of the BBC's mission and public purposes. The BBC's own research shows the positive influence that distinctive content for children has on audience perceptions of the BBC. Children's is rightly one of the BBC's five editorial priorities and deserves special protection and prominence.
2. While children in the UK have a huge choice of children's channels and programming, the amount of new programming made for them in the UK is falling. The UK now has 32 digital TV channels dedicated to children's content. Only 20% of original programmes are currently made in the UK, however, and the BBC has for some time now been the largest commissioner of such programming, particularly of factual and drama content. More widely, Ofcom reports some important changes to children's public service broadcasting (PSB) in the UK in recent years. Compared with the position in 2006, significantly less money is now being spent on children's programming by commercial PSBs in particular. In addition, although PSBs as a whole are showing more hours of children's programming, in recent years the total amount of first-run original programmes (i.e. not including repeats and acquisitions) broadcast by all PSBs has reduced by half.¹
3. In recent years, the BBC's spending plans for children's content have aimed to prioritise programming that makes the services distinctive, particularly drama and factual content on CBBC, while reducing time in the schedule for cheaper entertainment content. By focusing greater resources on fewer programmes, the BBC aims to concentrate on quality content rather than quantity.

Changes in children's media consumption habits

4. Media technology has driven rapid change in audience behaviour and is increasingly remoulding children's and parents' expectations of how they should be able to access content. In 2012, around one in seven children aged 5-15 used a tablet device such as an iPad at home, a threefold increase since 2011. Increasing numbers of children also have access to smartphones. In 2012, 28% of 5-15 year olds had such a phone compared to 20% in 2011, with ownership driven by older children.²
5. Children are also increasingly choosing to watch programmes at a time that suits them. For example, in the first four months of 2013 there was an average of 10.8 million requests for BBC Children's on-demand content each week via BBC iPlayer, compared with a weekly average of 6.6 million requests during 2012.
6. Ofcom's research confirms the important role that television still plays in children's lives, particularly for younger children. According to Ofcom, television continues to be the media activity that the most children in all age groups say they do almost every day, and the medium that children aged 5-7 and 8-11 say they would miss the most.³

¹ Ofcom, Public Service Broadcasting Report 2013: Annex F, Children's report

² Ofcom, Children and parents: media use and attitudes report 2012

³ Ofcom, 2012

Key findings

The performance of the services: Attracting and retaining audiences

CBeebies and CBBC have firmly established themselves in the lives of many of the UK's children and their families

7. Since our first review was published in 2009, the strong performance of CBeebies and CBBC has been maintained. Across all homes, both channels continue to be the most watched children's channels in the UK for their respective target audiences. This is without question an impressive performance given the huge diversity of needs represented by children aged 12 and under and the increasing array of products and services competing for their attention. In 2012-13, CBeebies had a weekly reach of 48% of its target audience (designated by BARB as housewives with children aged 0-3 and children aged 4-6), more than twice as high as its nearest competitor, Disney Junior. CBBC currently reaches 36% of children 6-12, considerably higher than the Disney Channel (22%) and CITV (21%). For both BBC services, these figures do represent a decline in viewing compared with 2011-12 but this was a five-year high for both channels.
8. While the headline viewing figures are very positive they do not tell the whole story. Our first review identified some performance challenges. Five years on, these challenges remain:
 - **BBC Children's does not perform as strongly in homes where children have more choice over what they watch.** The majority of other children's TV channels have been growing in popularity alongside CBeebies and CBBC. In satellite and cable homes, where most of the children's channels are found, the performance of both BBC services is not as strong. CBeebies is still the most popular pre-school channel in these homes but our audience research indicates less audience loyalty for it than in free-to-air homes. CBBC faces a harder task given the scale of competition. It has been overtaken by Disney as the most watched children's channel in satellite and cable homes. It should be noted that CBeebies and CBBC are found on the second page of the children's electronic programme guide (EPG) in Sky homes, which may affect viewing behaviours.
 - **Older children are still less inclined to watch the services.** For CBeebies, in 2012-13 reach amongst six year olds was 14 percentage points lower than amongst four year olds and this gap has remained high since 2008-09. For CBBC, weekly reach to 12 year olds stood at 30% compared with 44% for nine year olds, who represent the peak viewing age. CBBC also continues to struggle to inherit younger viewers moving on from CBeebies.
 - **Like other BBC TV services, the performance of CBeebies and CBBC is not uniform across the UK.** CBBC and CBeebies both continue to under-perform in Northern Ireland in particular. Across the English regions, in 2012-13 CBBC's weekly reach was nine points greater in the South (excluding London) compared with the North, where reach has declined year on year since 2010-11.

Action:

- 1. We do not underestimate the challenges for CBeebies and CBBC in serving all children aged 12 and under. But we expect the services to provide some relevant high-quality and distinctive content for all children across this age range.**

We fully support plans by BBC Children's to improve the services' reach to older children and to those who have more choice in satellite and cable households. We also support the plans to improve the transition of children aged 4-6 between CBeebies and CBBC. The increase in non-linear viewing creates further opportunities to serve children of different ages in different ways.

We appreciate that reach levels amongst the different age groups inevitably vary but BBC Children's should monitor performance levels closely and ensure there is no decline in viewing as it implements these plans.

Timing: We will monitor performance of the channels amongst different age groups in one year and on an on-going basis.

Audiences continue to be very happy with the quality and range of CBeebies and CBBC

9. Overall, the feedback from audiences and stakeholders on what they think of the respective offers of CBeebies and CBBC has been extremely positive. Programmes shown on both channels were consistently rated as being of high-quality, distinctive and comprising a broad range. Children and their families trust the services to deliver quality content in a safe, advert-free environment.
10. In recent years, BBC Children's strategy of focusing on commissioning a smaller amount of expensive high quality programming ('fewer, bigger, better') has led to a reduction in the hours of first-run originated children's content broadcast on the BBC. There has also been a small reduction in hours due to the Executive's decision to end commissioning programmes for morning slots on BBC One and BBC Two, as they did not perform well when broadcast on the CBBC channel. The hours devoted to entertainment programming have reduced the most relative to other genres. There has been some reduction in the hours of factual programming while hours devoted to drama programmes have remained relatively stable over the period of our review.
11. The 'general impression' of audiences for both CBBC and CBeebies compares very favourably to other BBC services. However, scores reflect adults' impression of the services rather than children's views. BBC Children's has recently developed a new online survey specifically seeking the views of children (and parents of very young children) on programme quality and overall perceptions of the services. Once established, such information should help its performance management, accountability and decision-making. Such data should also help BBC Children's better promote the quality of its content across the BBC and facilitate greater opportunities to show strong titles on other BBC channels.

CBeebies and CBBC make strong and valuable contributions to the public purposes

12. Our evidence shows that CBeebies and CBBC make significant contributions to the delivery of the public purposes. Parents and children felt that their particular strengths distinguished them from other channels, including their 'Britishness' and their commitment to representing diversity and inclusion.
13. Children especially valued the fun way both services educate and inform them. BBC Children's exceeded the minimum quota hours prescribed in the CBBC service licence for factual programming each year and parents and children alike judged that CBBC is good at telling their audience what's going in the world in a way that is clear and understandable.
14. BBC Children's is generally working well with the creative industry. The Department's move to Salford to be part of the BBC North group has resulted in a greater degree of collaboration between the BBC and independent producers based outside London.

The BBC offers some bespoke audio and radio for children

15. In late 2010, the BBC restructured its radio and audio output for children. It developed CBeebies pre-school audio available online for download, family-friendly content for older children on Radio 4 Extra, and agreed to the commercial release of children's radio archive for broadcast by third parties.
16. CBeebies audio downloads have increased in popularity following a rebuild of the CBeebies website in 2011, which gave greater prominence to the 'CBeebies Radio' offer. The downloads are also now available on the BBC iPlayer Radio mobile app. However, we found awareness of this provision was still very low amongst parents and carers taking part in this review.
17. Radio 4 Extra is currently listened to by around 26,000 children aged 10 -14 each week (the youngest age group for which listening hours are collated by RAJAR). This compares with overall weekly listener reach to the station of 1.7 million. The station's service licence obligation to broadcast children's programming is primarily met through *The 4 O'Clock Show*, a daily one-hour speech programme which is designed to appeal to older children and adults. Due to the relatively low number of children listening to Radio 4 Extra, the RAJAR survey does not enable us to reliably measure and report on how many children listen to the show within its total audience of around 166,000 listeners. Most parents who responded to our consultation were unaware of any targeted provision for children on BBC radio and none of the children who responded to the consultation question on what radio programmes they listened to mentioned Radio 4 Extra.
18. The BBC believes the main value children derive from BBC radio comes from its mainstream brands and services, particularly Radio 1 and Radio 2, which have had some success in attracting older children to their breakfast and daytime programming in particular.
19. Only a small proportion of the children's radio archive has been successfully released to third parties and it is clear that the Executive underestimated the complexity of doing this.

Action:

2. **We support the current scope of the BBC's radio and audio output for children but the Executive should find ways to promote it more effectively so that audience awareness levels increase and more children might discover speech radio programming that appeals to them.**

Timing: The Executive should update us on plans to increase children's awareness and listening of bespoke radio content within 6 months.

Meeting the strategic challenges

The financial challenge: Safeguarding the BBC's position as the cornerstone of UK-produced children's content

CBeebies and CBBC continue to deliver a good return for the money they receive from licence fee payers

20. CBeebies' cost per user hour is very low in comparison with other BBC services. The range of evidence we've collated on its performance, in particular the strongly positive audience perceptions on quality and impact, shows that the service continues to deliver a good return for the money it receives from licence fee payers.
21. CBBC's cost per user hour is relatively high compared with other BBC television services because of a combination of the type of programmes it produces (drama in particular is costly) and its smaller target audience relative to these other services. CBBC's cost per user hour increased in 2012-13, partially on account of viewing figures declining. However, the positive audience feedback we've received on the performance of the service, at a time when children have never had more choice on what to watch, shows that CBBC too is delivering an important service to the licence fee payer.

The additional investment that BBC Children's was given following the last review has supported the distinctiveness of both services

22. Following the last review, the Executive awarded BBC Children's an increase in funding from 2010-11 to 2012-13. This additional funding was designed to protect children's content from the budgetary pressures the department was then facing including shortfalls in commercial income. The department continues to benefit from a re-adjustment to its baseline budget, which assumes the additional investment carries on until 2016-17, the end of the current licence fee settlement period.
23. The additional funding has supported investment in higher-cost programmes particularly in drama and animation. These titles have attracted older audiences to both CBeebies and CBBC. Several programmes that have benefited from this funding have also contributed to the delivery of the public purposes particularly around citizenship.
24. The extra funding has also enabled BBC Children's to develop higher-cost programmes that have attracted co-production funding. While the commissions co-produced with commercial partners to date align well with the public purposes and support

distinctiveness, increased pressures to find funding could, if not carefully managed, lead to certain types of children's programming being favoured over a broader content mix.

BBC Children's is intending to manage the reduction to its budget so the impact on the audience is marginal

25. In approving the BBC's *Delivering Quality First* (DQF) savings proposals we supported the Executive's plans to protect children's content as one of the BBC's five editorial priorities. The Executive has taken specific action to protect the Children's departmental budget, which has meant that the reduction to this budget of 10.5% over the DQF period was proportionately much less than the reductions agreed for other BBC services. The department's budget will reduce from £101.7m in 2011-12 to £91m in 2016-17 in cash terms. The Executive expect to manage this reduction principally through increases in productivity and by earning additional commercial revenue.
26. When the Trust approved the Executive's DQF plans, reductions in the scope of children's content were expected to be minimal beyond the savings in repeat fees as a result of stopping the broadcasting of output on BBC One and BBC Two. BBC Children's was expected to make efficiency savings, like every other BBC department. BBC Children's will reduce the commissioning budgets of CBBC and CBeebies by around 8% and 5% respectively to achieve a £6.1 million saving in 2013/14. As a result, both services will commission slightly fewer original programmes over the next two years.
27. Both CBBC and CBeebies aim to minimise the impact on audiences of these changes. To maintain its investment in drama, CBBC is replacing some higher-cost factual entertainment programmes with new factual series with lower budgets. CBeebies will also change the mix of its commissions.
28. Through this review, BBC Children's has stated that it believes a reduction in the CBeebies originations quota may allow it to stretch its production budget further while maintaining the quality of its output. A proposal to change the quota would require endorsement from the BBC Executive Board and Trust and approval from Ofcom.

Actions:

- 3. We will continue to monitor the impact of the *Delivering Quality First* initiative on BBC Children's to ensure that there is minimal need for scope cuts beyond those achieved from stopping the broadcasting of output on BBC One and BBC Two. This is to protect the quality and scope of the output of BBC children's.**
- 4. To allow us to monitor the impact of DQF more effectively, and to support performance accountability generally, the Executive should establish robust quality metrics for children's content, which are regularly analysed and reported to the Trust as standard.**

Timing: We will monitor this impact on a quarterly basis each year.

The technological challenge: Being where children expect the services to be

The performance of CBBC's website has improved in the last year and the websites for both services are rated highly by the audience

29. Our previous review recommended that the Executive should address the declining usage levels of CBBC online. Changes to how online performance is measured mean it is not possible to accurately track trends from 2008-09 to 2012-13. However, we know that the weekly unique browser reach to the CBBC website averaged 927,000 in 2012-13, an 8% increase compared with the previous year. For the CBeebies website, the weekly reach in 2012-13 averaged 824,000 unique browsers. These figures are strong given the relative size of the audiences, although year-to-date figures for 2013-14 show CBBC website use has dropped compared with the same period last year. The CBeebies and CBBC websites regularly have the highest audience impression quality scores out of the 10 BBC online websites.
30. Reach to the websites is mainly driven by games, which many children and parents responding to our consultation praised on account of their educational value. As such, most resources are committed to the basic games offering, although an increase to the interactive budget that followed our last review has enabled BBC Children's to develop several more complex games as well as fund other innovations, such as online spin-offs of popular programmes.

BBC Children's wants to make its online offers more responsive to audiences' needs and consumption habits

31. Despite these improvements, BBC Children's feels it is at risk of falling behind children's media consumption habits. Stakeholders have also voiced concern in this respect. The interactive offer for both CBeebies and CBBC is relatively basic compared with some other commercial provision and there are some indications that its limitations – at present only a minority of content works well on smartphones or tablets – may be starting to impact on reach.
32. There are plans to address these issues, including launching more mobile-compatible games, a CBeebies app that was launched in August 2013, and a planned CBBC app due to launch later in 2013-14. As part of a pan-BBC initiative, next year the Executive also intends to publish content simultaneously for desktop and mobile devices, although these plans do not include making all of the games available on smartphone and tablet.
33. BBC Children's also wants to work with external websites with social functionality. CBeebies has made greater progress in this respect as it targets parents and carers only, so is not subject to the same child protection and editorial policy constraints as CBBC. YouTube in particular is very popular with the CBBC audience and BBC Children's wants to reach out to this audience and direct them to the CBBC site. BBC Children's is working with other BBC divisions including Editorial Policy to develop these plans. In doing so, it will be essential that all necessary steps are taken to minimise the risks of children accessing inappropriate content.

Action:

- 5. We support the development of plans by BBC Children's to improve its online and interactive offer to meet audience needs and expectations better. This is subject to any required approvals and subject to the plans adhering to existing syndication, editorial and other BBC guidelines and policies.**

Timing: We will assess progress of these plans in one year.

The pan-BBC challenge: Working together to serve children and young audiences

BBC Children's works with the rest of the BBC to promote and develop content for children

34. We were clear that, following the decision to remove dedicated children's programming from BBC One and BBC Two, it would be essential to ensure that children and their parents remain aware that the BBC provides programmes for children. This is particularly important as 2.1 million children watch BBC One and BBC Two each week but do not currently watch either CBeebies or CBBC. Licence fee payers generally also should be aware that the BBC provides dedicated services for children. As part of its usual marketing activities, the BBC is raising awareness of children's content on BBC One and BBC Two throughout 2013-14.
35. BBC Children's is also in discussions with other TV services to identify children's programmes that might be shown on other BBC channels. Currently these conversations take place on a fairly informal basis. While we have been encouraged by the evidence we have seen of the collaboration between BBC Children's and other divisions, there are areas where we believe consideration of the needs of children could be improved.
36. Strong relationships with BBC Television in particular are important as BBC One reaches 66% of children aged 6 – 12 years old every week, with some programmes in particular proving very popular with the CBBC target audience. BBC Children's has added its own versions of popular BBC One and BBC Two factual entertainment shows to its mix of programmes and is considering reworked versions of some BBC One programmes that perform well with teenagers. While such strategies help deliver content cost-effectively, some stakeholders were concerned that over-reliance on programme reversions could compromise innovation.
37. Opportunities for showing content that appeals to all the family on the main channels will always be limited given the demands on their schedule. As an alternative, BBC Children's is keen to develop output such as comedy that appeals to younger and older members of the family.

The BBC is considering how to serve young audiences better after they move on from CBBC

38. Reach of BBC TV and BBC Radio is lower amongst older children and teenagers compared with adults (apart from 16–24 year olds). The BBC Executive continues to look at ways to serve young audiences after they move from CBBC to mainstream TV, radio and online services.

Actions:

6. **We would like to see more concerted action taken by other BBC TV, radio and online services to consider children as an audience for mainstream output and to continue to seek opportunities to include relevant BBC Children's output as part of their offer. The Trust will consider children as an audience when we are reviewing BBC television and radio services over the next few years.**

Timing: Our review of BBC Television will commence this autumn and reviews of BBC Radio in following years.

