BBC On-demand
Performance review

May 2010

Getting the best out of the BBC for licence fee payers
1. Introduction

This report is the Trust's performance assessment of the BBC's on-demand offerings.

Background
In April 2007, the BBC Trust approved four new offerings which enable the BBC to provide audio and video content on-demand. These were:

1. Seven-day catch-up TV over the internet (referred to here as “online iPlayer”)
2. Seven-day catch-up TV over cable (“cable iPlayer”)
3. Simulcast TV over the internet

In its approval, the Trust committed to conduct a performance evaluation of these offerings 24 months from their launch, in order to assess whether they had performed as expected. This report is the outcome of that review.

The review has included a self-assessment of performance from the BBC Executive, a public consultation which attracted over 9,000 responses from the public as well as from some organisational stakeholders and submissions from the Trust's Audience Councils. The Trust Unit has carried out some analysis of available data and conducted interviews with people involved in the operation of the on-demand offerings at the BBC.

We are publishing alongside this report a summary report of the public consultation responses and some of the full submissions to the review.

Review scope
We published a Terms of Reference for this review setting out its scope – see Annex.

The review excluded consideration of the future development of the on-demand offerings and this report does not make recommendations or give any approvals for any changes to the offerings.

The BBC was already offering 7 day catch-up radio via the BBC Radioplayer in April 2007 and this review does not cover that offering.

The review has also not considered market impact of the on-demand offerings. This was considered in depth at the time of approval and we stated in our terms of reference that we would not make any further assessment at this point.
2. Executive summary

Performance assessment

On-demand has become an important and highly appreciated offer from the BBC.

The markets in which the BBC’s on-demand offerings operate have developed rapidly since the Trust’s approval in April 2007. Within this context, the main BBC on-demand offerings have performed very well indeed against the expectations set out by the Trust in 2007.

- **Reach**: to online and cable iPlayer is likely to at least match the expectations set by the Trust in 2007. Consumption of live TV on the internet is still at a very low level. It is a minor part of the BBC’s online video offer at present. Podcasts play a niche role in terms of overall consumption of the BBC’s audio output but they are highly appreciated by those who use them.

- **Quality**: appreciation of on-demand is very high and the quality of the offer appears good. We expect BBC management to be responsive to audiences and meet their expectations in areas such as programme availability where possible. Podcasts are highly appreciated by those who use them.

- **Impact**: iPlayer currently works effectively in terms of promoting niche and specialist output and we continue to think that this is a very important part of its role. BBC management has complied with the quota for series stacked programmes; we note that it plays a minor role in usage at this point.

- **Value for money**: our projections at the time of approval in 2007 that on-demand would represent reasonable value for money appear to have been correct.

Future development of iPlayer

We have considered a range of issues relating to future development of iPlayer as part of this review and wish to make the following points about future development:

- We do not expect niche and specialist output to be any harder to find in future versions of iPlayer.

- We believe it is important that parents and carers are made aware of parent controls on iPlayer and agree with BBC management that more could be done to promote them.

- We see no reason to change the definition of programme eligibility for series stacking at this point.

Finally, while this review did not include an assessment of market impact, we are clear that the BBC has an ongoing duty to consider the competitive impact of its activities as concerns have been raised in these areas by external stakeholders during this review.
3. Context

The markets in which iPlayer operates have developed rapidly since the Trust approved the BBC's offerings in April 2007.

iPlayer now operates in a TV market which is nearly fully digital and where consumers have many choices for linear and non-linear TV viewing.

Changes in the TV market since 2007

A number of aspects of the development of that market are worth mentioning as they are not necessarily as expected at the time of approval in 2007.

- Digital TV penetration is now at 91.4%, compared to 80.5% in 2007\(^1\), with many UK regions having switched over entirely.

- On-demand viewing has been primarily driven by the growth of PVR usage. At 40% household penetration in the UK (approximately double the rate in 2007), this is higher than in the US or the rest of Europe. \(^2\) Around half of BBC television catch-up viewing is via PVRs, with iPlayer and other forms making up the other half.\(^3\)

- Viewing to broadcast TV channels live has been more robust than many people expected in 2007. Despite anecdotal evidence that some people only watch TV in the form of catch-up or online, BBC management claim in early 2010 that, in fact just 0.4% of the adult population only consumes TV in this way.\(^4\) On-demand and catch-up viewing - which is partly additional to live TV viewing - is one of the causes of a slight overall increase in total hours of viewing to an average of 3.75 hours a day in the UK\(^5\).

- The growth of digital TV and of catch-up options which has given consumers much greater choice and convenience in their viewing has resulted in a rise in average appreciation index (AI) scores for all UK broadcasters. Viewers are more likely to choose specifically the programmes they consume, rather than watch just because they happened to be on, and so enjoy them more.

Development of the BBC’s on-demand offerings since 2007

The BBC's on-demand offering has evolved rapidly within its terms of approval since 2007. Podcasts and online iPlayer both launched in 2007 and cable iPlayer and simulcast of most BBC TV channels in 2008. The BBC has continued to make iPlayer available on an increasing number of operating systems, platforms and devices, in line with the Trust’s platform neutrality requirements and the BBC's syndication guidelines.

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\(^1\) Source OFCOM Q4 2009 and Q1 2007
\(^2\) Source: Screen Digest from BARB and BSkyB data
\(^3\) Source: Justin Bairamian, BBC blogs: http://www.bbc.co.uk/blogs/aboutthebbc/2010/02/7-on-demand-viewing-facts.shtml
\(^4\) Ibid
\(^5\) BARB 2009
4. Performance assessment

4.1 Introduction
The public value assessment (PVA) which was conducted as part of the approval for these offerings in 2007, concluded that the four on-demand proposals would deliver significant public value.

The most relevant considerations were that there was a strong fit with the BBC's purposes, and the proposals would play a significant role in maintaining reach to the BBC at reasonable value for money. Quality, distinctiveness and impact were also expected to be positive.

This section sets out our performance assessment against these expectations and also using evidence from other sources.

Due to the difficulty in measuring household reach, which is currently the main metric set out in the performance measurement framework for iPlayer, we will amend the performance framework for on-demand offerings to individual, rather than household, reach.

4.2 Summary
iPlayer has become an important and highly appreciated offer from the BBC alongside the broadcast services. Reach and appreciation levels of on-demand offers are high.

4.3 Reach
We expect reach to online iPlayer to at least match expectations in 2007.

The Trust's approval set out an expectation that the on-demand offerings would help maintain reach to the BBC by offering audiences alternative ways of consuming BBC programmes. It expected on-demand to be particularly popular amongst younger audiences.

These expectations appear to have been fairly accurate, although levels of live TV viewing have remained fairly stable overall over the past five years, with a fall of just 4 minutes to 3 hours and 32 minutes in 2009, with some on-demand viewing additional to live TV consumption.

Online and cable iPlayer
At the time of approval, the Trust expected online iPlayer to be used by 14% of all TV households and cable iPlayer to reach 5.6% of all television households by 2011.

Usage of online iPlayer has grown strongly since launch in December 2007 - see figure 1 below. Peaks in usage are driven by demand for particular programmes, such as Nick

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6 Source BARB
Griffin’s appearance on *Question Time* in October 2009. Online iPlayer now appears to be likely to exceed the Trust’s projection: BBC management state that, in November 2009, 28% of adults claim to have used online iPlayer, and 5% to have used cable iPlayer on Virgin Media.\(^7\) Taking an average household size of 2.35 people\(^8\) as a base, we estimate that this equates to approximately 12% of households having used online iPlayer and 2% having used cable iPlayer.

One of the stated reasons in our public consultation and in Audience Council submissions for not using online iPlayer more is that people prefer to watch television in a comfortable setting (ie. a sofa rather than desk/computer). For this reason, we think it likely that usage of iPlayer will grow further it becomes available on more TV sets via internet-connected set top boxes and televisions.

![Figure 1: Online iPlayer users since December 2007](image)

Source – BBC Management/PBTS

BBC management state that the profile of online iPlayer users has remained fairly consistent since it was launched, with a skew towards under-55 year olds and a skew towards the higher socio-economic groups (ABC1s).\(^9\) The majority of users are male, although the proportion of users who are female has increased from 31% post-launch, to 41% in the most recent data.\(^10\)

Cable iPlayer has a different demographic skew. It is used by an older and less well off audience.

Based on the profile of online iPlayer users, we agree with the Executive that the relatively high level of usage of online iPlayer among younger adults indicates that the on-demand offerings are performing well against the service licence requirement that usage

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\(^7\) Source: Pan BBC Tracking Survey (PBTS)
\(^8\) Source: ONS, 2007
\(^9\) Source: PBTS
\(^10\) ibid.
amongst 16-34 year olds should contribute to the BBC’s weekly reach being maintained.\textsuperscript{11}

This fits with the stated aim that on-demand would help the BBC maintain consumption amongst younger adults whose consumption of linear TV is generally lower.

Figure 2 below illustrates the demographic profiles of online and cable iPlayer users.

**Figure 2: Age profile of online and cable iPlayer users**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Online iPlayer users</th>
<th>All broadband users</th>
<th>All TV viewers</th>
<th>Cable iPlayer users</th>
</tr>
</thead>
<tbody>
<tr>
<td>55+</td>
<td>23</td>
<td>32</td>
<td>36</td>
<td>35</td>
</tr>
<tr>
<td>35-54</td>
<td>32</td>
<td>41</td>
<td>36</td>
<td>44</td>
</tr>
<tr>
<td>15-34</td>
<td>45</td>
<td>36</td>
<td>28</td>
<td>21</td>
</tr>
</tbody>
</table>

Sources: PBTS Jan 2010; BARB Jan 2010; broadband users from TNS Quarterly New Media Tracker (Sep 09)

**Simulcast TV over the internet**

**Consumption of simulcast TV on the internet is still at a very low level. It is a minor part of the BBC’s online video offer at present.**

Simulcast of BBC TV channels over the internet launched in November 2008. The Trust projected that 8.4\% of all television households would consume television in this way by 2011. While we cannot directly measure household reach of this offering, we know that, to date, no more than 9\% of iPlayer requests each month are for simulcast (rather than catch-up) viewing,\textsuperscript{12} so think it unlikely that reach will achieve the projected level by 2011.

Responses to our public consultation suggest that, while people value the option of being able to watch live TV on a computer, the experience of doing so is impacted by insufficient broadband speeds which impact on the quality of viewing.

Feedback from Audience Councils also suggests that many people do not see the point of watching live television on the internet, when they can do so on their television set. This is even true amongst young adults: “Why would you want to watch the BBC online when you have a TV?”\textsuperscript{13}

\textsuperscript{11} BBC Online Service Licence (August 2009), p.16
\textsuperscript{12} BBC iStats
\textsuperscript{13} Source: Student comment from Audience Council Northern Ireland submission
Podcasts

Podcasts play a niche role in terms of overall consumption of the BBC’s audio output.

The Trust’s approval included a projection that 4.5% of all households would use BBC podcasts by 2011.

Again, we cannot measure household reach directly, but using data that indicates around 4.8 million people subscribe to BBC podcasts, we think this equates to around 2% of households. This makes podcasting a much more niche form of catch-up than 7 day TV catch-up and this is lower than the Trust’s original projected reach level for 2011. The Radio Centre’s submission to this review noted that podcasts are a very small part of overall radio consumption.

Of the BBC’s radio stations, Radio 4 and Radio 1 have the most popular podcast offers. Consumption of BBC podcasts is growing, although there appears to be considerable variation in consumption across the calendar year – see figure 3 below.

The Radio Centre assumes that podcasting is additional, rather than substitutional for linear radio listening. Audience data supports this: 33% of podcast users say that they now listen to radio programmes to which they did not listen to previously.

Users of podcasts are more likely to be male (65% of users) and younger (54% of users are aged 15-34). This is a much younger age profile than the overall listenership to BBC radio.

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14 Source: Trust Unit estimates based on RAJAR Midas usage data and ONS household size measurement
15 iPlayer also offers 7 day catch-up to BBC radio output, but this was not included in this review
16 Source: Rajar MIDAS
17 Source: ibid
4.4 Quality

On-demand is very highly appreciated by its users.

BBC iPlayer performs very well on the main quality metric used for BBC online offerings - Net promoter. (This is an advocacy measure.) The Executive states that, at 72, iPlayer has the third highest score for any BBC site and well above the average for BBC Online at 40. The bespoke Cbeebies iPlayer scores even higher at 83. \(^\text{18}\)

The Trust has observed gradual rises in appreciation scores (AIs) for TV programming from all broadcasters and investigative research undertaken by BBC management has shown the role that catch-up viewing has played in this. People are more likely to specifically choose to watch the programmes they consume and less likely to be watching them because the TV is on.

Programme availability – length of on-demand window

The main negative issue which arose in public consultation relating to appreciation of the on-demand offer was the length of the window for programmes being available. A significant minority of respondents (one quarter) raised this, unprompted, in their answers to the question about what was “not so good” about on-demand.

The BBC’s window is 7 days following broadcast transmission. This is less than ITV or Channel 4’s 30 day window and for viewers who appreciate the choice and convenience of catch-up, a shorter window is clearly a negative factor. However, we note that data on levels of viewing to catch-up TV shows that requests are concentrated in the first 24 hours after broadcast transmission, with levels of requests for programmes usually tailing quickly over the 7 day period.

The 7 day window was also raised as a negative issue in response to our consultation question about what was “not so good” about podcasts. Just under 10% of respondents mentioned this unprompted.

Range of programmes available

Lack of availability of a particular programme is a negative factor for a minority of users. We are satisfied that management is aware of the need to meet audience expectations in this area and working to do so.

The volume of TV programming available on iPlayer has grown steadily since launch and, as rights clearances are agreed, categories such as US films which were previously unavailable are now sometimes offered.

A very small proportion of respondents (around 5%) to our public consultation mentioned that not all programmes are available. There are some specific examples, such as Match of the Day (which is only available to stream and not download, due to rights clearance issues), which are mentioned.

Availability of opt-out programming for the nations (Wales, Scotland, Northern Ireland) on iPlayer was raised by the Audience Councils in Wales and Northern Ireland. However, BBC management has assured us that nearly all first-run non-news opt out programming is available on iPlayer. The main nations and local news bulletins (eg. the 6.30pm BBC One bulletin) are also now being introduced to iPlayer. We note that there is a very low level

\(^{18}\) BBC submission to review. Based on q3, 2009
of demand for news bulletins on iPlayer, compared to other genres of programming, so accept that this would not have been a priority to date.

Availability of nations and English local radio output as podcasts was also raised by the Audience Councils in Wales, Northern Ireland and England. We note that volume of podcasts varies considerably between different radio stations – Radio Scotland and Radio Ulster/Foyle offer 12 against Radio Wales offering four podcasts.\textsuperscript{19} BBC management has explained that decisions over the creation of podcasts are taken on editorial grounds – which content is best suited to offering in this way. We encourage BBC management to be responsive to audience demand for particular programmes to be made available as podcasts.

Audience Council Northern Ireland noted that the range of programmes available varies on some platforms or devices – such as Nintendo Wii or iPhone. BBC management has responded to this point with the explanation that there some additional rights clearances are required for some platforms, but that they are working towards being able to offer a consistent service on all platforms.

Audience Council Northern Ireland mentioned that audiences are confused by the different timescales for when a programme is made available after its broadcast transmission. BBC management has provided us with information setting out the reasons why programmes become available at different times after broadcast. Many pre-recorded and live special events programmes are available around ten minutes after their broadcast transmission ends. There are two main reasons why a delay in availability occurs. Firstly, live programmes require media encoding before they are technically ready; secondly, some programmes may require edits following their broadcast. In these cases, the aim is that the programmes are available on-demand after a time around three times the duration of the programme. This issue did not arise in our general public consultation so we do not think it is a major concern.

The ways in which BBC management approaches the various issues relating to programme availability appear reasonable. However, it is clearly important for the BBC to be responsive to audiences on these issues and to strive to meet their expectations.

**Technical quality**

**Technical problems impact on users’ enjoyment of on-demand. But these are relatively rare for the main on-demand offers.**

At the time of approval in 2007, the Trust expected technical problems to have an impact on users’ enjoyment of on-demand offers. This reflected concerns raised during early trials that download speed and picture quality might not be good enough.

When technical problems do happen, they do impact on users’ enjoyment. But they appear to be relatively rare and the overall picture is that users’ appreciation of the choice and convenience of on-demand far outweighs any negative perceptions they may have.

BBC management are confident that iPlayer operates with a high level of technical robustness. They state that the rate of success for iPlayer requests is around 99%.\textsuperscript{20} They attribute this quality of service to the rapid development of technologies such as adaptive

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\textsuperscript{19} Number of podcasts available in April 2010

\textsuperscript{20} Source: Trust interviews with BBC management
bit-rate streaming which allow iPlayer to automatically regulate streaming according to circumstances, such as the user’s broadband speed.

The response to our public consultation suggest that a minority of users do experience technical problems. Around 10% of respondents raised “bandwidth” unprompted as an issue in response to a question about what was “not so good” about online 7 day catch up. We expect BBC management to remain responsive to audience feedback on technical problems as these arise as this can impact overall appreciation of iPlayer but do not think there are major issues to address at present.

The response to our public consultation suggests that insufficient bandwidth remains one of the barriers to take up of simulcast live TV on the internet – nearly one in five respondents mentioned this unprompted in response to the question about what was “not so good” about live TV online. However, given broadcast distribution methods remain the primary mechanism for live TV, we do not see this as a major problem at present.

### Podcasts

**Podcasts are highly appreciated by those who use them.**

Respondents to our public consultation who use BBC podcasts were very positive about them, praising the quality and variety of the offer and the convenience that podcasts give them, in terms of being able to listen to BBC radio output at times and in places that suit them.

### 4.5 Impact

The Trust judges impact mainly in terms of how well a service promotes the BBC’s public purposes. In the case of on-demand, the primary means of this is the programmes themselves, rather than the way in which they are offered, so we are not making a full assessment here. However, we have considered awareness and fulfillment of specific commitments made in the service licence.

In addition, we stated in the Terms of Reference for this review that we would consider particular functionality relating to TV catch up: series stacking and parental controls.

### Niche and specialist content

**iPlayer currently works effectively to promote niche and specialist output. We think that this should remain an important part of its role.**

The remit for iPlayer states that it should “aim to increase the audience to niche and specialist broadcast content.” At the time of approval, the Trust hoped that consumption of such output would increase if it was put on a more equal footing with mainstream content, rather than in off-peak slots or on less popular channels. Such programming often makes a strong contribution to the BBC’s public purposes and has high appreciation levels.

The iPlayer homepage is the main way in which users can be guided to content that they might not otherwise have found. A “carousel” of 20 programmes currently sits alongside

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21 A description of these purposes can be found on the Trust website at http://www.bbc.co.uk/bbctrust/about/how_we_govern/purpose_remits/index.shtml

22 Bookmarking was also included in the terms of reference but this is not yet available, so has not been reviewed.
lists of the most requested programmes and plays an important role in guiding users to new programmes.

BBC management has explained that programmes are manually selected to appear on the carousel using a range of criteria, including the notion of ‘hidden gems’ which are programmes that may have been missed on broadcast television or which have attracted modest audiences despite the strength of their content.

At present, on-demand TV appears to work well for niche and specialist output, with programmes from BBC Three and BBC Four both viewed disproportionately highly on iPlayer compared to their linear viewing figures.

A survey of iPlayer users run by BBC management\textsuperscript{23} showed that 84\% claimed to have viewed a programme on iPlayer that they had not heard of before. The response to our public consultation also showed that, unprompted, one of the things people appreciate about iPlayer is that they may discover programmes they would not otherwise have seen.

The Trust continues to believe that the ability to promote niche content alongside the BBC’s most popular programmes is an important element of iPlayer. We do not wish to see niche and specialist output made harder to find in future versions of iPlayer, even if these rely more on automated programme selection.

**Series stacking**

Series stacking plays a minor role in the on-demand offer. We see no reason to change the definition of programme eligibility at this point.

iPlayer makes some programmes available for the duration of a series, plus the normal 7 day window. This was termed “series stacking” in the approval and is offered to users as “series catch up”.

BBC management have provided information to us on compliance with the quota, showing that they remain within the 15\% volume cap set by the Trust.

Based on the response to our public consultation and from the Audience Councils, we do not think that awareness of series catch up is high.

The main issue raised in public consultation regarding this function was from the independent producers’ body Pact which raised concerns over the market impact of the function, and of on-demand more widely on producers’ secondary markets (DVD sales, etc). The terms of reference for this review made clear that we are not considering market impact. The BBC has a duty to have regard to the competitive impact of its activities and we note these concerns.

The Trust committed to reviewing the stated definition of programme eligibility for series stacking. This is that programmes must have “a distinct run, with a beginning and an end and a clear ‘narrative arc’ or those with exceptionally high impact. These should cover a broad range of programmes, in terms of genre and appeal.”

The type of output currently offered for series stacking is a mix. Factual output is by far the largest genre, with lower levels of drama, entertainment and children’s programming and still lower volumes of music and arts, current affairs and religious output.

Compliance with this definition clearly requires judgements to be made. However, the BBC Executive has stated that they believe the current definition is workable and does not request any change in the definition at this point.

\textsuperscript{23} Pulse, Q3 2009 (respondents answering ‘often’, ‘occasionally’ or ‘once’)

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We see no need to change the definition of programme eligibility at this point.

**Parental controls**

We believe it is important that parents and carers are aware of parental controls on iPlayer. We agree with BBC management that more could be done to promote them.

iPlayer is required to incorporate functions which ensure that children are protected from viewing unsuitable content. A “parental guidance lock” is offered when a user first tries to watch a programme which was broadcast post-watershed or is otherwise deemed unsuitable for under 16s. Once activated, the guidance lock makes all such programmes password-protected.

BBC management has acknowledged that levels of awareness are low, although they think that the system is effective when it is used. They are aware that there is a high level of public support for the provision of such protection.

There were signs of lack of awareness and understanding of this function amongst respondents to our public consultation and awareness currently appears to rely heavily on the need to opt-in or out when first using iPlayer.

We think that parental controls are an important part of the BBC’s on-demand offering and believe that BBC management should aim to ensure that parents and carers are aware of them.

**Accessibility**

The iPlayer incorporates a range of functions to enable access by disabled people.

iPlayer is required to provide adequate access for users with sensory, cognitive or physical impairments. Subtitling, audio description and signed programmes are all available on iPlayer and that work is underway to ensure that these are available on all platforms.

iPlayer has been recognised within the industry for its work in this area.

Audience Council Wales provided us with research from the Royal National Institute for the Deaf (RNID) in Wales on use of catch-up services. This noted that the BBC is one of the few broadcasters to provide any subtitling for on-demand output.

The vast majority of respondents to our public consultation who consider themselves disabled agreed that they were able to access the on-demand offers.

We conclude that the on-demand offers are complying well with this requirement.

**4.6 Value for money**

The Trust’s projections at the time of approval in 2007 that on-demand would represent reasonable value for money appear to have been correct.

iPlayer has a service licence budget of £3.9 million each year to cover central operating costs which are primarily technology-related and split fairly evenly between payments to Red Bee for play out and internal BBC costs. The cost of acquiring the relevant programme rights is borne by the service which first commissions and broadcasts those
programmes rather than within the iPlayer budget. The budget also does not include spending on future development of the service.

BBC management estimate that the cost per user reached of iPlayer, based on its service licence spend and the number of weekly users is around 2p. This is much lower than the cost per user reached for BBC Online (around 9p), but the comparison is imperfect as BBC Online’s service budget includes most costs of content while iPlayer’s does not.

The Trust’s projections at the time of approval in 2007 that on-demand would represent reasonable value for money appear to have been correct.
Annex: Terms of reference

Background

The BBC Trust is the governing body of the BBC and exists to get the best out of the BBC for licence fee payers. The Trust has the responsibility of approving new BBC services and changes to its existing services and, in April 2007, approved a number of on-demand offerings. When we approved these, we promised that we would conduct a performance evaluation of the on-demand offerings 24 months from launch. We also promised in our work plan for 2009/10 that we would consult publicly as part of this piece of work.

Scope of the review

The aim of the review is to assess whether the offerings have performed as expected. We will use the BBC’s standard performance measurement framework of reach, quality, impact and value for money (RQIV) in forming an assessment.

This review will include the four BBC on-demand offerings approved by the Trust in 2007. These are:

- 7 day TV catch-up over the internet. This will include the provisions for platform neutrality
- 7 day TV catch-up over cable
- Simulcast TV over the internet
- Non-DRM audio downloads (podcasts)

The review will consider particular functionality of the TV catch up offerings including: pre-booking/bookmarking, series stacking (compliance with annual quota and review of the stated definition of programme eligibility) and parental controls.

Scope limitations

The review will not consider potential changes to the on-demand offerings but will be a retrospective assessment of performance.

The review will cover the four on-demand offerings approved by the Trust in April 2007 – see list above. Other on-demand offers, such as 7 day catch up of radio broadcasts, will not be covered in this review; the means by which the on-demand offerings are accessed (i.e. the iPlayer) will not be directly addressed except in as much as they affect the performance of the on-demand offerings themselves.

Approach

BBC management will carry out an initial evaluation of the on-demand offerings. Their work will be submitted to the Trust who will use it, together with its own analysis and the outcome of a public consultation, as the basis for drawing independent conclusions on performance.

The Trust will publish its findings in full.