BBC Online and BBC Red Button
SERVICE REVIEW

Final Report of Qualitative & Quantitative Research
May 2013

Research conducted on behalf of the BBC Trust by:

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BACKGROUND

Every five years the BBC Trust must review each of the BBC’s services against its Service Licence.

The Service Licence lays out what is expected of the service and how it should deliver the BBC’s six public purposes.

Five years ago, the BBC Online Service Licence was the first service to be reviewed and now it is its turn again. Although the BBC Red Button’s Service Licence was reviewed two years ago, given the increasing closeness of these services, it was felt worthwhile to review these services together. Given the more recent review of Red Button, this review would mostly be focused on BBC Online.

Service reviews involve a number of pieces of inputs including a public consultation and contributions from the BBC Trust’s Audience Councils, as well as specially commissioned audience research that all feed into the final report.

This document outlines the findings from the audience research that was carried out by Sparkler between October 2012 and January 2013.
OBJECTIVES

The primary objectives for the research for the Service Reviews for BBC Online and Red Button are:

1. To assess the contribution made by both BBC Online and the BBC Red Button service in delivering the BBC’s public purposes
2. To explore and gain an understanding of audience perceptions of quality and distinctiveness of these services
3. To explore in more detail any issues arising from the public consultation and work with the BBC Trust’s Audience Councils

In order to meet these objectives the research was designed to cover a number of key bases. Specifically:

1. **To understand audience behaviours and perceptions**
   - Exploring usage of online services across devices and the usage and role of BBC Online’s services/products within that
     - ...in the context of its/their competitive set(s)
     - ...in the context of audience needs overall and their expectations of the BBC
   - Gauging any awareness/appreciation of any of the recent changes to the BBC offer (ie the refreshes)

2. **To evaluate the detail of the specific services/products**
   - In terms of their delivery of...
     - quality and distinctiveness
     - key public purposes as outlined in the service licence
   ...across different devices

3. **To identify how the specific services/products could best be developed...**
   - ...in the context of audience needs, the competitive offer, audience hopes/expectations of the BBC in this space
   - ... exploring what can be done to BBC Online and Red Button to better meet audiences needs and deliver greater value for money for licence fee payers

4. **To test our findings**
   - Putting numbers on the key findings to help understand their relative importance and performance against the purposes and components of quality and distinctiveness
METHODOLOGY & SAMPLE

In developing a methodology for the audience research there were a number of key considerations that informed our approach (please see Appendix).

We developed a multi-stage methodology in which we covered both BBC Online (overall and also focusing on key products within it) and BBC Red Button (which for the purposes of structuring the research was treated as one of the Online ‘products’).

With a range of quantitative data already available at the BBC we felt that the best approach would be a predominantly qualitative one. Given the sheer scope of the project we saw the role of quantitative research as ‘putting numbers’ on the key insights that emerged from the qualitative research.

Using this as our framework, we developed a 5 stage methodology with individual elements performing complementary roles in meeting the key objectives ‘blocks’ outlined above.

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<th>STAGE</th>
<th>OBJECTIVE</th>
<th>METHOD</th>
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<td>Stage 1</td>
<td>Setting Our Sights</td>
<td>Agree the precise focus of the project in terms of product focus and evaluation criteria</td>
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<td></td>
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<td>2-3 hour scoping workshop with key project stakeholders</td>
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<td>Stage 2</td>
<td>Voices From The Crowd</td>
<td>Understand role key products and RB play in lives and how they perform against criteria</td>
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<td>Open ended questionnaire with 100 person sample</td>
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<td>In real world setting gain depth on usage of online services and how BBC Online and Red Button are performing</td>
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<td>Stage 5</td>
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<td>Assess relative importance of purposes and how services and products perform against them</td>
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<td>1000 respondent online survey</td>
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EXECUTIVE SUMMARY

Six key overarching themes emerged from the research:

1. Views of BBC Online and Red Button reflect those of the wider service
   - Overall, BBC Online is felt to perform strongly with 84% rating the service favourably (the same % as for BBC overall).\(^1\)
   - By and large BBC Online is seen as an important and successful part of the wider BBC offering; meeting audience expectations and delivering value for money for licence fee payers.
   - Audiences find it difficult to think of BBC Online as a separate entity. It is a platform that is inextricably linked with other parts of the BBC.
   - This is especially true for News and Sport which are seen as truly integrated cross-platform offers with a strong cohesive identity.
   - Trust in BBC Online and Red Button stems from everything the BBC does. Interestingly, despite the backdrop of controversy\(^2\) during the study, trust remains high.
   - The Red Button service is seen as a more secondary part of the BBC offering, but one that is functionally fine and delivering good value for money, 68% rate Red Button favourably.\(^3\)
   - The perceived relationship between the BBC Red Button service and the wider BBC offer varies depending upon which element of the service people think of.
   - Interactive TV services are seen as an extension of the TV offer and information services are seen as the secondary part of the wider News and Sport offer.
   - However there is a sense that BBC Red Button could do more to meet audience expectations for more interactive and engaging content.

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\(^1\) Q.8: Thinking about BBC Online overall, how would you rate it overall? Base: 1000

\(^2\) The research took place in the midst of controversy around Jimmy Savile when allegations that the late BBC presenter had sexually abused children and adults were widely publicised. The BBC’s Newsnight programme faced criticism for dropping its own report on the story, leading to the set-up of inquiries into practices within the BBC.

\(^3\) Q.8: Thinking about Red Button, how would you rate it overall? Base: 200
2. BBC News values and associations dominate perceptions
   - BBC Online and Red Button are perceived as a source of News first and foremost.
   - They are used to access the 'here and now' (news, sport, TV) rather than being used as library or a reference tool.
   - Expectations of both services stem from expectations of the BBC News brand more widely. For many, BBC Online in particular acts as an ultimate arbiter of online truth - a confirmation and validation tool in a varied media landscape.
   - Content is expected to be robust, non-salacious and balanced, although there is permission for a lighter touch in some areas.

3. While it has strong products brands, BBC Online is seen as less than the sum of its parts
   - From the audience perspective, BBC Online can seem fragmented and fractured. It operates more as a broad church of smaller sites (the products brands) than as integrated products with seamless links.
   - BBC News, Sport and Weather have established the strongest brand identities and are most easy to access via the Homepage and current signposting.
   - Within this broad church, BBC iPlayer stands out as the most distinct but also most separate entity. Its nomenclature, vibrant image, branding and creative content feel quite different to the broader BBC Online offering which is more closely aligned with education and citizenship.
   - However audiences felt that there is huge potential in Knowledge & Learning (especially beyond Bitesize) that is currently unrealised due to a lack of signposting and navigational difficulties, particularly from the Homepage.
   - More broadly, it seems the site could work harder to showcase the diversity of its content, including TV, Radio and Music content alongside Knowledge and Learning.

4. At present, BBC Online operates as a destination of habit rather than exploration
   - Despite being well known for its breadth of content, usage of BBC Online (and Red Button) is characterised by habit.
   - It is not a place where audiences currently go for discovery. Visits are focussed, often limited to just one product area. There isn't the same invitation to come in and browse around as on other sites.
• This is partly a result of navigational issues. Few are using search and those that do find it confusing.
• There are also felt to be too few tabs along the top of the Homepage, while within certain products the number of tabs and content areas to choose from can feel overwhelming.
• The search function, tabs and recommended features could be better utilised to facilitate audience journeys.
• Audiences also felt more could be done to cross-promote online content via TV and Radio in order to grow audience relationships with BBC Online.

5. Overall BBC Online and Red Button are seen to meet the key requirements of their purposes
• The majority agree both services are meeting the requirements of each the purposes well. However, the detailed picture is more nuanced.
• Citizenship is seen as the most fundamental purpose to the remit of BBC Online and Red Button. Both services are doing well to deliver quality and trusted content but more could be done to support debate in an engaging way.
• The Nations, regions and communities purpose is more complex due to its multi-faceted remit. It would seem that covering Nations and regions is most important but there is room for improvement outside England and London.
• Global requirements appear to be well met across BBC Online and Red Button – albeit in the context of lower appetite for global content vs. other areas tested.
• The Digital purpose feels well served by the virtue of a strong presence across new platforms. However audiences felt that more could be done to stay at the cutting edge.
• Education is not something audiences automatically associate with BBC Online and Red Button, in part due to low awareness of the Knowledge and Learning offering (except Bitesize). On probing, the breadth and quality of the offering, is seen to implicitly play an informal educational role.
• Creativity has slightly different expectations, being seen as largely stemming from TV and Radio. However there is a sense that more could be done to make BBC Online and Red Button content more creative in its own right, for example using more audio and video content.
6. **There is an opportunity for BBC Online to work harder through interaction and personalisation**

- Currently the site feels more didactic than interactive and there is room to encourage greater interaction and debate.
- There is a perceived need amongst some for more personalised content, for example intelligent design which remembers and highlights users’ favourite content areas or is able to recommend related content. However this would need to be balanced with maintaining current ease of use and access as audiences were resistant to logging in or using passwords.

**THE CONTEXTUAL ONLINE LANDSCAPE**

Leveraging Sparkler’s knowledge from both this and previous studies, four key themes emerge as key to understanding the contextual picture:

1. **High expectations of websites**
   - Audiences expect websites to do a lot, including providing a multi-media and exploratory experience. Websites which provide ‘just text and a few pictures’ feel basic. A multi-media experience is now standard for most people.
   - Speed is of critical importance and audiences want to access their items of interest as quickly (and easily) as possible. Slow load times and too many ‘click-throughs’ can be a frustration.
   - Having the option to participate online is also increasingly becoming seen as a ‘hygiene factor’. This is especially true for certain websites, in particular social media sites (e.g. Facebook and YouTube) as well as those covering topics with high conversational currency value (e.g. sports and lifestyle).
   - While expectations are high that is not to say that all audiences are equally technically savvy. When developing websites, brands must ensure they cater to the needs of both digitally savvy and (often older) less technically savvy audiences.

2. **Online journeys are less linear than might be assumed**
   - Online behaviour is ‘magpie like,’ characterised by audiences switching between a range of content that attracts their interest rather than drilling down into one site and a single topic area. As such, ‘deep dive’ journeys are less common than shallower and shorter journeys.
   - At the same time, much online exploration is also a result of habitual routine with users returning to ‘tried and tested’ areas within websites and using the same
navigational devices to browse. This poses a challenge in terms of attracting audiences to new content.

- However, from what we saw, choice of approach to access content - including use of search, favourites, bookmarks, typing into the URL, toolbars and use of apps - can be quite random as well as reflect engrained habits.
- To optimise their online journeys and encourage exploration, audiences are looking for sites which work with the architectural codes and grammar which they are familiar with. For example, within certain sites the right hand side tends to be associated with adverts and can therefore be overlooked. Meanwhile, for most, the top tab bar is seen as vital to discovering content within sites.

3. **Different devices present new challenges for optimising content**

- While the laptop and desktop remain important, the usage of mobile and tablet devices are becoming more and more common.
- Having a website experience that is optimised across these smaller screens and operating systems that are compatible is increasingly important.
- Successfully delivering content through apps is of ever increasing importance to maintaining relevance to audiences.
- For those that use apps there is an expectation that the brands they use will have a presence in the app sphere. Brands not being seen in this space are felt to be lagging behind.
- Despite this, traditional browsing is still of great importance – see chart below:

![Chart showing preference for apps vs internet browsers](chart.png)

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4 Q25. To what extent do you prefer to use apps over internet browsers (e.g. Internet Explorer, Safari, Chrome, Firefox), or vice versa? Base: 1000
Whilst the uptake of multi-platform online services is on the up, there is still a large ‘traditional’ internet population out there. For them, browsers are still the main way to navigate.

4. Relationships with BBC Online are strong but vary by product and device

- BBC Online is a key part of the online lives of people in the UK. It is highly valued among most audience groups and for a significant number is their primary go-to online destination.
- However audiences tend not to have a relationship with BBC Online per se but rather with its component products.
- We found that there is little uniformity in how BBC Online was accessed. Respondents adopted a host of different approaches, including favourites, bookmarks, typing into the URL, history, toolbars, Google search and apps. While Google search ranked highly in terms of frequency, this also depended significantly on the device used.
- Audiences’ experience of, and relationship with, BBC Online differed across laptop, tablet and mobile devices. The fact that certain products have their own apps while others such as Knowledge and Learning do not creates and amplifies inconsistencies between the products.
- Those with apps can and tend to have developed a far more single minded and immediate relationship with BBC Online.
- It shouldn’t be assumed, however, that those with mobile or tablet devices are solely using apps to access the service, as many still access BBC Online through web browsers.

With this in mind, there are clear implications for BBC Online

1. Audiences have high expectations of websites

- To remain at the leading edge, BBC Online (and Red Button) needs to continue to build its provision of multi-media, and encourage participation while making sure this doesn’t hinder accessibility for less technically savvy audiences.

2. Audiences take ‘magpie’ like online journeys

- Design and navigation need to work hard to create a ‘stickier site’ by signposting and showcasing the breadth of its content in an intuitive and intelligent way.
3. **There are different behaviours by device**

- Audiences have different experiences and needs of BBC Online depending on device used.
- This is amplified by the different roles and relationships audiences have with each of the individual products and the mixed availability of apps across them.
QUALITY AND DISTINCTIVENESS OF BBC ONLINE AND RED BUTTON

In order to understand how BBC Online and Red Button are faring in terms of quality and distinctiveness an initial checklist of 10 attributes was developed to structure questioning and subsequent analysis in stages 1-4 of the research:

- Breadth
- Depth
- Appearance
- Ease of use
- Signposting
- Participation
- Use of audio and video
- Trustworthiness
- Being up to date
- Relevance

For the final quantitative validation stage an additional two attributes were identified as key areas of interest and added to the checklist tested:

- Quality of content
- Content not available elsewhere
Headline findings

The findings of the final quantitative stage illustrate that BBC Online overall is performing favourably against the majority of the quality and distinctiveness attributes outlined above. The exceptions are participation and providing content not available elsewhere, where the response is only slightly favourable.

Within this, News and Homepage stand out for quality and being up to date, despite strong competition. The Red Button is also performing favourably overall, although scores for use of audio and video, signposting and participation are lagging behind.

| % OF RESPONDENTS RATING THE SERVICES FAVOURABLY OVERALL AGAINST EACH QUALITY AND DISTINCTIVENESS CRITERIA |
|--------------------------------------------------|--------------------------------------------------|
| QUALITY OF CONTENT                                | 89                                               |
| EASE OF USE                                       | 88                                               |
| BEING UP TO DATE                                  | 88                                               |
| BREADTH                                          | 87                                               |
| DEPTH                                            | 85                                               |
| RELEVANCE                                        | 85                                               |
| APPEARANCE                                       | 83                                               |
| TRUSTWORTHINESS                                  | 82                                               |
| SIGNPOSTING                                      | 78                                               |
| USE OF AUDIO & VIDEO                             | 76                                               |
| CONTENT NOT AVAILABLE ELSEWHERE                  | 61                                               |
| PARTICIPATION                                    | 56                                               |
| RED BUTTON OVERALL                               | 80                                               |
|                                                   | 76                                               |
|                                                   | 78                                               |
|                                                   | 74                                               |
|                                                   | 72                                               |
|                                                   | 81                                               |
|                                                   | 74                                               |
|                                                   | 82                                               |
|                                                   | 67                                               |
|                                                   | 68                                               |
|                                                   | 70                                               |
|                                                   | 51                                               |

Q.5: How would you rate BBC Online / Red Button overall against the following checklist? % shown = net score slightly favourably + favourably + extremely favourably. Base: 1000 (BBC Online) & 200 (Red Button)

NB. A full breakdown of the performance of the four BBC Online products tested in the final quantitative study is available in the appendix.

The following sections of the report look at how BBC Online and the four key products (News, Sport, Homepage and Knowledge and Learning) as well as Red Button perform against each of these attributes in turn and draw comparison with other providers where relevant.
1. Quality of content

Quality of content sets BBC Online and Red Button apart from the competition

- Across the research, respondents were clear that BBC Online and Red Button are unique in terms of the quality of their offering - consistently described as professional, reliable and informative.

’The BBC website stands out in terms of quality’
(Female, Bitesize user, Stage 1 – Voices from the Crowd respondent)

- This is felt to be achieved quite uniformly across an impressive range of BBC Online’s products areas.
- This quality is seen to stem from the heritage of the BBC overall and is sustained by high standards of journalism, content, design and use of multimedia across the services.
- While audiences are aware there is work to be done to keep up with the competition in certain areas (especially Channel 4, The Guardian and Sky) overall the current perception is positive.

2. Ease of use

BBC Online and Red Button are seen as easy to use for habitual users

- For most, BBC online was considered easy to use. Respondents reported being able to find the information they were looking for quickly and efficiently.

’Very straightforward and quick to access information’
(Female, Homepage user, Stage 1: Voices from the Crowd Respondent)
• Familiarity has an important bearing on perceived ease of use. For most, BBC Online is a place of habit. Qualitatively, this feels especially true for News and Sport which are used most frequently.

• Audiences have a limited repertoire of journeys which they rarely venture beyond. When respondents were asked to find information outside of their habitual landscape and to explore between products, information was felt to be harder to uncover.

• The search function proved challenging. Some respondents were not even aware that it existed. Where search is being used, some users find the search results confusing and seemingly unrelated to the topic in question.

‘[Search is] not always 100% straight forward and there have been occasions when I’ve had to dig around for information but just went to Google’

(Female, News user, Stage 1 – Voices from the Crowd respondent)

• On probing, interesting content areas felt hidden within BBC Online and the slow / cumbersome loading of pages within Red Button caused frustration.

• Further detail on Search and Navigation within individual products is available within the products section of this report.

3. Being up to date

<table>
<thead>
<tr>
<th>BEING UP TO DATE</th>
<th>BBC ONLINE OVERALL</th>
<th>News</th>
<th>Sport</th>
<th>Homepage</th>
<th>K &amp; L</th>
<th>RED BUTTON OVERALL</th>
</tr>
</thead>
<tbody>
<tr>
<td>% OF RESPONDENTS RATING EACH SERVICE / PRODUCT FAVOURABLY</td>
<td>88</td>
<td>91</td>
<td>86</td>
<td>90</td>
<td>91</td>
<td>78</td>
</tr>
</tbody>
</table>

Q.5: How would you rate [service / product] against the following checklist?
% shown = net score slightly favourably + favourably + extremely favourably. Base: 1000 (BBC Online)/200 (Red Button/Products)

BBC Online and Red Button are seen as up to date, if not the first, for breaking news

• Generally, BBC Online and Red Button were perceived to be providing timely news and refreshing content regularly within the key products.

• However the services aren’t necessarily known as the place to go for ‘breaking news’ in particular within the News and Sports products. Sky News is a key competitor, being cited by many as ‘owning’ the breaking news territory.

‘It’s good but I think Sky can be better at being the first to break the News’

(Male, News user, Belfast)
That said, Sky doesn’t benefit from the same level of trust as the BBC. Audiences feel that the BBC does better in terms of verifying stories vs. Sky.

Issues also emerged around specific products. While the browser site was considered up to date, some respondents felt that the News app and Red Button News were updated less often. Others mentioned issues with the ticker not refreshing frequently.

**Being up to date is crucial to relevance**

Beyond this, it was clear that being up to date and having relevance are inextricably linked. Relevance, it would seem, is defined by how timely or up-to-date the content is (as well as personal interest). This is especially true for content within the News, Sport and Homepage products vs. Knowledge and Learning.

‘Yesterday’s news isn’t interesting anymore. You want to know how things are updating throughout the day.’

(Female, News user, Cardiff)

4. **Breadth**

<table>
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<tr>
<th>BREADTH</th>
<th>BBC ONLINE OVERALL</th>
<th>News</th>
<th>Sport</th>
<th>Homepage</th>
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</tr>
</thead>
<tbody>
<tr>
<td>% OF RESPONDENTS RATING EACH SERVICE / PRODUCT FAVOURABLY</td>
<td>87</td>
<td>81</td>
<td>83</td>
<td>84</td>
<td>84</td>
<td>74</td>
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Audiences appreciate the breadth offered on BBC Online

Audiences consistently described the range of information found on BBC Online as diverse and far reaching. Compared to other services it was seen to have unparalleled breadth of content and something for everyone. This is felt to be an important part of BBC Online’s role as a public service provider.

‘There is a lot there, I am hardly using a tenth of the resource. You always know you’ll get your info there’

(Female, Knowledge and Learning user, London)

‘Very good, I can’t think of any other internet site that offers the same information and quality as the BBC’

(Male, Homepage user, Bridgend)
• That said audiences were often not aware of the extent of this diversity. When their attention was drawn to it they felt that more should be done to promote the wide range of topics BBC Online covers – especially within Knowledge and Learning.

• However, while breadth of content is something audiences expect from BBC Online, they don’t want it to cover everything. It is not the place for red carpet gossip, for example. The expectation is for BBC Online to focus on ‘harder’ topics particularly within News and Sport, alongside some ‘softer’ (but not salacious) content around entertainment or lifestyle topics.

Audiences are happy with the BBC providing links to external sites

• While there is appreciation of BBC Online’s breadth, audiences also proved generally happy to be provided with links, to find out more elsewhere, as shown below\(^5\).

![Bar chart showing audience responses]

- Clear differences did emerge in terms of how well the products are doing to deliver these links\(^6\).

There is appetite for more breadth within Red Button

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\(^5\) Q.20: As well as providing links to content within the different parts of the BBC Online site, the BBC provides links to other external sites which might be relevant to you. To what extent do you appreciate this from the BBC? Base: 1000

\(^6\) Q.14: Thinking about News / Sport in a bit more detail, how well do you think it does in providing links to other websites. Base: 200 per users per products
Across the qualitative and quantitative stages, there was a clear sense that the BBC Red Button service doesn’t compare as favourably on breadth – 74% rated the Red Button favourably for depth vs. 87% overall for BBC Online.

While respondents were clear that providing more content shouldn’t come at the expense of ease of use, when discussed, audiences felt this was a missed opportunity for Red Button to provide access to valuable online content.

Appetite for more breadth is especially strong for News and Sport as the most popular topics used.

"The Red Button is a good back up for the big stories, but you have to go online for the other stuff"
(Male, Red Button user, Birmingham)

5. Depth

Overall the level of detail on BBC Online feels about right

- Audiences have different expectations of depth vs. breadth - tending to look to BBC Online (and Red Button) for a starting point or an overview of a topic.
- In general, respondents said they were happy to use other sites for more detail – they do not expect to find minute levels of detail or very niche information within BBC Online.
- Particularly for News, the depth of information is felt to be just right. Whilst some users did visit other specialist sites for more detailed information, they are still happy with the depth of content provided within News.
- Overall, the current offering of ‘depth’ meets the needs and expectations of the vast majority.

"It [BBC Online] does the job. I don’t think the stories are too long or too short"
(Female, Sport user, Edinburgh)
In-home observation showed that users tend to ‘graze’ on BBC Online content rather than use it as a reference tool to dive into detail. It would seem that more could be done to facilitate this ‘grazing’ behaviour.

‘I often browse BBC Online [homepage] on my tablet while we’re watching TV. I’m just scanning really for something that attracts my attention’

(Male, Homepage user, Bridgend)

Users want slightly more from Red Button in terms of detail

- Positivity on the current level of depth offered was quite uniform across BBC Online’s products. However the Red Button service stood out as not quite meeting the needs of current users – scoring 72% on favourability for depth vs. 85% for BBC Online overall.
- As with breadth, Red Button users don’t expect the service to be as extensive as BBC Online. However there is appetite for slightly longer articles and more supporting images, especially around key topic areas such as news and sport.

‘The Red Button is good for the scores, but you have to go online for the nitty-gritty’

(Red Button user, Birmingham)

6. Relevance

The breadth of offer allows BBC Online and Red Button to feel relevant to most

- Overall, BBC Online and Red Button are doing well in terms of providing relevant content. The wide range of topics on offer and strong product brands (notably News, Sport and iPlayer) are key to this.

‘I think it covers subjects which would appeal to the widest range of users. Other general sites tend to concentrate on certain areas’

(Male, Knowledge user, Stage 1 - Voices from the Crowd respondent)
• Relevance is aided by demarcation of different topics within the products which allows audiences to navigate towards areas of personal interest. This was reflected in the relatively strong performance of each product (and Red Button) against relevance.
• However audiences felt that more could be done to highlight lesser known content. Issues around navigation and awareness are evident, in particular within Knowledge and Learning and Radio and Music where potentially motivating content feels under-realised.

'I didn’t know there was all this stuff on music here. I wouldn’t think to go to the BBC for this’
(Male, Homepage User, Belfast)

There is a challenge to increase relevance with certain groups
• BBC Online emerged as having less relevance to lower socio-economic groups – with 78% of C2DEs rating BBC Online favourably for relevance vs. 89% of ABC1s.
• Qualitatively, BBC Online also emerged as being less relevant to younger vs. older audiences.

'I really respect the BBC but there are more exciting websites out there’
(Female, News User, Glasgow)

• In part, this reflects the wider online repertoire of younger audiences who are less reliant on the BBC brand at a macro level but do engage with BBC channels such as Radio 1. As such, for most audiences, credit doesn’t necessarily go back to BBC Online per se.
• However, both lower socio-economic groups and younger audiences appear to be looking for lighter / more discursive content than is currently provided by BBC Online.
• There were also regional differences in how well BBC Online and Red Button performed on relevance. These are covered within the Nations, Regions and Communities purpose detailed later in the report.

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7 Q5.10: How would you rate BBC Online overall against relevance? Base: 1000
Personalisation could help showcase the most relevant content

- The idea of personalisation came up across the research and there was a feeling that BBC Online could do more in terms of recommending content related to audiences’ interests. As more and more sites remember audiences’ preferences this seems to be becoming something of a given on most websites.
- Creating a smarter and ‘stickier’ site through the use of cookies and geo-targeted content was felt to be widely acceptable. In particular, and linking with BBC Online’s performance against the Nations, Regions and Communities purpose considered later in the report, the service was not seen to be doing enough in giving prominence to local issues and this was seen as a good way to achieve this. This is providing the BBC makes clear that data will not be used for other purposes.
- More proactive use of ‘suggested links’ was also recommended by audiences to allow cross-fertilisation between products and to facilitate the ‘grazing’ mind-set.

‘They could have links to other stuff that had a similar theme – like they do on YouTube’
(Female, News User, Bristol)

- Some were also in favour of being able to build their own preferences. However on balance, few currently felt prepared to sign into the BBC. They felt that personalisation shouldn’t come at the expense of ease of use.

7. Appearance

<table>
<thead>
<tr>
<th>APPEARANCE</th>
<th>BBC ONLINE OVERALL</th>
<th>News</th>
<th>Sport</th>
<th>Homepage</th>
<th>K &amp; L</th>
<th>RED BUTTON OVERALL</th>
</tr>
</thead>
<tbody>
<tr>
<td>% OF RESPONDENTS RATING EACH SERVICE / PRODUCT FAVOURABLY</td>
<td>83</td>
<td>81</td>
<td>82</td>
<td>81</td>
<td>86</td>
<td>74</td>
</tr>
</tbody>
</table>

Q.5: How would you rate [service / product] against the following checklist?
% shown = net score slightly favourably + favourably + extremely favourably. Base: 1000 (BBC Online)/200 (Red Button/Products)

The appearance of BBC Online and Red Button is well received, but not considered to be outstanding

- Overall, we found BBC Online to perform well in terms of its look and feel. It was praised for being ‘contemporary’, ‘professional’ and for some ‘bold.’ In comparison to other sites, many respondents felt the appearance to be ‘clearer’ and ‘cleaner’ – in part due to the lack of advertising vs. competitor sites.
'It is clear and easy on the eye. Other services are also easy on the eye but I feel the BBC has the edge'

(Female, Homepage user, Belfast)

- The design codes of certain products cut through as being well-established (notably News and Sport) and striking (iPlayer). However there were issues around content appearing too cluttered within News, while Red Button and Bitesize were felt to lack dynamism and sufficient visuals.

- Overall (with the notable exception of iPlayer), BBC Online is not seen as ground-breaking on appearance vs. its key competitors. There was specific praise for the use of The Guardian’s use of visuals (infographics, photography and video), Facebook’s ultra-clean design and colour palette, as well as Amazon’s design code and tabs. This feels especially important to attract younger and more technically savvy audiences.

‘You wouldn’t call the BBC website funky or cool...its [looks are] ok’

(Male, Sport user, Glasgow)

8. Trustworthiness

<table>
<thead>
<tr>
<th>TRUSTWORTHINESS</th>
<th>BBC ONLINE OVERALL</th>
<th>News</th>
<th>Sport</th>
<th>Homepage</th>
<th>K &amp; L</th>
<th>RED BUTTON OVERALL</th>
</tr>
</thead>
<tbody>
<tr>
<td>% OF RESPONDENTS RATING EACH SERVICE / PRODUCT FAVOURABLY</td>
<td>82</td>
<td>81</td>
<td>86</td>
<td>87</td>
<td>87</td>
<td>82</td>
</tr>
</tbody>
</table>

Q.5: How would you rate [service / product] against the following checklist?
% shown = net score slightly favourably + favourably + extremely favourably. Base: 1000 (BBC Online)/200 (Red Button/Products)

BBC Online and Red Button benefit from high levels of trust

- Both services were frequently described as reliable and professional. This trust stems from the heritage and stature of the BBC overall (notably TV and Radio).

‘They’re a credible organisation that are trustworthy across everything they do’

(Female, Sport user, Stage 1 – Voices from the Crowd respondent)

- The research was carried out at a time of high profile controversy for the BBC, but despite this backdrop, trust in the BBC and BBC Online appears to be high. While

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8 The research took place in the midst of controversy around Jimmy Savile when allegations that the late BBC presenter had sexually abused children and adults were widely publicised. The BBC’s Newsnight programme faced criticism for dropping its own report on the story, leading to the set-up of inquiries into practices within the BBC.
some respondents did speak about their trust in the BBC having been damaged, this was not a widely held view.

- From what audiences said about the different BBC services, BBC Online and Red Button appear to benefit from even greater trust than TV and Radio. This is because Online and Red Button are perceived to be more factual in nature vs. more personality and opinion driven content on TV and Radio.
- For some, BBC Online plays an ‘arbiter of online truth’ role vs. competitor websites – the place people go for confirmation of stories. Respondents felt that unlike some of its competitors, BBC does not publish rumours until they have been confirmed.

**There is geographical variance in levels of trust**

- Trust is quite uniform and high across the different BBC Online products and Red Button, although there is a slight dip for News and Red Button.
- This slight dip in trust for News reflects concerns around impartiality amongst a small minority of News users. Concerns amongst this minority varied by respondent and included perceived left and right wing bias, as well as pro and anti-American sentiment.
- Notable differences did cut through for England vs. other nations of the UK reflecting some concerns around an ‘England-centric’ bias – 84% of respondents in England rated BBC Online favourably on trust vs. an average of 74% for Northern Ireland, Scotland and Wales.

### 9. Signposting

<table>
<thead>
<tr>
<th>Signposting</th>
<th>BBC Online Overall</th>
<th>News</th>
<th>Sport</th>
<th>Homepage</th>
<th>K &amp; L</th>
<th>Red Button Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of respondents rating each service/product favourably</td>
<td>78</td>
<td>79</td>
<td>83</td>
<td>82</td>
<td>83</td>
<td>67</td>
</tr>
</tbody>
</table>

Q5: How would you rate [service / product] against the following checklist?
% shown = net score slightly favourably + favourably + extremely favourably. Base: 1000 (BBC Online)/200 (Red Button/Products)

**Signposting is good but could work harder to promote exploration**

- Respondents felt that there is consistency in the page templates, tabs and sub-sections. By and large they are seen to succeed in making the site generally easy to navigate.

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9 Q5.8: Trustworthiness. How would you rate BBC Online overall against the following checklist? Base: 1000 users
'Navigation is easy because every page uses the same template so it is easy to find what you are looking for'

(Male, Homepage user, Stage 1 – Voices from the Crowd respondent)

- That said certain products were felt to be easier to access than others. News, Sport, Weather and iPlayer were consistently mentioned as parts of the site that were easier to navigate to and around. This was primarily due to their prominent positioning on the Homepage tab bar.
- Audiences also discussed where signposting could be improved to aid further exploration:
  - Content within the ‘More’ tab on the Homepage was often overlooked, if not unheard of. This was considered particularly true of Knowledge and Learning.
  - Sub-headings and links didn’t always feel consistent. On some areas of the site they were felt to be exhaustive (e.g. News), whereas on others they were far fewer (e.g. Homepage). Furthermore within some of the Knowledge subcategories, respondents reported subheadings appearing and disappearing depending on the page they were on.
  - Some suggested more could be done to shine a spotlight on ‘interesting stuff’.

'I tend to use the same bits of the BBC website over and over. I don't think you really notice the other stuff it has there’

(Female, News user, Leeds)

10. Use of audio and video content (A/V)

<table>
<thead>
<tr>
<th>USE OF AUDIO &amp; VIDEO</th>
<th>BBC ONLINE OVERALL</th>
<th>News</th>
<th>Sport</th>
<th>Homepage</th>
<th>K &amp; L</th>
<th>RED BUTTON OVERALL</th>
</tr>
</thead>
<tbody>
<tr>
<td>% OF RESPONDENTS RATING EACH SERVICE / PRODUCT FAVOURABLY</td>
<td>76</td>
<td>71</td>
<td>80</td>
<td>79</td>
<td>78</td>
<td>68</td>
</tr>
</tbody>
</table>

Q.5: How would you rate [service / product] against the following checklist?
% shown = net score slightly favourably + favourably + extremely favourably. Base: 1000 (BBC Online)/200 (Red Button/Products)

BBC Online is well established, if not leading the way, for providing audio and visual (A/V) content

- Audiences have clear expectations of a strong audio and visual offer. A/V is increasingly seen as a ‘hygiene factor’ and BBC Online is understood (and expected) to have a multi-media online offer because of its links with TV and Radio.
- BBC Online is seen to provide a solid offer and the deployment of A/V is seen to play a complimentary role in bringing other content to life. Sport emerged as particularly strong and there was appetite for even more sports video content. However it was acknowledged that limited rights to footage may make this hard to achieve.

- Many felt BBC Online could work harder overall in utilising the resources from TV, particularly within the news offering online and within Red Button.

- That said, not everyone uses A/V, especially on certain devices or where connectivity is limited. Many respondents spoke of challenges they faced when trying to load video on mobiles out of home. This led to a less favourable impression - the option to ‘take or leave’ content is important.

‘There are a lot of videos which is good, but they don’t all play on my iPad/iPhone which is annoying when I am on the move and I want to watch the video on a News article’

(Female, TV & iPlayer user, Bridgend)

**Video in particular feels vital to providing a future facing offer**

- Most feedback emphasised video over audio, suggesting a shift towards more visual content and the role video plays in building associations with the brand and high production values.

- While ‘nice to have’, audio felt less relevant to how audiences engage online (i.e. visually) - 67% of respondents stated that video content is important on BBC Online vs. just 56% for audio.10

11. **Content not available elsewhere**

**Knowledge and Learning, iPlayer and Red Button are, by their nature, seen as unique in their field**

- The breadth and accessible nature of content within Knowledge and Learning feels unrivalled.

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10 Q28 / 29: How important would you say audio / video content is for you on BBC Online? Base: 1000 users
'It’s really impressive. There’s no one else that does so much in one place’
(Male, Knowledge user, Edinburgh)

- iPlayer is seen as the market leader for providing online access to TV content online.
- While audiences are aware of interactive TV services from other media brands (notably Sky and Channel 5), the BBC stood out as the most comprehensive offering.

In contrast, audiences do not expect more commoditised products to be unique

- Content within the Homepage, News and Sport products are seen as more commoditised. Audiences are aware that competitor brands will also cover the same stories and in this sense, by their very nature, content matter is not unique per se.
- However, audiences appreciate that what sets BBC News and Sport apart online is the quality of the offering, rather than uniqueness. This is reflected in the high favourability scores for these products for quality of content, trust, appearance, breadth and depth.

12. Participation

<table>
<thead>
<tr>
<th>PARTICIPATION</th>
<th>BBC ONLINE OVERALL</th>
<th>News</th>
<th>Sport</th>
<th>Homepage</th>
<th>K &amp; L</th>
<th>RED BUTTON OVERALL</th>
</tr>
</thead>
<tbody>
<tr>
<td>% OF RESPONDENTS RATING EACH SERVICE / PRODUCT FAVOURABLY</td>
<td>56</td>
<td>51</td>
<td>62</td>
<td>57</td>
<td>53</td>
<td>61</td>
</tr>
</tbody>
</table>

Q5: How would you rate [service / product] against the following checklist?
% shown = net score slightly favourably + favourably + extremely favourably. Base: 1000 (BBC Online)/200 (Red Button/Products)

Participation is becoming more of a hygiene factor

- In an increasingly interactive and discursive online landscape, BBC is felt to be relatively didactic – providing a one way communication of information from the organisation to audiences, as opposed to actively fostering audience participation.
- Active engagement and participation with BBC Online was felt to be quite limited and where it did take place tended to be restricted to leaving comments. Some respondents pointed out that they were not sure how to go about participating or that there is limited incentive to participate.

'I have never been involved in any commenting on the BBC website, I did not even know that you could. I knew that you could tweet them but that is it’

(News user, Leeds)
• In part, limited opportunity to participate is seen to fit with the impartiality and robustness required of the service. BBC Online’s role in particular is perceived to be in providing watertight facts rather than opinion. The Mail Online was highlighted as a site that some respondents felt has the licence to do this and they felt that it succeeds particularly well by encouraging reader discussions of stories. This was not deemed appropriate for BBC Online.

‘People post their wacky ideas on the [Daily] Mail. That’s what you expect but that’s not what the BBC should be about’

(Female, Homepage user, Bridgend)

Interest in participation polarises, so needs careful management

• Overall there was licence for more participation and opinion. Over half those surveyed had participated on BBC Online in some form and agreed participation is important to BBC Online.
• Activities being done include sharing links (38% of respondents have done regularly or occasionally), reading comments (29%) and following BBC brands/people on Twitter (29%)\(^\text{11}\).
• Participation is most important for early adopters and younger audiences and it was felt could play a role in maintaining relevance and creating a personal connection, most notably through the blog and feeds of key BBC talent from TV and Radio.
• However not all are equally keen. A significant number appear ambivalent to participation (41% rated participation as neither important nor unimportant to them). Clear careful demarcation of content feels important to serving the needs of both audiences simultaneously.

There is more appetite to participate with certain products

• Participation is most motivating within products with high conversational currency – notably News and Sport (including within Red Button).
• BBC Sport is felt to be leading the way – with many praising the use of Twitter feeds, the gossip column and ‘texting in’ on match days in particular.
• However, BBC News doesn’t have as strong a reputation for participation beyond sharing links.

\(^{11}\) Q.16: Which of the following apply to BBC Online? Base: 1000
• Beyond this, the BBC’s radio stations were cited as the most participative part of the BBC offer, but this level of interaction was not felt to be reflected online.
PERFORMANCE OF BBC ONLINE AND RED BUTTON AGAINST THE PURPOSES

One of the primary objectives of the research was to understand how BBC Online (and its component products) and Red Button are performing against the six public purposes. This section of the report looks at the public purposes in the context of BBC Online overall while drawing from the individual products – based on the link and relative importance they have with each purpose.

An overview of key purposes by product and for the Red Button

<table>
<thead>
<tr>
<th></th>
<th>RED BUTTON</th>
<th>NEWS</th>
<th>SPORTS</th>
<th>K&amp;L</th>
<th>TV &amp; iPLAYER</th>
<th>RADIO &amp; MUSIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>CITIZENSHIP</td>
<td></td>
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<tr>
<td>EDUCATION</td>
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<tr>
<td>CREATIVITY</td>
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<tr>
<td>GLOBAL</td>
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<tr>
<td>DIGITAL</td>
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<td></td>
</tr>
<tr>
<td>NATIONS, REGIONS &amp; COMMUNITIES</td>
<td></td>
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<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Legend:
- **= very important
- = quite important
- = less important

**Headline Findings**

Across the qualitative and quantitative exploration of the purposes, two stories emerged. Within the final quantitative validation stage, two-thirds of the audience felt BBC Online (and Red Button) are meeting the requirements of all their purposes.

The Global purpose emerged as being best served, with an overall favourability score of 81% and Nations, regions & communities lagged behind at 66% (albeit still a positive score).

The level of importance audiences placed upon the purposes by and large mirrored the extent to which they were seen to be performing, as shown in the table below.
Summary of *quantitative* feedback on the performance and importance of the purposes overall

![Graph showing quantitative feedback]

However, interrogating the purposes during the qualitative stages unearthed a slightly different understanding of importance and performance. This reflected the nuanced nature of the purposes and the various elements within them – something which can be hard to prise apart in a quantitative setting.

The rest of this chapter drills down into the specific purposes from a qualitative perspective, outlining the intricacies that came to the fore from face to face research. This section has been structured to reflect how important respondents told us (qualitatively) that each purpose was to BBC Online and Red Button.

**Summary of *qualitative* feedback on the importance of the purposes overall**

![Graph showing qualitative feedback]

1st **CITIZENSHIP**
2nd **EDUCATION**
3rd **CREATIVITY**
4th **GLOBAL**
5th **DIGITAL**
6th **NATIONS, REGIONS & COMMUNITIES**

31
1. Citizenship

**Provides high-quality news, which is comprehensive, constantly updated, accurate, impartial and independent. Keeps you informed and supports debate about important issues and political developments in an engaging way.**

The Citizenship purpose epitomises perceptions of BBC Online

- In the main, BBC Online is seen to deliver the Citizenship purpose very well. Of all the public purposes Citizenship is also felt to be the most important; what BBC Online really should be doing.
- The quality of News was seen as second to none - regarded as the ‘go to’ source for confirmation of stories. Audiences trust it implicitly to provide accurate and high quality content.
- While respondents felt BBC Online was up to date, it isn’t always seen to be as quick as other sites. However it was acknowledged that this was because other providers are more likely to report rumours so will get stories to market quicker. The trade-off implied between accuracy and speed meant that respondents were happy for a story to appear on BBC Online a little later, as they knew that when it did it would be watertight. In this sense BBC Online is regarded as a back stop – an ‘arbiter of online truth’.

Balancing expectations of impartiality with the appetite for debate is a challenge

- Impartiality, by some, was questioned in some ways and there were a few respondents who felt that sometimes BBC Online demonstrated left or right wing bias.

  ‘I don’t think the reporters have given this [current] government a fair deal. I’ve noticed hints of bias in some of the stories’

  (Male, Red Button user, Birmingham)

- BBC Online was not felt to be meeting the purpose when it came to ‘support[ing] debate about important issues and political developments in an engaging way.’ The impartiality of the BBC, while seen as a positive attribute, was felt to limit debate as reporting is more confined to the facts of the matter rather than biased opinion. The potential for this to ignite debate was felt to be limited.

- There were mixed views about whether straight reportage was the right approach. Some felt there was room for the BBC to offer more opinion based content although
it was important that this was labelled as such. It was felt this should be an addition to existing more neutral content rather than a replacement for it

The invitation to participate and engage is not necessarily clear to users

- Few of those we spoke to had ever commented on a story on BBC Online despite a number having done do on other sites such as the Mail Online or Twitter. Respondents mentioned that the comments function was hidden at the bottom of the page and its functionality was not seen to be as intuitive or easy to use as sites like Twitter or Facebook which they felt set the standard when it comes to participation. The absence of forums, particularly for Sport, was also noted.

- Overall, users of BBC Online saw their relationship with the service as more of a one-way dialogue rather than a conversation. There was a definite sense that the BBC could and should be doing more in this area. Radio was felt to lead the way here, although the engagement and debate that it creates were not perceived to be reflected online.

Presentation has an important role to play in driving engagement

- While the content is often seen as second to none, BBC Online was felt to be lacking in terms of presenting content online in the most engaging way. Respondents cited the use of infographics, stronger design codes and multi-media by key competitors e.g. The Guardian as being more successful here.

‘The Guardian is doing some cool stuff with visuals – I really liked this timeline thing they created last week. I associate the BBC more with just text and pics’

(Male, Sport user, Glasgow)

Looking at the key product and service areas for Citizenship

Within the qualitative research sessions, respondents were asked to consider in detail how well News within BBC Online and the Red Button service were meeting the Citizenship purpose. These products were selected as those with most relevance and importance to the Citizenship purpose.

- News and the Citizenship purpose:
  - News was felt to perform well against Citizenship. It was acknowledged as being a destination for high quality and comprehensive news content.
There were a few issues raised regarding the impartiality of News. Particular issues that were raised were in relation to coverage of conflict in the Middle East and questions over the BBC’s relationship with Government. For example, some expressed concerns around how the BBC could be truly impartial because they felt ultimately the organisation relied on government backing.

With regards to ‘breaking news’ BBC News isn’t always considered as up-to-date as Sky News. BBC News is used as a confirmation tool, creating the view that it can lag behind.

Supporting and encouraging debate was the area where News was felt to fall behind. Respondents described their consumption of news on BBC Online as being more didactic rather than interactive.

It was seen more as a destination to broadcast facts, whereas TV and Radio were considered more suitable platforms to inspire and support debate.

Supporting debate online was perceived to be a challenge, and respondents argued whether there is a need to do this in any case.

**Red Button and the Citizenship purpose:**

Audiences feel the content within the Red Button News service delivers well on quality and impartiality, again reflecting associations with the BBC News offer more widely. However it was felt the service could work harder to deliver this in a more engaging way – particularly in terms of use of audio and video content, speed of news updates and links to find out more.

‘It [BBC Red Button] isn’t exactly cutting edge. It’s miles behind what you can get online and from TV’

(Female, Red Button user, Birmingham)

2. **Nations, Regions and Communities**

Reflects the communities that exist in the UK, whether they be based on geography, on faith, on language, or on a shared interest such as sport. Stimulates debate within and between the communities of the UK and encourages people to get involved with their local communities.

Nations, Regions and Communities was the most complex purpose for audiences to evaluate

Overall there was a sense amongst respondents that this is an important purpose for BBC Online to be delivering against.
There was, however, some debate about the relative importance of the nations vs. regions vs. communities elements and, on balance, it was the purpose against which respondents felt BBC Online performed least well against. The purpose currently feels best satisfied by and relevant to News although there was a desire amongst respondents for other areas of BBC Online to have a more local flavour. At the same time, some questioned the appropriateness of BBC Online representing faith and how feasible this would be while keeping the breadth of content manageable. Others asked whether as the British Broadcasting Corporation, BBC Online should be covering very localised community issues. Some felt that this was too lofty a goal.

**The Nations element of the purpose feels better satisfied than Regions and Communities**

- Respondents felt the service covered the Nations element reasonably well but there were a few issues around content feeling 'England centric'. While audiences are aware of coverage for the other nations, audiences tended to think that the focus of content is biased towards England.
- For Welsh respondents, it was not easy to find the Welsh Language pages and once visited, these can feel out-dated compared to the rest of the site as they don’t seem to be refreshed as frequently. In Northern Ireland some felt that BBC reporting on Northern Irish issues sometimes missed the delicate nuances of local politics.

> ‘I appreciate they have people focused on Northern Irish issues, but they don’t go into the same depth as the Belfast Telegraph would’

(Female, Homepage user, Belfast)

- There was not a great deal of discussion about BBC Online’s regional coverage, with the exception of some respondents commenting that the service had a London-focussed feel.
- Communities were, however, an area that sparked considerable debate. There was a feeling that more could be done to reflect what is going on at a local level. A number of respondents said they would like BBC Online to provide information about what was happening in the local area, even if this was simply links to other sites.
- With regards to encouraging audiences to get involved in their local communities, some respondents challenged whether it was the BBC’s role to do this in the first
place. For many, it was both outside the BBC’s remit and something BBC Online was not seen to be achieving.

- There was a view that BBC Online could be doing more to represent different interest groups. While sport was felt to be reasonably well catered for, the depth of information on some of the less mainstream sports was limited.

‘There’s not much on cycling that I’m into - mostly its football.’

(Male, Sport user, Edinburgh)

- Likewise, some felt that shared interest groups weren’t adequately satisfied within Knowledge and Learning. This was partly due to navigational issues surrounding Knowledge and Learning and partly a result of low levels of interaction and participation with the website.

Looking at the key product and service areas for Nations, Regions and Communities

Within the qualitative research sessions, respondents were asked to consider in detail how well specific products (in this case News, Sport and Knowledge and Learning) and Red Button were meeting the Nations, regions and communities purpose. These products were selected as those with most relevance and importance to this purpose.

- News and the Nations, Regions and Communities purpose:
  - News performed fairly well against this purpose but respondents felt that more could be done. Despite being known for its breadth, many respondents felt there was a ‘London-centricity’ to news on BBC Online.

‘BBC News definitely covers this well, but I do feel like there is a bias towards News stories in London as opposed to here in Cardiff’

(Female, 25-34, Medium News, Cardiff)

- While national news coverage was felt to be good (as explored earlier in the report), there were some issues surrounding coverage of the different nations.

- There was demand for more local coverage and a feeling that as it stands BBC News online is not providing the detail respondents would like.
With regards to reflecting the different communities that make up the UK, there was scepticism about whether BBC News online should be doing this. For many, national and regional news coverage was deemed to be adequate. There was little sense that BBC News encouraged audiences to get involved with their local communities. TV and Radio were, again, considered better outlets to encourage conversation and pro-active public engagement. It was felt amongst some that greater personalisation could play a role in highlighting local news content and bringing relevant news stories to audiences attention.

- **Sport and the Nations, regions and communities purpose:**
  - Against this purpose Sport was felt to perform reasonably well but only to an extent. That extent being that the information on the site is relatively topline. It was difficult for respondents to fully relate all aspects of the purpose to Sport, particularly the mention of ‘faith’ and ‘language’.
  - Sport was not seen to provide a particularly strong sense of community when compared to other sites for example team and club specific fan sites.
  - Despite this, BBC Sport was praised for stimulating debate. Its close proximity to Twitter were seen to stimulate debate well and compared to other areas of BBC Online, Sport was considered to be one of the strongest.
  - The debate itself, however, was seen by some to be somewhat rigid due to its question and answer style.
  - For some, local and regional sport news would be more naturally sourced from a fan or local team site, and not BBC Sport.

- **Knowledge and Learning and the Nations, Regions and Communities purpose:**
  - The general expectation was that the BBC would provide content relating to Nations, Regions and Communities within Knowledge, but there was a call to raise awareness of the areas within Knowledge that meet this purpose.
  - Again, audiences also had finite expectations of the BBC in this area. They did not expect it to have an extensive catalogue of content to cover all interests and communities – and would prefer focus on quality over quantity.
  - The provision of learning resources for Welsh and Scottish examinations within the site is recognised as helping Bitesize realise the Nations, Regions and Communities purpose requirement. However, it is difficult to comment on
the importance of this component of the service within this report as our sample was focused on parents within England.

- However, there was limited demand for developing more localised or personalised content within the communities covered (that is, beyond catering for different learning styles and abilities as mentioned above).

- **Red Button and the Nations, Regions and Communities purpose:**

  - The dedicated regional tabs within the news offer work well to meet audience demand for headline local news and sport. The service is not however seen as offering content for other communities (e.g. faith or ethnicities) but from what we saw demand is limited.

    ‘Red Button’s just for the headlines really. I don’t use it like online for looking up things around my hobbies and interests.’

    (Female, Red Button user, Birmingham)

3. Digital

| Helps everyone in the UK to get the best out of emerging media technologies. |

**Overall BBC Online is seen to be meeting its Digital requirements but perceptions vary by products**

- For most, BBC Online is regarded as having a strong presence across new technologies, such as mobile and tablet as well as emerging social media, Twitter, in particular.

- Respondents were quick to refer to BBC Online’s apps where they exist, particularly the News app, as good examples of BBC Online meeting this purpose. For some the News app is not as good as the BBC News desktop/ laptop browser page. However generally it was viewed positively by those who had used it.

  ‘The News app is the next best thing to going online. Great when you’re out and about’

  (Male, News user, Cardiff)
• The most prominent example of BBC Online meeting this purpose lay with iPlayer. It was often mentioned as leading the way in its field. It is not only considered to be ahead of other online TV catch up services, but its design is also seen to be more forward thinking than the rest of BBC Online.

**Audience needs from the Digital purpose are shifting**

• Observed across the majority of the research, digital exclusion appears to be becoming lower and lower. Execution rather than access will be increasingly important for BBC Online.

• To meet the Digital purpose fully, BBC Online needs to be best in class and part of this is about a seamless experience across different devices. Audiences felt that having apps for all areas of the websites, or a meta BBC Online app might be a way forward.

  ‘I’d expect the BBC to have apps for all the different parts of online like News, Sport and Weather.’

  (Male, Homepage user, Belfast)

• Overall, BBC Online is seen to perform excellently against this purpose for the mass market. However digitally savvy respondents did suggest that BBC Online lags slightly behind commercial competitors in terms of investing in a comprehensive tablet and mobile offer.

  ‘The BBC [News] app is ok but it’s not as cutting edge as some of the things you can get’

  (Male, Sport user, Edinburgh)

**Looking at the key product and service areas for Digital**

Again, respondents were asked to consider in detail how well specific products (in this case Knowledge and Learning and TV & iPlayer) as well as Red Button were meeting the Digital purpose. These products were selected as those with most relevance and importance to delivering the Digital purpose.

• **Knowledge and Learning and the Digital purpose:**
  
  o For the vast majority of people the need for formal digital education felt limited.
o Bitesize was mentioned by a few people in a positive light, but over and above this, there was little that audiences could recall.

o Overall, Knowledge and Learning was felt to offer potential in learning, but the overwhelming feeling was that more could be done to push the use of new and emerging technologies in this area.

- TV & iPlayer and the Digital purpose:
  o Despite not being considered in detail for its delivery against this purpose, TV and iPlayer are seen by many to be leading the way when considering the Digital purpose. Particular reference was given to the iPlayer App for mobile and tablet and there is a sense that iPlayer has brought online catch-up TV into the mainstream.

   ‘The BBC has led the way with catch-up. ITV and Channel 4 do have their offering, but they are more playing catch-up.’

   (Female, Red Button user, Belfast)

4. Creativity

Offers the best examples of creative work that engage and excite audiences, breaking new ground and encouraging interest in cultural, creative and sporting activities.

Audiences make strong links between BBC Online and BBC TV when talking about the Creativity purpose

- Most found it difficult to interpret the Creativity purpose in the context of BBC Online alone. Audiences regard the BBC for producing creative work which is showcased well on the website but are less sure about BBC Online being creative in itself.

- In this context, the BBC was felt to be lagging slightly behind other broadcasters. Channel 4 and Sky in particular were cited as being more cutting edge and risk taking in their programming.

Individual personalities and programme brands can be key to driving Creativity online

- Within the context of BBC Online, examples of creativity were less top of mind. This is partly because BBC Online is felt to be characterised by one-way communication of information rather than engaging and exciting audiences.
• However BBC Online was seen to do big sporting events very well, in particular the Olympics was cited as an example of where BBC Online’s coverage was creatively executed well.

‘The Olympics stuff was really impressive – the way you could watch different events at the same time and how they used graphics to help you understand what was going on.’

(Female, Sport user, Cardiff)

• However there was also some evidence of competitors taking the lead, for example Channel 4’s use of live online blogs and the presence of talent from TV online.

• Knowledge and Learning were seen as having potential to play a strong role in helping audiences develop new and creative interests but it is felt that this potential remains untapped as it is not currently seen to be creatively presented.

Looking at the key product and service areas for Creativity

For the Creativity purpose, respondents were asked to consider in detail how well Sport, Knowledge and Learning, TV and iPlayer, Radio and Music, and Red Button specifically were performing against the purpose.

• **Sport and the Creativity purpose:**
  o For most, Sport is considered to meet the Creativity purpose. Audiences are by no means overwhelmed by the creativity on Sport, but they feel that in terms of what they expect from creativity within an online sport service, BBC Sport is getting it right.
  o The coverage of the Olympics was considered to be excellent on BBC Sport and this has raised audiences’ expectations to some extent. There is a feeling for some that the purpose is not being delivered as well after the event.
  o The breadth of coverage and inclusion of lesser known sports was felt to encourage interest in different sporting activities.

‘The Olympics really raised the profile of some smaller sports like boxing and talent like Nicola Adams.’

(Female, Red Button user, Birmingham)
• **Knowledge and Learning and the Creativity purpose:**
  o The potential of Knowledge and Learning to meet the Creativity purpose is strong but is not being realised due to awareness issues.
  o On viewing content, many felt the general presentation of the products felt flat, outdated, wordy and textbook like. As a result, it was not seen as being very engaging.

  ‘The stuff for learning is reliable but doesn't look as funky as other stuff [on the BBC website]’
  (Female, parent of Learning user, Bristol)

• **TV & iPlayer and the Creativity purpose:**
  o TV and iPlayer was felt to perform well against this purpose. The look and feel of iPlayer was felt to be more creative than other areas of BBC Online. Respondents made particular reference to its sleek and stylish design. In particular the features and coverage of the Olympics gave performance against this purpose a huge boost.
  o Creativity was largely seen as a function of broadcast content. There was a slight sense that the BBC has been falling behind some of the other broadcasters on this front, notably Channel 4, E4 and ITV.

• **Radio & Music and the Creativity purpose:**
  o Creativity was not largely acknowledged within Radio and Music. The general feedback included how it hosts content which often is creative, but the site itself isn’t particularly so. BBC Online is seen to be more about access to creative Radio and Music content and, for those who used micro sites such as the Glastonbury page, there was recognition that the site is creative in its appearance and design.

• **Red Button and the Creativity purpose:**
  o There seems to be a clear disconnect here between the more basic ‘day-to-day news offer’ and the Red Button’s potential, as showcased during the Olympics, Glastonbury etc.. Creating and signposting more creative content and interaction within Red Button felt important to growing appeal.

  ‘They need to have more of interactive stuff around live programmes and tell people about it’
  (Female, Red Button user, Birmingham)
5. Education

supports formal education in schools/ colleges and offers engaging ways for everyone to build their knowledge and skills across a broad range of subjects.

BBC Online is better known for formal educational content

- BBC Online was seen to support formal education very well. News and Bitesize were the areas at the forefront of audiences’ minds, and they were very highly regarded. However the primary association with Bitesize is as a product for children.
- Respondents expected other ‘education’ within BBC Online to be didactic and formal, rather than engaging, informal and relevant to their lives.

‘I’d expect any learning to be quite dry – literacy practice and stuff like that’

(Female, Sport user, Cardiff)

Awareness and navigational barriers to engagement

- While audiences appreciated the depth and breadth of information for formal and informal learning available (when shown it), many respondents expressed they would appreciate more help finding it in the first place.
- The concealed tab on the BBC Homepage, issues with the BBC Search function and limited promotion of content on TV emerged as key barriers.
- Google appears to be the most common route to finding content. The BBC brand has strong credibility in search results and, from what we saw, search engine optimisation seems to be playing a strong role in driving visits – in particular to Food and Health topics.

Looking at the key product and service areas for Education

For the Education purpose, respondents were asked to consider in detail how well News, Knowledge and Learning and Red Button specifically were performing against the purpose.

- News and the Education purpose:
  - News was not viewed as a direct means of supporting formal education in schools and colleges. Respondents felt there was a wealth of specialist websites that were more tailored to meet particular information or educational needs.
'There are sites like the CIA World Factbook and Wiki that you’d go to first if you wanted information on a particular country.'

(Male, News user, Belfast)

- However, on probing, respondents did express an appreciation for the implicit role News plays in providing information and building their knowledge of domestic and international affairs.

- **Knowledge and Learning and the Education purpose:**
  - There was widespread acknowledgement that the content undoubtedly does support education, but it could do more if there was higher awareness of its offering and if navigation was easier. Knowledge was seen to be one of the poorest performing products in terms of navigation. However with low awareness of its content and being a ‘broad church’ of seemingly disparate topic areas, the need for signposting to work harder was clear.
  - That said audiences did not expect BBC Knowledge to compete with sites such as Wikipedia in terms of breadth and depth.
  - Audiences were unanimous that Bitesize works well against this purpose – it is seen as easy to use, well publicised and the most comprehensive curriculum offer available. Students felt they could rely upon it as a study aid for formal examinations.
  - However, respondents felt that there is always opportunity to do more in terms of breadth and depth. Specifically, this requires working harder to meet the needs of students of different ability levels or learning styles, for example by splitting content and tasks out into foundation level and higher level and offering more interactive content. They also felt that there may be an opportunity to broaden the subject offering beyond core subjects and potentially into A-Levels.

'Bitesize is great up to when you do your GCSEs but I guess they could do more for older students.'

(Female, Homepage user, London)
6. Global

Provides internationally-respected news services to audiences around the world and keeps you in touch with what is going on in the world.

The current offering fits (limited) audience demand

- BBC Online was seen to be performing particularly well against the Global purpose. For those with an interest it provided good coverage of global news and was felt to offer those abroad a much valued link with home.

  'You really appreciate it when you compare to it other providers. Even in my home country, Holland, the biggest online sites don’t cover international news the same way’

  (Make, Homepage user, London)

- That said there was a lack of demand amongst those we spoke to for extensive global news and while views on performance against the purpose were very favourable, it was not seen as being as important as some of the other purposes.

Perceptions of Global are driven by the ‘master brand’

- At a headline level audiences associate BBC Online with the quality international news service they know from TV. Many respondents defaulted to talking about BBC’s broadcast services (including the BBC News channel and BBC World News) when thinking about this purpose, suggesting it is the BBC’s broadcast news that drives the global perception of BBC Online.

- There were many positive examples given of BBC Online providing excellent global news coverage – Hurricane Sandy and the US Elections were notable. Many respondents felt that BBC Online was especially good at covering these sorts of big global news events.

  'If there’s a big news story, you know the BBC will be there.’

  (Male, Knowledge user, London)

- Respondents appreciated the impartiality of its global news coverage, particularly in the context of some US broadcasters.

- The presence of correspondents in every country was also seen as a big plus and some thought they would like to hear more from these personalities within BBC Online.
• However CNN and Sky were cited as a strong competitors – especially in regard to being first at breaking news stories and having strong production values.

• Respondents found it more difficult to comment on whether BBC Online successfully delivered ‘internationally-respected news services to audiences around the world’ as they didn’t feel in a position to comment. There was a sense that the BBC was respected but this tended to be based on anecdotal evidence from contacts living abroad. BBC Online was, however, felt to provide an important link to home when abroad as well as being a British media export in which there was considerable pride.

> ‘The BBC is certainly world class. Family abroad really respect it.’

(Female, News user, Leeds)

**Looking at the key product and service areas for Global**

For the Global purpose, respondents were asked to consider in detail how well News and Red Button specifically were performing against the purpose.

• **News and the Global purpose:**
  o News was felt to be delivering against this purpose effectively. It currently matches audience expectations.
  o For those whose interest in world news was greater, it was not seen as being detailed but it provides enough information. Respondents are happy to access specialist destinations for more detailed content such as CNN for US news, The Economist for political analysis and Al Jazeera for news from the Middle East.

• **Red Button and the Global purpose:**
  o The service is seen to be working well to meet day-to-day demand for key global news headlines. It is seen as trusted and impartial, reflecting the strong heritage of the BBC more widely in this field. However, for some, there is an appetite to drill down into more details, potentially with subsections to regional / national news stories.
DEEP DIVE INTO BBC ONLINE’S PRODUCTS AND THE RED BUTTON

This section drills down into the feedback on the component products within BBC Online and Red Button in more detail, identifying the key themes which emerged, in particular in relation to the quality and distinctiveness criteria.

The products/ service areas covered are:

1. News
2. Sport
3. Homepage (including Search and Weather)
4. Knowledge and Learning (excluding Bitesize)
5. Red Button
6. Bitesize
7. TV and iPlayer
8. Radio and Music

As outlined in the methodology, products areas 1-5 were covered in greater depth across the sample than products areas 6-8 and were given an individual analysis stage. The Red Button has been treated as a ‘product’ for the purpose of this report while acknowledging that this is actually its own service.

Please note, Homepage and Search play a slightly different role to the other products in that they are navigational aids rather than content generators. As such key themes emerging from the discussion have been included but they have not been measured against specific purposes.
Headline Findings

Positivity is high across all the products & Red Button, although awareness and engagement varies greatly between the different products areas.

<table>
<thead>
<tr>
<th>News</th>
<th>Sport</th>
<th>Homepage</th>
<th>Knowledge &amp; Learning</th>
<th>Red Button</th>
<th>TV &amp; iPlayer</th>
<th>Radio &amp; Music</th>
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<tbody>
<tr>
<td>87%</td>
<td>84%</td>
<td>89%</td>
<td>87%</td>
<td>73%</td>
<td>Qualitatively, also viewed positively by users</td>
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</tbody>
</table>

% of users rating each Product favourably overall

1. News

- **OVERALL FAVOURABILITY SCORE: 86%**

  - News is at the core of what respondents feel is BBC Online’s raison d’etre. BBC Online is felt to reflect values associated with its broadcast counterpart such as trustworthiness, accuracy and professionalism.

    ‘News is mainly what I think of when talking about BBC Online... I use BBC News because I trust it’

    (Male, News user, Belfast)

  - The relationship between BBC News Online and BBC News on TV is seen as very close and this was very much reflected in the way people describe them.
  - In fact, audiences are less critical of BBC News online than on TV. There is a sense that the online offer feels at arm’s length from scandal in a way that TV News does not which increases the sense of it being impartial
  - BBC News Online is used as a source of hard news and a destination for confirming and validating stories in the public domain. The BBC is not associated with lighter and social currency content. While respondents appreciate the BBC playing this role this risks alienating younger audiences who have a greater interest in lighter content. Some younger respondents described BBC News as boring, staid or serious.

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12 Q8: Thinking about BBC News Online, how would you rate it overall? (Favourability scale 1 to 7) Base: 200
'The BBC website does a good job but it’s not as relevant as other sites to younger people'

(Male, Homepage user, London)

- News has to strike a delicate balance. It has permission to offer and curate more light touch content, but also must remain true to what is undoubtedly being successfully delivered in terms of ‘hard news’.
- With that said, for the majority, BBC News was considered best in class and offers a distinctive experience which sets it apart from other broadcasters and papers online.

2. Sport

- OVERALL FAVOURABILITY SCORE: 84%  

- Like News, Sport on BBC Online is seen as a source of confirmation. Users place great trust in the validity of the content, and was often favoured in comparison to Sky Sports which was felt by some to be more sensationalist and rumour based.
- The breadth of information on Sport could not be faulted, although while acknowledging this, some users felt that too much airtime was given to football.
- The depth of information was seen to be just right. Articles and stories are of a detailed length but without being too specialist. For more detailed, in depth content, respondents would go to specialist websites.

'It’s fine that BBC Sport doesn’t go into the real detail, you’d go to a proper Sport website for that kind of thing'

(Male, Sport user, Leeds)

- However, some felt that certain sports were lacking a satisfactory amount of content, e.g. taekwondo and shooting. This was however addressed as an observation rather than something that needs drastic improvement.
- BBC Sport is recognised as having a strong visual identity. Yellow and black was a recurring brand association that many users picked up on. The recent change in aesthetics was acknowledged by those we spoke to, but only as a temporary annoyance and once they became familiar with the new look it made little difference.

13 Q.8: Thinking about BBC Sport Online, how would you rate it overall? (Favourability scale 1 to 7) Base: 200
Like News, audiences see a very close relationship between BBC Sport on TV and BBC Sport Online, again seeing them as an integrated offer with different faces (TV, Radio, Online and Mobile).

Interestingly, due to the appetite for on-the-go information on sport, it would seem that the online and mobile offers are especially important in that mix.

The use of images and audio and visual content, connected with the above, is considered very effective. Audiences feel this complementary content supports articles well. Videos, particularly of interviews and highlights, were also popular.

“You can find what you want really quickly”
(Male, News user, Cardiff)

We found many users of BBC Sport to be advocates of the mobile offer. This was especially true on weekends, with the majority using it for the live feed of scores and latest news.

Sport was praised for its participation from a social media perspective. For some, it is felt to involve audiences more than other areas of the site and respondents feel they are encouraged to give their opinions and to get involved. The live scores on the weekend with Twitter (#BBCFootball) and texting were popular with the respondents.

The research also found Sport performed favourably with regards to external links and referrals. External links are felt to be better signposted and generally to be more relevant compared with other areas of BBC Online.

3. Homepage (including Search and Weather)

OVERALL FAVOURABILITY SCORE: 89%  

Overall, the Homepage was felt to lack clarity of purpose, despite the overall high favourability score. It is seen to house a lot of different content, with no clear focus or lead. Many respondents were unsure of what it is there for. At best, they felt that it provides a lighter extension of the news offering – with key headlines mixed with weather and entertainment.

Where used, it was usually for the global navigation along the top of the page, rather than the content featured on the page.

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14 Q.8: Thinking about BBC Homepage Online, how would you rate it overall? (Favourability scale 1 to 7) Base: 200
In terms of appearance, it was felt to be clean and clear. However, many commented that the neutral colour palette and ‘random’ selection of stories does little to invite exploration and engagement.

There is also, it would seem, an awareness challenge around the Homepage. Many use individual products pages (notably News) as a gateway to other content. In addition, very few respondents knew that the BBC logo in top left corner provides a link to the Homepage.

It was felt that signposting could work harder to showcase Homepage content. Key tabs across the top – News, Sport, iPlayer, TV & Radio - work well to signpost certain products but the selection / layout of stories felt too random and do little to invite exploration. Content ‘below the fold’ (such as the Most Popular and What’s On sections at the bottom of the Homepage) was generally overlooked and, on probing, many preferred the fuller list of options provided under ‘Explore’. The ‘More’ tab is felt to be too vague and was seen as a missed opportunity to showcase key content areas, especially within K&L.

**Feedback on Search**

- The search functionality was consistently compared against the high benchmark set by Google. In the case of BBC Online, search was seen as lacking in this comparison and was seldom being used.
- Poor search experiences meant respondents defaulted back to Google which finds the item of interest immediately. The ‘nice touches’ of Google, e.g. predictive search, felt more intuitive to respondents than the BBC functionality.
- The lack of search in the BBC News app caused irritation for a few – limiting opportunity for deeper exploration.

**Feedback on BBC Weather**

- Weather is considered part of BBC’s core offering and integral to its online offering. News and Weather are often mentioned in the same breath, and for many is their mainstay destination for weather related needs.
- Unsurprisingly however, for most, the relationship with Weather is quite a shallow one. For some, all the information they need is on the Homepage. Others will occasionally look for information on their local area or longer term forecasts.
- There was, on probing, appreciation of geo-targeted content but little to suggest that audiences want more from the site in terms of exploring their local weather in detail or exploring the science behind it.

4. Knowledge and Learning (excluding Bitesize)

- **OVERALL FAVOURABILITY SCORE: 87%**

- The research found that the occasion for using Knowledge was not clear. It is not used as a first port of call like News and Sport. More often the pages and topics that comprise Knowledge are found via links from other products or via Google search.

- The language of ‘knowledge’ or ‘learning’ felt incongruent to audiences’ day-to-day needs which they saw more in terms of ‘answering’ ad-hoc questions or ‘exploring’ topics of interest. As such, Knowledge was felt to be an artificial construct and distant – rather than part and parcel of the BBC Online that audiences use on a regular basis.

- The breadth of content within Knowledge was seen as impressive but there were awareness issues. Overall there was a sense that the information within Knowledge needs to be better promoted and there was a desire for more cross-fertilisation between different areas.

- The depth of information within Knowledge on BBC Online generally meets or exceeds expectations – which are for entry level of information rather than a deep dive. While some older audiences prefer depth, in general, audiences were looking for the BBC to act as a generalist and starting point for learning.

- BBC Knowledge is not known as or widely used as a reference tool in the same way as Wikipedia and Google. These are seen to be easier, more extensive and more convenient ways to find information.

> ‘I might click on BBC educational stuff from a Google search, but I wouldn’t think to look on the BBC first’

(Male, Knowledge user, London)

- The research discovered a growing appetite for Knowledge in particular to be more easily digestible and interactive – facilitating ‘grazing’ and exploration across topics, rather than a focused deep dive.

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15 Q.8: Thinking about BBC Knowledge & Learning Online, how would you rate it overall? (Favourability scale 1 to 7) Base: 200
• Audiences suggested that audio and visual content could play a stronger role in helping to achieve this.

5. Red Button

- OVERALL FAVOURABILITY SCORE: 73%  

• At a headline level the Red Button is seen as a functional but often unexciting offer.
• It is primarily used day-to-day as a convenient, low-technical means to access headline stories from News and Sport during downtime watching TV, plus occasional access to lottery results and children’s games.
• From what we saw, it is used most often by less ‘technically-savvy’ audiences. For them, the Red Button provides a good option for getting ‘the headlines’ vs. more cumbersome online search options.
• Conversely, it has less relevance to audiences who are more confident accessing online content instantly via smartphones, iPads and on demand services. For them the Red Button offer is seen as easy to use but slow, clunky and not offering enough breadth or depth.
• In contrast, interactive programme content and access to iPlayer via the Red Button is seen as much more exciting and motivating for audiences.
• Specifically, coverage of the Olympics, Glastonbury and Royal events emerged as ‘best in class’ and seem to add value to the viewer experience.
• However there are issues around the limited occasions these services apply to and awareness of Red Button coverage generally – audiences do not feel there is enough advertising and prompts to press the Red Button during ‘normal’ programming.
• There was a clear need among respondents for the Red Button to truly embrace the digital age – offering more than a ‘Ceefax +’ and to be better integrated with the wider BBC online offer. Furthermore some felt the Red Button should look to provide a greater range of interactive programme content.

'It’s a bit of a dinosaur when you think about what you can do online and with smart TV’s these days’

(Male, Red Button user, Birmingham)

16 Q.8: Thinking about BBC Red Button, how would you rate it overall? (Favourability scale 1 to 7) Base: 200
6. Bitesize

A note on sample:

Feedback on BBC Bitesize is based on a smaller sample of two in-home sessions. Feedback from spontaneous discussions with parents as part of the broader BBC online discussion has also been included where relevant.

- Overall audiences feel positive about BBC Bitesize. It is seen as an effective and functional resource for formal learning, primarily revision for children from primary school age up to the end of GCSE. There was also some mention amongst adult students of using the resources as a quick way to brush up on the basics.
- Brand trust is high. This is function of its longevity, a belief that it delivers all the necessary curriculum content by key stage, and teacher endorsement in school.
- While there is strong competition from specialist subject sites, Bitesize stands out as a unique cross-curriculum offer which teachers, students and parents use frequently to support learning. When it comes to breadth of content Bitesize is unparalleled, even if there is always opportunity to do more.

‘There’s no other site my son can use in the same way to help his homework. The only thing is that not every topic is on there’

(Mum of Learning user, Bristol)

- On balance, it is also seen to achieve an effective tone and visual code by being positive, colourful and consistent. Crucially, it is fun but never too ‘down with the kids’ or distracting.
- While there is a sense that Bitesize has a certain ‘timelessness’ to it, it was also criticised for looking a little dated and being too static. When compared to other areas of BBC Online for younger audiences, it was perceived to lack vibrancy.
- To become more engaging, there is an opportunity to take the site beyond being an online textbook and to capitalise further on the online opportunities – through infographics, interactive games, use of audio and video and links to other content within the wider Knowledge and Learning products.
'There is some really exciting content out there for kids to learn from which looks more like a video game and really engages them in learning’
(Mum of Learning user, London)

7. TV and iPlayer
- When evaluating TV and iPlayer, it is important to note that the vast majority of respondents refer primarily to iPlayer.
- iPlayer was widely regarded as best in class as a catch-up TV service. iPlayer has encouraged people to watch longer form content online, whether this is on desktop PC, laptop, tablet, phone or through gaming platforms. Across all devices the service was seen to operate and stream content with little error and navigation is easy.
- The iPlayer app is very well known and is seen to perform well. Its growing use on tablets and phones emerged and the general consensus was largely positive.
- The iPlayer brand was clear amongst those we spoke to. Whether respondents saw it as closely tied with the overall BBC Online brand or as a separate entity in itself, there was a broad understanding of the iPlayer brand and what the product is there to do.
- When probing around other areas of TV content on BBC Online, its use extends little further than the occasional checking of the TV guide. For this use respondents were happy with the service.

8. Radio and Music
- In general, when discussing BBC Online, awareness of the Radio and Music product was relatively low. Most BBC Online products came up spontaneously in discussions however this was not the case with Radio and Music. The associations with Radio and Music were limited in most cases to radio. The BBC radio channels have strong brands in their own right and as a result Radio and Music is felt to be separate to the main BBC Online service.
- While BBC Online (specifically iPlayer) is widely regarded as the home of TV this is not the case for radio. Awareness of the radio iPlayer was much lower than that of the TV iPlayer. For some, radio was still heavily associated with the physical object and there was a sense that the media doesn’t fit the online platform.
- Moving away from radio specifically, the music content available within Radio and Music was received positively. In particular the BBC Glastonbury site stood out to those who had used it.
• Some concern was raised with the search function in relation to radio. Some found it
difficult to find audio clips and radio shows and as a result Google is used as the
main gateway to BBC Online radio services.
OTHER THEMES

We used the quantitative study to look in more detail at issues that fell outside of the remit of the qualitative study. Broadly, these were split into two key areas:

1. Devices, Browsing and Apps across products
2. Value for Money

Devices, Browsing and Apps across products

As outlined in the Online Contextual Navigation section, audiences have increasingly sophisticated expectations of websites and are increasingly accessing content across multiple devices.

The findings of the quantitative phase confirmed this, with 24% and 17% of respondents stating they used mobile and tablet devices to access BBC Online respectively. Mobile in particular stood out as important for Sport and News, reflecting their habitual use and value in providing on the go updates.

However laptop and desktop remain the most widely used devices, with 63% and 41% respectively stating they used them to access BBC Online. In addition, it would seem that for most, mobile and tablet are used alongside laptop and desktop, rather than as a complete substitute.

<p>| % of respondents using each device to access BBC Online and its individual products |
|---------------------------------------------------------------|---|---|---|---|---|---|---|---|</p>
<table>
<thead>
<tr>
<th>TOTAL</th>
<th>MALE</th>
<th>FEMALE</th>
<th>18-34</th>
<th>35-54</th>
<th>55+</th>
<th>HOMEPAGE</th>
<th>NEWS</th>
<th>SPORT</th>
<th>K&amp;L</th>
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<td>24%</td>
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</table>
Maintaining relevance requires serving audience needs across devices

Across the qualitative and quantitative research audiences were clear that ensuring and maintaining content optimisation across devices was of great importance. Overall BBC Online was seen to be performing well in this respect, with the iPlayer display on tablet and BBC Sport on mobile standing out as examples of good practice. There were however some discussions about the extent to which the same breadth of offer was instantly available within mobile (and app) products offers.

‘You don’t get all the stories on the News app that you see on the main website.’
(Female, News user, Leeds)

‘The News app just shows the headlines for the biggest stories... it’s not as deep [as BBC News online].’
(Female, News user, London)

Unsurprisingly optimisation is most important to technically-savvy audiences and looking to the future, as small screens become even more mainstream, it would seem the need for optimisation and uniformity across platforms will be of greater importance
‘I tend to get most of my news on my mobile these days’
(Male, News user, London)

Available apps are broadly seen to be successful

Over half of those surveyed told us they used the News and iPlayer app regularly or occasionally. Apps also proved most frequently used by early adopters, highlighting their importance for maintaining relevance in future across the products.

Qualitatively, the News app cut through as the best established on mobile, while use of the iPlayer app was more common on tablets, alongside TV and laptop. Both apps were seen to be performing strongly, in particular many described iPlayer as ‘best in class’.

Sport scored slightly lower on favourability, perhaps due to its infancy within the app market at the time of research. However initial feedback from the qualitative phase showed strong appreciation for the offer as a way to keep up to date with key stories.

<table>
<thead>
<tr>
<th>HOW WOULD YOU RATE EACH OF THE BBC ONLINE APPS YOU USE?</th>
<th>82% Overall favourability score</th>
<th>83% Overall favourability score</th>
<th>73% Overall favourability score</th>
</tr>
</thead>
<tbody>
<tr>
<td>DO YOU USE ANY OF THE FOLLOWING APP AND HOW OFTEN?</td>
<td>51% Regularly or occasionally use the app</td>
<td>55% Regularly or occasionally use the app</td>
<td>31% Regularly or occasionally use the app</td>
</tr>
<tr>
<td>EARLY ADOPTERS</td>
<td>67% Regularly or occasionally use the app</td>
<td>73% Regularly or occasionally use the app</td>
<td>48% Regularly or occasionally use the app</td>
</tr>
<tr>
<td>ADVANCED MAINSTREAM</td>
<td>52% Regularly or occasionally use the app</td>
<td>55% Regularly or occasionally use the app</td>
<td>27% Regularly or occasionally use the app</td>
</tr>
<tr>
<td>LATE MAJORITY</td>
<td>29% Regularly or occasionally use the app</td>
<td>31% Regularly or occasionally use the app</td>
<td>16% Regularly or occasionally use the app</td>
</tr>
</tbody>
</table>

(Base: 100 users)
Value for money

Across the qualitative workshops and as part of the final quantitative phase respondents were asked whether they felt BBC Online and BBC Red Button provided good value for money. Questions looked first at the licence fee overall at £12.13 a month, and then explored reactions to the proportion spent on BBC Online (63 pence per month) and Red Button (13 pence).

Perceptions of value for money for the BBC are generally positive

- On balance the majority of respondents felt that £12.13 a month represented good or fairly good value for money for the licence fee
  - 17% stated the BBC overall provides 'very good' value for money
  - 45% stated the BBC overall provides 'fairly good' value for money

- In general audiences had a strong appreciation for the BBC, its public service remit and the broad offer across TV, radio and online. Concerns which emerged mainly related to high pay of managerial staff and key talent by the corporation, as well as a need for the BBC to keep in tune with the demands of the media market. There were also some who paid for television packages like Sky who resented then having to pay the licence fee on top.

- These concerns were strongest amongst younger respondents, those from lower socio-economic groups and from outside England.
In this context BBC Online was seen to provide very good value for money

- On balance, a greater majority of respondents felt BBC Online provided good value for money
  - 37% stated BBC Online provides ‘very good’ value for money
  - 40% stated BBC Online provides ‘fairly good’ value for money

<table>
<thead>
<tr>
<th>Very Good Value</th>
<th>Fairly Good Value</th>
<th>Not Very Good Value</th>
<th>Not at all Good Value</th>
<th>Don’t Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>37</td>
<td>40</td>
<td>11</td>
<td>8</td>
<td>4</td>
</tr>
</tbody>
</table>

‘Excellent. I don’t think anyone could argue that’s not value for money’

(News user, Belfast)

- That said the extent to which £0.63 per month is good value for money proved hard to judge due to the extent of overlap with other services. Much of the value of BBC Online was felt to come from TV and radio – notably news resource and footage, TV content and programme / channel brands, and as such it was difficult for respondents to pick apart the exact contribution that Online makes.
- Few respondents felt £0.63 per month was not good value for money. Where complaints did exist, they were directed at the wider BBC service, rather than BBC Online per se. Again, dissatisfaction was slightly stronger amongst younger audiences, lower socio-economic groups and outside England.
BBC Red Button is also seen to provide value for money but some questioned its shelf life

- BBC Red Button users proved comfortable with the proportion of the licence fee spent on the Red Button service. Many were pleasantly surprised by the figure of 13 pence, especially in the context of infamous TV presenter and BBC managerial salaries which were a cause of discontent for some.

- Appreciation is high for the overlap between the Red Button and the wider BBC, especially BBC Online. Again this made it hard to judge value for money by products in isolation.

- On probing, there were discussions around how value for money could be further maximised by making more content from BBC Online available via the Red Button – providing this doesn’t impact on ease of use.

- Beyond this, some questioned the extent to which the Red Button in its current guise would continue to represent value for money in the long term if it didn’t innovate. Specifically, audiences were aware that the ‘basic information offer’ (albeit one known and liked) risked becoming antiquated. They felt that increasing the interactive programme offering (as exemplified by Olympic and Glastonbury coverage) and greater integration with BBC Online were crucial to the on-going validity of the Red Button.
APPENDIX

Contents

- Part 1: Methodology and sample in detail
- Part 2: Additional tables / data

PART 1: Methodology and Sample Overview in detail

Introduction to the Methodology

In developing a methodology for the audience research there were a number of key considerations that informed our approach:

- The review involved evaluating two services within one project. Therefore we needed to ensure we struck the right balance between BBC Online and BBC Red Button.
- BBC Online is made up of ten different 'products'. There was a need to balance evaluating the services at an aggregate level and looking at the component products in a way that felt meaningful.
- In addition to the complexity of dealing with multiple products, each one would need to be dealt with slightly differently as not all the public purposes were relevant to all of the products.
- Alongside the public purposes, the services needed to be evaluated in terms of their quality and distinctiveness. To ensure a thorough and in-depth analysis we knew it would be necessary to unpack what we meant by these terms in the context of the research.
- Finally, the review needed to uncover how audiences’ experience of BBC Online plays out across different screens therefore this would also need to be factored into our approach.

With these points in mind we developed a multi-stage methodology in which we covered both BBC Online (overall and also focusing on key products within it) and BBC Red Button (which for the purposes of structuring the research was treated as one of the Online ‘products’).
With a range of quantitative data already in available at the BBC we felt that the best approach would be a predominantly qualitative one. Given the sheer scope of the project we saw the role of quantitative research as ‘putting numbers’ on the key insights that emerged from the qualitative research.

Using this as our framework, we developed a five stage methodology with individual elements performing complementary roles in meeting the key objectives ‘blocks’ outlined below.

### Overview of Five Stage Methodology

<table>
<thead>
<tr>
<th>Stage</th>
<th>Objective</th>
<th>Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stage 1</td>
<td>Setting Our Sights</td>
<td>Agree the precise focus of the project in terms of product focus and evaluation criteria</td>
</tr>
<tr>
<td>Stage 2</td>
<td>Voices From The Crowd</td>
<td>Understand role key products and RB play in lives and how they perform against criteria</td>
</tr>
<tr>
<td>Stage 3</td>
<td>Up Close and Personal</td>
<td>In real world setting gain depth on usage of online services and how BBC Online and Red Button are performing</td>
</tr>
<tr>
<td>Stage 4</td>
<td>Service in the Spotlight</td>
<td>Examine in detail how BBC Online and Red Button performing against evaluation criteria</td>
</tr>
<tr>
<td>Stage 5</td>
<td>Quantitative validation</td>
<td>Assess relative importance of purposes and how services and products perform against them</td>
</tr>
</tbody>
</table>

### Stage 1 – Setting Our Sights: Developing the right approach

**Stage Objective:** To agree the precise focus of the project in terms of products focus and evaluation criteria

As set out above, evaluating BBC Online and Red Button is not a straightforward undertaking. We knew that ensuring absolute clarity about the evaluation criteria, the balance between the two services and the relative importance of the products that make up BBC Online would be central to the success of the research.
In order to set the parameters for the project, we ran a half day workshop with key project stakeholders from the BBC Trust during which we agreed on the following:

- The appropriate balance between BBC Online and BBC Red Button
- The BBC Online products that the project needed to focus on
- The ‘non-products’ elements of BBC Online in need of focus
- The specific purposes the key services/products should to deliver (and how these can be best articulated)
- The component parts of quality and distinctiveness
- Audience definitions of who we needed to speak to in the research

**Defining the product areas for the research**

Considering these points in more detail, BBC Online is made up of 10 different products: Homepage, Search, News, Sport, Weather, Knowledge and Learning, TV and iPlayer, Radio and Music, CBBC and Cbeebies.

For the purposes of the research we focussed on five key areas: four BBC Online products and Red Button:

1. News
2. Sport
3. Homepage (including Search and Weather which we grouped for simplicity)
4. Knowledge and Learning (excluding Bitesize)
5. Red Button

With the exception of CBBC and Cbeebies which were not featured in the review we dealt with the remaining products in less detail.

6. Bitesize (part of the Knowledge and Learning product)
7. TV and iPlayer
8. Radio and Music

**Refining the public purposes into consumer facing language**

Off the back of the workshop, we also translated the six public purposes into more consumer facing language we could test in the research. The purposes we explored in more detail were:
1. **Citizenship**: Provides high-quality news, which is comprehensive, constantly updated, accurate, impartial and independent. Keeps you informed and supports debate about important issues and political developments in an engaging way.

2. **Education**: Supports formal education in schools/colleges and offers engaging ways for everyone to build their knowledge and skills across a broad range of subjects.

3. **Creativity**: Offers the best examples of creative work that engage and excite audiences, breaking new ground and encouraging interest in cultural, creative and sporting activities.

4. **Global**: Provides internationally-respected news services to audiences around the world and keeps you in touch with what is going on in the world.

5. **Digital**: Helps everyone in the UK to get the best out of emerging media technologies.

6. **Nations, Regions and Communities**: Reflects the communities that exist in the UK, whether they’re based on geography, on faith, on language, or on a shared interest such as sport. Stimulates debate within and between the communities of the UK and encourages audiences to get involved with their local communities.

The public purposes have varying degrees of importance for the products which make up BBC Online and Red Button. In order to structure the research we used the following matrix. When looking at specific products in detail we only tested against the purposes that were of high and medium importance.
Creating a structured checklist to explore quality and distinctiveness

In order to get under the skin of quality and distinctiveness we developed a checklist of attributes which we used as a basis for structuring this aspect of the research. The checklist included ten attributes for phases 1 to 4 of the research. An additional two attributes were added for the final quantitative stage:

1. Breadth
2. Depth
3. Appearance
4. Ease of use
5. Participation
6. Use of audio and video
7. Signposting
8. Trustworthiness
9. Being up to date
10. Relevance
11. Quality of content (stage 5 only)
12. Content not available anywhere else (stage 5 only)
**Stage 2 – Voices from the Crowd**

*Stage objective: To gain a clear understanding of where the key BBC Online services/products fit into users’ lives and assess their perceptions of its delivery*

With a view to setting the agenda for the rest of the project this phase of the research was designed to understand perceptions and usage of BBC Online at a macro level, get an initial read on performance and identify areas to explore and interrogate further in the subsequent stages of the research.

Deploying a 10 minute online questionnaire – the structure of the open-ended script looked at getting respondent feedback on the ‘checklist of attributes’. We also asked respondents to score the purposes in terms of how well they felt BBC Online as a whole was meeting them. It involved qualitatively surveying a sample of 100 people – focussing on those who use a range of different products, with varying frequencies.

As shown in the table below, a target was set for the number of respondents required by products (numbers in brackets represent the minimum requirement):

**Sample overview: Voices from the crowd**

<table>
<thead>
<tr>
<th>100 person sample</th>
<th>BBC SPORT</th>
<th>BBC NEWS</th>
<th>BBC HOMEPAGE</th>
<th>BBC KNOWLEDGE</th>
<th>BBC LEARNING (BITESIZE)</th>
</tr>
</thead>
<tbody>
<tr>
<td>HEAVY</td>
<td>10 (6)</td>
<td>10 (6)</td>
<td>10 (6)</td>
<td>8 (5)</td>
<td>8 (5)</td>
</tr>
<tr>
<td>MEDIUM</td>
<td>7 (4)</td>
<td>7 (4)</td>
<td>7 (4)</td>
<td>6 (4)</td>
<td>6 (4)</td>
</tr>
<tr>
<td>LIGHT</td>
<td>7 (4)</td>
<td>7 (4)</td>
<td>7 (4)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Stage 3 – Up Close and Personal**

*Stage objective: To gain greater depth about usage of online services and the role of the BBC within that. To get a sense of how BBC Online and Red Button perform against quality and distinctiveness in a real life setting. To see how these criteria play out across the different screens.*
With ‘Voices from the Crowd’ having provided an initial read on how BBC Online overall was performing, we felt it was crucial to dive in deep to understand what was really going on in people’s lives/homes and shed a true light on how and why they use the key services and products they do. We also wanted to see how their usage plays out across different screens.

In order to do this we ran 12 x 2 hour in-home ethnographic depth interviews. To get respondents sensitised to the topic area before meeting them we asked them to fill out a diary over the course of the week documenting their online behaviour, making a note of the sites they use, why they use them, what they liked and didn’t like about them.

Respondents were a spread of users across the key products areas and a mix of single and multi-device owners.

The sessions were structured as follows:

- **My life:** Aimed at understanding respondents’ personal lives, and gauge the context that informs their online habits and decision making.
- **My online world:** To ascertain, the role online plays in respondents’ lives.
- **Going online:** Going online with respondents to understand how they define a ‘good’ website and, specifically, how BBC Online fares in amidst the online landscape. We looked at the BBC and other sites across different devices to understand how different sites are accessed and the practical realities of doing so.
- **Quality and distinctiveness:** To understand how the respondents felt BBC Online was performing against our checklist of attributes.
- **Evaluating the purposes:** To specifically evaluate the purposes in relation to the different products within BBC Online that respondents were using and understand how Red Button fared.
- **Value for money:** We explored the issue of value for money with respondents thinking about the BBC overall before looking at BBC Online specifically.

The primary recruitment criteria for this stage was to include a mix of heavy, medium and light users of a range of ‘primary products.’ Respondents also had to use ‘secondary products’ at least once in the last month. The table below illustrates the sample for each of the ethnographic depths. In order to ensure a rich discussion of the different products
within BBC Online we skewed in favour of heavy users. Red Button was treated as a secondary product during this phase of the research.

**Sample overview: Ethnographic Depth Interviews**

<table>
<thead>
<tr>
<th>Primary Product Usage</th>
<th>Primary Product</th>
<th>2ndary Product</th>
<th>Device</th>
<th>Age</th>
<th>M/F</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>E1 Heavy</td>
<td>News</td>
<td>Red Button</td>
<td>Single</td>
<td>25-34</td>
<td>F</td>
<td>Leeds - Urban</td>
</tr>
<tr>
<td>E2 Heavy</td>
<td>Sport</td>
<td>Red Button</td>
<td>Multi</td>
<td>18-24</td>
<td>M</td>
<td>Leeds - Urban</td>
</tr>
<tr>
<td>E3 Heavy</td>
<td>Homepage</td>
<td>Radio/Music</td>
<td>Multi</td>
<td>35-44</td>
<td>M</td>
<td>Bridgend- Rural</td>
</tr>
<tr>
<td>E4 Heavy</td>
<td>Knowledge</td>
<td>TV &amp; iPlayer</td>
<td>Single</td>
<td>45-54</td>
<td>F</td>
<td>Bridgend- Rural</td>
</tr>
<tr>
<td>E5 Heavy</td>
<td>Learning</td>
<td>Mix</td>
<td>Single</td>
<td>Parent</td>
<td>F</td>
<td>Bristol- Rural</td>
</tr>
<tr>
<td>E6 Heavy</td>
<td>News</td>
<td>Red Button</td>
<td>Multi</td>
<td>25-34</td>
<td>M</td>
<td>Bristol- Rural</td>
</tr>
<tr>
<td>E7 Medium</td>
<td>Learning</td>
<td>Mix</td>
<td>Single</td>
<td>Parent</td>
<td>F</td>
<td>London - Suburban</td>
</tr>
<tr>
<td>E8 Medium</td>
<td>Homepage</td>
<td>TV &amp; iPlayer</td>
<td>Multi</td>
<td>45-54</td>
<td>M</td>
<td>London - Suburban</td>
</tr>
<tr>
<td>E9 Medium</td>
<td>Knowledge</td>
<td>Red Button</td>
<td>Single</td>
<td>55-64</td>
<td>F</td>
<td>Glasgow - Suburban</td>
</tr>
<tr>
<td>E10 Light</td>
<td>Sport</td>
<td>Radio/Music</td>
<td>Multi</td>
<td>35-44</td>
<td>M</td>
<td>Glasgow - Suburban</td>
</tr>
<tr>
<td>E11 Light</td>
<td>News</td>
<td>Red Button</td>
<td>Multi</td>
<td>65+</td>
<td>M</td>
<td>Belfast - Suburban</td>
</tr>
<tr>
<td>E12 Light</td>
<td>Homepage</td>
<td>News</td>
<td>Single</td>
<td>55-64</td>
<td>F</td>
<td>Belfast - Urban</td>
</tr>
</tbody>
</table>

Across the sample we recruited a mix of multi and single device users, but over weighting multi device users, to ensure we could cover perceptions of BBC Online across different screens. We recruited a spread of age, gender and SEG. We also ensured that we spoke to respondents who lived in urban, suburban and rural locations.

**Stage 4 – Service in the Spotlight**

*Stage Objective: To examine in detail how the BBC Online and Red Button are performing in terms of quality, distinctiveness and the public purposes at a pan service and products level*

With an understanding of consumers’ needs and their expectations of BBC Online and Red Button these sessions were an opportunity to drill down into quality, distinctiveness and the public purposes and assess how the services are performing at a product level.
For this stage we split the research between BBC Online and Red Button

1. BBC Online
We carried out 8 x 2 hrs x 5 respondent workshops that took place in facilities where each respondent had access to their own screen.

Whereas Stage 3 was about getting a wider understanding of audiences’ online behaviour and understanding how the BBC fits into the wider online landscape, this stage drilled down into the different products that make up BBC Online to see how they are performing against delivering their relevant public purposes and in terms of quality and distinctiveness. For this reason we felt more intimate sessions would work better so we limited numbers to five people per group.

The sessions were structured as follows:

- **What makes a good website:** Exploring what audiences felt were the ingredients of a good website and looked at how alternative providers were faring, getting respondents to demonstrate using laptops what they liked and didn’t like about different sites.

- **Spontaneous exploration of BBC Online:** Uncovering respondents initial reactions to BBC Online and exploring how, when and why they use the service.

- **Evaluating the public purposes:** Having outlined the purposes for respondents we looked at how important they felt each purpose to be in the context of BBC Online, how BBC Online was performing against them and what it could do to better meet the purposes.

- **Primary products:** We recruited respondents based on their use of a particular products within BBC Online i.e. Sport, News, Knowledge, Homepage. To pick apart how these different products were performing we discussed them in detail, using the attribute checklist as the basis for the discussion. We also looked at how the respondents felt the specific products were performing against their relevant purposes.

- **Online safaris:** Based on past experience we know that perceptions of BBC Online are influenced by the degree of familiarity with the site. To guard against this we sent respondents on ‘online safaris’ to ensure they were commenting on areas of the site which were less familiar to them as well as those areas they knew well.
• **Secondary products**: We explored a secondary product with respondents in slightly less detail than the primary – getting a topline read on overall appeal, what works well vs. not so well, its performance against its purposes and potential improvements

• **Value for money**: We explored perceptions of value for money, with respondents thinking about the BBC overall before looking at BBC Online specifically.

In terms of sample, respondents were recruited by usage of a primary and secondary products, age and location. Within this a spread of SEG, gender and device usage was included.

**Sample Overview: BBC Online Respondent Workshops**

<table>
<thead>
<tr>
<th>Product groups</th>
<th>Primary Product Usage</th>
<th>Primary Product</th>
<th>Secondary product</th>
<th>Age</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>G1</td>
<td>Heavy</td>
<td>News</td>
<td>Sport</td>
<td>35-44</td>
<td>Belfast</td>
</tr>
<tr>
<td>G2</td>
<td>Heavy</td>
<td>Homepage</td>
<td>News</td>
<td>25-34</td>
<td>London</td>
</tr>
<tr>
<td>G3</td>
<td>Heavy</td>
<td>Sport</td>
<td>TV &amp; iPlayer</td>
<td>18-24</td>
<td>Edinburgh</td>
</tr>
<tr>
<td>G4</td>
<td>Heavy</td>
<td>Knowledge</td>
<td>Radio/Music</td>
<td>35-44</td>
<td>Edinburgh</td>
</tr>
<tr>
<td>G5</td>
<td>Medium</td>
<td>News</td>
<td>Radio/Music</td>
<td>25-34</td>
<td>Cardiff</td>
</tr>
<tr>
<td>G6</td>
<td>Medium</td>
<td>Knowledge</td>
<td>TV &amp; iPlayer</td>
<td>45-54</td>
<td>London</td>
</tr>
<tr>
<td>G7</td>
<td>Light</td>
<td>Sport</td>
<td>News</td>
<td>65+</td>
<td>Cardiff</td>
</tr>
<tr>
<td>G8</td>
<td>Light</td>
<td>Homepage</td>
<td>Sport</td>
<td>55-64</td>
<td>Belfast</td>
</tr>
</tbody>
</table>

**2. Red Button**

2 x 1.5 hour x 6 respondent focus groups were conducted in a venue with a Red Button enabled television.

The groups were an opportunity to examine in detail how Red Button is performing in terms of delivering the public purposes and against the quality and distinctiveness checklist. They also enabled us to explore whether audiences consider Red Button to offer value for money and understand how the service could better meet their needs.

The Red Button groups were based on the following structure:
• **My TV World:** Exploring how respondents consume TV, where they go for news, sport, entertainment and weather and the extent to which they interact with TV programmes.

• **Spontaneous awareness of Red Button:** Exploring awareness of the red button functionality overall and how BBC Red Button sits within the competitive set.

• **BBC Red Button in detail:** Having looked at red button in a wider context we focussed in on BBC’s Red Button capabilities to understand the extent to which respondents thought it offers a high quality and distinctive service.

• **Evaluating Red Button against the purposes:** As in the online workshops, we introduced respondents to the public purposes that are most relevant to BBC Red Button and asked them to consider how the service is performing in delivering them.

• **Value for money:** We also asked respondents to consider the question of value for money at a macro BBC level and specifically thinking about BBC Red Button.

The BBC Red Button groups were recruited on the basis of being heavy or medium users of the service. We excluded light users as awareness and use of the service is lower than BBC Online and we wanted to make sure we could have a rich and insightful discussion about Red Button. A range of ages and users of different content (e.g. sport, news and interactive TV services) was included, alongside an even split of male and female respondents.

**Sample overview: Red Button respondent workshops**

<table>
<thead>
<tr>
<th>Red Button groups</th>
<th>Red Button usage</th>
<th>Age</th>
<th>Reason for user</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>RB1</td>
<td>Heavy</td>
<td>35-44</td>
<td>Mix</td>
<td>Birmingham</td>
</tr>
<tr>
<td>RB2</td>
<td>Medium</td>
<td>45-54</td>
<td>Mix</td>
<td>Birmingham</td>
</tr>
</tbody>
</table>

**Stage 5 – Quantitative Validation**

*Stage Objective:* To assess the relative importance of the public purposes. To evaluate how BBC Online/ Red Button and their component products perform against quality, distinctiveness and the public purposes across a range of different audiences and to also explore key findings from the consultation.
In order to give the qualitative findings weight and robustness we conducted an online survey with a nationally representative sample of 1000 respondents split across the key products/service areas: Homepage, Sport, News, Knowledge and Learning and Red Button.

The survey followed this structure:

- Usage of BBC Online, Red Button and BBC Online products
- Relative importance and performance of different public purposes
- BBC Online performance against the quality and distinctiveness checklist
- Key products and Red Button performance against the quality and distinctiveness checklist
- ‘Future facing’ themes (e.g. apps and value for money)

The sample for Stage 5 was slightly different as we did not explicitly include users of all of the products, focusing on four key BBC Online products and Red Button.

**Sample Overview: Quantitative Validation**

<table>
<thead>
<tr>
<th>1000 person – Online Questionnaire</th>
</tr>
</thead>
<tbody>
<tr>
<td>200 visit BBC Homepage</td>
</tr>
<tr>
<td>200 visit BBC News</td>
</tr>
<tr>
<td>200 visit BBC Sport</td>
</tr>
<tr>
<td>200 visit BBC K&amp;L</td>
</tr>
<tr>
<td>200 to have used Red Button services in the last week</td>
</tr>
</tbody>
</table>
PART 2: Additional data from the Quantitative study

Overall performance against the Quality and Distinctiveness criteria

<table>
<thead>
<tr>
<th>Criteria</th>
<th>BBC ONLINE OVERALL</th>
<th>News</th>
<th>Sport</th>
<th>Homepage</th>
<th>K &amp; L</th>
<th>RED BUTTON OVERALL</th>
</tr>
</thead>
<tbody>
<tr>
<td>QUALITY OF CONTENT</td>
<td>89</td>
<td>90</td>
<td>88</td>
<td>90</td>
<td>89</td>
<td>80</td>
</tr>
<tr>
<td>EASE OF USE</td>
<td>88</td>
<td>90</td>
<td>89</td>
<td>88</td>
<td>86</td>
<td>76</td>
</tr>
<tr>
<td>BEING UP TO DATE</td>
<td>88</td>
<td>91</td>
<td>86</td>
<td>90</td>
<td>91</td>
<td>78</td>
</tr>
<tr>
<td>BREADTH</td>
<td>87</td>
<td>81</td>
<td>83</td>
<td>84</td>
<td>84</td>
<td>74</td>
</tr>
<tr>
<td>DEPTH</td>
<td>85</td>
<td>83</td>
<td>84</td>
<td>84</td>
<td>84</td>
<td>72</td>
</tr>
<tr>
<td>RELEVANCE</td>
<td>85</td>
<td>85</td>
<td>85</td>
<td>87</td>
<td>85</td>
<td>81</td>
</tr>
<tr>
<td>APPEARANCE</td>
<td>83</td>
<td>83</td>
<td>82</td>
<td>87</td>
<td>86</td>
<td>74</td>
</tr>
<tr>
<td>TRUSTWORTHINESS</td>
<td>82</td>
<td>81</td>
<td>86</td>
<td>87</td>
<td>87</td>
<td>82</td>
</tr>
<tr>
<td>SIGNPOSTING</td>
<td>78</td>
<td>79</td>
<td>83</td>
<td>82</td>
<td>83</td>
<td>67</td>
</tr>
<tr>
<td>USE OF AUDIO &amp; VIDEO</td>
<td>76</td>
<td>71</td>
<td>80</td>
<td>72</td>
<td>78</td>
<td>68</td>
</tr>
<tr>
<td>CONTENT NOT AVAILABLE ELSEWHERE</td>
<td>81</td>
<td>82</td>
<td>81</td>
<td>84</td>
<td>84</td>
<td>70</td>
</tr>
<tr>
<td>PARTICIPATION</td>
<td>56</td>
<td>56</td>
<td>62</td>
<td>57</td>
<td>63</td>
<td>53</td>
</tr>
</tbody>
</table>

Q.5: How would you rate BBC Online / Red Button overall against the following checklist? % shown = net score slightly favourably + favourably + extremely favourably. Base: 1000 (BBC Online) & 200 (Red Button/Products)

Favourability of BREADTH by Product (amongst users)*

<table>
<thead>
<tr>
<th>Product</th>
<th>Favourability</th>
</tr>
</thead>
<tbody>
<tr>
<td>RED BUTTON</td>
<td>74%</td>
</tr>
<tr>
<td>NEWS</td>
<td>81%</td>
</tr>
<tr>
<td>SPORT</td>
<td>83%</td>
</tr>
<tr>
<td>HOMEPAGE</td>
<td>84%</td>
</tr>
<tr>
<td>KNOWLEDGE &amp; LEARNING</td>
<td>84%</td>
</tr>
</tbody>
</table>

Favourability of DEPTH by Product (amongst users)*

<table>
<thead>
<tr>
<th>Product</th>
<th>Favourability</th>
</tr>
</thead>
<tbody>
<tr>
<td>RED BUTTON</td>
<td>72%</td>
</tr>
<tr>
<td>NEWS</td>
<td>81%</td>
</tr>
<tr>
<td>SPORT</td>
<td>83%</td>
</tr>
<tr>
<td>HOMEPAGE</td>
<td>84%</td>
</tr>
<tr>
<td>KNOWLEDGE &amp; LEARNING</td>
<td>84%</td>
</tr>
</tbody>
</table>

Favourability of DELIVERING CONTENT NOT FOUND ELSEWHERE by Product (amongst users)**

<table>
<thead>
<tr>
<th>Product</th>
<th>Favourability</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEWS</td>
<td>48%</td>
</tr>
<tr>
<td>HOMEPAGE</td>
<td>58%</td>
</tr>
<tr>
<td>SPORT</td>
<td>64%</td>
</tr>
<tr>
<td>KNOWLEDGE &amp; LEARNING</td>
<td>67%</td>
</tr>
<tr>
<td>RED BUTTON</td>
<td>70%</td>
</tr>
</tbody>
</table>

Favourability of TRUSTWORTHINESS by Product (amongst users)**

<table>
<thead>
<tr>
<th>Product</th>
<th>Favourability</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEWS</td>
<td>81%</td>
</tr>
<tr>
<td>RED BUTTON</td>
<td>82%</td>
</tr>
<tr>
<td>SPORT</td>
<td>86%</td>
</tr>
<tr>
<td>HOMEPAGE</td>
<td>87%</td>
</tr>
<tr>
<td>KNOWLEDGE &amp; LEARNING</td>
<td>87%</td>
</tr>
</tbody>
</table>
Favourability of BEING UP TO DATE by Product (amongst users)**

Favourability of DELIVERING QUALITY CONTENT by Product (amongst users)**

Favourability of APPEARANCE by Product (amongst users)**

Favourability of AUDIO & VIDEO by Product (amongst users)**

Favourability of PARTICIPATION by Product (amongst users)*
Breakdown of performance within individual products against the Quality and Distinctiveness criteria

### NEWS AGAINST THE QUALITY & DISTINCTIVENESS CHECKLIST

<table>
<thead>
<tr>
<th>Category</th>
<th>Unfavourably</th>
<th>Neither unfavourably or favourably</th>
<th>Favourably</th>
</tr>
</thead>
<tbody>
<tr>
<td>Providing content I can’t find elsewhere</td>
<td>17%</td>
<td>36%</td>
<td>48%</td>
</tr>
<tr>
<td>Providing high quality content</td>
<td>8%</td>
<td>90%</td>
<td></td>
</tr>
<tr>
<td>Relevance</td>
<td>12%</td>
<td>85%</td>
<td></td>
</tr>
<tr>
<td>Up-to-dateness</td>
<td>6%</td>
<td>51%</td>
<td></td>
</tr>
<tr>
<td>Trustworthiness</td>
<td>12%</td>
<td>81%</td>
<td></td>
</tr>
<tr>
<td>Signposting</td>
<td>10%</td>
<td>79%</td>
<td></td>
</tr>
<tr>
<td>Use of audio/video</td>
<td>26%</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>Participation</td>
<td>44%</td>
<td>51%</td>
<td></td>
</tr>
<tr>
<td>Ease of use</td>
<td>10%</td>
<td>90%</td>
<td></td>
</tr>
<tr>
<td>Appearance</td>
<td>16%</td>
<td>81%</td>
<td></td>
</tr>
<tr>
<td>Depth of content</td>
<td>13%</td>
<td>81%</td>
<td></td>
</tr>
<tr>
<td>Breadth of content</td>
<td>14%</td>
<td>81%</td>
<td></td>
</tr>
</tbody>
</table>

### SPORT AGAINST THE QUALITY & DISTINCTIVENESS CHECKLIST

<table>
<thead>
<tr>
<th>Category</th>
<th>Unfavourably</th>
<th>Neither unfavourably or favourably</th>
<th>Favourably</th>
</tr>
</thead>
<tbody>
<tr>
<td>Providing content I can’t find elsewhere</td>
<td>12%</td>
<td>25%</td>
<td>64%</td>
</tr>
<tr>
<td>Providing high quality content</td>
<td>9%</td>
<td>88%</td>
<td></td>
</tr>
<tr>
<td>Relevance</td>
<td>11%</td>
<td>80%</td>
<td></td>
</tr>
<tr>
<td>Up-to-dateness</td>
<td>10%</td>
<td>86%</td>
<td></td>
</tr>
<tr>
<td>Trustworthiness</td>
<td>11%</td>
<td>89%</td>
<td></td>
</tr>
<tr>
<td>Signposting</td>
<td>13%</td>
<td>83%</td>
<td></td>
</tr>
<tr>
<td>Use of audio/video</td>
<td>10%</td>
<td>85%</td>
<td></td>
</tr>
<tr>
<td>Participation</td>
<td>32%</td>
<td>62%</td>
<td></td>
</tr>
<tr>
<td>Ease of use</td>
<td>9%</td>
<td>89%</td>
<td></td>
</tr>
<tr>
<td>Appearance</td>
<td>13%</td>
<td>82%</td>
<td></td>
</tr>
<tr>
<td>Depth of content</td>
<td>13%</td>
<td>83%</td>
<td></td>
</tr>
<tr>
<td>Breadth of content</td>
<td>12%</td>
<td>83%</td>
<td></td>
</tr>
</tbody>
</table>
Usage of BBC Online by daypart

- **MORNING**
  - Total: 16%*
  - Male: 18%
  - Female: 14%

- **LUNCH**
  - Total: 9%
  - Male: 9%
  - Female: 10%

- **AFTERNOON**
  - Total: 24%
  - Male: 18%
  - Female: 29%

- **EVENING**
  - Total: 51%
  - Male: 55%
  - Female: 47%

*Q9 At what time of day do you tend to use BBC Online the most? Base: 1000 users

Performance of BBC Online in terms of providing content for Nations & regions and communities & Interest Groups

<table>
<thead>
<tr>
<th>Provides content for a broad range of audiences*</th>
<th>NATIONS &amp; REGIONS</th>
<th>COMMUNITIES &amp; INTEREST GROUPS</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNFAVOURABLY</td>
<td>6%</td>
<td>31%</td>
</tr>
<tr>
<td>NEITHER FAVOURABLY OR UNFAVOURABLY</td>
<td>23%</td>
<td>6%</td>
</tr>
<tr>
<td>FAVOURABLY</td>
<td></td>
<td>71%</td>
</tr>
</tbody>
</table>

*Q26 / 27 Part of BBC Online’s service remit is to provide content for a broad range of audiences including different communities and interest groups / Nations & Regions. Overall how would you rate BBC Online in achieving this? Base: 1000 users
Importance of participation by audience group

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>18–34</th>
<th>35–54</th>
<th>55+</th>
<th>Early Adopters</th>
<th>Advanced Mainstream</th>
<th>Late Majority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unimportant</td>
<td>16%</td>
<td>12%</td>
<td>16%</td>
<td>21%</td>
<td>11%</td>
<td>17%</td>
<td>21%</td>
</tr>
<tr>
<td>Neither important  nor unimportant</td>
<td>25%</td>
<td>22%</td>
<td>25%</td>
<td>30%</td>
<td>21%</td>
<td>26%</td>
<td>29%</td>
</tr>
<tr>
<td>Important</td>
<td>59%</td>
<td>66%</td>
<td>59%</td>
<td>49%</td>
<td>68%</td>
<td>57%</td>
<td>51%</td>
</tr>
</tbody>
</table>

Q18 Thinking again about the different ways you could interact / get involved with BBC Online mentioned (eg. using social media, leaving and reading comments). Overall, how important do you think it is for BBC Online to allow people to interact / get involved in these ways? Base: 1000

Claimed participation by audience group

<table>
<thead>
<tr>
<th>%</th>
<th>Participation in the form of...</th>
</tr>
</thead>
<tbody>
<tr>
<td>38%</td>
<td>SHARING LINKS</td>
</tr>
<tr>
<td>29%</td>
<td>READING COMMENTS</td>
</tr>
<tr>
<td>29%</td>
<td>FOLLOWING BBC BRANDS/PEOPLE ON TWITTER</td>
</tr>
<tr>
<td>23%</td>
<td>USING BBC FORUMS</td>
</tr>
<tr>
<td>20%</td>
<td>COMMENTING ON ARTICLES/BLOGS</td>
</tr>
</tbody>
</table>

Q16. Which of the following activities applies to you on BBC Online? Base: 946

Questionnaire and discussion guides are also available on request

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58-60 Berners Street
London
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020 707 99 555
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Barbara@sparkler.co.uk
Zairn@sparkler.co.uk
Jonny@sparkler.co.uk