

## Overview and Summary

The Children's Media Foundation (CMF) [www.thechildrensmediafoundation.org](http://www.thechildrensmediafoundation.org) wishes to offer a comprehensive response to the BBC Trusts' call for observations to feed into its review of BBC services for children.

This response is based upon reports submitted by the organisation's Executive Group and other supporters, which are attached as **APPENDIX A**. They cover various aspects of the BBC's provision for children.

### List of the full reports:

- a) CBeebies branding, promotions, presentation, schedule, balance and range
- b) CBeebies Animation
- c) CBeebies Live Action Programming
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In this initial overview we have highlighted the issues of most concern to CMF.

In general the responses are positive. We believe that the BBC does a good job, serves it's audience well, delivers value to the licence payer, and is a good example of a PSB children's service.

We also have a number of observations, which we hope the Trust will find of value in making their final assessment and some concerns, which we think the Trust should query or address.

### CBeebies

- A very popular and successful channel operating in a highly competitive sector.
- However the average weekly reach is only around 45% compared with BBC One's average reach of 75%. It appears that the channel is not catering for a significant part of the potential audience. We note that the tone of CBeebies is very traditional, and there is a lack of urban context and wonder whether this slightly middle-class atmosphere is off-putting for some viewers.
- We also question whether the channel might take a wider view of the world in its acquisitions policy, reflecting cultures and people outside the UK.
- In terms of fiction, the channel is dominated by mostly high quality animation, but there is little live action drama.
- We also note the lack of female protagonists throughout.

- We applaud the light-touch educational elements in programming and the emphasis on developing children’s curiosity and creativity.
- The BBC has a great asset in the CBeebies brand. But we feel that it may be under-appreciated by senior management and under-promoted on the main BBC Channels. We are also concerned that commercial revenues may not always be directly re-invested for the benefit of the service.
- The affects of the new animation tax break on the channel, and the extent to which major new international deals - such as the Fremantle “first look” arrangement must be assessed in terms of the overall tone of the Channel. Is there a danger of CBeebies becoming more international in look and feel, as pressure on budgets and producing quality competitive programming drives the channel to more co-production over time? The Trust needs to make a long-term study of the consequences of these trends.
- The pressure to increase the 20% acquisitions quota to 30% should be resisted unless there is clear evidence that this will release funds to improve commissioned programming, and that these improvements and the new acquisitions at least comply with the BFI “cultural test” for animation.
- Transparency in the allocation of budgets, in house and independent, acquired and commissioned, and the structures behind important co-production deals is vital so that the Trust and organisations like the CMF and PACT can assess the trends within the pre-school economy which CBeebies dominates in the UK.
- The CMF would resist any suggestion that CBeebies budgets should be reduced, and would suggest enhancement if it could lead to improved online and mobile services and more live action drama.

## CBBC

- A reasonable service, but less successful with its target audience, achieving only an average weekly reach of 32%. We appreciate that this is a more diverse audience than that of CBeebies, but feel CBBC should be able to achieve more.
- CBBC covers all genres, and on the whole the mix is reasonably good, although factual remains under represented with too much reliance on long running series like *Horrible Histories* and *Deadly*. Excellent new shows like *My Life* have very short runs - only seven half hours a year.
- There is a similar problem in drama where despite excellent new series like *Wolfblood* and *Wizards v Aliens* there appears to be an over reliance on scripted comedy shows and long running series like *Tracy Beaker* now morphing into *Dumping Ground*.
- There is obviously great value in known brands but too much dependence can lead to a lack of innovation, and stifle the development of new talent, which is a vital role for a public service provider.
- We are also concerned that apart from *Tracy Beaker* and *The Dumping Ground* and the recent short series *Post Code*, there is very little contemporary, challenging drama reflecting today’s society, in which children can see and hear a wide range of their peers.
- The Trust should consider whether enough children’s voices are heard on the channel – and indeed on the BBC in general.
- We believe attention needs to be given increasing the number of new drama and factual series. In its 2007 report on children’s services Ofcom noted the decline of both drama and factual content across the board in the UK. Richard Deverell, the

then controller of BBC Children's, stated that it was clear that parents wanted more of both genres, and we are sure this still holds good.

- This is a budget issue as much as anything else. Only with sufficient budget to ADD to the mix, can CBBC maintain its competitiveness while also challenging the audience.
- While we would encourage a widening of co-production to bring in more finance for quality drama, comedy and potentially factual on CBBC, we would once again counsel caution in terms of the potential erosion of local content.
- We are also concerned about the upper end of the CBBC target age range - the 9 to 12 audience. We believe that in reality there is very little content which is relevant to this audience. For example Newsround is no longer delivering content to 10+. Channel 4 has a remit to cater for the 10+ age-range, but does very little to fulfil it at present.
- We believe that this problem continues in the 12 to 16 age group. We understand that this is not the remit of BBC Children's, but nor does it appear to be anyone else's.
- We think that the Trust should consider the needs of these age groups. We understand the difficulties of reaching these audiences and providing appropriate content, but because it is difficult does not mean it should not be tackled. The BBC is supposed to cater for all sections of the public and, at present, an important sector is underserved.
- In light of the recent EBU Television Committee Chair's call for public broadcasters to address younger audiences, this task, while traditionally difficult, should nevertheless be embraced.
- In general we would press the Trust to ascertain whether CBBC appeals to the whole community of children in the UK, to the many regional differences, income levels, interest groups and age-ranges, and the extent to which they offer challenging, surprising, innovative and relevant content for those groups.

### **Collaboration and partnership opportunities**

- We note the very small number of feature films in the BBC catalogue, suitable for family viewing and even fewer films aimed directly at children. The Trust should press for BBC Children's and BBC films to work together in this area and in partnership with the BFI.
- We accept the move of children's services away from BBC ONE and BBC TWO but are concerned about the 'out of sight out of mind' factor. We wonder whether there is sufficient cross-trailing and cross-referencing both on-air and on-line.
- We would expand on this observation to ask whether there is sufficient liaison in general between the 'adult' genre departments and BBC Children's; e.g. News (as was traditionally the case with *Newsround*), Films and also Sport. For example did BBC Children's take full advantage of the Olympics and is it now following up on the potential of Olympic legacy by co-operating with BBC Sport? BBC Children's has a very clear and positive identity, but it could benefit more from co-ordination with other content areas while at the same time gaining greater profile in the mainstream.
- It is important to keep the profile of the children's services high, both with the public and politicians. The children's services are part of the core PSB remit and people need to be strongly aware of them.
- There also seems to be an issue around external relationships. The BBC has been charged (in general) with developing links with other national cultural organisations, such as the Royal Opera House and National Theatre. Although BBC Children's has

been involved in some initiatives e.g. with the British Museum and Tate Gallery, there appears to be little follow-through or onward development. Given that most cultural organisations are developing screen-based media strategies, especially in relation to the children's audience, BBC Children's should be looking at new potential partnerships with museums, children's theatre and other institutions.

### **Budget**

- We are concerned that the on-going mandatory cuts are putting severe pressure on children's budgets and could lead to even less original locally-produced and UK-relevant content.
- We have observed the long-term decrease in children's drama and factual provision, and the scaling back of ambition on Blue Peter is clearly evident.
- In areas where external funding can be sought, this almost inevitably entails co-production partnerships with other broadcasters or large international distributors. This leads to programming which is more "international" in nature (which usually means more palatable for the American market).
- The recently announced long-term association of BBC Children's with a global brand like Fremantle Media will clearly also skew yet more programming towards the international. While this might be applauded in terms of increasing competitive production values, serious consideration should be given to offsetting the negative results for the audience and for the children's production sector in the UK, by ensuring that the savings from such deals are clearly channelled back into UK-based production of UK-centric content.
- Co-productions with other public service providers in Europe, Canada, and Australia, such as the recent *Wolf's Blood* drama co-commissioned by CBBC and ZDF Germany might also leaven the overall content mix, and provide a wider view of the world than available in US-centric shows.
- With the above in mind, we support PACT's call for greater transparency on budgets, and more detail on the costs and the genres commissioned, co-produced and acquired.
- In light of the new animation tax incentive, we would also press for a long term assessment of the extent to which it affects the style and content of programming, and the balance of animation, mixed media and live action in CBeebies and CBBC output over the next few years.
- We are aware of PACT and UK Animation's call for the raising of the 20% acquisition quota on the CBeebies Channel. Our view is that BBC Children's would need to produce a convincing long-term case to prove that the financial benefits of a 10% increase in acquisitions would release sufficient budget to significantly enhance the output elsewhere – particularly improved live-action commissioning on CBeebies. We would need to be convinced that this would result in a real benefit to the audience as well as the industry, and any such content should meet the BFI cultural test.

### **Online and interactive**

- The CBBC website and its failure to enter the Apps world is creating a sense of stagnation and failure to deliver. Serious thought needs to be given to the strategies driving a service which majors on promoting the big TV brands while providing a variety of casual games. The days of innovation, active engagement, purpose and relevance in online content – and particularly the way in which online is a route to older audiences for the CBBC brand – seem to have been lost.

- This is a budgetary issue and clearly more resources are needed to re-create an effective BBC Children’s online and mobile offering - especially for CBBC.
- There are also concerns in the wider interactive industry reported by our supporters that lack of transparency in interactive budgets, and complacency about the need of innovation and leadership, and a closed mentality is leading to creative weakness and inefficiency.
- Red Button services are inadequate, old-fashioned and failing to provide for the Sky audience – a key demographic to extend the range of BBC Children’s reach.
- We repeat the observations in our response to the Trust consultation on the BBC’s mainstream interactive and online services that children are insufficiently taken into account as occasional users of the BBC’s “adult” services, and guidance to their own content is needed, especially on BBC news websites.
- We have concerns about children’s online services and the blurring of lines between PSB and commercial content.
- Initially the BBC took the lead in trying to maintain clear separation between public service content and the growing commercial content provided by brand owners, though this should have been official policy rather than custom and practice. Some brand owners, notably including BBC Worldwide, have been less than transparent, doing their best to obscure their "non BBC status". A policy would be worth pursuing.
- This is still evident in the app space – with CBeebies logos and show brands being seen on apps, which require secondary payments for premium content – the “freemium” model.
- However there is almost no presence for BBC public service brands on any of the app services. The app market is increasingly the place where children and families find their digital content. Under its existing remit the BBC needs to provide high-quality indigenous apps that enhance and reflect the lives of kids in the UK and provides a counter to the globalised services already on offer.
- We would urge the BBC not only to enter the app space, but to take the initiative by establishing basic standards of communication, clarity and control for freemium offers, and to find an acceptable model (especially in collaboration with BBC Worldwide) to roll out Public Service apps which have freemium elements.

## Conclusion

In conclusion CMF feels that on the whole BBC Children’s provides a good service for its viewers, but that there is a danger of complacency.

- There is a lack of challenge and risk taking, and a danger that the lives and interests of a considerable number of the potential audience are not addressed.
- This is compounded by the pressure on budgets. We would urge the Trust to resist any further diminution of BBC Children’s budgets and support greater investment in original drama, factual and online/mobile services.
- We would like to see more attention paid to the 9+ audience
- We feel that there is a real need for the BBC to develop a stronger presence and a coherent policy regarding children in the increasingly commercialised area of apps.
- We would urge the Trust to support the ethos of transparency (albeit respecting commercial confidentiality) in terms of budgets, partnerships and outcomes.
- Finally, we wonder whether BBC senior management really appreciates and supports the asset it has in its children’s services and makes this known to the wider public. We are concerned that children have been relegated to their traditional place “out of sight, out of mind...”

We would welcome the opportunity to discuss these issues further with Members of the Trust

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## Appendix: Full Reports

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### a) CBeebies branding, promotions, presentation, schedule, balance and range

CBeebies is rightly regarded as a success story. The brand is loved by both parents and children, and the channel has carved out a strong position in a highly competitive market.

#### Quality

CBeebies continues to commission fantastic content across a range of genres, featuring both live action and animation. Recently we've had *Old Jack's Boat* (devised by Russell T Davies and starring Bernard Cribbins), *Let's Play*, *Andy's Wild Adventures*, *Tree Fu Tom*, *Abney and Teal*, and *Baby Jake* – all shows with high production values and strong story-telling.

Last year there was a big push on learning with the 'Love To Learn' slot, featuring *The Lingo Show*, a new series of *Alphablocks*, and *Numtums*.

#### Reach

The only question we might want to ask is whether or not there is a risk of complacency. It's worth noting that CBeebies' average weekly reach for its target audience currently fluctuates around 44%, which compares favourably with around 32% for CBBC but less favourably with, say, BBC 2's 52% reach (*figures based on BBC's quarterly audience information reports*).

And perhaps it would be fairer to compare the reach of a general children's service with BBC 1's reach, which is usually over 75%.

Do these figures suggest that CBeebies is very popular with a particular sub-section of the UK population, but is not meeting the needs of the wider children's audience?

#### Branding, Presentation and Promotions

CBeebies has a strong brand identity. The CBeebies audience knows what to expect and the BBC delivers. The shows are loved and respected by their audience and it is rare to hear any criticisms from parents or children.

The channel's on-screen branding is highly professional, inventive, playful and warm. The channel adapts the branding to reflect changes in the seasons and to feature events (Christmas, Easter, Summer Holidays). So, to some extent, it gets refreshed periodically.

But it's now 11 years since the channel launched and 6 years since the mini-relaunch, change of age-range and revamp of the schedule. Is it possible the BBC is thinking about a more substantial re-branding? In which case they will need to find the resources to achieve that and, of course, it would be unwise if that money come out of programme budgets. Although recently there has been the suggestion (reported by some programme makers) that the BBC is keen to avoid programme ideas that 'do not fit' with the CBeebies brand, which suggests the BBC Children's management are comfortable with the current branding.

If there is a re-branding and re-launch then that could be an opportunity to broaden the channel's appeal.

They have a great team of presenters and they are a diverse group. This is where the channel shouts 'British' in a way that other channels just don't achieve. You get a great range of voices and characters, bolstered by the guests on the CBeebies *Bedtime Stories*. Again, it's very safe and gentle, and clearly works for the audience.

CBeebies promotes its shows exceptionally well within the channel – again, it's creative, informative, and well-targeted. However, without comprehensive information, we would simply question the extent to which the channel is trailed elsewhere on the BBC. Our supporters indicate they see little cross-promotion from the bigger channels. This is of particular importance since the loss of CBeebies programming for BBC TWO. Is the BBC failing to push one of its greatest assets? Is CBeebies held in high regard by the BBC's senior management team? Are they aware of the powerful brand that has been created and the bond it develops with a huge audience segment – not only the early years starters, but their young parents? In general, children's services tend to get marginalised within the BBC – this needs to be addressed now that the BBC has such a valuable brand.

### **Schedule Balance and Range**

As already indicated, CBeebies commissions great programmes across all genres. There is an emphasis on animation, puppets and suits/skins, and presenter-led live action, but that's what you would expect for this age range. There's not much new scripted live-action drama apart from *Old Jack's Boat* and *Grandpa In My Pocket*, and perhaps you could include *Woolly and Tig*.

CBeebies excels at practical education shows – *Mr Bloom's Nursery*, *Nina and The Neurons*, *What's The Big Idea*. Also great on imagination and creativity – *Let's Play*, *Mr Maker*, and *Show Me Show Me*. Within the last couple of years there's been a push to get out of the studio and feature children on-screen with the presenters. So we have seen shows like *I Can Cook*, *Mr Bloom's Nursery*, and *Mr Maker* go out on the road to meet children where they live.

### **A Note on Commercial Activity**

CBeebies taking its programme-making on the road is complemented commercially with theatre shows reflecting the brands and personalities such as *Justin and Friends*. These are in general appreciated by parents, as are the merchandising products available, as necessary and high-quality brand extensions they are prepared to pay for to enhance their children's enjoyment of their favourite programmes and personalities. In general we believe that parents accept these as they believe they "put money back" into the public service offering while also offering them BBC quality assurances. But it remains a concern as to how much of the money generated by such activity actually finds its way into CBeebies' overall budgets,



beyond the obvious value of investment in specific projects, and that is an area that the Trust should investigate.

### **Local vs Global**

Investment by large multi-national producer/distributors in co-production agreements which bring funding to raise the production values of CBeebies programmes, such as *Tree Fu Tom* or the projects which may result from the recent Fremantle “first-look” deal, also cause concern, as they inevitably lead to programming which is more “international” in appeal. While the CBeebies team clearly make strong efforts to resist “Americanisation” of their programming, there are a number of factors which will lead to increased pressure on the CBeebies brand to become less oriented towards British children and more international in appeal. Increasing competition from the big international players in the pre-school field (both competitor broadcasters and producer/distributors), coupled with pressure on BBC budgets, could lead to yet more emphasis on internationally funded programmes.

The new animation tax-break which came into effect in April 2013 could serve to assist CBeebies achieve more control over the UK educational and cultural remit in its programmes, as it should result in more production decisions being taken in the UK. (The simple equation being, more budget input into a co-production results in more control in the territory that budget comes from). But equally there will be an increased interest from international partners to produce animation in the UK and the temptation will be to divert funds from UK-centric programming to bigger, competitive, high-value shows. This Trust needs to be aware of this potential trend and keep it under review. This is the reason why the CMF believes that any extension of the acquisitions quota on CBeebies, as advocated by other organisations contributing to this consultation, should only take place if it can be clearly proved that the resultant cost savings will be diverted into more UK live action production. Hence our support for greater transparency in the allocation of budgets and the contract arrangements with co-production partners.

### **Budget**

It is vital that CBeebies has the funds to refresh the schedule over the next five years. Will they be able to replace *In The Night Garden* and *Charlie and Lola* with UK-originated shows of the same quality? Will the funding they offer UK producers allow the shows to truly reflect UK culture or will we see the BBC Licence Fee subsidising more “international” shows in the style of *Waybuloo*? The CMF would strongly advise against any reduction in budgets of CBeebies, and for the reasons listed above, we would be pleased to see the BBC accept the importance and value of its services to younger children with enhanced investment in programming and the CBeebies online services.

This particularly relates to our final point. Does the BBC need to broaden the channel’s appeal? Is CBeebies too middle class?

### **Appeal**

There is no doubt the channel makes a genuine effort to address that criticism, particularly with respect to the children they feature in their shows. The difficulty with that is the children featured are often non-speaking and only provide a back-drop to the main content.

The settings for a small number of shows are urban – for example, *Abney and Teal*, *Me Too*, *Mr Bloom* – but, in general, they don’t reflect the lives of many children in the UK. The CBeebies presenters and characters tend to be well-spoken and well-behaved, with not much room for anything a bit ‘rough and ready’. Even *Grandpa In My Pocket* puts

Sunderland born James Bolam into a relatively posh family living in a gentile Suffolk coastal resort.

We are not suggesting this is a major problem for the channel, but it could become a problem over the next ten years as pressure grows on the Licence Fee. It would be easier for the BBC if their services offered something for the majority of UK children and not just the 45% that currently watch CBeebies. We do not offer solutions but we believe that this is an issue which needs to be considered.

## b) CBeebies Animation

Of the daily broadcasts on CBeebies, approximately one third of output is animated content (4.8 out of 13 hours). Spread throughout the day, on first look the number of programmes is substantial and apparently nearly all use independent production companies.

However out of 24 different animated shows screened on 10.5.13, at least 18 were repeats. Furthermore a whole selection of 'educational' shows broadcast in the morning were recycled in the early afternoon (*Alphablocks*, *Numtums*, *What's the Big Idea?* as well as live action shows). These repeats weren't just secondary screenings of episodes of new commissions (*What's The Big Idea?*) but significantly older series (*Waybuloo Series 1*, *Charlie and Lola Series 2*). While such shows don't look dated and charm and delight children today as much as they ever did, this reliance on repeats means little money is going back into the production sector.

The money that is spent on new content, is not necessarily spent on new ideas either: instead old properties such as *Postman Pat* have been dusted off and revamped. According to Animation UK, while all other BBC Channels have a 30% quota for acquisitions, CBeebies only takes 20%, which obviously limits the number of new animated titles they can buy and the number of times they can repeat them. Increasing the quota to 30% in line with other channels would make a big difference to the production sector, but might impact adversely on the audience.

Many of the live action shows include animation in some way, whether it's just the credit sequences (*The Rhyme Rocket*), or stories and characters within shows (*Iconicles*, *Nina and the Neurons*). This is also valuable work for outside animation houses such as Blue Zoo and Karrot.

Compared with the commercial broadcasters (especially the cabsats) CBeebies is innovative, despite the appearance of depending on tried and tested shows and characters. Not just in terms of animation styles but more importantly with content: *What's the Big Idea?* a pre-school philosophy show, or *Rastamouse* the reggae-based detective show for example.

Overall the range of content is eclectic, serving the wide range of interests and developmental stages of the audience: educational (*Numtums*), the preschool experience (*Charlie and Lola*), the very young (*Baby Jake*), Action-Adventure (*Octonauts*), Comedy (*Timmy Time*), Fantasy (*Cloudbabies*), the Grown Up World (*Postman Pat*, *Bob the Builder*), Detective Mystery (*Rastamouse*), Costume (*Mike the Knight*), Other Cultures (*Tinga Tinga Tales*), Special Needs and activity (*Tree Fu Tom*). Though this has a safe quality – rarely dealing with topics involving social groups not in the core CBeebies middle-class audience.

Protagonists range from adults like Pat or Bob, to trains (*Chuggington*), animals (Raa Raa or Rastamouse), boys (Mike, Charlie) and girls (Rosie, Tilly). But whether they are animals, adults or vehicles, the majority of protagonists are male. While there are some female characters in shows such as *Octonauts* and *Chuggington*, they are still really secondary characters and feel like the token girls rather than significant people in the worlds they occupy. While Lola is often the protagonist in *Charlie and Lola*, of the 24 different shows aired on 10.5.13, only two had eponymous girl characters (*Tilly and Friends* and *Everything's Rosie*). There were 8 eponymous males.

*Abney and Teal*, *Charlie and Lola* give their characters equal weighting and some of the ensemble shows, such as *Big Barn Farm* and *Waybuloo* are more balanced in their use of gender. The shows with human lead characters seem to skew to their relevant gender (*Mike the Knight* for boys, *Tilly and Friends* for girls), whereas the shows with male animals are more appealing to both sexes. Nevertheless, the shows are very much about male heroes (Pingu, Raa Raa) in a male world. There are few aspirational female roles or experiences in animated stories beyond sisterly caring and sharing. In live action, there are more exciting role models such as Nina (*Nina and the Neurons*) and the nurse (although the doctor is still male) in *Get Well Soon*. It must be noted that there is, this spring, the delightful new *Sarah and Duck*. It does have an animated girl protagonist. It is fun and lovely and an instant hit. But it is still set around home life. It would be good to see animated female characters stepping out of the garden/domestic world into more traditional male environs, and not just as the sidekick.

In terms of storytelling, the animated shows screened on CBeebies are of a consistently high standard. CBeebies is, as the Trust requires "A cornerstone of quality UK Production". From the credits, it is clear that CBeebies executives are heavily involved in the development of the content they buy. But it is also clear from the credits that so are other broadcasters. Too many investors with differing requirements makes the production process arduous and challenging for the creatives at the heart of the shows. Bigger investments on CBeebies' part would ensure a stronger position in the co-production process and allow it, as the Trust requires, to continue to be the cornerstone of quality UK production.

### c) CBeebies Live Action Programming

Pre-school development is increasingly recognised as the most important time of a child's life and media plays an important role in influencing that development.

CBeebies is the primary source of Live Action TV, TV-Like and Digital Live Action Media for the UK child. Milkshake have a small in-house puppetry show and import one mixed-action heritage US show out of 31 shows. Nick Junior have 4 small live and 3 mixed action shows out of 30 (including *Yo Gabba Gabba* and *Blues Clues*), Cartoonito (Turner) have 2 Mixed/Live shows out of 14, Disney Junior have 4 live and 3 mixed amongst 22 shows. CBeebies have 43 Live shows and 19 mixed shows (animation and live action) from a total 113 shows i.e. approximately 50%. Live Action includes Puppetry, Reality and Suits.

CBeebies includes a good variety of genres in its live action – Factual, Magazine, Drama, Storytelling, Links. There have been a number of new Factual programmes (e.g. *Andy's Wild Adventures*), which is an excellent development for the younger child audience. There continue to be Make and Do programmes (Art, Cooking etc.) and symbolic didactic (number and letter learning). There is recognition of minority needs - e.g. in *Something Special* and

the inclusion of diverse performers and presenters. Due to editorial awareness almost all CBeebies live action programmes seem to have some educational value.

The one genre in live action that seems relatively poorly represented is drama. There is currently one show, *Grandpa in My Pocket*, and another show in production, *Topsy and Tim*. This may be an area for expansion.

Although there is a variety of genres, the decision to brand the channel in content terms, means that there is a narrowing of tone and style. While it is understandable that there is a need to have a clear position in the marketplace, the BBC's responsibility to the young audience and its PSB considerations, should mean that at times they should look to create, commission or acquire programmes outside the rigidity of the brand guidelines.

Another form of innovation would be for CBeebies to consider acquiring programming from a wider range of territories than the usual suspect which create the international animation successes. While live action does not travel as easily as animation, there is high quality programming available programming which could show the diversity of the world to the younger audience. We applaud the current dominance of UK programming on CBeebies, but we would not wish this to prevent a wider view.

Currently independent production contributes a not insignificant proportion of the live-action content on CBeebies, but we would support the PACT request for greater transparency in the allocation of budgets to projects, and across in-house and independent production.

In assessing the value of CBeebies programmes, currently there are two assessments available – popularity ratings such as Barb and and Iplayer viewings, and Industry awards. One of the major problems with Barb ratings for pre-school is that they currently don't include the under-4s. It might be valuable if the BBC opened up a discussion with Barb about this. In addition there could be more academic assessment of the Public Service and/or Educational Value of these programmes, the encouragement of more expert review and more consumer opinion surveys.

Generally live action Pre-School within CBeebies seems to be varied and high quality. We think it needs to be assessed for its developmental and educational value and customer satisfaction. In-house and Indie budgets should be compared. There should more freedom in the style of programming and drama projects should be increased.

#### d) CBBC Schedule, Balance and Range

CBBC provides a richer mix of factual, news, entertainment, animation and fiction than any of its competitor channels. However this should not lead to complacency and constant examination of whether the channel meets its public-service purposes.

The CMF appreciates the need for CBBC to compete in a multi-channel landscape. As with the BBC in general, BBC Children's in part justifies its use of the Licence fee through its reach

and the popularity of its programmes. There is a constant balance to be struck between the popular and the purposeful. We would suggest that the Trust's main role in examining the CBBC schedule is to ascertain how broadly those purposes are met, the extent to which CBBC appeals to the wide variety of children in the UK, to the many regional differences, income levels, interest groups and age-ranges, and the extent to which they offer challenging, surprising, innovative and relevant content for those groups.

Our exploration of CBBC factual in the schedule indicates challenging content is on offer, as well as material which reflects a relatively wide range of children, especially in *Newsround Specials*, *My Life* and some elements of *Blue Peter*. But these are not extensive in the schedule, and they do not extend across all age ranges. In particular, children over 10 are not well-served. *Newsround* items are clearly aimed at younger than 10, so the daily opportunity to engage is lost. While this might be seen as reflecting the available audience thought needs to be given either within the CBBC brand or outside it, as to how this older children's audience should be served.

Similarly CBBC drama majors on fantasy and has very little content which might be called "gritty" or realistic, and again fails to offer much for 10s plus. This is a long-term trend away from reflecting the rich variety of children's lives and experiences, and presenting to the mainstream the experiences of the minority. If BBC schedules on BBC ONE or TWO were to take this approach, there would be justifiable criticism of the Corporation failing to reflect life in the UK as it is.

The capacity for drama to attract older audiences and to explore the issues which face older children and young teenagers should not be underestimated. There have been successes in the past – notably *Grange Hill* and *Byker Grove*, and the loss of competition from CITV, which also produced powerful drama for older children such as *Children's Ward* and *Press Gang*, makes this an area which the Trust should ask BBC Children's to examine. As the issue is almost certainly associated with budgets as much as with available audience – serious consideration should be given to providing enhanced finance to BBC Children's to address the issue.

The young audience should be a major concern for the BBC. It needs to gain the loyalty of future Licence fee payers and ensure that the UK is a media literate society, expecting quality, depth, realism and reflection of itself in its media – rather than the acceptance of blander and less relevant programming from outside the UK. The children's audience – at all ages - should not be ignored.

Other features of the CBBC schedule which stand out are the reliance on factual programmes "spun-off" from adult series, in drama, comedy and animation on returning series, and in general in a relatively small pool of talent. These are symptomatic of risk-aversion, and while this has its advantages, in the end it leads to stagnation.

The voices of children are not heard on the channel as often as they could be. Many factual and magazine formats on CBBC depend on presenters to tell the story, rather than allowing children their own voice. Once again CBBC should be taking the lead in providing a platform for its young audience as participants.

In addition, with the removal of CBBC programmes from BBC ONE, children are seen and heard less on the mainstream channels. Children deserve their voices to be heard in mainstream programming as well as on their own services. There is no definition of BBC

ONE that states it is a channel which should only feature adults. This is an area the Trust should investigate over time. What evidence is there that BBC ONE and TWO take children into account as they would other “minority” audiences? Is there a sense that the BBC has relegated Children to their own room – out of sight and out of mind?

The lack of feature-length content on the channel differentiates it from many of its European public service counterparts. Slots for feature films created by a new partnership with BBC Films and potentially the BFI, would also potentially result in material of high quality, for and about children which could find a place on BBC ONE or TWO.

## e) CBBC Animation

Animation provides an integral part of the CBBC schedule, although its prominence is perhaps overshadowed to a degree by the channel’s live action and magazine format commitments which are considered to be of wider appeal to its target age range.

The channel carries a mix of internationally acquired and UK Indie produced animation, although much of the latter is invariably co-produced to varying degrees as a funding necessity. Co-production partners tend to be from Australia, France, the US, Canada and Malaysia.

Cel animation examples are *Arthur*, *The League Of Super Evil*, *Dennis & Gnasher*, *Muddle Earth*, *Pet Squad*, *The Animated Dr Who*, *Zombie Hotel* and *Scooby Doo*.

*Muddle Earth* was made in the north west of England by Hullaballo/Factory Transmedia and was drawn animation (almost cut-out in style), but with some CGI FX. It didn’t make the impact that might have been expected.

Risks have been taken with stop frame shows such as *Rastamouse*, which has been both applauded and criticised. Stop motion shows such as *Shaun The Sheep* from Aardman continues to attract viewers of all ages.

Another stop motion show, *The Ooglies*, proved popular, despite its ‘retro’ look and comedy sketch style (involving fruit and vegetable characters).

A new show, *Strange Hill High*, which is created in the UK using an innovative production technique combines rod-operated puppets, stop motion, Japanese vinyl toys and digital effects - a technique dubbed ‘hypervynorama’ - which not only enables costs to be kept lower, but also result in a fresh new look. The scripts, production values and voice casting are all strong.

Generally, the cross section of animation style and content is a fair mix of tried and trusted favourites along with new and innovative shows, such as *Strange Hill High*.

However, that show is the only origination offered in the week 's CBBC Channel schedule studied. The remainder is a mix of oft-repeated UK-produced, international co-productions and acquired shows including *Arthur*, *Dennis & Gnasher*, *League of Super Evil*, *Shaun The Sheep*, *Scooby Doo* and *Pet Squad*.

## f) CBBC Drama and comedy

### The general picture

Overall, CBBC drama is in rude health, offering a rich mix of diverse, well-funded, indigenous dramas across a range of genres from fantasy, comedy, action adventure and social realism. These series, which regularly top the ratings on the Channel and on BBC iPlayer, have often delivered numbers in excess of many adult shows.

Whilst some of the peak demand is driven by established favourites, it's encouraging to see that there are a number of new titles also appearing in the top ten, from innovative comedies like *The Four O'Clock Club* to ambitious high end co-productions such as *Wolfblood* and *Wizards vs Aliens*. *Wolfblood*, was one of two new shows commissioned off the back of a new writers initiative and *The Four O'Clock Club* was developed as a vehicle for new comic talent, Doc Brown. It's vitally important CBBC continues with these kinds of talent initiatives, seeking out new voices to deliver fresh, cultural, social and geographical perspectives on what it means to grow up in modern Britain. This has not always been the case in the past and needs to be encouraged if it's to continue in the future. Delivering this requires a joined up commission and production strategy, which takes into account that finding and developing new talent takes time and commitment.

### Funding

Whilst funding across all areas has been squeezed, CBBC Drama has been fairly successful over the last two years in partnering on key high-end projects to deliver ambitious, quality productions, most notably the hit shows *Wolfblood* and *Wizards vs Aliens*. The former, a co-production between CBBC and ZDF, greatly benefitted the audiences by delivering high production values and added revenue, as the net affect of this production created an attractive and very saleable show which was recently purchased by the Disney channel in the US, almost unheard of for European tween live action and a hopeful development for the future.

In a managed portfolio of drama and comedy the CMF would applaud CBBC efforts to finance programming of quality and range from international collaboration, and international sales. However we would have concerns if the drama and comedy slate were dominated by co-production or distributor-financed series, due to insufficient support from public service budgets. Equally transparency in the investment strategies of distribution partners, especially BBC Worldwide, is essential if the Trust is in future going to be equipped to assess whether there have been changes in the balance and range of CBBC Drama which can be attributed to the growth in international partnership deals.

Encouraging as all of this may be, children's drama, when compared with other genres, is significantly more expensive to produce, which makes hitting the requirement for original new content increasingly difficult. So what we have begun to see is a redefining of what may be classed as "original drama" with a significant shift to include a number of cheaper, scripted fiction productions which have actors in them. For some the "drama debate" is just a semantic argument, but in reality, the net affect creates an ambiguous picture of how much "children's drama" is actually produced. A scripted comedy produced for around £75k per episode, like *Scoop*, serves the audience well, as does a show like *Hotel Trubble*, but these are not what we have come to traditionally define as "drama". Although many of the techniques and skills are similar, the role of these shows, primarily comedies, is substantially different in intent and purpose. This, of course, is complex as there are shows in the comedy genre that are every bit as challenging and thought provoking as any drama,

using different techniques to challenge the audience. But it may require a more honest and open debate about the way we define “drama“, and the expectations created by those definitions, in order to clarify and understand just what is being categorised as “original drama” hours.

### **Range**

A brief review of the drama slate shows that there is heavy bias towards fantasy adventure - *Wolfblood*, *Young Dracula*, *Wizards vs Aliens*, *Sarah Jane Adventures* - and a lot of comedy - *Four O Clock Club*, *Sadie J*, *The Legend of Dick and Dom*, *Scoop*.

Although most of these shows are richly produced and very capable of exploring the challenging and complex journey of growing up, CBBC should review whether there is room for more drama that explores the **real** and rapidly changing world the audience is experiencing. Of late, *Tracy Beaker/The Dumping Ground* is in danger of becoming the sole representative of the less privileged and culturally challenged, and were *The Dumping Ground* to disappear, one would worry where this representation would come from.

In a multi-cultural society, CBBC drama could play a more significant part in helping the young audience understand not just the emotional landscape of growing up, but the place children take in the world, who they are and whom they share it with. So while all the drama takes into account “multicultural casting“, there’s a need for more thought about storytelling and representation. It’s the role of a public service broadcaster to reflect the breadth of the society in which British children live, including those at the less well-off end of the economic spectrum. The power and influence of a well-rounded and empathetic character has long been understood as often the most effective means to help the audience gain an insight into the world they are being brought up in. Where are the new stories of the young British Sikhs or Muslims? Who is telling us what it’s like to be a Polish immigrant or a young Somalian girl living without a passport on borrowed time or the over-crowded family living below the poverty line on a bleak council estate in Birmingham? There are many new stories that need to be told and if CBBC doesn’t do it, it’s hard to imagine who will.

We appreciate this is a case of balancing competitive popularity (an essential to justify the Licence fee) and public responsibility. We would suggest that CBBC drama currently errs on the side of the palatable and popular, and needs to re-assess its capacity to deliver stories which relate to the range of issues children face as they grow up.

## **g) CBBC Factual**

The list of factual programmes transmitting on CBBC in one week looks quite impressive at first glance. But once viewed it becomes less so, as one realizes just how many are spin-offs from adult shows, and how many have been diluted by introducing so many game show elements that the factual elements become secondary, and sometimes lost in the mix.

In one respect it is good that children have their own versions of popular mainstream shows, but it does compromise the innovation of the channel to a certain extent. There’s *Junior Masterchef* (repeats from 2010), *Trade Your Way to the USA* (based on a challenge from *The Apprentice*), *Extreme School* (like *Worlds Strictest Parents* and made by the same production company), *Driving Academy* (like *Dangerous Driver’s School*) and *Junior Bake Off*.



There are some similar series where a group of children learn to do a particular job – like *Cop School*, *Hero Squad*, *Junior Vets* and *Deadly Mission Madagascar*. The children featured in these are invariably at the top of the CBBC target age range, and are often older than that at 13 or 14. There is a lot of presenter or narrator input into these series, which tends to reduce and limit the voices of the children taking part.

There are also brands that have been transmitting for quite a few years, such as *Deadly* and *Horrible Histories*, which are strong brands that seem to be standing the test of time. But with *Horrible Histories* now going into its final series, there is a need to find new talent and new formats.

The channel does provide variety over the year, and they have produced new original factual shows too, such as *Fierce Earth*, *Naomi's Nightmares of Nature*, *Goodbye Year Six*, *VIP People*, and *Absolute Genius*.

In terms of pure factual content, CBBC's main brands are *Newsround*, *Deadly*, *Blue Peter*, and the documentary series *My Life*. *Newsround* provides a daily news bulletin; twice in the morning (3 minutes duration) and twice in the afternoon (5 minute duration). The bulletins are lively, child-friendly and interactive, with presenters always asking what the viewers think and to go online to tell them. They also carry out their own experiments to see if they corroborate the latest survey that has hit the news. The bulletins are rather short, compared to when *Newsround* transmitted on BBC1 at ten minutes long. Now the longest bulletin is only 5 minutes, which is a shame, as the shows present a great mix of stories, in a very accessible and entertaining way. *Newsround* could extend its reach by offering a child friendly news app – and the BBC should nurture its younger viewers more on its main news website by providing links to *Newsround* so that young people can read news stories from a child-friendly perspective. There are a few presenters in the *Newsround* stable who do a mix of studio presenting and off-site reporting. They tend to be warm and engaging yet have an air of authority.

CBBC also run *Newsround Specials* every now and again. These are 15-minute features which are either presented by children or a *Newsround* presenter. 2011's *My Autism and Me* was presented by Rosie who has Asperger's Syndrome – it offered an amazing insight, was hugely positive and empowering, as well as using animation creatively throughout. She was such a good presenter, that they used her again a year later in their *Up and Away* special – a film about moving up to secondary school. The special *Internet Safety* narrated by David Tennant, was also original, and provided difficult facts in a creative and accessible way. *Hard Times* offered a clear and simple explanation of why the country is currently suffering a recession. Animation was used again to make the visuals more appealing. There is a tendency to use animation now in CBBC's pure factual shows, which can make them look quite similar. One could argue that this creative device has become too heavily relied upon.

*Deadly* has worked well for the channel for the past few years and the brand is inextricably linked to Steve Backshall. One could consider it dangerous to have such a strong brand associated with just one person, but it could be that one can't exist without the other.

*Blue Peter* transmits a live half hour once a week. It was reduced from twice a week at the beginning of 2012.

It's currently presented by Helen Skelton and Barney Harwood. The latter was chosen last year having already fronted 11 different series for the channel. Being such an experienced

presenter has its drawbacks in that he is so used to presenting shows that he tends to lack the fun and excitement we have grown to expect from *Blue Peter* presenters. But Barney and Helen do have a good on-screen relationship. CBBC has recently announced they're looking for a new presenter for the show, and the search will be made into a new series fronted by Dick and Dom. Again, they are using presenters who have been on the channel for a long time – in this case, 17 years. Dick and Dom will then be fronting 3 different series for the channel. There is a balance to be had in using recognized faces to reinforce the channel branding and familiarity, and being original and not risk-averse in showcasing new talent.

New faces abound on *My Life*, which is presented and narrated by children themselves. It is a series of half hours, usually made by different independent production companies and has covered a huge variety of subjects, from a boy who undergoes a kidney transplant, to 3 young people with Downs Syndrome who are gaining independence, to a big wedding in a Mormon family. These stories definitely tick the diversity box, in terms of subject, ethnic representation, and disability. Styles are different depending on the story and the production company that makes it. But it is worth noting that there are only 7 half hours each year.

Since the BBC decided to remove Children's programmes from its terrestrial channels, it now does not represent them in the schedules. There are various factual shows that appeal to the family audience – e.g. *The One Show*, *Rhys Jones's Wildlife Patrol*, *Helicopter Rescue* and *Bang Goes the Theory*. (Examples taken from a sample week in April 2013). But children's voices are rarely heard within the mainstream schedules.

CBBC is providing their audience with a good factual mix, including science, careers, business, art, animals, sports and food. There seems to be a commitment to provide the audience with a diverse range of subjects, presented in a variety of different ways. It is difficult to hit the target range of the channel in that a 6 year old is very different from a 12 year old, but it is important that the BBC continues to invest in factual shows for children as all the other children's channels are much more heavily focused on entertainment.

## h) BBC Children's and Film

A review of the 156 Films in the BBC Catalogue shows a chronic absence of films intended for the children's or family audience. The only 6 titles even vaguely suitable for a family audience seem to have been:

1. *Billy Elliot* (2000) - given a PG13 certificate. Really this is an adult drama that also has some appeal to kids of 13 and above, which is obviously not the same as a family film.
2. *Millions* (2004) about a bag of cash that lands at a young boy's feet. It was written by Frank Cottrell Boyce and directed by Danny Boyle. It received a PG-13 certificate (indicating parental guidance for children under 13). This was the one BBC attempt at a British family film.
3. *The Mighty Celt* (2005) about a 14 year old who works with racing greyhounds. This received a 12A rating (12A means the child has to be accompanied by an adult to the cinema). This was more an adult drama with a 14 year old in a lead role rather than a family film.
4. *The Boy in the Striped Pyjamas* (2008) about the Holocaust received a PG-13 rating. An adult drama that might have expected to capture some of the teen audience around a

difficult and challenging subject.

5. *Street Dance* (2010) was clearly intended for a teen/young adult audience and received a PG rating.
6. *Africa United* (2010) about 3 Rwandan Children journeying to the 2010 World Cup opening ceremony, received a 12A rating.

Our assessment suggests that only 1 of the films - *Millions* - had the family as its target core audience, and 1 other film, *Street Dance*, was clearly aimed at teenagers and young adults to form its core audience.

CBBC and CBeebies have no remit for family films and have not been involved in any. On the basis of the above evidence, BBC Films involvement in 2 family films from a portfolio of 156 films shows a poor record of support, and even these two films were not suitable for the younger audience i.e. the under 8's. There do not appear to have been any U-Certificate Feature Films supported by the BBC.

Recently in the trade press there was an announcement that Nicholas Barton's Harbour Pictures are developing a film of *Swallows and Amazons* with BBC Films. We welcome this addition to the portfolio, but question whether there is any connection between this initiative and BBC Children's priorities. More recent announcement of a film on the life of William Shakespeare using the style and writing talents of the *Horrible Histories* team is also welcome. But again we would ask whether this initiative comes about as a result of the success of *Horrible Histories* amongst the children's audience, or because the brand has translated to mainstream television in a reformatted form.

We would suggest that the Trust should make it a priority to question BBC Children's and BBC Films why there is no "joined up thinking" between these two powerful cultural agencies. The lack of independent children's and family film in the UK - productions which are British content based, funded and produced in the UK and aimed squarely at the younger audience - is a matter of concern to the Children's Media Foundation. The new plans for film financing and the comprehensive new approach to film education at the BFI would suggest that the time is right for new initiatives which could ensure a resurgence in long-form entertainment and storytelling aimed at the younger audience, with stories which resonate for them, and with an economic base which sees profit and success returning to the UK, rather than draining away to Hollywood. In Holland and Germany new schemes to support film have recently grown out of cultural and media-support funds allying with the children's broadcasters with the specific aim of re-developing their children's film sector. The new German children's film initiative call for proposals produced 110 original entries this year. At the heart of it is broadcaster support.

The need for BBC Children's to take its cultural role seriously is of concern to the CMF. Partnership with the BFI on a children's film initiative could be the start of new approaches to working with external cultural organisations with resultant synergies and economies.

## i) BBC Children's Online and Interactive Services

### Introduction

The CMF feels it important to recognise the role the BBC has traditionally played (and continues to play) in delivering free, high-quality digital services for the UK under 13 audience, but we also have a number of concerns we wish to highlight.

The two children's channel web brands offer a strong range of programme support and two identifiable destinations that children can easily find through online search in the UK. The brand identities also act as a kitemark for parents - as an indicator of good, wholesome age-appropriate UK centric content - amidst a sea of un-vetted web propositions.

However recent data suggests there is little room for complacency. (We are not privy to the BBC's internal audience monitoring tools but we have consulted non-BBC sources). We gather CBBC is driving strong weekly visits but appreciation is falling behind brands such as FRIV, Moshi and Minecraft in certain age/gender groups. (See Childwise figures for children's favourite sites at the end of this report). CBeebies on the other hand remains the UK's most favourite pre-school brand although we understand online monthly unique user statistics to be dropping.

Furthermore, neither brand seems to be taking a particularly pro-active role in defining what the future of the internet should look like for children and the Corporation appears conspicuously silent when it comes to highlighting the dangers of Facebook and YouTube to under 13s or offering a credible alternative.

With its unique role in the market-place we would like to see the BBC offer a far more clearly articulated strategy that focuses on engaging, enthusing and empowering British kids under 13 as digital citizens of the future.

To that end we would ask the Divisions responsible to take a much more open approach in publishing performance data, strategic objectives, costs and financial contributions to the UK creative economy – including the publication of annual spend on technical and editorial, in-house and amongst the independent sector.

### **Observations on CBBC and CBeebies services and areas of concern**

The CMF's remit in the digital space is to ensure British kids can access the quality and range of experiences they deserve, and that they are not short-changed by the marketplace. Having consulted CMF supporters, some of whom regularly conduct their own focus groups with kids and parents, we have collated the following observations.

- Both websites appear solid but fail to surprise and excite.
- They are considered reliable conduits for getting to branded aggregation areas but the activities are often unsurprising and predictable.
- **CBeebies**
  - The CBeebies **website** has to support a dual audience of children and parents. But the grown-up proposition feels lost and fragmented. When you get there the articles and videos feel overly promotional, rather than a place where the adult audience can genuinely have a dialogue with programme makers.
  - On **mobile**, the site feels like it is desperately trying to catch up with rivals rather than lead the agenda about what is appropriate for younger kids on mobile devices.
  - We would like to see CBeebies take a much stronger leadership role in researching and defining the appropriate interaction behaviours for younger

children on mobile - with data and best practice being shared amongst the industry.

- **CBBC**

- As mentioned above, CBBC seems to be successfully playing other tween sites at their own game with the main emphasis on the promotion of a few blockbuster TV shows and their associated games. But in the obsession to drive numbers and TV objectives, the homepage is narrowing the range of onward journeys. (On some days the main promotional window can feature the same show two or three times on the carousel).
- There is also a disproportionate focus on derivative casual arcade games. We understand that in the move towards mobile it makes sense to create a number of reusable HTML5 formats but these are at risk of becoming over-repetitive. For example, children in focus groups have commented to our respondents about the inexplicably high volume of 'running games' and that they think it's all getting a bit 'samey'. Similarly the mobile site is disproportionately skewed towards games.
- Our concern is that this 'me too' approach, presumably being followed to compete with Drix and Miniclip, is turning out to be to the detriment of the key brands and the BBC is in danger of forgetting its core remit to do more than just deliver big numbers. CBBC reach and appreciation has undoubtedly benefitted from the closure of the online CITV portal but we would urge the BBC to consider its *raison d'etre* as being more than about head-counting. We would encourage more leadership about what it means to educate, inform and entertain in the digital space.
- Many of our supporters have remarked that the level of digital innovation has declined in recent years. There seems to be an over-reliance on templated solutions and little investment in new forms of digital entertainment that are emerging elsewhere on the web. We would urge the BBC to make a clear statement of intent about developing new kids' experiences that really are 'native' to the third medium rather than just VOD and arcade game formats.
- This all pre-supposes a certain level of on-going financial investment and we are still struck by how opaque the digital spend is and what the commitments are year-to-year. We are concerned that infrastructure decisions are still fundamentally driven by a corporate agenda to service the BBC's other products first and would like clarification of the total spend (editorial and technical) that is allocated to BBC children's content.
- Once again the CMF is forced to ask, to what extent is children's of real importance to senior management at the BBC.
- Whilst it is not our prerogative to get involved in the contractor-supplier discussions, we do believe the audience benefits from a plural supply base and would like re-assurances that the BBC is open and receptive to third party expertise. We have been told by industry insiders that there seems to be a bias towards in-house builds when it comes to core architectural projects and that in-house teams are very inward looking and often under-value their external partners.
- It has been observed that every year digital spend is rushed out in the last quarter of the year to hit financial deadlines which implies that the allocated 30% for outsourced spend is still an afterthought.

- We believe the sector would benefit from openly publishing the break-down of all children’s digital spend – including that which the BBC has deemed ineligible for external bidding; how that total is split between editorial and technical; and the proportion of each which is commissioned from the Indie sector.
- **Mobile**
    - It is in the mobile sphere that we believe the BBC has lost the most ground and we would urge the Corporation to make significant investment into new content on mobile platforms as a matter of urgency. This needs to be more than just a few re-versioned games.
    - Both brands need to develop and articulate a clear strategy for what their public service proposition is for mobile. Audience data suggest that the move to mobile in the children’s sector is not about increased mobility, but more personalised screens and new interaction patterns.
    - However there are many considerations that parents are unaware of: - tariff shock if downloading on 3G, un-mediated access to the internet leading to inappropriate content; un-moderated sharing of personal information on social networks.
    - As the BBC catches up in this space we would like to see the CBeebies and CBBC brands take advantage of their new mobile presence to deliver some basic educational messages about the devices and what they offer.
  - **Red Button**
    - The CMF also notes that lower socio-economic families are more likely to have access to Sky than a broadband package and we would like the BBC to step up it’s commitment to this underserved audience.
    - While Children’s services are available on Red Button, we feel the navigation, when accessed from BBC1 or BBC2, has not been sufficiently designed with children in mind. The text-based menus require a certain level of literacy that cannot be taken for granted, and children can easily get lost, or, worse still, trip over content that is not entirely appropriate for un-moderated viewing. (This is better on when accessed via CBeebies and CBBC but these services are not always available).
    - When young viewers arrive in the Red Button children’s zone, they are offered a *Newsround* and a *CBBC Extra* section that appear to be strictly text-based (where they previously carried video).
    - The look of these pages feels out of date and significantly less well funded than other sections of the Red Button portfolio. We would argue, that if anything, this audience in particular, need to be offered a richer audio-visual offering than other genres if the BBC is to hit meet its obligation of universal access, and also ensure the support of tomorrow’s tax payers.
    - We would ask the Trust to consider whether the BBC is assigning sufficient funds to the Children’s Red Button services and that the BBC be transparent about the annual spend against the different genres on this platform, so that the less mainstream audiences are not forgotten or overlooked.
    - We also note that Red Button events accessed via CBeebies and CBBC command comparatively high audiences in proportion to the total number of available viewers in each age bracket and would advocate more of these event rather than less.

- We would urge the BBC to put more effort and resource into supporting this younger demographic with Red Button services and pay particular attention to the navigation issues younger viewers encounter.

### **Beyond CBeebies and CBBC websites**

The CMF's primary concern is with the provision of a diverse range of high quality content specifically tailored for child audiences across the UK. However, we also appreciate that the web is not as compartmentalised as traditional media and would like to raise the issue of how the children's services are signposted and discovered from other parts of [bbc.co.uk](http://bbc.co.uk).

According to Ofcom data, most children use Google as their primary search tool and will often arrive at BBC pages without going via CBeebies and CBBC. The BBC homepage makes little reference to these services (with direct links hidden behind a More button in the global navigation or below the fold) and can often be found promoting content that would not be deemed inappropriate for younger viewers. (For example on the day of writing the TV section was promoting a BBC3 programme *Crazy for Party Drugs* and the IPlayer was flagging *Ripper Street* in its Most Popular section).

Whilst the iPlayer does require parental approval to view post-watershed G-rated shows (such as *Ripper Street*), it's one click to override and far too easy for curious children to circumvent. Live streams also appear not to carry any ratings when they are launched.

As a universal destination, designed for the full range of UK audiences, we would urge the BBC to spend more time thinking about the user journeys for this younger demographic who understandably seek out the BBC for their favourite shows – both primetime and on the children's channels.

### **Contradictions between the Public service and commercial offerings**

In the past, the journeys from public service content to commercial services were clearly demarked by platform. BBC TV was commercial-free, L&M and publishing paid for. From an audience perspective this was relatively clear and well understood.

The rise of the web was more confusing as big production companies built their own product-marketing websites to create direct-to-consumer channels in direct competition with the BBC branded channels CBeebies and CBBC. So you had [Postmanpat.com](http://Postmanpat.com), [Rastamouse.com](http://Rastamouse.com), [Charlie&Lola.com](http://Charlie&Lola.com), [Chuggington.com](http://Chuggington.com) sitting side by side with [bbc.co.uk/cbeebies](http://bbc.co.uk/cbeebies) - the official BBC home of those properties.

The main driver for this came not from a desire for direct digital revenues but a need to communicate B2B and B2C messages about traditional franchise extensions and sustain audience loyalty when the BBC push for these shows had waned. This was particularly evident as funding models became more complex and producers needed to find new ways to compensate for reduction in fully-funded budgets. In the main, the only people who could afford to create their own .com sites were the bigger companies like HIT, DHX, Tiger Aspect etc.

Although it was not always immediately clear to the user which was commercial, the BBC's search rating normally won through, which meant that the audience would tend to find BBC sites before the commercial ones. The BBC also encouraged producers to be transparent about their sites if they expected a link from a BBC site. This however, was never formulated as a policy.

But the dramatic rise of mobile, and the supporting app stores have attracted far greater attention from the commercial teams charged with monetising these brands (BBC Worldwide included). And as a result the previous conventions seem to be being eroded unchecked.

Across the board, well-known children's brands associated with the BBC are now incorporating promotions to their Facebook and YouTube channels, seemingly unaware that these are, by their own terms and conditions, not appropriate for younger children. We would like to see the BBC take a more pro-active role in educating their partners about what constitute best practice.

The Corporation needs to lead by example, and should set clear policies of the standards it expects from its suppliers and distributors – BBC Worldwide included.

We are particularly concerned how the BBC fudges the distinctions between its public service and commercial sites.

<http://www.teletubbies.co.uk/> ranks number 1 in Google and gives the impression it is the official home of the Teletubbies. Hidden in the footer (rather than a public message at the top of the screen) is the pink and purple logo of BBC Worldwide.

Elsewhere, Facebook pages for BBC Kids <https://www.facebook.com/bbckids?fref=ts>, created by BBC Worldwide around a channel proposition in Canada, appear to be suggesting Facebook is appropriate for children.

For the most part, the BBC's foresight to get on the web early, their massive inventory, and strong tagging has meant they dominate search and the Google search returns are sufficiently distinctive that few parents are left confused. However, a clear and consistent policy would be preferable.

## **Mobile**

With the advent of mobile media a new series of questions emerge.

BBC public service brands have been left behind in the apps "land-grab". The browser-based mobile offering is very limited and there is no official Children's presence in any of the app stores. Over time this will damage the BBC's brand awareness and audience loyalty.

There are, however, already many freemium and paid-for apps in the app stores that give the illusion of being official BBC offerings.

Under CBBC and CBeebies you can download:

- *CBeebies magazine* (from BBC worldwide) that is free but is basically a sample, encouraging you to buy the full issue at £2.99
- *In the Night Garden* - carries the purple BBC logo - at £1.49. There is no real explanation in the app store.
- *Guess with Jess* – this also carries no explanation that it is commercial and therefore different from the show delivered on CBeebies.
- Search CBBC and there's *Storytap* an app based on Mr Tumble's *Tumble Tapp*
- Search any of the content brands individually and you will find any number of commercial or freemium apps.



Since the app market has demonstrated it is possible to make digital revenue from purchases, more and more children's properties are migrating to the app space with mixed business models, the most lucrative of which at the moment seems to be freemium. Freemium, where free entry-level activity is subsidised by premium aspects later in the experience, is a well-understood phenomenon in the app market, but easily abused. But, as press coverage and the recent report from regulator PhonePay Plus reveals, ethical best practice in this space is anything but the norm.

These two problems (lack of presence, and the rogue nature of the market) come together to create an opportunity for BBC Children's.

For BBC children's digital properties to remain relevant in the mobile space, the BBC has to take a decision to develop its mobile and Apps presence. This will require budgetary support. At the same time it should take a much stronger lead and set the gold standard of what is and isn't acceptable. This should include developing a more defined and formal relationship with commercial franchises of its sub-brands (especially BBC worldwide).

The BBC should also re-evaluate its position on freemium. If the BBC rejects this business model but then cannot fund mobile products sufficiently, then the BBC brand will be eroded anyway. The concept of subsidising the Licence fee with commercial revenues is long established. As Freemium becomes the norm it's time to re-assess the public service/commercial boundaries using tried and tested principles but in the new circumstances.

This would be timely, as there are no accepted standards in the industry for freemium relating to kids. Setting a new standard for transparency and clear guidelines would follow the BBC's online tradition of taking a lead in the provision of services rather than waiting for the market. An App could be downloaded as a free, public service offering, and at the point where free becomes premium, there could be clear messages about, and best possible practice for parental control over, the move to a paid-for service. This is only marginally different from the old model of a walled garden for the BBC public service website, with messages to indicate when children were moving across to linked commercial sites. It's just that this message would occur within the app.

The BBC already operates the freemium model across platforms: TV is free but you pay for the t-shirts, plush toys and books. As everything becomes more connected it's only a matter of time before these models get applied to digital products too. The BBC could be leading audience awareness rather than appearing to be burying its head in the sand and losing its relevance in the process.

### **Data**

The CMF has been given permission to share the following data available from the CHILDWISE Monitor Report 2012-13 for 6-12s for favourite website (spontaneous). Children were interviewed using an online questionnaire, via schools across the UK.

YouTube and Facebook still dominate, though less so, and both are mainly popular with the top end of the 6-12 age range.

Below are the 6-12 figures, in total, and separately for boys and girls (based on all who go online):

	<b>Total 6-12s (875)</b> %	<b>Boys 6-12 (429)</b> %	<b>Girls 6-12 (446)</b> %
YouTube	12	13	11
Facebook	9	8	11
Moshi Monsters	7	3	10
FRIV	5	6	5
CBBC	3	3	3
Minecraft	3	6	1
Bin Weevils	3	2	4
MoviestarPlanet	3	0	6
Google	3	3	3
Miniclip	2	2	1
GirlsGoGames	2	0	3
Twitter	2	1	3
CBeebies	1	1	0

For the younger age group, we have figures for 5-6 year olds from the CHILDWISE Monitor Report 2012-13, and for 0-4s from the Monitor 2012 Pre School Report (both sets of data based on all who go online – very few under 2s). For the 0-4s, Childwise surveyed mums. For the 5-6s, children were interviewed face to face via schools – quite a high proportion said that they didn't know / didn't have a favourite.

	<b>Age 5-6 (141)</b> %	<b>Age 0-4 (46)</b> %
CBeebies	10	61
FRIV	8	-
CBBC	4	7
Moshi Monsters	4	-
YouTube	3	11
Google	3	-
Dressupgames	3	-
Cartoon Network	2	-
Disney	-	4
Milkshake	-	4