

Review of CBeebies against Conditions and Commitments

March 2004

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Section 1: Introduction

1.1 Summary of channel proposition

CBeebies launched in February 2002 as a dedicated pre-school channel, stimulating young children with a playful approach to learning. The channel is largely made up of UK/EU programming and is designed to address a market dominated by channels offering little beyond US acquired animation, even if re-voiced or re-versioned for the British audience.

The philosophy of “learning through play” is reinforced with the values of quality, trust and safety delivered by the BBC. CBeebies offers high quality, original content that is largely developed and produced by pre-school specialists, and linked to the Foundation Stage curriculum.

CBeebies is an important part of the new digital portfolio strategy for BBC Television. It was launched to extend, deepen and enrich children’s viewing from the BBC beyond that offered on BBC ONE and BBC TWO, and to build on the success of CBBC on Choice. The BBC is committed to driving digital take up, and CBeebies plays a critical role in that objective.

The Secretary of State granted approval for CBeebies in September 2001, following an extensive industry consultation process in which it was well supported. When the DCMS approved the new BBC digital services in September 2001, Tessa Jowell commented:

“...In particular, I believe the new stations for children offer the hope of a new golden age of children’s programmes; a real national asset which will become a lasting legacy for children and their parents.”

Approval was given on the basis of a set of conditions. These conditions, and the commitments made by the BBC as part of the approval form the scope for the channel which would be distinctive in the following ways:

- A unique mix of education and entertainment
- A high degree of new EU/EAA programming
- An interactive core to the channel
- Freedom from commercial advertising

The structure of this document is designed to address these commitments in a methodical way.

Section 2 deals with the commitments that relate to how the channel is delivered at an overall level. This includes commitments relating to standards, programme mix, target audiences and its relationship to other BBC channels.

Section 3 addresses the commitments at a more detailed level, mainly relating to programming. This includes levels of original programming, genre mix and new media.

Section 4 refers to the contribution of the channel to the UK broadcasting industry.

Section 5 explores the challenges that CBeebies faces over the coming year.

Data is provided for the first year since launch (Feb 02 to Feb 03), full year 02/03 data (Apr 02 to Apr 03) and year to date activity (up to November 2003).

1.2 Top line performance to date

Performance against consent

CBeebies has met almost all the conditions and commitments set out by the Secretary of State and the BBC at launch, with the following principal exceptions:

- The condition that 'the launch of CBeebies should not be developed at the expense of programmes catering for this age group on BBC ONE and TWO' has been compromised by a small reduction in the hours of pre-school programming on the analogue channels in the first year since launch. This was caused by changes to scheduling such as the Iraq War and increased parliamentary coverage, not by the launch of the new digital channel. In the second year however, the hours of pre-school programming on the analogue channels have increased by more than 30% to 668 hours with new dedicated pre-school slots on both BBC ONE and TWO. Section 2.4 covers this in more detail.
- CBeebies has so far been unable to carry information for parents/carers on its unique interactive enhanced text service. However the same information has been offered to date on-line and the interactive services will be operational in 2004/5. Section 3.4 covers this in more detail.
- The higher than expected costs of co-production have made it difficult for CBeebies to meet the commitment requiring that the channel invest directly in animation co-production. However, the alternative approach of pre-buying has delivered excellent results and in a way that both supports UK animation and provides better value for money. Section 3.6 covers this in more detail.

Audience Performance

CBeebies has enjoyed outstanding success. It is the most watched children's channel, reaching nearly a million viewers each week (902,000) and taking a 6.8% share of the children's digital universe. Its average audiences were 41,000 in November 2003. CBeebies ranks first in terms of reach and share against all other pre-school channels.

The channel is seen as distinctive compared to other pre-school offerings because of its UK-based programming and educational value. The BBC brand also conveys a trusted viewing environment for young children and parents.

The top performing programmes based on average share demonstrate the variety of the offering and the way in which CBeebies continues to push the boundaries for pre-school children. The channel premiered the first pre-school drama, *Balamory*, which had an 8% share and received critical acclaim. *Tikkabilla* revived the much loved magazine format of *Play School*, with every show being a journey of discovery and learning, receiving a 7% share. *Smartenies*, a "make and do" art show, became the number one performing programme on CBeebies with 9% share (in digital homes containing children over 4 years old). *Fimbles*, (7% share) the third CBeebies landmark show, centres on a magical valley, supporting and encouraging learning.

The channel has received critical praise; forming an important part of the BBC's digital portfolio and improving the market offerings:

"CBeebies is a merit good: a socially desirable item that the market would not provide by itself." John Gapper, chief business commentator and associate editor, Financial Times

"The launch of CBBC and CBeebies...are arguably the BBC's most successful use to date of its increased channel capacity". Emily Bell, Guardian, 21.10.02

"CBeebies is fantastic, educational and I don't have to supervise them while they're watching." Nikki, Mum aged 37. South England.

The interactive service is available 24 hours a day, via the Sky platforms. This service had 45% awareness in Sky households at the end of year one and in November 2003. Usage in November 2003 was 14%. CBeebies also has a very successful website. Year to date data shows the site had 1.1m unique users in November 2003, with over 77m page impressions.

2.1 Standards

The Secretary of State required that "high general standards in all respects (and in particular in respect of content, quality and editorial integrity) be maintained in relation to each service".

All the new digital TV channels are expected to meet the editorial standards of the BBC. They are overseen by the Director of Drama, Entertainment and CBBC and are managed by the Controller, CBBC. All new staff go through the BBC's Upfront induction course to familiarise themselves with BBC standards and procedures, including the Producers' Guidelines, ensuring editorial integrity.

The quality of the channel is confirmed by its success in the BAFTA awards. *Bob the Builder Special – A Christmas to Remember* won the Children's BAFTA for Animation in 2003; and the channel dominated the pre-school live action section with two nominations for *Balamory* and *Fimbles*. In 2002, CBeebies won the BAFTA Children's Pre-School award for *Teletubbies Everywhere*.

The channel has also generated enthusiasm from audiences and press alike, in delivering consistently high quality programming across a variety of genres:

"There isn't another channel around with such good quality programmes and such a variety of programmes to keep the children interested. It works!" Mum, North England

Children's television improved considerably [in 02] in terms both of quantity (with the launch of two new BBC digital channels, CBeebies and CBBC) and quality". Graham McCann, *Financial Times*, 18.12.02

"Most programmes on the channel are interesting and thought provoking, they use good language" Louise, Mum aged 48

"They have nice programmes that teach children values as well as the creative stuff." Linda, housewife, South England.

Source: Vox Pops International, December 2003.

This success has been recognised by the industry and viewers alike:

"CBeebies has provided the viewing public with a lively, high quality, and focused channel for the young viewers of the UK and they have responded by supporting it whole heartedly on a daily basis. In fact in some homes, when the very young

children want the TV on they say, 'CBeebies on! CBeebies on!' instead of 'TV on', This is indeed a testament to its success."
Iain Lauchlan, Joint Chief Executive of Tell-Tale Productions

In addition, CBeebies programmes, across almost all output support the six areas of learning in the Government Foundation Stage curriculum.

2.2 Target audience

The Secretary of State stated that CBeebies is to be aimed at children under six years old.

CBeebies is targeted at children aged five and under, and importantly, to parents and carers as well. There are approximately four million children of this age in the UK with 68% of 4-5 year olds having access to digital TV.

Our library of information on the CBeebies target audience is limited compared to our knowledge of other audiences, as it is hard to assess the views of children under six. This makes it difficult to understand media consumption habits.

CBeebies ran a qualitative survey three months after launch among 4,000 people who regularly look after young children aged five or under in a home environment. This showed that within four months of launch, 89% of parents or carers with children under five had heard of the CBeebies brand, rising to 91% amongst those with digital television.

The Pan BBC Tracking survey shows CBeebies has the highest awareness of all the digital children's channels amongst parents of pre-school children, at 76% in November 2003, compared to 62% for Nick Jr and 66% for Disney. This increases further for these parents in digital homes, where CBeebies has an awareness of 88%, compared to 74% for Nick Jr and 80% for Disney¹.

In September 2002, a qualitative research project amongst regular CBeebies viewers showed that the BBC had created a hugely successful pre-school brand watched with pleasure and endorsed unreservedly by parents and carers. The philosophy of "learning through play" is at the core of this success, and the channel delivers interactive, educational, behaviour-enhancing, broad-based entertainment more comprehensively than any of its competitors. [Source: CBeebies Qualitative Review by BBC/Quaestor Research & Marketing Strategists. September 2002].

¹ Source: PBTS Face to Face Jan 2002 – Dec03

2.3 Programme Mix/ Schedule Structure

CBeebies offers a range of pre-school genres across its output, either within 'magazine' formats or through single-subject programmes. This is examined in more detail under section 3.3, Genre Mix.

Programming is supported and enhanced by CBeebies' unique presentation style using a family of dedicated pre-school presenters. Simplicity and consistency underpins the CBeebies channel schedule as pre-schoolers need routine and habit in their daily lives. However, occasional themes such as *Sing-a-Song Week* and *Tweenies Fun Day* inject energy and fun into the schedule and are fully supported by online, interactive and on-air activity. Importantly, all CBeebies programmes support the six areas of learning in the Government's Foundation Stage curriculum: maths, language, literacy and personal, social and emotional development.

Broadcast hours for CBeebies are 0600 to 1900. The CBeebies' weekday schedule consists of a four hour block that repeats three times a day followed by the Bedtime Hour between 1800 and 1900. Key titles play on the hour, every hour so they are easy for viewers to remember and find. The schedule is mood driven, recognising the daily patterns of a young child's life and the presentation links reflect the time of day. The Bedtime Hour contains calmer programming and a bedtime story read by a celebrity.

At the weekends, the channel first offers a four hour block aimed at very young children, repeated and then followed by an older block for three to five year olds. This is to appeal to children at the different stages of pre-school development and also to ensure complementary scheduling on BBC ONE, BBC TWO and The CBBC Channel.

2.4 Relationship with BBC ONE and TWO

With regard to the role of the channel within the BBC TV portfolio, the conditions state that CBeebies "must not be developed at the expense of programmes catering for this age group on BBC ONE and BBC TWO".

Overall, the number of children's programme hours broadcast on the analogue channels has remained stable since launch with 1895 hours broadcast 2001/2002 (actual hours) and 1916 hours broadcast in 2002/2003 (actual hours). This is forecast to rise to 2145 hours in 2003/2004 (forecast based on slot duration) with regular slots on both channels.

Contrary to the commitment above however, CBeebies saw a decrease of approximately 80 transmitted analogue hours from 587 hours in 2001/2002 to 505 hours in 2002/2003. This was not due to the launch of the new CBeebies channel but because of an increased time allocation on BBC ONE and TWO for Parliamentary coverage, the War in Iraq, and an overall rationalisation of the CBeebies and CBBC Zones on ONE and TWO from launch. This "rationalisation" included solidifying slot allocations and moving Bank and other holiday (e.g. Christmas) children's timeslots from BBC ONE to BBC TWO to simplify navigation across the portfolio.

Pre-school programming on the analogue channels **increased in 2003/2004 (YTD) by more than 30%** to 668 hours with new pre-school slots on BBC ONE and TWO, including titles *The Shiny Show* (series 2), *Tikkabilla* (series A), *Balamory* (series 2) as well as first plays of some acquired titles including *Boo!* and *Little Red Tractor*. CBeebies has not therefore been developed at the expense of programming for this age group on BBC ONE and TWO. Indeed those channels have benefited from the extra investment in new programming which CBeebies has made by being able to show new programmes made for CBeebies.

Reach and share amongst children has remained relatively stable on BBC ONE and TWO, although a slight decline can be seen, more so on BBC TWO. This is partly due to a change in the BARB panel at the start of 2002 which had an impact on data across the board. In addition, this is attributable to the high rate of take up of digital amongst homes with children over that time period. In January 2001, 35% of children were in digital homes but in January 02, this had increased to 52%. As seen above, in 2003, young children have the highest rate of take up of digital television in the UK, with penetration amongst 4-5 year olds at 68%, compared to 56% for all individuals with multi-channel.

Reach on BBC analogue channels pre and post launch of CBeebies

%	2001		2002		2003	
	000's	%	000's	%	000's	%
BBC One	(7,302)	80%	(6,063)	66%	(6,974)	76%
BBC Two	(6,489)	71%	(4,947)	54%	(5,209)	57%

Source: BARB Average weekly reach figures for 4-15's, based on 15+ consecutive minutes.

Share on BBC analogue channels pre and post launch of CBeebies

	2001	2002	2003
BBC One	21.8%	20.3%	19.9%
BBC Two	12%	11.3%	9.6%

Source: BARB average share data Jan 01 – Jan 03, 4-15's.

The pre-school programming on the analogue channels is branded CBeebies to maximise the impact of the brand. These zones on BBC ONE and BBC TWO provide a critical link between terrestrial audiences and the enriched digital television service that CBeebies offers.

CBeebies on ONE and TWO showcases the "best of" the CBeebies digital channel content offering. Talent is developed across both platforms and is not mutually exclusive.

Section 3: Assessment of CBeebies against conditions and commitments relating to what the channel delivers at a lower level

3.1 Distinctive Remit

The Secretary of State's conditions state that CBeebies "will maintain a higher level of educational programming than its competitors". The BBC commitments stated the channel would deliver "a range of new, high quality, UK-produced educative and entertaining programmes for young children. Available all day, the service will provide a consistently safe environment. They will be available free and will not carry advertising."

CBeebies' distinctive proposition is achieved through a range of areas:

- Its unique mix of education and entertainment
- A higher level of educational content than competitors
- A learning through play approach
- The significant amount of UK/EU original programming
- The consistently high quality programming
- The use of the BBC archive
- The safe, trusted environment
- No commercial advertising

The channel offers a **unique mix of education and entertainment** content, which is **available free to air** on all digital platforms. Education forms the core of the CBeebies channel proposition; its philosophy is "learning through play". Content is largely developed and produced using pre-school specialists; and almost all CBeebies programmes support the six areas of learning in the Government Foundation Stage curriculum – including personal, social and emotional development; communication, language and literacy; mathematical development; knowledge and understanding of the world; physical development and creative development.

Indeed, these are all sometimes covered within one broader magazine programme. This distinctive offering is valued and recognised by audiences and press:

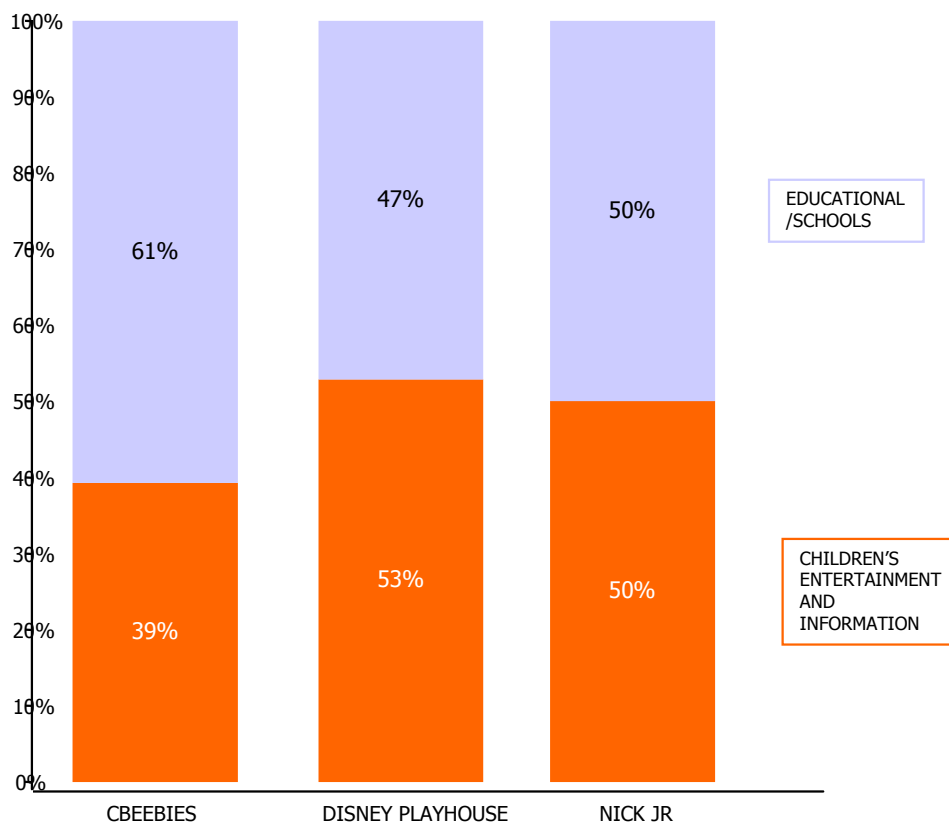
"I agree it is of a very high quality with high learning and educational content. Programmes are designed to keep children stimulated." CBeebies viewer, London.

Source: trbi, Into Everything Top 40 Research, December 2003.

"CBeebies, a delightful free channel providing 12 hours of educational and morally sound toddlers' programmes every day". Jackie Kemp, The Herald, 10.9.03

The channel delivers a **higher level of educational programming** than its competitors. CBeebies delivered 61% educational/schools programmes in May 2003, compared to 50% for Nickelodeon Junior and 47% for Playhouse Disney.

UK PRESCHOOL THEMATIC CHANNEL OUTPUT BY TYPE – MAY 2003



Source: Mark Oliver Economic Impact Work, Jan 2004

"We would choose to watch CBeebies over everything else. It has higher educational value because it's well researched – delivers what pre-schoolers need. It's about having fun as well, it's about learning through fun". Nikki, Mum aged 37. South England ¹

"CBeebies is better than other channels, because of the variety of programmes and the broad spectrum, they're more educational." 36 year old part time mum from South England ¹

Importantly, on CBeebies the **learning is done through play**, rather than in a formalised, educational environment:

CBeebies is seen as offering a type of 'edutainment' widely considered both suitable and attractive for little children. Sue Palmer, Education Adviser

"It's stuff they can do and understand. Sharing, numbers, colours, teach them. It covers most aspects – they are learning without them knowing it. To explain to a child is hard, but when they watch they pick it up on TV." Shelly, childminder aged 39. ¹

This informal style of learning ensures that CBeebies can affect previously hard to reach audiences.

"The most impressive feature of CBeebies in my view is that it seems able to reach the homes of parents and child-minders who do not buy books. There is much work to be done at present in developing linguistic and social skills in preschool children and good children's television – appealing to children and parents – can penetrate to parts that government agencies such as Sure Start often cannot reach. As more families and nurseries acquire Freeview, the potential to extend the 'edutainment' function of CBeebies seems immense." Sue Palmer, Education Adviser

The channel delivers a distinctive offering in the market through its **UK/EU based original programming**. Around 95% of programming is made in the UK/EU and c. 80% is originated content. This is explored in more detail in Section 3.2 originated programming and Section 4.1 UK/EU production. Research has shown that audiences value this part of the offering:

"They all speak properly and there are no strong American accents which the kids are imitating." CBeebies parent. ¹

"I wouldn't let him watch Cartoon Network – its just too American, too awful, too crazy, too busy, we don't like at all – we like a nice, easy pace." Mandy, Tutor, aged 36 ¹

It's very English, the US has such a different way of doing things. Everywhere is Americanised. The slang, the language and attitude isn't appropriate and ends up coming out in the children." Lisa, housewife, aged 36 ¹

Source: *Vox Pops International, December 2003.*

CBeebies continues to push the boundaries for pre-school children, with **high quality programming**. Programmes are interspersed with live presentation links, delivered by a range of engaging and diverse presenters. Children are encouraged to participate in the channel's output and interact with programmes. The channel offers a range of pre-school genres; from storytelling to music and movement or simple science to animation.

It's got a fantastic range of programmes, the kids like the musical bits and I like the educational bits. It's just the variety they have." 36 year old part time mum from South England.

Source: *Vox Pops International, December 2003.*

The schedule is completed with some output from the **BBC archive**. Landmark shows *Teletubbies* and *Tweenies* continue to be hugely successful, whilst the channel has delivered a range of new, equally popular strands such as *Balamory* and *Tikkabilla*. Since launch, the channel has received acclaim from critics and audiences over the quality of its output:

Catherine Bennett, television critic at the Guardian wrote on 17.7.03:

"A regular viewer tells me that, supposing she had to pay for it, the sublime trio of Balamory, Tikkabilla and Storymakers would alone justify the licence fee, for they not only amuse, she believes, but instil an early sense of all the good and intelligent things television can do"

CBeebies, through the BBC brand also provides a **safe, trusted environment** for young children to develop:

"...Over the past year children's TV has also provided parents with peace of mind thanks to CBeebies, the BBC's hugely successful pre-school channel. Gautam Malkani, Financial Times, 14.1.03

"I know that everything is completely safe and there's no violence" Mandy, Tutor aged 36

Source: *trbi Into Everything Top 40 Research November 2003*

Importantly, the fact that the channel **does not carry advertising** is particularly valued by parents and carers:

"You also get too many commercials from other channels that the children always want things from in the supermarket."
Linda, housewife, South England.

"Not having ads, especially coming up to Christmas is a brilliant thing". Susie, aged 38, carer.

Source: Vox Pops International, December 2003.

3.2 Original Programming

The Secretary of State's condition was: "around 80% of airtime must be directed to originally produced or commissioned programming". The BBC commitment was "the channel will offer a rich mix of 90% British programming, a quarter of which will be new material. Just over three quarters of the channel's investment will be in new British programming".

This condition is core to CBeebies and provides the basis for distinctiveness in the marketplace, where much of the programming is US based. CBeebies is committed to offering a high proportion of new programming on the channel.

	Target	1 st Year from Launch 11.2.02 – 10.2.03	Full year 02/03 1.4.02 – 31.3.03	03/04 YTD 1.4.03 – 30.11.03
'All originated' hours		3,778	3,767	2,569
% of Eligible Hours	80%	80%	80%	82%

'New material' hours		1,955	2,030	1,788
% Eligible Hours (1/4 of 90%)	22.5%	41%	43%	57%

New British Programme Investment		£15.2m	£13.1m	£6.3m
% of eligible channel investment	75%	93%	91%	90%

3.3 Genre Mix

The Secretary of State's conditions state: "the service must deliver a mixed schedule of programmes covering music and movement, storytelling, make-and-do, simple science, natural history, puzzle-programmes, as well as animation."

There is currently no formal genre classification system for pre-school output. This is largely because the genre definition is not as clear as for other channels, and importantly because many of the programmes shown on CBeebies incorporate more than one genre, such as the magazine formats and landmark programmes like *Teletubbies* and *Tweenies*. They are likely to cover a range of activities from music and movement to make and do in one afternoon. CBeebies is looking to implement a classification system going forward which will enable a more detailed analysis of genre split on the channel. Instead, programme examples for each genre are provided to demonstrate that all genres set out by the Secretary of State are covered on CBeebies; from music and movement, storytelling, make and do to simple science, natural history, puzzle pictures and animation.

Music and movement aims to encourage both interactivity and listening and to help children acquire an early understanding of musical pitch, rhythm and dynamics. Examples of programmes include *Zingalong*, where Zing and children collect sounds in the environment and use them in a 'join-in' song back at the nursery; and *Boogie Beebies*, a new series which finds inspiration for a range of movements in places like an aquarium, a fair ground, a building site, or spring-cleaning around the home.

Music and movement is also an important element of landmark series. *Teletubbies* has very simple, repetitive moves shown in the dances. Some of the 'tummy inserts' also feature children from the around the world engaged in dance and music activities. *Tweenies* is full of 'jump up and join in' moments, both with the regular Song Time sequences, and often as part of a special performance when 'Surprise Time' is featured. Lastly, *The Fimbles* perform their 'Fimble Dance' on a regular basis, and encourage viewers to join in with other action songs; *Rockit the Frog* is an inherently physical and very bouncy puppet character.

"She sings, dances and joins in with the counting" Lydia,
Mum, North England

"Her favourite is Tweenies, she likes the singing and dancing"
Tina, Mum aged 28 from South England.

Source: Vox Pops International, December 2003.

The Story Makers is a **storytelling** genre programme that provides a rich range of language and narrative. The programme is set in a library and particularly encourages children to contribute to the story-telling process with their own imaginations – a repeated rhyme and the story machine feature before each of the three stories told in every programme. Each episode features three stories, from real children in 'Playbooks', to artwork and animation in 'Blue Cow' stories.

Step Inside introduces children to a rich range of published stories, while *Tikkabilla* includes a story in most programmes. Similarly *Tweenies* has a 'Story Time' section, and many other series are have a strong narrative drive - including *Rubber Dubbers*, *Little Robots*, *Andy Pandey*, *Bill and Ben* and *Clifford* - all these expose children to narrative structures and extended vocabulary.

The Roly Mo Story Show, a new series coming to CBeebies is an extension to the *Fimbles* series and is set in Roly Mo's underground library. There will be two stories in every episode, along with other related activities stemming from a 'busy book'.

The **make and do** genre encourages children to make things, either together or with their parents/carers. In *Fimbles*, for example, Baby Pom makes a card for Florrie, Florrie draws a picture for Fimbo, or Fimbo makes a hoop into a steering wheel for a bus, which leads to interactive imaginative play.

Smarteenies is entirely focused on arts and crafts; and *Come Outside* teaches children to create things. *Tikkabilla* makes a feature of creating its 'makes' in real time so the process is very clear and accessible to follow. *Tweenies* has 'Messy Time' in most programmes, and *Big Cook Little Cook* often includes some artwork as well as a daily recipe.

Emphasis for all these is on interacting with the programme and physical things around them to improve co-ordination and understanding.

"Come Outside is particularly educational, it targets things that children are interested in and shows them how to make them. Smarteenies is very good too, it shows you how to

make different things together” Diana West, 34 year old Mum and aerobics instructor. South England

“Mathew likes Fimbles and Smarteenies. They (the children) interact a lot, especially if they are together. They’ll clap or join in the conversation on the telly.” Simon, Dad aged 35, consultant.

Source: Vox Pops International, December 2003.

Fab Lab is a **simple science** programme, introducing children to the world of science in a fun and accessible way, featuring topics such as changing materials (melting), growing plants, food and body movement. *Big Cook Little Cook* focuses on an age-appropriate and fun daily recipe, including nutrition and food information, alongside the various chemistry processes and food technology involved in cooking.

Tikkabilla and *Tweenies* include environmental stories, processes such as colour-mixing and a look at animals and plants in some of the episodes. Environmental good practice, such as cleaning teeth, hygiene, disposing of/recycling waste etc is shown in a number of series such as *Come Outside*, *Balamory*, *Bits and Bobs*.

Natural history is covered largely through the magazine shows. *Teletubbies* includes a regular guest presenter (Andy) who introduces children to the world around them, such as a range of animals, along with age-appropriate activities like how to use a bird table. In *Come Outside* the very popular *Pippin the Dog*, triggers many of the trips out and about, exploring the world around them. Both *Fimbles* and *Tweenies* include natural history themes and inserts, such as a look at winter, autumn leaves, frosty days, looking after pets, visiting the zoo or vet etc. *Bits and Bobs* also ventures out and about, looking at hens for example and discovering where eggs come from. Lastly, *Big Cook Little Cook* investigates where certain ingredients come from in every programme, including cows and milk, and almonds and marzipan.

Tikkabilla has particularly strong and rich natural history inserts, carefully contextualised by the presenters, and drawing on the rich range of material available in the BBC archives – but packaged in an age-appropriate way. These include giving pre-school children access to marvellous sequences such as those featuring nocturnal animals, animals that fly, yellow/green/red animals and plants, camouflaged animals and plants, and the UK wildlife observed in the large, overgrown garden of two little boys.

Barnaby Bear is a popular puppet character (created in association with the Geographical Association) who explores the **world around him**, from various locations in the UK including his home town in Chester, to further-flung places such as France, Norway and Mexico. He makes contact with young children in the places he visits and sends video diaries to his friend Becky at home. Simple songs and stories enhance learning and develop the imagination. *Open a Door* is another successful example of this genre.

The Shiny Show is an interactive **puzzle programme** that introduces real-world sequences and then asks children simple questions about the content - it is presented by a lively trio of puppets, and always rewards those who tried as well as those who succeeded; Shinyies are the prizes, and they can be anything shiny you have to hand at home or at nursery or play-group! *Boo* invites younger children to guess where Boo is, find their favourite character and extend their vocabulary.

Many series include guessing games and interacting opportunities, such as matching pairs, working out which object has been taken away from a collection of items or guessing a character from a series of clues. Time telling is developed through the *Tikkabilla* clock.

Balamory is the first pre-school **drama** programme, unique to CBeebies. It features real nursery school children together with a range of 'people who help us' characters, and conveys a strong sense of community alongside the various challenges and social interactions experienced by everyone in the dramatised series. Anticipation and prediction are age-appropriate skills encouraged by the show's format and recap sequences.

Animation remains hugely popular with young children. *Bob the Builder*, for example, entertains but also covers a number of social relationship issues, such as taking turns, helping others and caring for other people/characters. Other highlights in this genre include *Clifford*, *The Big Red Dog* and *Andy Pandy*.

It is this range of genres and the high quality programming within them that makes CBeebies distinctive in the market. Audiences value this scope of output:

"CBeebies is not just about cartoons, various programmes are shown." Dad, South England.

Source: *trbi Into Everything Top 40 Research November 2003*.

CBeebies has met its commitment to ensure **archive material** is predominantly *Teletubbies*, *Tweenies* and *Playdays* with the addition of the very best of the BBC Education pre-school library and other favourites (such as *Come Outside* and *Storytime*). New landmark pre-school commissions such as *Fimbles* continue to enhance this provision.

3.4 New Media

The Secretary of State's condition was: CBeebies "must have a strong educational and interactive strand throughout the day, including peak viewing hours; the interactive enhanced text service should be developed as technology allows". The BBC commitment was to "develop a unique, interactive enhanced-text service carrying information for parents and carers, and stimulating stories, games and puzzles for the pre-school child".

Interacting with young audiences on all levels is a critical element of the CBeebies' proposition. Children are encouraged to participate with the channel on a daily basis, from the interactive TV site to the Birthdays slot each day.

The channel developed and launched a **digital interactive enhanced-text service** during the first year, which is available 24 hours a day, across all platforms. This is a unique service in the market and reinforces CBeebies industry leadership. It offers games and stories for children to play and read via their televisions. The site uses the coloured buttons on the remote control to encourage children to interact and learn on a new level. The games and stories are programme related, for example: *Balamory Painting Fun (Colour in with PC Plum)*, *Bob the Builder, Build a Truck* and *Tweenies Storytime*. *Tweenies, Ready to Play* won the British Interactive Award for Home Learning at the 2002 Children's BAFTA awards.

"I introduced it to her (my daughter) and she was really fascinated, and it really got her, so now she knows what to do but I help her with it obviously. But, yeah, it's really good, and she has learnt colours and shapes and things from it"
Mum, Scotland.

Source: trbi Into Everything Top 40 Research, 2003.

This service had 45% awareness in Sky households at the end of the first year, and this was stable in November 2003. Usage at the end of the first year was around 18% (Feb-Mar 03). This fell slightly in November 2003 to 14%.

Whilst the channel has invested heavily to develop an interactive service, which provides an excellent resource for children, we recognise that the text service does not as yet include information for parents/carers as committed at launch. This is due largely to bandwidth restrictions. As a result, the strategic shift has been to provide ample information for parents and carers online, on the

hugely successful CBeebies online site [see below]. CBeebies plans to enhance the 'grown ups' information service on iTV over the coming year, increasing ease of access to the information parents/carers require.

As part of the integrated interactive offering, CBeebies has a comprehensive **online site**. Year to date data shows the site had 1.1m unique users in November 2003, with over 77m page impressions. The CBeebies online site offers content for young children and importantly, for their parents/carers. The majority of CBeebies online content for children is programmes or channel related; whether individual pages or the three stand alone sites for the flagship shows *Teletubbies*, *Fimbles* and *Tweenies*. As with the television programming, all CBeebies online content is underpinned by the six areas of learning in the Government Foundation Stage curriculum. The site offers a vast range of distinctive content, encouraging children to interact, participate and learn.

CBeebies online is very good interactively, it gets them doing an awful lot of things through the computer, not necessarily just playing games... there is a lot of variation there, and a lot of good things for them to be doing with an educational background behind it" Mum, Manchester Source: trbi Into Everything Top 40 Research, 2003.

The *Art Box* site, for example, is based around creative development. This covers a variety of artistic styles such as watercolour to increase a child's awareness of different media. The *Games and Stories* site offers stories presented in such a way that text is highlighted and written simply to encourage young children's emerging literacy skills. Games on CBeebies take inspiration from a learning goal, be it to improve motor skills (Physical Development) or numeric skills.

"Take Bored Little Ones On A Surfing Adventure' The amazing BBC site - is one of the best to steer your children towards. Under the CBeebies [site] for the younger ones, they are sure to find content from their favourite after-school programme - games, puzzles, stories, songs, jokes, competitions, quizzes and much more." Western Daily Press, 2nd August, 2003

The *Grown Up* site provides parents and carers with activity ideas for them and their children to encourage their child's development. The website explains the early learning goals within the Foundation Stage and outlines the means of evaluating performance set out by

the DfES. A variety of activities for parents/carers and children to do together are listed, expressly aiming to further educational skills.

As a member of the steering group for the National Literacy Trust's project 'Talk to your Baby', which exists to alert parents to the pressing need to talk and interact with very young children, I am very much aware of the problem of overuse of television as an 'electronic babysitter'. CBeebies attitude to this problem is a responsible one – programmes invite shared watching with adults, and the excellent resources on the website encourage parent-child collaboration and interaction. There is also much helpful (and very accessible) information directed to parents through the website. Sue Palmer, Education Adviser

The message boards within the site create communities of parents/carers, providing them with a space to share concerns about their child's development and learn from each others' experiences. An adult perspective is provided within many areas of the children's site. *Art Box* for example, has a section called 'Visit It' which provides information for on galleries and exhibitions which are suitable for young children across the UK.

3.5 Peak Hours

*The Secretary of State's condition was: CBeebies "must have a strong educational and interactive strand throughout the day, **including peak viewing hours**"*

CBeebies does not differentiate between peak and non peak, in that the pre-school family schedule is less dependent on traditional time keeping or 'peak hours' than families with older or grown up children. As such, programming **throughout the day**, in each repeated four hour block has a **consistently strong educational strand**. As seen above, almost all programming output has a strong educational element and supports the Government Foundation Stage Curriculum.

Similarly, the online and interactive enhanced text services are available 24 hours a day, ensuring that the channel has an **interactive strand at all times**.

The repeated four hour blocks shown on CBeebies provide great flexibility for different families to access programmes at times that suit their own schedule. The Bedtime Hour from 6pm to 7pm contains calming programming and a bedtime story read by an adult, often a celebrity. The bed time hour is particularly important as a winding down period:

"The best part is the bedtime hour. Every night she sings a rendition of the bedtime song with Dad when he's home from work... tomorrow's a dream away... now its time to sing goodnight" Louise, part time dietician.

Source: Feedback email from audience, BBC log.

3.6 Animation

The BBC made a commitment to "invest directly in animation co-production far more frequently, thereby increasing the number of UK-based projects. A spirit of playful learning will inform the style and content, with strong emphasis on the Early Learning Goals".

CBeebies has had some success with animated programming, highlighted by:

- ✓ the BAFTA award winning special, *Bob the Builder A Christmas to Remember*.
- ✓ *Yoho Ahoy*- Best Animation at Banff 2001
- ✓ Bafta nominated *Boo!*
- ✓ BAA nominated *Little Robots*

CBeebies has, however, failed to meet its commitment to 'invest directly in animation co-production far more frequently, thereby increasing the number of UK-based projects'. Instead since launch, CBeebies has been involved in many animation projects through the industry-standard practise of pre-buying programmes, which meets the same objective more cost effectively.

Pre-buying supports the UK industry by cash-flowing animation projects through the early stages of development and production. This has allowed the channel to deliver excellent value for money to its audiences and at the same time provides the channel with an editorial stake in the content to ensure that the final product is suitable for its audiences and importantly, have a strong emphasis on the early learning goals within the Government's Foundation stage curriculum.

This pre-buy strategy also ensures that CBeebies can work with a wider range and number of animation production companies, thereby spreading out and increasing the investment in the UK animation industry on the whole. Alongside its acquisitions, for 2002 and 2003, the channel pre-bought 12 titles – all of which came from British animators. Without this CBeebies pre-buy investment, or perhaps more importantly the BBC's "stamp of approval", many of these programmes would either not be made at all, or not at the level of quality required to compete with other animated titles outside of the UK.

CBeebies has developed programmes with the following UK animation houses (not exhaustive listing):

- ✓ Cosgrove Hall (*Little Robots*)

- ✓ Hot Animation / Hit Entertainment (*Bob the Builder*)
- ✓ Famous Flying Films (*Koala Brothers*)
- ✓ Abbey Home Entertainment (*Wide Eye*)

Going forward, CBeebies recognises that it must work even harder with the UK animation sector to stimulate and support the next generation of UK animated titles.

Finally, since channel launch, there has been a c. 25% increase in animated programme spend and the channel will continue to invest in animated programming via pre-buys and acquisitions as an effective way of distributing a limited amount of capital amongst the UK animated sector.

3.7 Repeats

The BBC commitment was: "we envisage showing most programmes between 3 and 4 times per day. However, there will be a six-month gap between transmission days".

CBeebies does repeat programming 3 times a day, in line with the four hour blocks, repeated three times a day. This is in order to respond to young children's love of repetition and to ensure families can view the channel at times suitable to them. In most cases, a six month gap is maintained between transmission days.

3.8 Diversity

The DCMS condition states: CBeebies "shall stimulate, support and reflect the diversity of cultural activity in the UK within the defined scope of the service." The BBC commitment stated: "the emphasis is on reflecting the lives of children and their world from a UK perspective".

The **multi-genre offer** found on CBeebies provides programmes that cover a wide array of topics and genres – from storytelling and painting to music and movement. No other children's brand in the UK provides such an extensive range of multi-cultural and diverse programming.

The channel also **reflects the diversity of cultural activity** in modern day Britain. CBeebies works hard to ensure a diverse mix of children and presenters in terms of disability, gender and ethnicity. CBeebies have developed a family of on-air presenters who come from a diverse range of ethnic and social backgrounds, and these channel faces present our audiences with role models they can trust and with whom they can connect. These include, Pui Fan Lee, Sidney Sloane, and Nicole Davies. CBeebies continues to champion diversity in its schedule through its on-air links and programmes like *The Shiny Show* and *Tweenies* which celebrate religious and cultural festivals in an engaging and inclusive style that is unique to the channel. *The Story Makers* rotates through a 'sibling group' of five black presenters over the course of a whole series.

"CBeebies is very good. It has loads of variety, children love it so it's good for me, it's very colourful and there's always loads to see with different nationalities and people from different backgrounds". Shelly, childminder aged 39, South England.

CBeebies introduces pre-school children to different aspects and cultures of their world in an appealing and informative way. For example, *Balamory* reflects the diverse range of cultures in the UK with its portrayal of many underserved audiences and includes disabled and ethnic minority actors. A highlight of ethnic programming was the *Tikkabilla* episode in March 2003 which contained a multicultural piece featuring a 4 year old girl (Tarini Tripathi) and her mum (Gauri) who came to into the studio to perform kathak dancing (Indian animal dancing).

"Programmes like ... CBeebies' Balamory, challenge, inspire and educate in an environment of fun and imagination. This

distinctive relationship between programme and viewer encourages children of all ages and backgrounds to build bridges of possibility in their own lives and beyond.” Diane Louise Jordan, TV presenter, member of the Diana Memorial Committee, Trustee, Children in Need.

3.9 Promoting digital take up

The Secretary of State requires that "the BBC will maintain a vigorous campaign across the full range of its services to promote the uptake of digital television and radio services and equipment generally".

CBeebies has employed a two pronged approach to driving digital take up. Firstly, specific digital campaigns have been carried on all analogue channels, both within the CBeebies analogue programming and adult programming targeted at parents and carers. In 02/03, 16% of CBeebies' marketing airtime on BBC ONE and BBC TWO was dedicated to cross promoting the digital channel. In addition, CBeebies ran three campaigns outside the dedicated pre-school slot, equating to around 175 trails. CBeebies has just launched a high priority campaign, set to run through January covering radio, TV and press advertising. The campaign consists of 800 TV trails, advertisements in *Mother and Baby*, *Baby and You*, *Practical Parenting* and *BBC parenting*. All these carry tags for the digital channel and will help to drive digital take up.

CBeebies employs a "best of" strategy for cross-channel scheduling to help drive digital take up. This sees much of the new CBeebies programming launch on the digital channel. The BBC ONE 15:25 slot showcases current and key CBeebies titles, delivering the best programmes to both analogue and digital viewers via the CBeebies brand. For BBC TWO, new titles move across in stages, approximately 6-12 months after they have premiered on the channel. This way CBeebies ensures that programming is constantly fresh and new year-round while the analogue zones are replenished by the most successful channel brands.

3.10 Audiences with sensory impairment

The Secretary of State's condition states "consideration be given to promoting the understanding and enjoyment of [CBeebies] by viewers with sensory impairments; and that the BBC Governors should monitor the levels of subtitling, signing and audio description provided... and apply to those levels from time to time the same targets which they apply from time to time to existing BBC digital channels"

In line with its role as a responsible broadcaster, CBeebies has more than met this condition. The agreed targets, expressed as percentages of total transmission hours are as follows:

	02/03		03/04	
	Target	Actual	Target	YTD (April to Nov 03)
Subtitling	40%	80.2%	50%	75.3%
Audio Description	4%	4.8%	4-6%	5.7%
Signing	2%	2.1%	2-3%	2%

The Governors monitor these targets and report on them in the BBC's Annual Report

The channel runs two deaf awareness weeks per year (for each deaf charity) and programming is marked with extra editorial and signing during those periods.

Tikkabilla has two wordless comedy sequences (the animated Bonny, Banana and Mo and the slapstick Higgledy House) that work well for children with special needs. CBeebies is developing 16 new 'Something Special' programmes which will use *Tikkabilla*'s Justin Philips and Makkaton signing to support children with learning difficulties. Going forward, CBeebies aims to do more in this area, by incorporating signing into the editorial programmes.

In 2002 CBeebies started a project of research into interactive content for children with disabilities, starting with children who are visually impaired. We have now created two successful pieces of content specifically created for visually impaired children; '*Tweenies Music Maker*' and '*Debbie Duck*'; which have also proved to be popular with entire audience.

Section 4: Assessment of CBeebies against conditions and commitments approved at launch, relating to how the channel contributes to the UK broadcasting industry

4.1 EU/UK production

The Secretary of State's condition states: "around 90% of the output must be made in the EU/EAA". The BBC commitment was: the channel will offer a rich mix of 90% British programming and that almost all the programming will be UK produced".

CBeebies has met this condition at all times since launch. A rich mix of British programming reinforces the distinctiveness of the channel in the digital landscape; with nearly all eligible hours accounting for UK produced material.

	Target	1 st Year from Launch 110202 – 100203	BBC Financial Year 02/03 010402 – 310303	BBC Financial Year 03/04 YTD 010403 – 301103
UK/EU Hours		4,513	4,518	2,976
% of Eligible Hours	90%	96%	96%	95%

"A hugely important consideration in assessing the success of CBeebies is the amount of UK based content on screen. Most other broadcasters rely on a large proportion of their children's output coming from overseas. ... The more content we produce from the UK the more chance we'll have of exporting our shows overseas". Karl Woolley, Managing Director. Tell-Tale Productions Ltd

4.2 Regional production

The Secretary of State's condition was: "a proportion of programme production must be allocated to companies based outside London". The BBC commitment was: "BBC Scotland will be a significant provider of programming, as will the BBC regions and regional independent companies."

The BBC has overarching commitments to levels of regional and production to which CBeebies contributes. Since launch, hours and spend allocated to companies based outside London are as follows.

	1 st Year from Launch 11.2.02 – 10.2.03	Full year 02/03 1.4.02 – 31.3.03	03/04 YTD 1.4.03 – 30.11.03
Regional Production			
Hours - regional	84.5	83.5	35.9
% of Eligible hours	38%	45%	59%
Investment – regional	£5m	£4.9m	£2.4m
% of Eligible Investment	41%	46%	56%

BBC Scotland is a significant provider of new programming. Approximately 30% of programme spend was allocated to Scotland for programmes including *Balamory* and *Zingalong*.

Independent production companies have highlighted the impact of CBeebies on the UK production industry:

"CBeebies' impact on UK production over the last two years has been undeniably positive. ... CBeebies output is distinctive in several ways. It bears all the hallmarks of quality BBC output that has been thought through carefully. Testament to this is the way in which BBC executive producers work with independents. It is a hands on role from script to screen. Producers are simply not allowed to cut corners because at the end of the day they are producing for the BBC, a brand guarded zealously by its executives in my experience." Karl Woolley, Managing Director. Tell-Tale Productions Ltd.

"The arrival of the two new digital channels has been the most significant change in children's broadcasting in more than a decade, as they are the first dedicated channels to be wholly owned by a British broadcaster with a commitment to

supporting British programme content and British production. As well as having the resources to support a significant amount of new and original production, the BBC's channels have a clearly thought through programming strategy, which enables them to commission programming for the full range of children's age groups." Mike Watts, Managing Director, Novel Entertainment Ltd

"Personally, I have been impressed by the care and attention the team at [CBeebies] have put into nurturing our first production for pre-school children, enabling us to achieve a key balance between fun and learning. That's why, as programme makers, we have an important role to play in children's lives in the UK and [CBeebies] is committed to providing diverse programming with an indigenous voice." Vanessa Chapman, Managing Director and Global Controller, Programming and Strategy, Create TV & Film Limited

Section 5: Challenges

CBeebies is a British success story, providing parents and their children with great programmes in an environment that is free, safe and fun. Since launch, CBeebies has benefited from its strong roster of world class children's pre-school programmes, including: *Teletubbies*, *Tweenies*, *Balamory*, *Tikkabilla* and *Fimbles*.

Going forward, the challenge for CBeebies is to refresh and strengthen the offer to its audience through the development of the next generation of ground-breaking programmes that are both educational and entertaining. New programmes like *Big Cook*, *Little Cook* and a new music and movement series to promote fitness, will be balanced with the popular favourites above. CBeebies will continue to invest heavily in UK-originated programming, across a range of pre-school genres, retaining its distinctiveness in the marketplace.

As part of CBeebies' continuing commitment to education, the channel will launch a new literacy series designed to aid the development of speaking and listening skills; and *Something Special* will be aimed at children with learning difficulties, using Makaton signing.

The channel will enhance the 'grown-ups' information on the enhanced interactive text service in the coming year. This will make much of the content now available online, available on the text service, increasing ease of access to the information that parents and carers require. The CBeebies website and interactive television site will continue to offer educative and entertaining content beyond that on screen.

Original animation remains a genre where CBeebies will continue to seek out further opportunities to work with the British animation industry to develop new titles.

Finally, the most important challenge for CBeebies is to maintain the integrity of the brand in order to provide the safest possible environment for the nations' youngest audience.