

# **BBC Trust – ‘Project Canvas’**

## **Analysis of Public Consultation**

### **OVERVIEW and EXECUTIVE SUMMARY**

The BBC Executive has asked the Trust for approval to develop a joint venture proposition that would promote a ‘standards based’, open environment, for internet-connected digital terrestrial and digital satellite television devices, referred to as Canvas. For consumers this would enable subscription-free access to on-demand television services and other internet-based content, through a new broadband connected digital device.

As part of the approval process, the Trust launched a public consultation in order to gather licence fee payer opinions and comments about Canvas. Although responses were accepted by the Trust in hard copy format or emails, this overview considers only those responses received via the web form that was available on the BBC Trust’s website. Furthermore, only replies from individuals have been considered rather than those replying on behalf of organisations which have been taken into account separately by the Trust.

Responses were analysed and compiled by Public Knowledge, an independent research company, on behalf of the BBC Trust, as an input to its review of the proposals relating to Canvas.

The consultation was open from 26 February to 17 April 2009 and 743 people responded to the consultation questions on the Trust website. The following summarises the key emerging themes. A more detailed report of the responses will be made available in due course.

The reader should note that the responses represent the views of those who chose to take part in the consultation and may not be representative of the population as a whole. Respondents were primarily male (80%), White British (87%) and from a broad spread of ages. The majority of respondents received digital TV (90%) and had used the internet in the last month (96%).

**Do you think the Executive's proposal for Canvas is attractive from a consumer point of view?**

- Most respondents agree that in principle the proposals for Canvas are attractive from a consumer point of view, although there were some reservations; these were particularly based on cost, the need for better broadband services and requirement of an additional set-top box.

**Do you think Canvas would be a good use of licence fee money?**

- Around two thirds of respondents think that Canvas would be a good use of licence fee money although some have reservations particularly around concerns that the BBC should continue to focus on its core remit of producing and broadcasting high quality content.

**How important is it that the BBC improves access to its on-demand and online video content in the run-up to digital switchover and the launch of terrestrial HD television? Do you think the proposals for Canvas will help to achieve this?**

- Respondents generally agree that it is important that the BBC improves access to its on-demand and online video content in the run-up to digital switchover and the launch of terrestrial HD television. Furthermore, most respondents think the proposals for Canvas could help to achieve this requirement particularly as it would provide a free-to-air option for consumers and would bring on-demand viewing via the TV. However, some doubts were raised based on concerns about the broadband infrastructure.

**In what ways do you believe these proposals are different from other services or facilities available (or anticipated soon to be available) in the wider market?**

- Two-thirds of respondents highlighted a point of distinctiveness with existing or soon to be available products. Nearly a quarter of respondents think that the main point of difference is that there would be no ongoing charge for Canvas. Around a fifth of respondents, however, do not believe there is anything distinctive about this proposition.

**What effect, if any, do you think Canvas will have on consumption of on-demand TV and radio content (including content that is currently only available through subscription based or paid for services)?**

- Around one-half of respondents think that Canvas will have a positive effect on consumption of on-demand TV and radio content by increasing overall demand and usage, increased choice and increased demand for and quality of subscription services. A smaller proportion of respondents believe that Canvas will have little or no effect on consumption of on-demand TV and radio and only a very small proportion feel that there will be a detrimental effect on existing subscription or paid for services.

**Is Canvas likely to be valuable, attractive, and accessible to all licence fee payers?**

- Respondents tend to agree that Canvas is likely to be valuable, attractive, and accessible to all licence fee payers as long as it is easy to use, well communicated and isn't overly expensive. A smaller proportion of respondents do not agree with that Canvas will be valuable, attractive and accessible.

**Does Canvas have a particular appeal to certain groups of people?**

- Only a small proportion of respondents mentioned whether they thought Canvas would have a particular appeal to certain groups of people. Of those who did, it was felt that Canvas would appeal mainly to either those who are more 'technologically aware', possibly those with broadband or Freeview already and the younger age groups.

**Are there any groups who are likely to be excluded from enjoying any benefits of Canvas?**

- Only a small proportion of respondents named groups which they thought would be excluded from enjoying the benefits of Canvas. These included the elderly, those who are least 'technologically aware', those who would not be able to afford it and those either without any access to broadband or only with access to lower capacity broadband.

**One of the stated objectives of Canvas is to drive take-up of broadband services in households with Freeview or Freesat which do not currently subscribe to a broadband connection. To what extent do you believe the proposal will achieve this objective?**

- The majority of respondents think that the Canvas proposals will help drive take-up of broadband services, particularly in households with Freeview or Freesat which do not currently have a broadband connection at home. However, there were reservations particularly around cost, available broadband capacity, the inconvenience of continual upgrade and set-up help for vulnerable groups of people.

**To what extent do you believe the proposal, as outlined, will contribute to [the delivering digital Britain] public purpose?**

- Around two thirds of respondents think that the Canvas proposals would contribute to this public purpose. Again, reservations were based on broadband capacity, cost and also content.

**Are there any other issues regarding the public value assessment of the Canvas proposals you would like the Trust to consider?**

- A range of comments were provided for this question, with the largest single theme repeating their support of the proposals. Other comments included keeping costs to a minimum, maintain quality of BBC content and concerns about broadband infrastructure