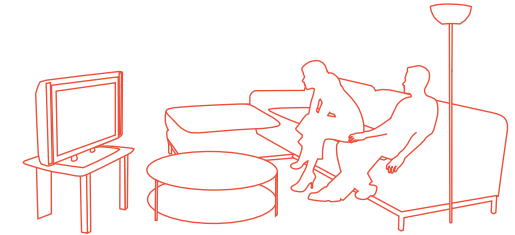


TeleScope

A focus on the nation's viewing habits from TV Licensing



Foreword



Television today creates an environment which is largely imperceptible for the simple reason that we are so immersed in it. This report from TV Licensing, which I am pleased to introduce, makes us aware of this environment by asking the right questions, dividing television into parts to help us understand “what is going on”.

For me, television has three main components; its technology, its content, and its effects as a medium. When my grandfather John Logie Baird famously unveiled the world’s first working television system in early 1926, people were astonished. Although cinema and radio were established by 1926, television still seemed like science fiction. Since that giant leap, technology has never stopped advancing and today we are witnessing faster developments than ever before.

The part of the television industry which makes programmes has found itself in a radically different situation from that of 10 or 20 years ago. Because of new technology and altered business models, this has meant the decline of some programme formats while evoking new ones. A few formats are experiencing a resurgence of popularity. One which comes to mind is “the talent show”, but the main change has been that there are far fewer technical restrictions, and therefore a considerably greater choice of programmes to watch overall.

The medium of television has changed too. In profound ways, television builds collective identities via mass amplification of experience and memory, while influencing individual creativity. It invites us into other worlds so that we may escape the hectic pace of our own. It expands our understanding of the world stage and the roles we can play in it. There is no question television is playing a more central role in our lives than ever.

Iain Logie Baird

Curator of Television at the National Media Museum

Executive summary

How are we watching? What are we watching? When are we watching? Where are we watching?

We're watching more TV than ever and in more ways than ever before – a growth fuelled not just by the emergence of catch-up TV, but by a peculiarly British passion for having the biggest and best TV sets. TV sales have risen over recent years, and we've bought far more than our European neighbours: 43m flat screen TV sets were sold in Britain between 2004 and 2010, compared to 28m in Germany and 27m in France.

'Catch-up' TV services such as the BBC iPlayer are growing in popularity as the number of platforms they can be accessed from increases – with iPad and Android apps the latest new ways to watch.

With these developments, the definition of the TV schedule is starting to blur. Although it has been delayed until next year, could YouView, the set top box that promises to "change the way you watch TV forever", further transform our viewing habits?

Catch-up TV may be redefining the TV schedule, but some programmes will always pull in a big 'live' audience.

The X Factor final was the most watched show in 2010, with 17.7m viewers. In previous years, the chart-toppers have included major episodes of our favourite soaps, *Eastenders* and *Coronation Street*, Christmas specials of our favourite comedies such as *Only Fools and Horses*, and the big football games at the World Cup or European Championships.

They share one thing in common: the ability to get the nation talking. And with 3bn worldwide predicted to tune in to witness Prince William and Kate Middleton marry on April 29, could the top spot on the most-watched list for 2011 already be secured?

Having bought more TV sets, we're making the most of them, watching more hours of TV a week than ever – and up to 12 hours more a week in the winter than the summer.

However, a poll conducted especially for TV Licensing by ICM reveals people are watching far more TV than they realise. The survey found adults thought they watched less than 20 hours a week on average, when official BARB statistics show the average is actually more than 30 hours.

So when are we squeezing in these extra hours? Prime time is still 8-9pm for most people, but catch-up TV appears to have extended TV viewing hours later into the night for many, with BBC iPlayer requests peaking around 10pm. Is the concept of prime time TV threatening to become outdated, particularly among the young?



While the technology now exists to allow us to watch TV on the move, fewer than 0.1% of us are actually doing so. Most prefer to save our TV viewing for when we can kick back on the sofa in front of the box at home, with 89% watching most of our TV from the comfort of our living rooms (and often with a TV dinner on our laps).

And it's clear household growth alone can't account for the rise in TV sales in recent years: rather it seems we're filling up our houses with sets. According to our poll, the average number of rooms with TVs 10 years ago was 1.9 and has now risen to 2.4. By 2020, people think their homes will have an average of three rooms with TVs in them.

But the big question is, will the 10% of men who want a cinema room by 2020 get their way?

It's 20 years since the BBC became the licensing authority responsible for collecting the TV Licence fee from almost every household in the UK. In that time, TV has changed dramatically – not just in the quality and range of the programmes being made but in the many ways people can now watch them. This report aims to reflect the UK's great passion for TV and show that, while much is changing, some things will always remain reassuringly the same: great TV will continue to unite people, providing a unique medium for entertainment, education, information and debate for years to come.

Pipa Doubtfire, Head of Revenue Management, BBC TV Licensing

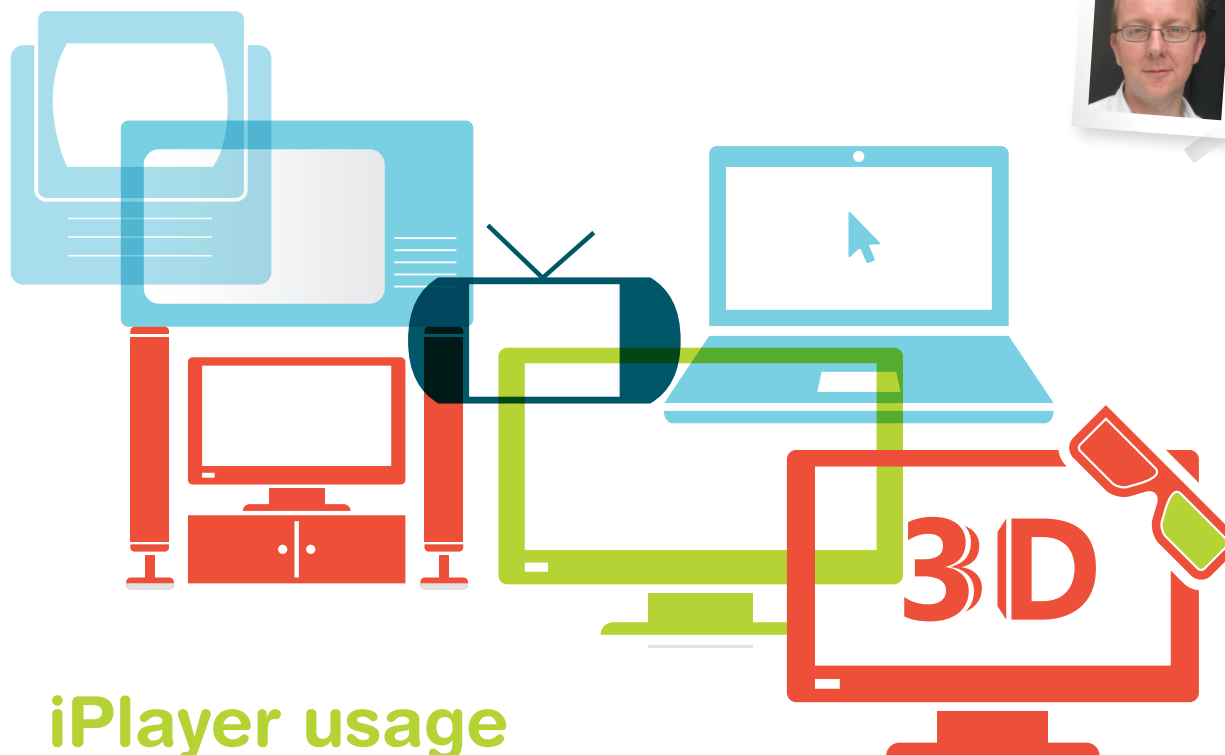


How?

It's a fact that TV is more popular than ever and recent advances in technology mean there are now more choices of how we watch our favourite shows. TV sales have increased, the popularity of catch-up services is exploding and, with the advances in mobile technology, we can now even choose to watch TV on the move. But does that mean a shift in the way we watch TV or simply a growth, given we can access our favourite shows more easily and in more places?

Almost **97%** of households in the UK have a TV set, according to BARB, and sales of TVs have seen significant year-on-year rises over recent years, say market data experts GfK, from **4.3m** flatscreen sets sold in 2006, to **9.8m** in 2009 (dipping slightly to **9.5m** in 2010).

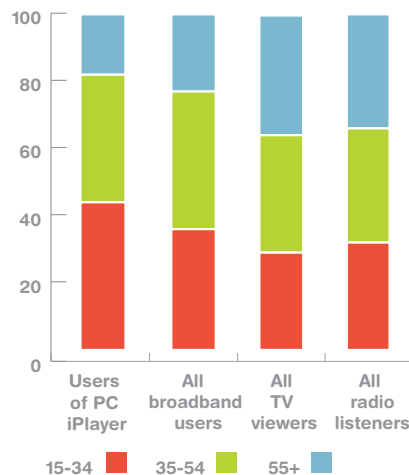
Online catch-up services have seen a huge increase in 2010 - with BBC iPlayer TV programmes being requested online more than **887m** times over the year (in addition to **242m** requests via Virgin Media set-top boxes) and by December 2010 receiving an average of almost **2.9m** online requests per day. This is happening in tandem with an increase in the average number of hours people spend watching on TV sets.



Matt Locke, Head of Cross Platform, Channel 4:

“We’re living in a new world – a place where our audiences see their own lives broadcast to friends across networks like Facebook and Twitter, and where jokes, arguments and love affairs are conducted through comments and responses, likes and retweets, friending and tagging. Broadcasters have probably been a bit slow to create formats fast enough and open-ended enough to reflect the way we live our lives now but it feels like it’s starting to explore what this might look like”

iPlayer usage



Future gazing

So what might the next ten years look like? It's clear TV viewing will continue to become more personalised, with less focus on traditional programmers' schedules in favour of an on-demand culture. Internet-enabled TV sets will become standard, and at the centre of this might be the long-awaited arrival of the next-generation set-top box, YouView, due to launch next year. YouView claims it will "change the way you watch TV forever" by delivering a range of internet catch-up and video-on-demand services from a variety of providers via broadband, with the box's on-screen programme guide going backwards in time as well as forwards.

3D is hailed as the next big thing, and while it is yet to truly break through, **125,000** 3D-enabled sets were sold last year following their Easter launch. If the growth from the last three months continues then sales will reach around half a million in 2011.

So despite all the technological changes, relaxing on your sofa to watch great programmes on a widescreen set looks likely to remain the way most of us will watch TV for a few years yet.

How?

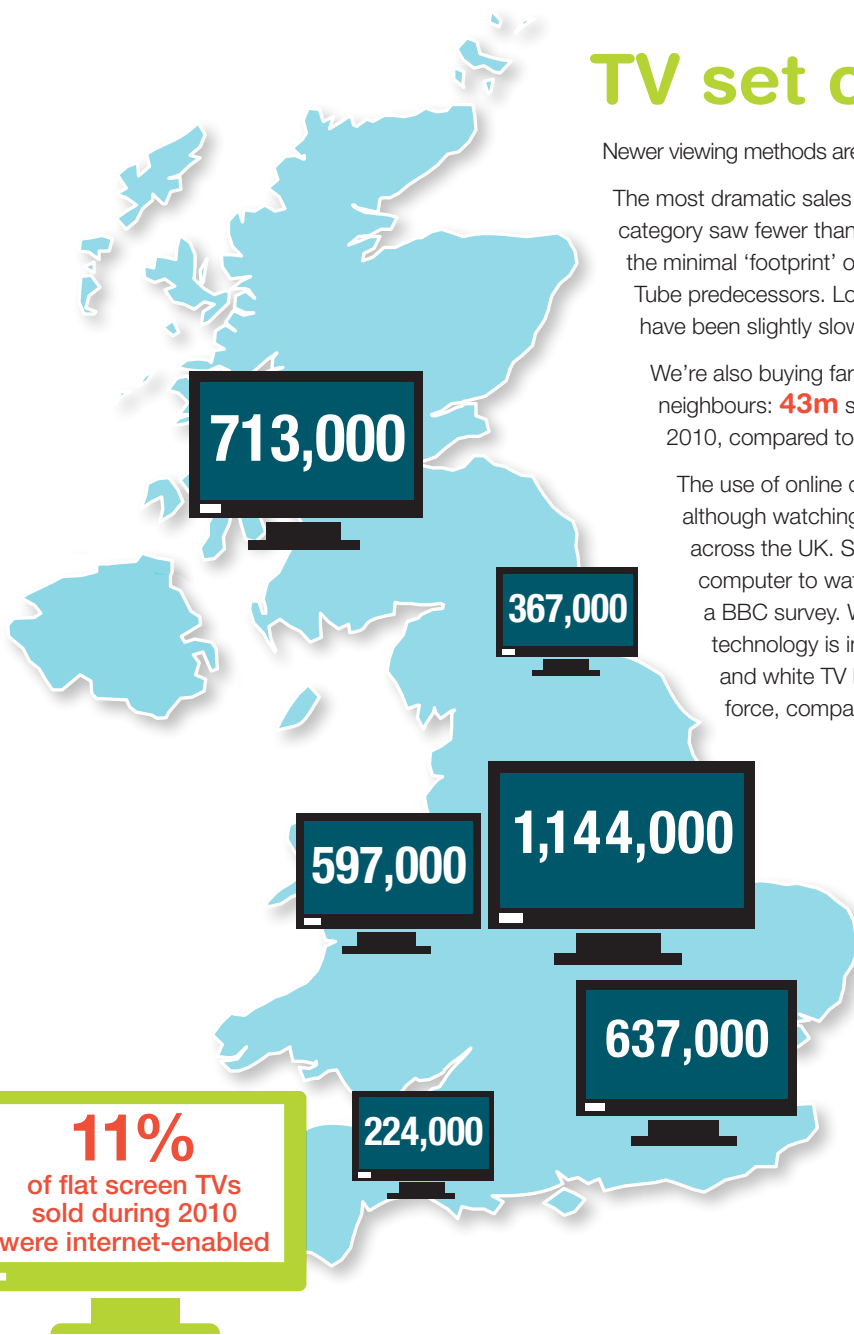
Number of TVs bought in the UK during 2010 by ISBA television region (000s)



London	1625
Midlands	1144
Lancashire	910
Yorkshire	870
Scotland	713
South England	637
Wales and West England	597
Anglia	567
North East England	367
South West England	224

Average hours of TV watched per week by BARB standard regions

Total	
North East	34.7
Border	33.9
Scotland	33.5
North West	32.6
Yorkshire	32.3
Ulster	31.5
Wales & West	30.9
Midlands	29.2
South & South East	28.5
South West	28.4
East of England	27.8
London	27.6



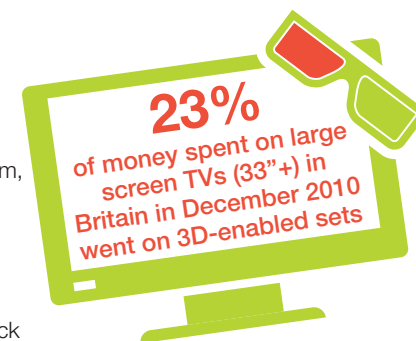
TV set or computer?

Newer viewing methods are gaining popularity, but the traditional TV set still rules - and our sets are getting bigger.

The most dramatic sales increase has been of TVs with screens 40" or bigger. In 2006 this 'super large' category saw fewer than 600,000 sales, but by 2010 had grown to over **2m**. This growth is fuelled by the minimal 'footprint' of flatscreen TVs: they can be bigger, yet take up less space than their Cathode Ray Tube predecessors. London leads the way with these supersize TVs (**35%**), while those in the South West have been slightly slower to scale up (**23%**).

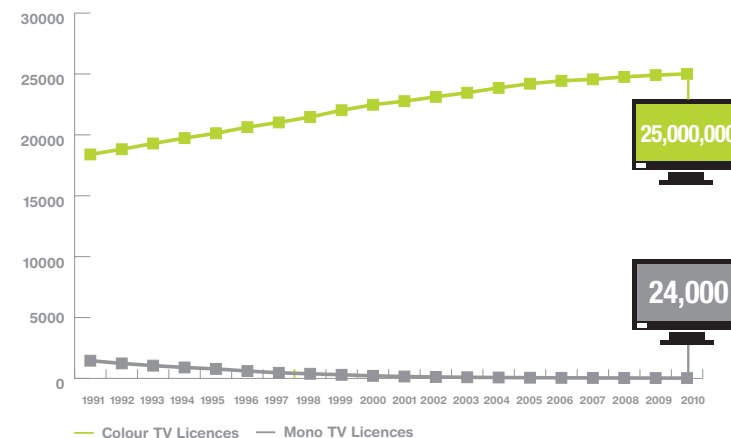
We're also buying far more flat screen TVs than our European neighbours: **43m** sets were sold in Britain between 2004 and 2010, compared to **28m** in Germany and **27m** in France.

The use of online catch-up services has also gained momentum, although watching TV on a big screen is the overriding trend across the UK. Some **34%** of adults say they have used a computer to watch TV using the BBC iPlayer, according to a BBC survey. While the number of those embracing new technology is increasing, the number of people owning black and white TV licences is falling. There are currently around 24,000 black and white TV Licences in force, compared to **25m** with colour licences – up from **18.3m** in 1991.



Colour vs Mono

TV Licences in force (000s) as at March 2010



Top ten programmes of the last six years

What?

The nature of TV programmes has changed in the last decade. Reality, celebrity and live talent shows have begun to dominate the schedules and knock the soaps off the top spot on the most-watched programme lists.

The programmes attracting the largest audiences in 2010 were mainly the big live events: *The X Factor* final was the most watched show with **17.7m** viewers.

Great drama and comedy has also remained a stalwart in the top ten charts over the years – from *Inspector Morse* and *One Foot in the Grave* in 2000, to *The Vicar of Dibley* and *A Touch of Frost* in 2005, to *Doctor Who* and *Downton Abbey* in 2010.

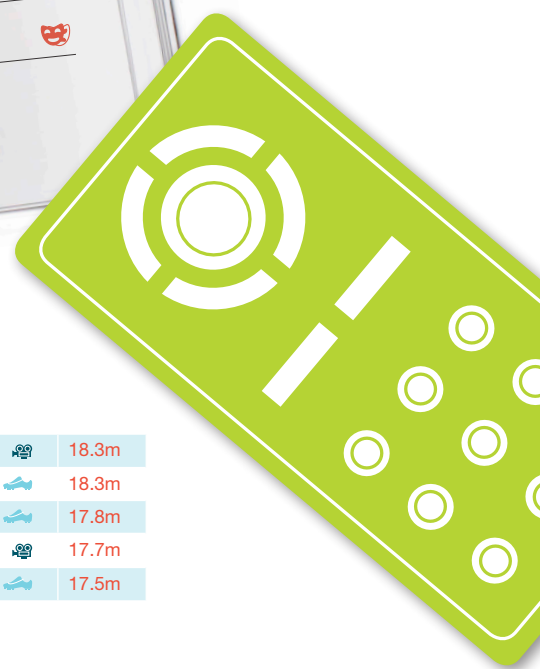
But if you look back over the 10 years, it's clear that less has changed than you might think: whether live talent shows, major sporting events or one-off special dramas, the programmes which pulled in the biggest audiences were those with the capacity to unite the nation and get people talking, fuelling gossip and debate in playgrounds and workplaces across the country.

2010	2009	2008	2007	2006	2005
1 The X Factor Results 17.71m	1 Britain's Got Talent Final Result 18.29m	1 Wallace and Gromit: A Matter Of Loaf and Death 16.15m	1 Eastenders 14.38m	1 World Cup: England v Sweden 18.46m (ITV)	1 Coronation Street 14.36m
2 World Cup: England V Germany (BBC) 17.45m	2 Britain's Got Talent 16.36m	2 The X Factor Results 14.06m	2 Doctor Who 13.31m	2 World Cup: England v Ecuador 16.29m (BBC)	2 Eastenders 14.34m
3 EastEnders 16.41m	3 The X Factor Results 16.28m	3 Britain's Got Talent Final Result 13.88m	3 Rugby World Cup 13.13m (ITV)	3 World Cup: England v Portugal 16.2m (BBC)	Out Of Here! 12.35m
4 World Cup Final: Holland V Spain (BBC) 14.87m	4 The X Factor 14.03m	4 The X Factor 13.77m	4 Coronation Street 13.08m	4 World Cup: Italy v France 13.92m (BBC)	4 The Vicar Of Dibley 11.57m
5 Coronation Street 14.75m	5 The Royle Family 11.74m	5 Doctor Who 13.1m	5 The Vicar Of Dibley 13.08m	5 World Cup: England v Trinidad & Tobago 13.67m (ITV)	5 Emmerdale 11.18m
6 World Cup 2010: England V Algeria (ITV) 14.62m	6 Eastenders 11.67m	6 Coronation Street 13.02m	6 The X Factor Results 12.23m	6 Coronation Street 12.6m	6 Comic Relief: Red Nose Night Live 05 10.94m
7 Strictly Come Dancing 14.28m	7 Doctor Who 11.57m	7 Strictly Come Dancing 12.97m	7 Concert For Diana 12.22m (BBC)	7 The Vicar of Dibley 12.39m	7 Doctor Who 10.81m
8 World Cup 2010: England V USA (ITV) 13.58m	8 Coronation Street 11.46m	8 Dancing On Ice 12.08m	8 Strictly Come Dancing 12.09m	8 Eastenders 12.33m	8 Strictly Come Dancing 10.76m
9 Britain's Got Talent 13.50m	9 Dancing On Ice 11.31m	9 Britain's Got Talent 11.86m	9 The X Factor 11.78m	9 A Touch Of Frost 10.28m	9 A Touch Of Frost 10.28m
10 I'm a Celebrity Get Me Out Of Here! 13.48m	10 Strictly Come Dancing 11.29m	10 Eastenders 11.73m	10 Britain's Got Talent 11.58m	10 World Cup: England v Paraguay 12m (BBC)	10 Little Britain 10.17m



“People are always pretending they don't watch television. Of course they do. Television is the dominant art form in Britain and we should glory in its power to touch the imagination”

Writer and Director, Stephen Poliakoff



- Reality TV
- Sport
- Drama

Top ten of the decade

1	2001	Only Fools and Horses		21.4m
2	2004	Euro 2004 England V Portugal (BBC)		20.7m
3	2001	Eastenders		20.1m
4	2003	Coronation Street		19.4m
5	2006	World Cup England V Sweden (ITV)		18.5m
6	2009	Britain's Got Talent final result show		18.3m
7	2004	Euro 2004 England V Croatia (BBC)		18.3m
8	2004	Euro 2004 England V France (ITV)		17.8m
9	2010	X-Factor Final		17.7m
10	2010	World Cup: England V Germany (BBC)		17.5m

What?

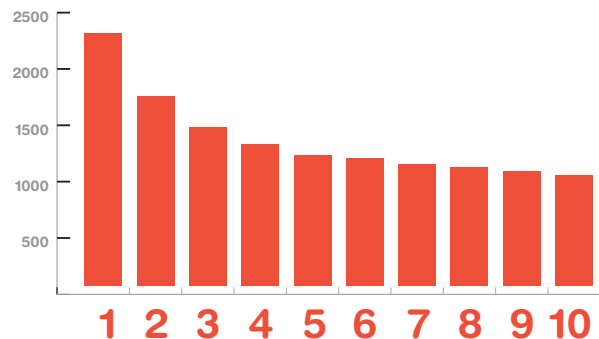


The context of the TV schedule is changing with the introduction of on-demand and internet TV and our viewing habits are evolving as a result.

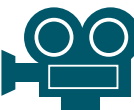
While there are certain programmes people tend to watch live - 'unmissable' moments, such as the upcoming royal wedding or talked-about shows such as *Strictly Come Dancing* - our attitude to drama and factual programming appears more flexible, with this genre dominating our catch-up viewing. The most 'time-shifted' programme on the BBC iPlayer in 2010, somewhat ironically, was Matt Smith's debut as the new *Doctor Who*, with *Sherlock* and *Outnumbered* also in the top five.

The rise of online TV

Top 10 most requested programmes on BBC iPlayer¹ per series in 2010 (000's)



Rank	Programme	Total requests (000s)
1	Doctor Who (The Eleventh Hour, S5, Ep1)	2,241
2	Top Gear (S5, Ep1)	1,680
3	Sherlock (A Study in Pink, Ep1)	1,403
4	Top Gear (S14, Ep7)	1,255
5	Outnumbered (S3, P1, Ep1)	1,157
6	Eastenders Live (19 Feb)	1,130
7	Live at the Apollo (S5, Ep6)	1,076
8	The Apprentice (bakery episode, Ep3)	1,050
9	Doctor Who (The End of Time part 2, Ep2)	1,015
10	Russell Howard's Good News (S2, Ep3)	982



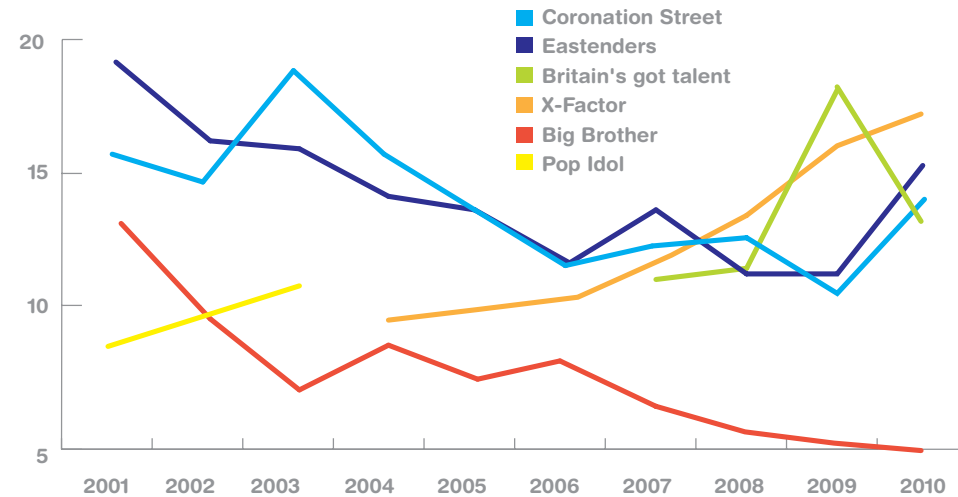
Reality versus Soaps

Back in 2001, when reality TV was in its infancy, *Coronation Street* and *Eastenders* dominated the ratings charts, pulling in **16m** and **18m** viewers respectively for their most watched episodes. The first series of *Big Brother* aired in 2000, and it wasn't until 2001 that *Pop Idol* gave us a first glimpse of Simon Cowell's now infamous deadpan put-downs. By 2005, Cowell's franchise had changed the landscape dramatically and now reality TV challenges soaps when pulling in loyal audiences who never miss an episode.

Sporting events

Major sporting events are capable of uniting millions in front of their TV sets, whether avid fans or not. England's Euro 2004 football games drew an average of **18.9m** viewers, while their World Cup matches in 2006 pulled in around **17m** each. In 2010, over **17.4m** tuned in to watch England lose to Germany in the knockout stage of the competition.

Peak viewing figures for selected programmes 2001-2010 (millions)



When?

Even though the technology is now available to watch TV at work, on our computer or laptop, or even on the move on some mobile phones, this hasn't led to us watching less television in the traditional way.

On the contrary, the amount of TV consumed on TV sets has risen steadily over recent years, from an average of around **25 hours** per week in 2001, to more than **28 hours** in 2010, according to BARB (figures for all ages, including children). The weekly average viewing hours can vary by as much as **12 hours** over the course of the year, with the peak perhaps unsurprisingly always in winter, and the trough always in spring or summer – a pattern which goes back decades.

However, people don't realise how much time they spend watching TV. A TV Licensing/ICM poll conducted especially for this TeleScope report in January this year (during peak TV viewing season) showed the average amount adults thought they watched was just under **20 hours** a week – over an hour a day less than the **30 hours** a week average shown by the BARB statistics.

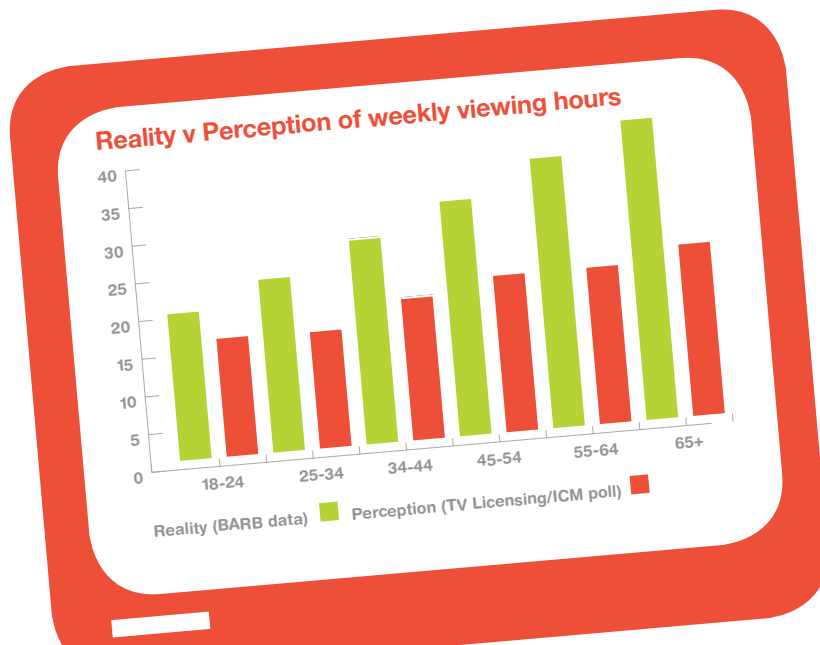
Women watch four hours a week more TV than men according to BARB (**32 hours vs 28 hours**) and underestimate their viewing time more. In our poll, they thought they only watched **21 hours**, compared to **20 hours** for men.

And there are also geographic variations: in our poll, Londoners said they watch the least TV (**19 hours**) while those in the West Midlands are the biggest telly addicts (**22 hours**).



“With the new media landscape everyone has so much choice and we can create our own schedules. But there is still a collective need to share experiences and, more importantly, to talk about them. Our research has shown this is a really important need and TV is an excellent conversation piece. So our group identities can co-exist with our individual identities and preferences and television serves them both in different ways.”

Dr Brian Young, media psychologist, University of Exeter

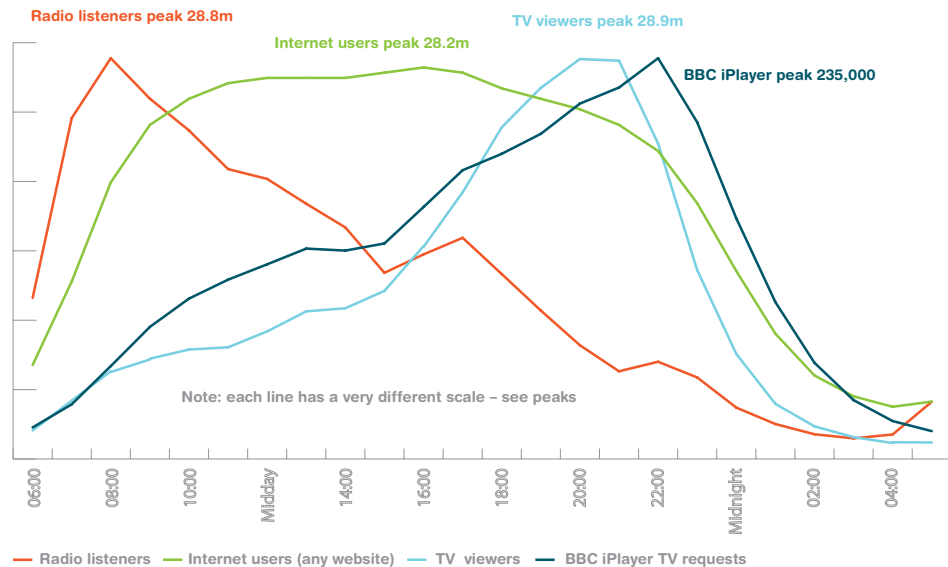


Annie Bradley, 76, from North London:

“I won't have the TV on in the background for the sake of it, but I do often eat in front of the TV as I live alone. My viewing is usually planned around scheduled programmes such as property and cooking, and the occasional drama in the evenings, although I sometimes watch TV at lunchtime too. I never watch TV online, although I do use catch-up services through my digital box.”

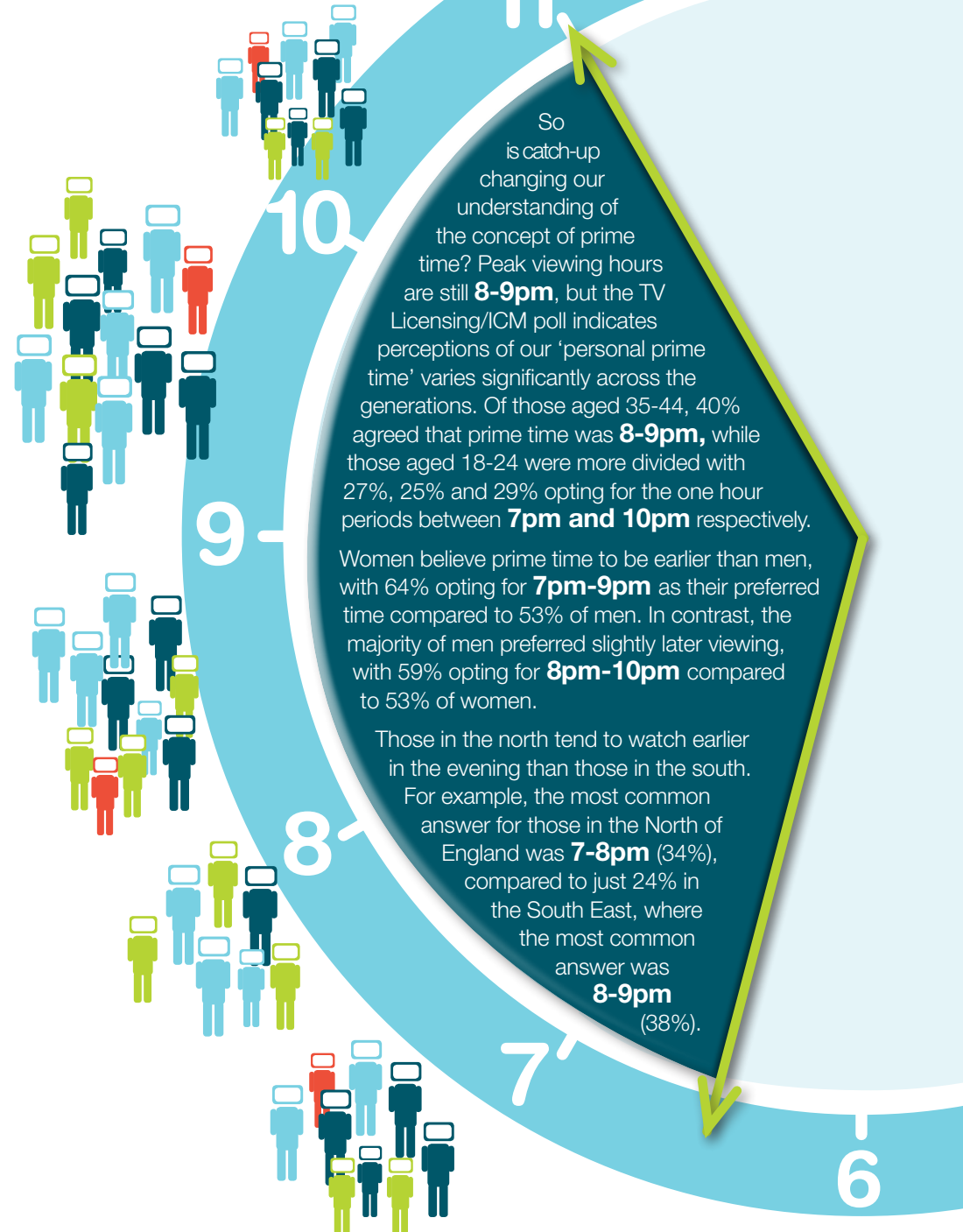
When?

Catch-up TV hasn't changed the times we tend to consume our media: the average individual wakes up to radio, uses the internet all day and enjoys the bulk of their TV viewing in the evening. What catch-up TV has done for many is extend TV viewing hours later into the night. Linear TV viewing increases through the day to an evening peak between 8-9pm, while the BBC iPlayer requests follow a similar pattern, but tend to peak around an hour later.



“I tend to watch TV late at night on my laptop, just before going to sleep. Quite often a couple of friends will either join me in my room, or I'll go into theirs to watch something together. I don't always watch programmes during their original broadcast time, but often prefer to use BBC iPlayer and 4 On Demand. I think these services are great because it means I can catch up on my favourite shows at any time, and allows for a busy and sometimes hectic student lifestyle.”

Nathan Jones, 20, student



So is catch-up changing our understanding of the concept of prime time? Peak viewing hours are still **8-9pm**, but the TV Licensing/ICM poll indicates perceptions of our 'personal prime time' varies significantly across the generations. Of those aged 35-44, 40% agreed that prime time was **8-9pm**, while those aged 18-24 were more divided with 27%, 25% and 29% opting for the one hour periods between **7pm and 10pm** respectively.

Women believe prime time to be earlier than men, with 64% opting for **7pm-9pm** as their preferred time compared to 53% of men. In contrast, the majority of men preferred slightly later viewing, with 59% opting for **8pm-10pm** compared to 53% of women.

Those in the north tend to watch earlier in the evening than those in the south.

For example, the most common answer for those in the North of England was **7-8pm** (34%), compared to just 24% in the South East, where the most common answer was **8-9pm** (38%).

Where?

Thanks to new technology, we can watch TV anywhere, but our TV Licensing/ICM poll shows that the home remains where the bulk of our viewing takes place, with **89%** of us watching most TV in our living rooms.

We have TVs in many more rooms of the house than we did 10 years ago and it's likely this trend will continue. Our survey showed people had an average of 1.9 rooms with TVs in 2000, which has now risen to 2.4. By 2020, people think their homes will have an average of three rooms with TVs in them.

Perhaps surprisingly, the number of us who say we'd like TVs in our bathrooms by 2020 looks set to increase the most, from **1%** in 2010 to **8%**, while **8%** want dedicated cinema rooms in the next 10 years – compared to just **2%** who have them now.

TV ownership was split fairly evenly ten years ago, but men tend to have more rooms with TVs now – even though they watch less TV on average. The men who responded to our survey have TVs in more rooms than women: for example nearly a quarter (**24%**) of men, compared to just **17%** of women, have a TV in their kitchen. Men are also more likely than women to have a TV in their bedroom (**73% vs 67%**) and have plans to install a cinema room, or put a TV in their bathroom, over the next decade (**10% vs 6% in both cases**).



Where?

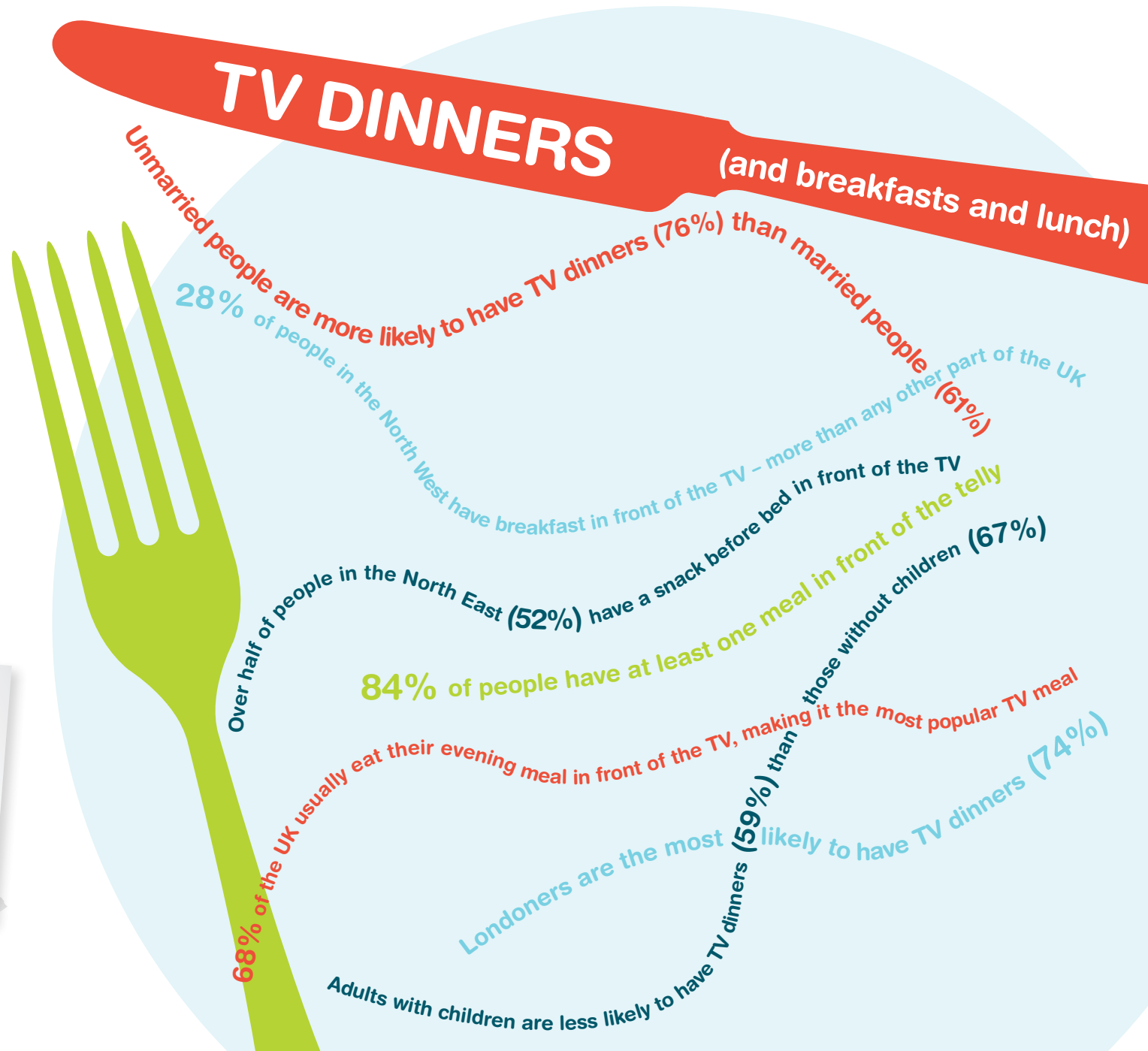
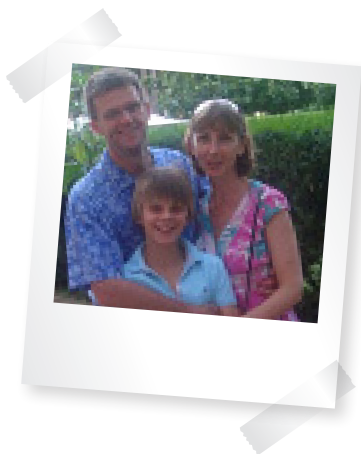
As well as being a key feature in our homes, TV is also an important part of our daily routine. According to our ICM survey, **72%** of us typically eat at least one of our main meals of the day in front of the box.

There are some clear regional differences though, as those from the South East are less than half as likely (**12%**) to eat breakfast in front of the TV than those in the North West (**28%**), while time-poor Londoners are **9%** more likely than average (**74%**) to have dinner in front of the TV.

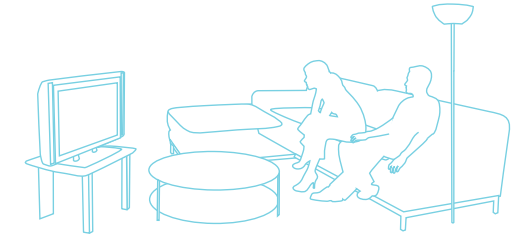
While TV viewing may be an important family pastime, those with children are less likely to eat dinner in front of the TV than those without (**59% vs 67%**).

The Crowley family

“We all have different schedules and a range of tastes in TV shows. During the week we can all be off watching different programmes in different rooms online, on catch-up or live TV, but we enjoy all coming together as a family to watch the big prime time shows or a family film on a Saturday night, in our living room.”



What next?



This report has examined TV viewing in the UK now, but current trends also give us a clear view of where TV is heading.

The people we surveyed want bigger and better TVs in more rooms than ever before. Those TVs are likely to be internet-enabled and multi-functional - although

whether many will also show programmes in 3D is yet to be seen.

Whatever the technological developments, it is clear we will increasingly have more choice than ever before. Will our viewing patterns fragment with ever more

personalised schedules or will we maintain the viewing rituals established over decades, along with the social aspects associated with this?

We asked three experts to give us their predictions for the next decade.



Ben Preston, editor, Radio Times

We'll still recognise television in 2021. Technology may change how we do things – but those changes won't be as dramatic as most experts predict.

Millions more of us will watch 'television' on the move, thanks to cheaper, lighter, better handheld devices. And many more of us will chat to each other electronically about programmes while we're watching, thanks both to those new handheld devices and to the new computer/television hybrids that are already starting to appear in the living room.

But what we actually watch won't change that much at all. People will still want news, sport, drama, films and entertainment shows. Why? Because people like to find out what's going on and chat about it. There'll still be schedules - because we like new stuff best.

And people will still complain that television is dumbing down – many of them the same people who do so now - because they forget one of television's most vital functions is to give us something mildly diverting to chill out to after a hard day at work or school.



Prof Ian Hutchby, Professor of Sociology, University of Leicester

The history of broadcasting has been a history of meshing programme content and scheduling with patterns of everyday social life - 'primetime', 'the watershed', 'lunchtime' and 'early evening' slots were all invented to match types of viewing with structures of working and family life.

I see this trend continuing to evolve. Technologies of television viewing are heading in two directions simultaneously: both minimising (handheld screens) and maximising (widescreen and 3D HD flat panels).

Rather than converging, these technologies may result in two types of TV viewing emerging in association with two distinct social rituals. In the maxi-zone, TV's 'core business' remains similar to the early days: mass viewing of family shows that celebrate the performative (from *Opportunity Knocks* to *The X Factor*) and the sociable (soaps such as *Coronation Street*) as well as major sporting and other public events.

Although the mini-zone won't displace this core business, what we may find is that, alongside the maxi-zone, there will be innovative developments in programme types matched to the different dynamics of solo viewing in mobile contexts.



Richard Lindsay-Davies, Director General, Digital TV Group

In the near future we will see the majority of TV and set-top boxes becoming 'connected'. Connected TV combines broadcast digital television and the internet to deliver new services, applications and programming - and is a natural progression from the catch-up TV and video-on-demand service offerings such as BBC iPlayer, ITV Player and Sky Player.

Connected TV will not spell the end of watching programmes at the same time as they're broadcast but instead enhance the traditional viewing experience – allowing viewers to never miss an episode, download extra-content, apps or tweet about their favourite TV shows.

We will also see the rise of the 'second screen': viewers watching the TV in their living room while using a second device such as a laptop or mobile phone to interact with the content on their main TV.

In short, viewers will have more choice than ever over what they watch, how they watch it and when they watch it.

References

Data:

BARB (Broadcasters Audience Research Board) – TV viewing statistics

BBC – audience research statistics (including BBC iPlayer data)

GfK Retail and Technology –GB Panelmarket Flat TV sales statistics; Regional Statistics exclude online sales and sales by Mail Order Houses and Pure Online Players

TV Licensing/ICM poll – conducted online for TV Licensing in December 2010 and January 2011. Sample size was 2,066 UK adults.

TV Licensing – TV Licences in force

With thanks to:

Iain Logie Baird, National Media Museum

Professor Ian Hutchby, University of Leicester

Richard Lindsay-Davies, Director General, Digital TV Group

Matt Locke, Head of Cross Platform, Channel 4

Stephen Poliakoff, writer and director

Ben Preston, editor, Radio Times

Dr Brian Young, media psychologist, University of Exeter