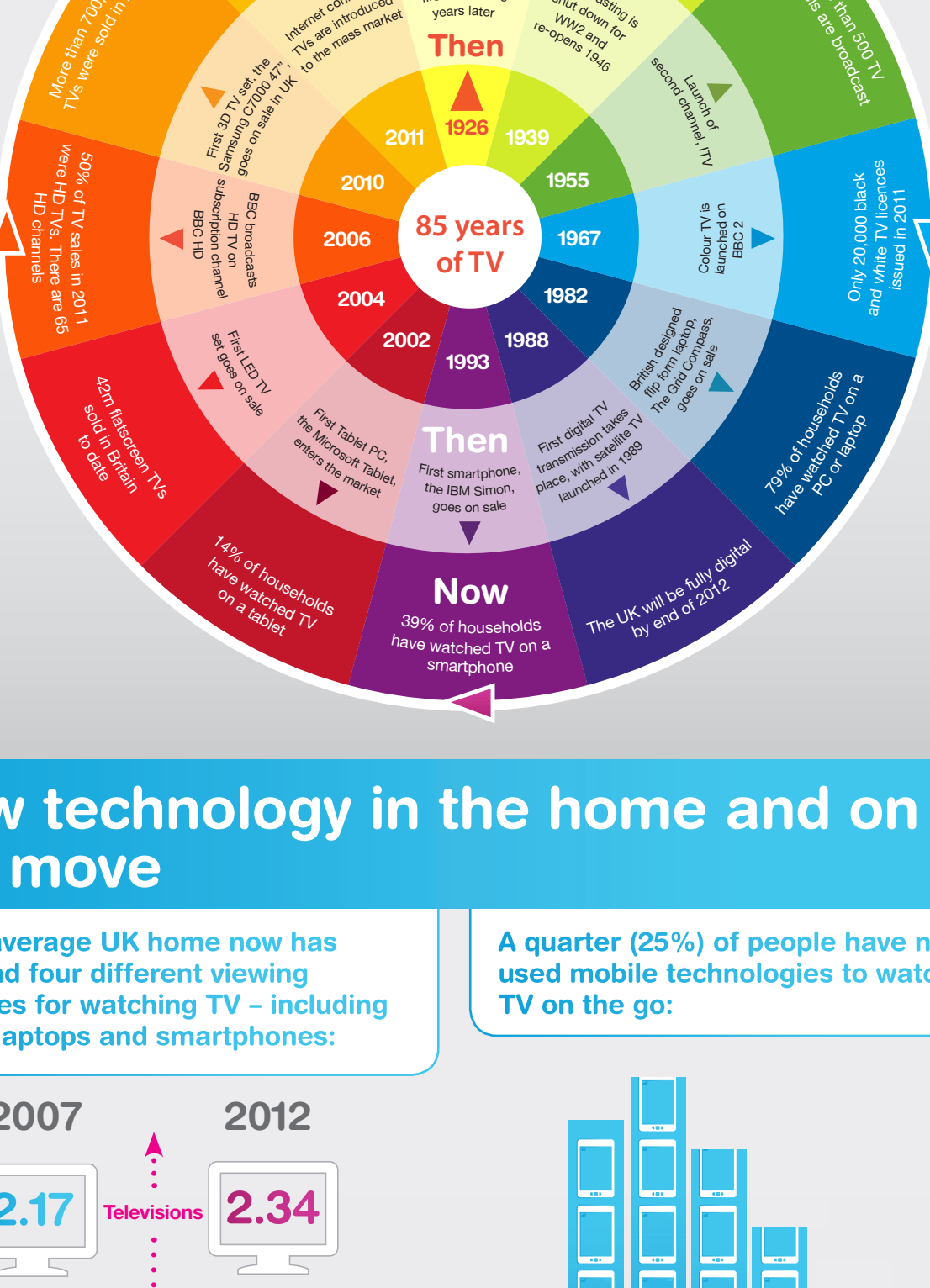


TeleScope

A look at the nation's changing viewing habits from TV Licensing

UK television through the ages

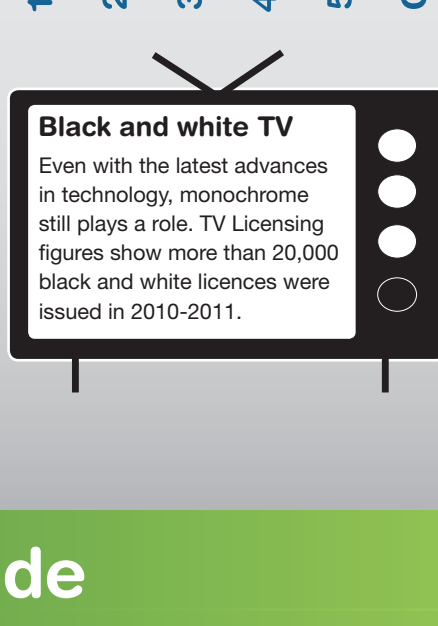
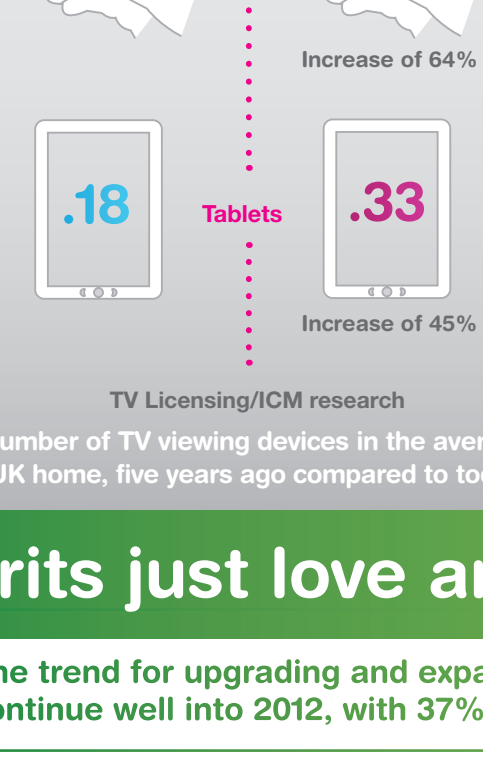
The last decade has seen a boom in TV innovation. As the completion of digital switchover signals the end of analogue transmission in the UK, we take a look at how far and how fast the British public has responded to date to this new wave of technologies:



New technology in the home and on the move

The average UK home now has around four different viewing devices for watching TV - including TVs, laptops and smartphones:

A quarter (25%) of people have now used mobile technologies to watch TV on the go:



Black and white TV
Even with the latest advances in technology, monochrome still plays a role. TV Licensing figures show more than 20,000 black and white licences were issued in 2010-2011.

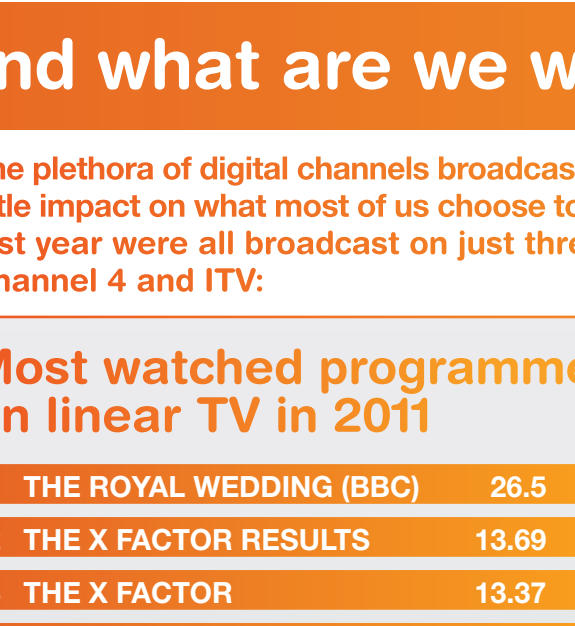
Brits just love an upgrade

The trend for upgrading and expanding our range of viewing devices looks set to continue well into 2012, with 37% investing in viewing technology this year:



How much TV are we watching?

The TV set remains king as we enjoy the enhanced experience of bigger, better screens for the majority of our TV viewing. On a weekly basis, 97% of us watch live or catch-up TV programmes on the traditional TV set, watching an average of over 28 hours. But this is supplemented with viewing on newer, mobile technologies, as we personalise our TV experience to suit our personal needs and preference:



Our love affair with TV is even stronger than we think - we estimate we watch 2 hours and 20 minutes of TV on our TV set daily but we actually watch 4 hours and 2 minutes. This equates to two months of every year

And what are we watching?

The plethora of digital channels broadcasting content in the UK has had relatively little impact on what most of us choose to watch. The top 25 programmes from last year were all broadcast on just three of the main channels - BBC 1, Channel 4 and ITV:

Most watched programmes on linear TV in 2011

1 THE ROYAL WEDDING (BBC)	26.5
2 THE X FACTOR RESULTS	13.69
3 THE X FACTOR	13.37
4 STRICTLY COME DANCING	13.34
5 BRITAIN'S GOT TALENT RESULT	12.95
6 I'M A CELEBRITY - GMOOH!	12.76
7 CORONATION STREET	12.76
8 BRITAIN'S GOT TALENT	12.70
9 DOWNTON ABBEY	12.44
10 EASTENDERS	11.42

The Royal Wedding

- 26m UK household viewers
- 4,020 mentions a minute on Twitter
- 4,440 mentions a minute on Facebook
- 436,252 live requests on BBC iPlayer
- 2bn viewers globally
- 750m YouTube viewers globally
- 750,000 people watched on big screens at Hyde Park

2011's TV movers and shakers

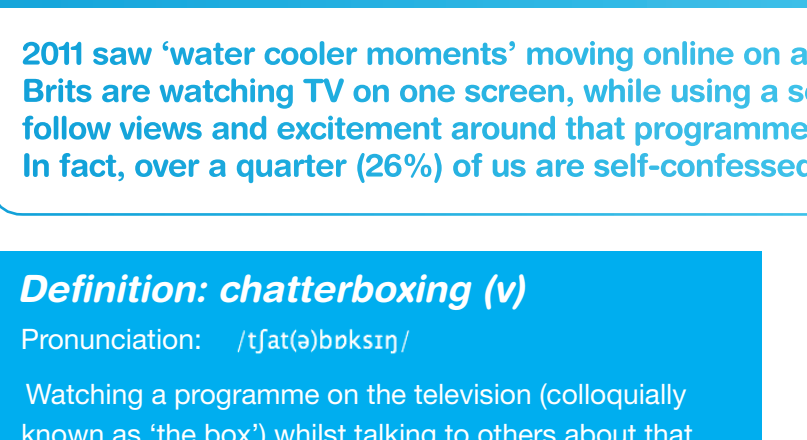
In terms of viewing habits, last year's movers and shakers include:

- Period drama** entered the top ten this year. *Downton Abbey* moved up eight places from 2010, pulling in an audience of **12.4m** for the series finale.
- Nature documentaries** also made their mark. *Frozen Planet* became the first of its genre in the last five years to make the top 25. It was also the most watched programme on BBC iPlayer.
- Whilst in 2010, World Cup matches occupied four of the top ten slots in the viewing rankings, sport did not make the top ten for 2011. However this year is all about the Olympics, with **80%** of the UK population expected to tune in, according to the BBC.

Live vs Catch-up TV

While live TV is still hugely dominant, more people are creating their own TV schedules, fitting TV around their daily lives. There is a clear difference in programme choice between scheduled and time-shifted viewing:

Percentage of time viewed by genre



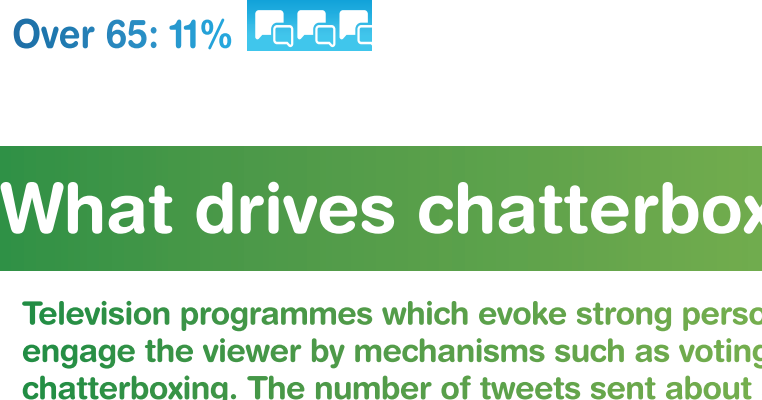
Catch-up viewing accounted for 9.2% of UK consumption in 2011 (BARB), up from 7.1% in 2010.

BBC iPlayer had an average of 1.78m daily users in 2011 (1.39m in 2010).

Requests for BBC iPlayer peaked at 399,000 at around 10pm each day.

Two screens are better than one?

2011 saw 'watch cooler moments' moving online on a grand scale. Increasingly, Brits are watching TV on one screen, while using a second screen to share or follow views and excitement around that programme with a wider online audience. In fact, over a quarter (26%) of us are self-confessed 'chatterboxers':

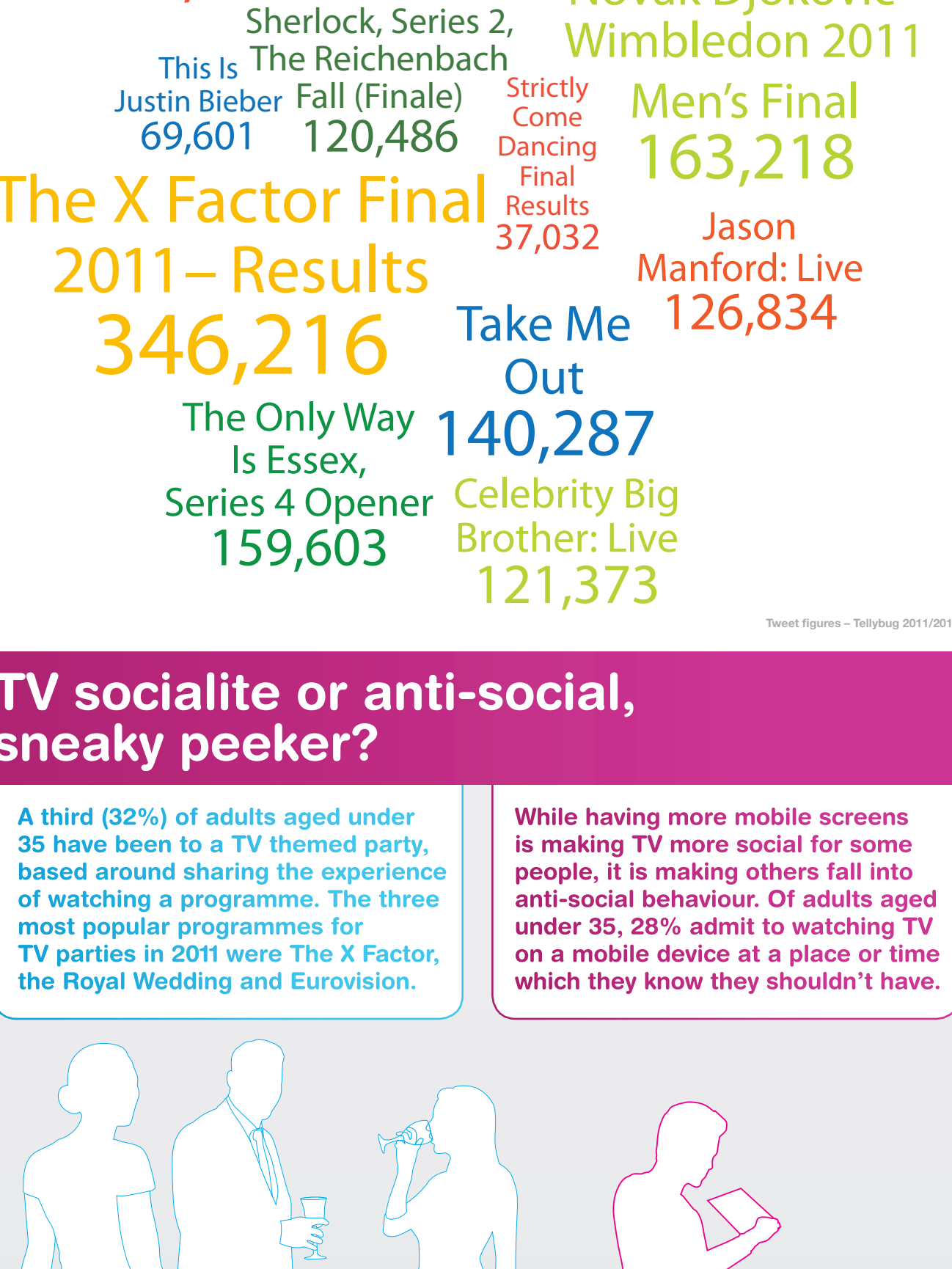


Of under 35s who use social media...

- 24% enjoy social media chatter about a live TV programme
- 19% try to watch important programmes live, to avoid social media spoilers
- 19% will avoid all social media sites if they miss a TV programme live
- 17% can be persuaded to watch a TV programme on catch-up if they see chatterboxing around that programme

What drives chatterboxing?

Television programmes which evoke strong personal opinion, and/or already engage the viewer by mechanisms such as voting, are the most likely to drive chatterboxing. The number of tweets sent about a programme, as it is broadcast, is a good indicator of chatterboxing levels:



TV socialite or anti-social, sneaky peeker?

A third (32%) of adults aged under 35 have been to a TV themed party, based around sharing the experience of watching a programme. The three most popular programmes for TV parties in 2011 were *The X Factor*, *The Royal Wedding* and *Eurovision*.

While having more mobile screens is making TV more social for some people, it is making others fall into anti-social behaviour. Of adults aged under 35, 28% admit to watching TV on a mobile device at a place or time which they know they shouldn't have.

