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 **TV LICENSING**

www.tvlicensing.co.uk

TeleScope

March 2012

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



Foreword



When my grandfather, John Logie Baird, introduced the world's first practical television system in 1926, few imagined TV would become the powerful omnipresent medium it is today. Despite growing competition from other media and entertainment sources, television is, as much as ever, part of the fabric of our everyday lives.

This report from TV Licensing, which I am pleased to introduce for a second year, brings into focus the various elements shaping our love affair with TV, 85 years on.

Television continues to hold our attention for two reasons. Firstly because of the quality and choice of content. Secondly because a huge range of interfaces have evolved to suit every taste and lifestyle. We can easily control how and when we watch TV by creating our own TV schedules from the abundance of content available, or tuning in on-the-go via a mobile device. We have more choice than ever before, and each person, family or household has the opportunity to mould their television experience according to their personal preference.

Whilst we all adopt a more 'personalised' approach to how we watch TV, we still want to share our experience with others. The people with whom we're now watching and chatting are as likely to be connected to us by social media as they are sitting next to us on the sofa.

When it was invented, my grandfather envisaged a rich future for television: that it be a force for social cohesion, creating a shared experience for the masses, to enjoy sight as well as sound. In this remarkable and transformational era for TV, his early 'social' philosophy rings true even more strongly than ever before.

We're no longer just consumers of TV - we are becoming the masters of our own choice. And, with the final switch from analogue to digital and the launch of newer services such as internet and mobile TV, 2012 is set to be a landmark year for television.

Iain Logie Baird
Curator of Broadcast Culture at the National Media Museum

Executive summary

Kit

Our love for the 'box' is still going strong, as our desire for upgrades keeps pace with technological change. Since 2004, UK households have bought millions more flatscreen TVs than any other EU country. In 2011 alone, we bought 700,000 3D TV sets, compared to just 125,000 in the previous year.

We are also topping up our viewing by watching TV on other viewing devices. The average UK home now has many more screens on which to watch telly than five years ago. On average, this breaks down into 2.3 'traditional' TV screens, with 1.5 laptops, 0.8 smartphones and 0.3 tablets making up the rest.

The trend for upgrading and expanding our range of viewing devices looks set to continue well into 2012 - but opinion is divided about what will dominate. Internet connected television might become more mainstream, or the trend might be towards more viewing on-the-go using mobile devices.

Control

Innovation in technology over the last decade means there are fewer barriers to how and when we watch TV, and these developments are impacting our viewing habits.

We still turn to the TV set for the majority of our viewing as 90.7% of TV programmes were watched as scheduled in 2011. The linear schedule remains king with prime-time TV keeping 25m people across the UK on average, glued to their screens from 8 - 9pm.

However, we are certainly trying out new technologies. Indeed, we intend to watch the biggest sporting event of the year - the Olympics - on a variety of viewing devices, including laptops, smartphones and tablets.

More of us than ever before are taking advantage of 'catch-up' to create our own TV schedule, with time-shifted or catch-up viewing accounting for 9.2% of the UK's TV consumption in 2011, compared to 7.1% in 2010. For BBC iPlayer alone, there were 1.78m daily users last year.

Content

As more of the nation switched to digital TV in 2011, most households now have access to more channels than ever before. Nevertheless, the top 25 most-watched programmes for 2011 were broadcast on BBC1, ITV and Channel 4.

Last year, the big ticket, one-off live events united the nation. Prince William's marriage to Kate Middleton was by far the most popular programme of the year. In scheduled programming, reality TV talent shows continued to pull in the crowds, with The X Factor, Strictly Come Dancing and Britain's Got Talent all featuring in the top ten most-viewed programme list for 2011.

This year, millions of people are expected to watch the Olympics and the Diamond Jubilee, so one-off live events look set to dominate in 2012 as well.

Company

TV has always provided a talking point, and 2011 saw huge numbers of TV 'water cooler moments' move online. A proliferation of mobile devices, and a growing number of social media users means Brits are able to watch TV on one screen while chatting about it at the same time, with a much wider virtual community, on another. This two-screen viewing means chat about TV is becoming more immediate and interactive than ever before.

Latest research suggests this is a widespread trend, with 26% of all adults and 45% of those aged under 35 admitting to commenting, or 'chatterboxing', about programmes on a second screen. A large number also say that chatterboxing with others is improving their viewing experience.

This phenomenon is affecting what we watch, as people try new programmes as a direct result of social media buzz.

With this trend set to continue, it will be interesting to see how broadcasters and production companies adapt their programming to meet the growing demand for more interactive and personalised viewing experiences.

More than 25 million UK households bought a TV licence in 2011, as television continues to be an activity enjoyed by all generations - TV is a regular conversation focus at work, in the classroom, in the pub, and even online. This report shows innovation in technology is helping people to personalise their relationship with TV - from how they watch, to when they watch, to how they talk about it. It also shows our love affair with TV remains as strong as ever for the vast majority of the nation.

Pipa Doubtfire, Head of Revenue Management, BBC TV Licensing



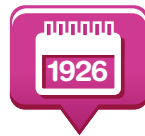
Kit

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

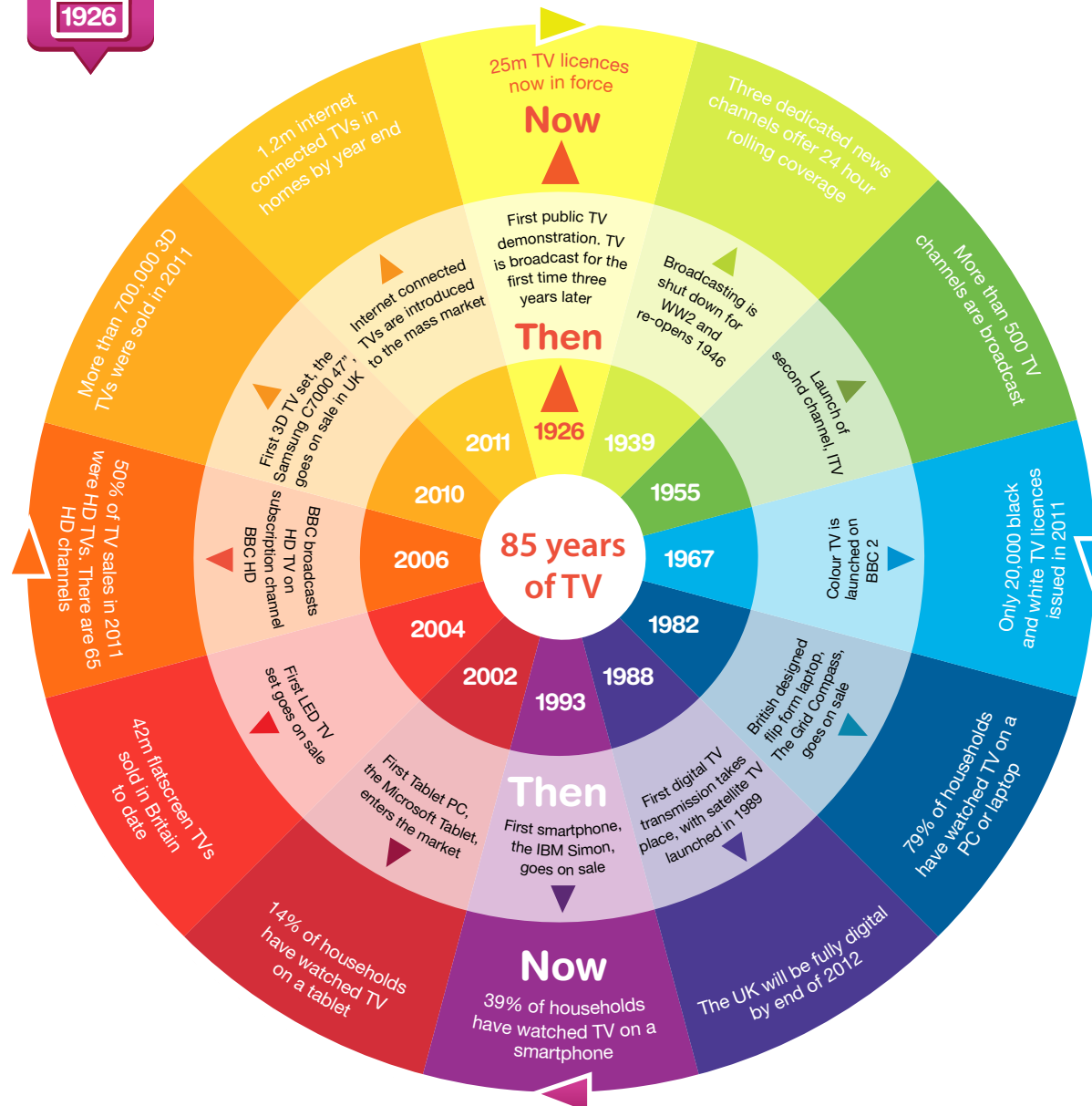
Our relationship with TV started in 1929 in the UK, with the first television broadcast. Since then, technology has developed apace – black and white television moved to colour, cathode ray to flatscreen, and today 3D TVs have pride of place in hundreds of thousands of households all over the country. The last decade in particular has seen a boom in innovation.

This year, the completion of digital switchover signals the end of analogue transmission in the UK and will drive forward a new digital era in which technologies such as internet-connected and HD TVs gain ground.

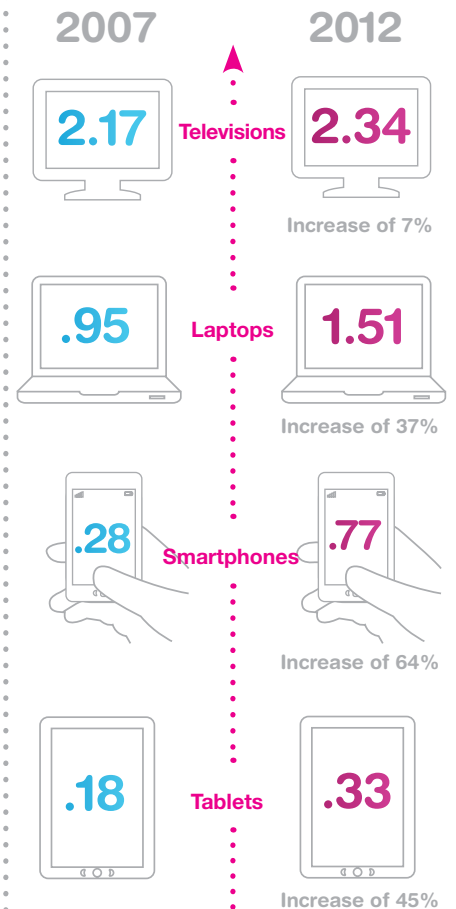
In this section, we look at how far and how fast the British public has responded to date to this new wave of technologies.



UK television throughout the ages



Number of TV viewing devices in the average UK home, **five years ago** compared to **today**



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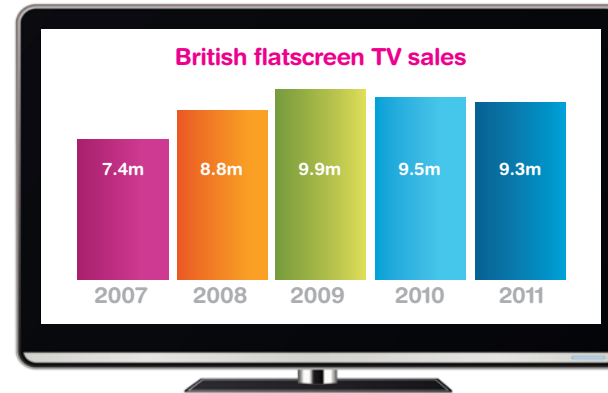


Sales and upgrades

We love to upgrade our TV equipment and adopt the latest viewing technologies. This trend puts us well ahead of the rest of the European market with **42m** flatscreen TVs purchased between 2004 and 2010 and **9.3m** sold in 2011 alone. Even though this is a slight decline on two years ago, the figure remains high and equates to a new TV set for one in three households in 2011.

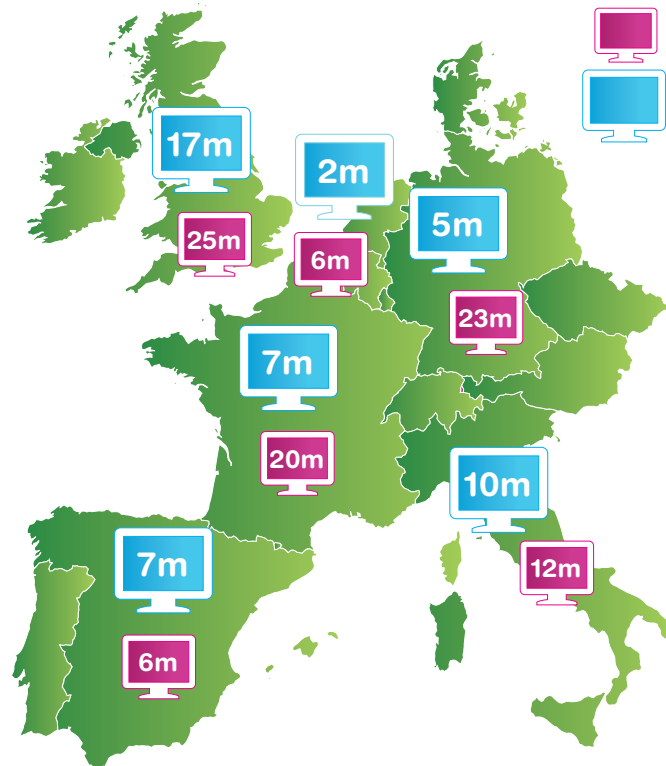
Significant price drops in large screen models, as well as increased features and capabilities, are encouraging investment in new replacement viewing technology.

Flatscreen TV sales 2004–2010



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.



Small flatscreen TV sales



Large flatscreen TV sales



Over 700,000 3D TV sets were sold in 2011, vs 125,000 in 2010. Nearly 40% of screens over 43" sold were 3D TVs.

Size matters – almost a third of all TV sets sold in 2011 (32%) were over 33", vs 25% in 2009 and 30% in 2010.

LED screen penetration increased, making up 30% of all sales in 2011, whilst sales of plasma TVs remained steady at 9%.

Our love of TV is driving investment in new technology

Connected TVs accounted for 16% of all sales in 2011, vs 9% in 2010. About 40% of all screens over 33" now have internet access.

Up to 50% of all sales in 2011 were HD TVs

Mobile Technologies



Sales of mobile technologies, such as smartphones and tablets, continue to rise, with ownership of smartphones nearly doubling between February 2010 and August 2011 (from **24%** to **46%**) (OFCOM).

More of us are using our mobile devices to watch TV. By the end of 2011, **39%** of households watched TV content on a smartphone, while **14%** used a tablet.

Control

New technologies mean we now have more control of the viewing schedule and can create a personal viewing experience which fits in with our lives. We can watch what we want, when we want, both in our homes and on the move. Here we look at whether our viewing habits reflect the rapid pace of technological change.

TV set vs mobile technologies

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 technologies, as we personalise our TV experience to suit our personal needs and preference.

Consider how we are planning to watch this summer's major sporting events: the BBC alone is broadcasting 241 days worth of live coverage, and people intend to follow the action in different ways. Of those of us who will be watching, the overwhelming majority of us – nine in ten (**88%**) – are planning to watch some of the action live on a traditional set. Laptops and PCs will supplement our viewing: **7%** of us intend to watch live on these devices, and **6%** on catch-up. Luxury small screens will play a supporting role, allowing the die-hards to tune in while on the move; **1%** hope to watch some of the events live on a smartphone, and **1%** on a tablet.

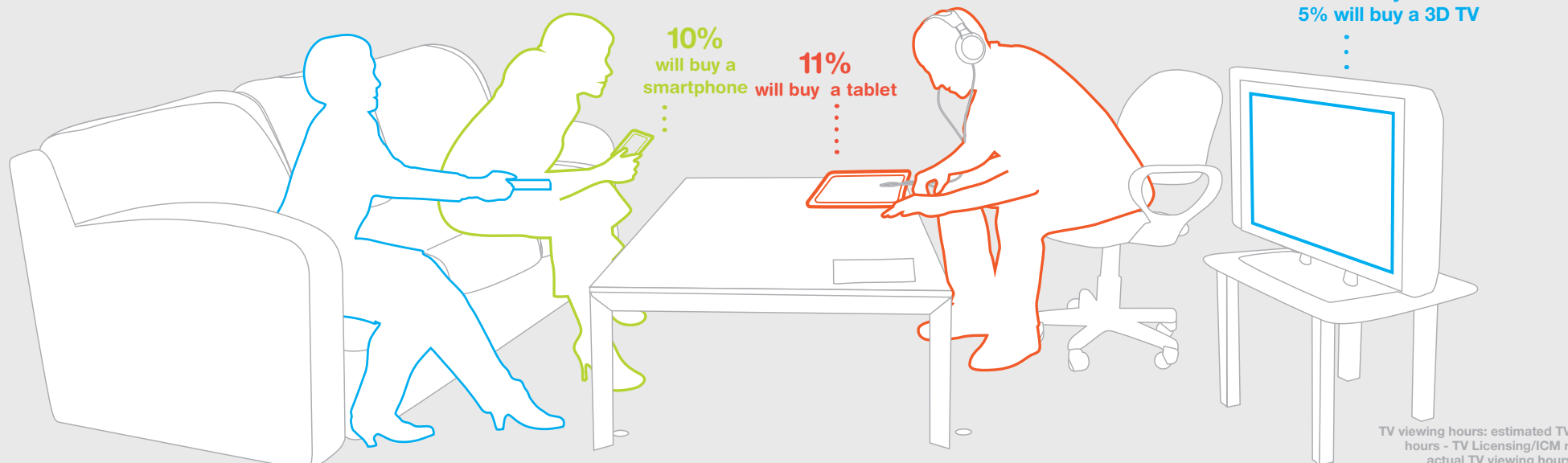
Our love affair with TV is even stronger than we think – we estimate we watch 1 hour and 50 minutes of TV on our TV set daily but we actually watch 4 hours and 2 minutes. This equates to two months of every year



"I pretty much make my own TV schedule. I'll watch live when I can, but some of my TV viewing is catch-up - I like to skip the ads! I record in HD to watch later or use services like BBC iPlayer and 4oD. It suits my lifestyle because, after the kids go to bed, I can watch what I want when I want between 7pm and midnight, without missing out on my favourite dramas."

**Oliver Shingler, 31,
from South Wales**

37% will be investing in technology this year...



Live vs catch-up

Live TV remains dominant. BARB statistics show **90.7%** of TV programmes were watched as scheduled in 2011 with an average of **25.3m** tuned in for prime time scheduled programming between 8-9pm.

However, more of us are fitting TV around our daily lives. Catch-up (or time-shifted viewing), accounted for **9.2%** of all viewing in 2011, compared to **7.1%** in 2010.

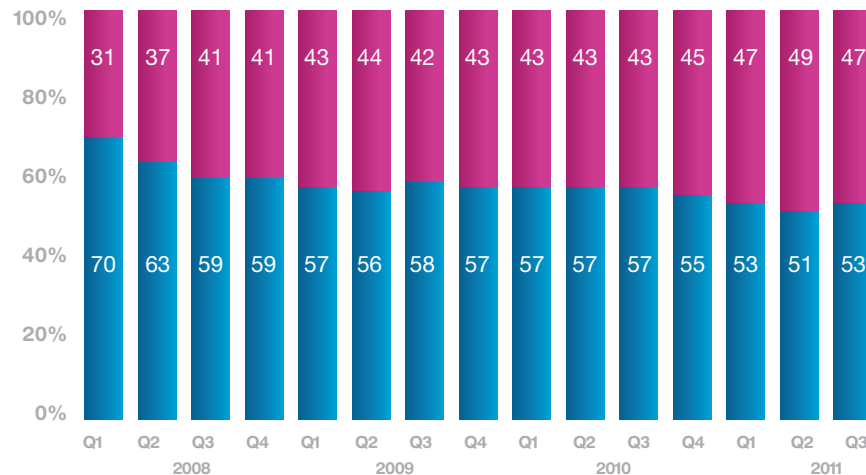
Figures for the BBC's catch-up service, BBC iPlayer, reflect this with a **28%** increase in daily users in 2011 to **1.78m**, up from **1.39m** in 2010.

Traditionally, the majority of BBC iPlayer users have been male, but the proportion of women has increased. In 2011 **48%** of the audience was female. Requests for BBC iPlayer peak at **399,000** around 10pm daily.



BBC iPlayer use by gender

Women Men



What's next for 2012?

TV sales are predicted to reach **8.7m** by the end of 2012, with the demand for added features and large screens continuing as even bigger sets enter the market (GfK).

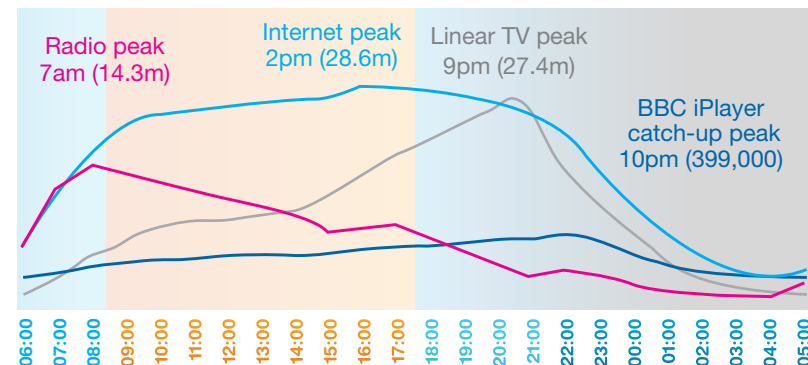
Innovations in technology continue at speed. TV Licensing/ICM research reveals that one in ten of us intends to invest in a bigger set over the coming year, with one in 20 intending to buy a 3D model and one in 14 migrating to connected TV.

In 2012, connected and 3D television will reach smaller screens (under 32") and flatscreen TVs will continue to drive sales as bigger and better screens become increasingly important.

Young adults are driving uptake of mobile technologies with **33%** aged under 25 now watching TV on the move. This figure climbs to **37%** of 25 to 34-year-olds, with more money to invest in viewing technologies. Just **12%** over 65s watch on mobile screens away from home.

Radio, internet and catch-up patterns by the hour

Note: each line has a very different scale (see peaks)



Content

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 most-watched programmes for 2011 were all broadcast on BBC1, ITV and Channel 4.

The TV schedule remains central to Brits' viewing habits

Whilst catch-up is on the rise, the live TV schedule still pulls in the biggest audiences. The most-watched programmes of 2011 were live, national events, as well as celebrity and talent reality shows. Last year, weekend TV talent shows occupied four of the top five slots in scheduled TV viewing figures. This is an enduring trend as, for the last three years, The X Factor, Strictly Come Dancing and Britain's Got Talent have been among the top ten most-watched programmes.

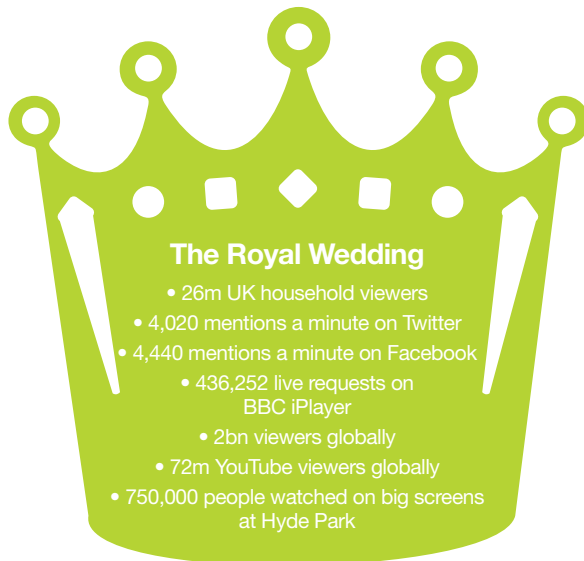
Most-watched programmes on linear TV

2011

2010

2009

1 THE ROYAL WEDDING (BBC)	26.5	1 THE X FACTOR RESULTS	17.71	1 BRITAIN'S GOT TALENT FINAL	18.29
2 THE X FACTOR RESULTS	13.69	2 EASTENDERS	16.42	2 BRITAIN'S GOT TALENT	16.36
3 THE X FACTOR	13.37	3 WORLD CUP 2010: ENG V GER	15.81	3 THE X FACTOR RESULTS	16.28
4 STRICTLY COME DANCING	13.34	4 THE X FACTOR	15.41	4 THE X FACTOR	14.03
5 BRITAIN'S GOT TALENT RESULT	12.95	5 CORONATION STREET	14.75	5 THE ROYLE FAMILY	11.74
6 I'M A CELEBRITY - GMOOH!	12.76	6 WORLD CUP 2010: LIVE	14.62	6 EASTENDERS	11.67
7 CORONATION STREET	12.76	7 STRICTLY COME DANCING	14.28	7 DOCTOR WHO	11.57
8 BRITAIN'S GOT TALENT	12.70	8 BRITAIN'S GOT TALENT	13.52	8 CORONATION STREET	11.46
9 DOWNTON ABBEY	12.44	9 I'M A CELEBRITY - GMOOH!	13.50	9 DANCING ON ICE	11.31
10 EASTENDERS	11.42	10 WORLD CUP 2010: HOL V SPA	13.44	10 STRICTLY COME DANCING	11.29



The Royal Wedding

The TV event of 2011 was the Royal Wedding. More than **26m** of us watched Kate Middleton and Prince William marry at Westminster Abbey, with an estimated **2bn** tuning in from around the globe. It was also the most viewed live online broadcast with over **436,000** requests on BBC iPlayer in the UK alone.

Live broadcasts of Royal events have always commanded the nation's attention. All of the following attracted the highest viewing figures in their respective years: The Queen's Coronation (**20m**), and the marriages of Prince Charles to Lady Diana Spencer (**28m**) and Princess Anne to Captain Mark Phillips (**28m**). Programming to celebrate the Diamond Jubilee is expected to pull in one of the biggest UK viewing audiences of the year.

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.

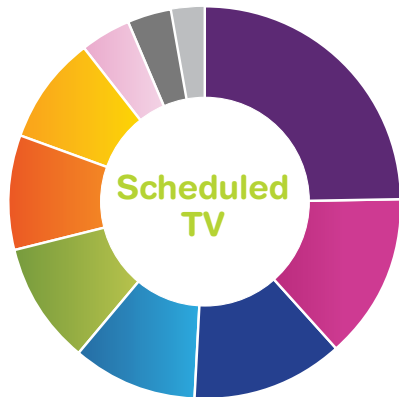


Whilst in 2010, World Cup matches occupied four of the top ten slots in the viewing rankings, **sport** did not make the top ten for 2011. However this year is all about the Olympics, with **80%** of the UK population expected to tune in, according to the BBC.

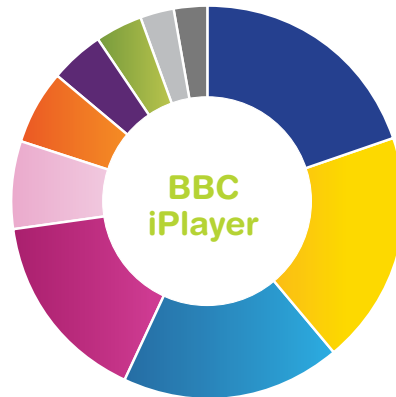
What are we choosing to watch on catch-up TV?

There is a clear difference in programme choice between scheduled and catch-up TV. News programming accounts for the largest single chunk of content viewed on scheduled TV (**25%**). On BBC iPlayer, however, documentaries, drama and comedy shows are dominant, as people tune in to follow-up on viewing recommendations from friends or to catch-up on 'must see' programmes which they missed when they originally aired on the schedule.

Percentage of time viewed by genre for scheduled TV and BBC iPlayer



News/Weather	24.7%
Entertainment	13.6%
Documentaries	12.2%
Drama	10.3%
Current Affairs	10%
Hobbies/Leisure	9.2%
Soaps	9%
Children's TV	4.2%
Sport	3.6%
Other	2.5%



Documentaries	19.8%
Soaps	19.2%
Drama	18.1%
Entertainment	15.8%
Children's TV	7.1%
Hobbies/Leisure	6.3%
News/Weather	4.4%
Current Affairs	3.8%
Other	2.9%
Sport	2.5%



The most-watched episodes from the most popular series on BBC iPlayer

2011		2010	
Frozen Planet	2.78m	Doctor Who Series 5	2.22m
Come Fly With Me	2.05m	Top Gear Series 15	1.66m
Doctor Who Series 6	1.90m	Sherlock	1.38m
Top Gear Series 16	1.65m	Outnumbered Series 3	1.14m
Life's Too Short Series 1	1.53m	The Incredibles	1.12m
The Apprentice Series 7	1.25m	EastEnders	1.09m
Young Apprentice Series 2	1.19m	Live at the Apollo Series 5	1.06m
Waterloo Road Series 7	1.14m	The Apprentice Series 6	1.00m
Tracy Beaker Returns Series 2	1.12m	Russell Howard's Good News Series 2	0.97m
Outnumbered Series 4	1.17m	Mock the Week Series 8	0.93m

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Are two screens better than one?

TV has always brought people together and provided us with fodder for conversation. But 2011 saw the start of 'water cooler moments' moving online on a grand scale. Increasingly viewers in the UK 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 community. This virtual TV commentary often happens on social media sites, such as Facebook, Twitter or Tumblr.

This section looks at whether two-screen viewing is a significant cultural trend which is here to stay.

Who?

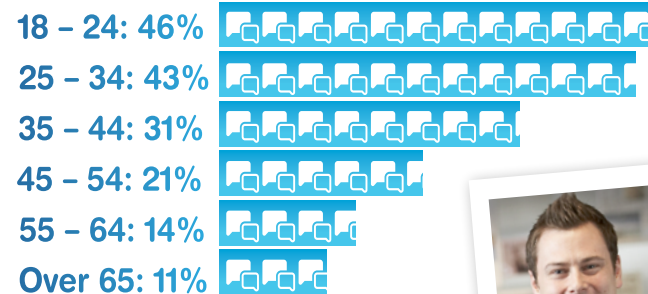
'Chatterboxing' is a widespread phenomenon according to TV Licensing/ICM research – especially among young adults. Over a quarter (**26%**) of us say we have commented on a programme on a second screen. Young adults are the most likely to chatterbox with nearly half (**46%**) aged under 25 saying they have used a social media channel to comment on a TV programme. Not far behind are 25 to 34-year-olds, with **43%** of them saying they have done so.

Definition: chatterboxing (v)

Pronunciation: /tʃæt(ə)bɒksɪŋ/

Watching a programme on the television (colloquially known as 'the box') whilst talking to others about that programme online, normally via a social media platform

Percentage of people chatterboxing



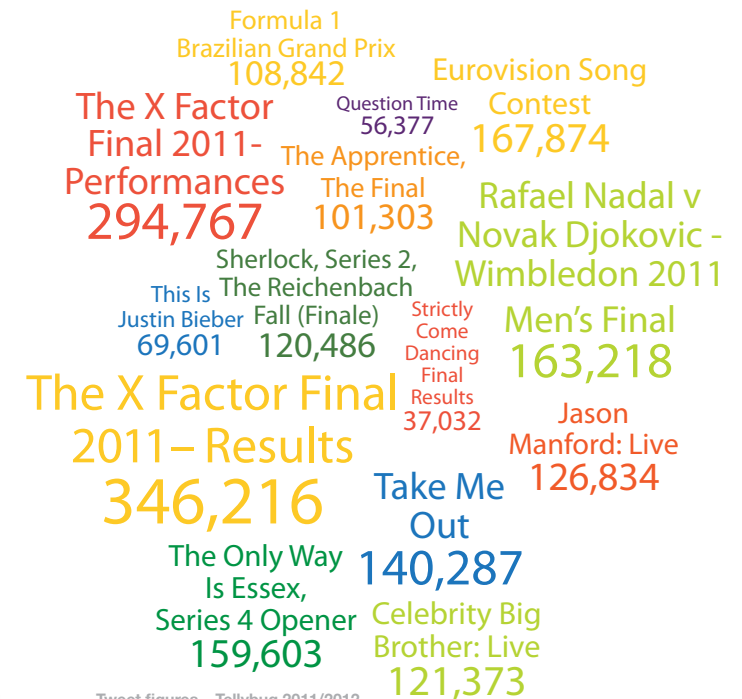
Why?

Chatterboxing is helping us enjoy television even more. One third (**33%**) of social media savvy under 25s say they enjoy a TV programme more when they are chatterboxing about it.



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...



Tweet figures – Tellybug 2011/2012

"When my favourite programme starts, I am as excited about loading up Twitter as I am about turning on the TV. Programmes such as The X Factor are brilliant for getting a regular community talking - some people give 'expert' opinions on the music and others just make funny comments about outfit choices. Joining in the chatter is actually a big incentive to watch it live - I actually rate the opinions and the jokes of my fellow tweeters more than the celebrity judges!"

Dan McLoughlin, 32, from South London



How is chatterboxing changing viewing behaviour?

Over half (**57%**) of the country's adult social media users aged under 35 say social media buzz around a TV programme can affect whether they watch a programme live or not. Being involved in and following chatterboxing in the build-up to and during a live programme, is actually becoming part of the viewing experience, and is encouraging people to watch a programme as it is shown on TV.

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



Corrine Sweet, psychologist, shares her thoughts on the growth in popularity of chatterboxing.

"Wanting to communicate with others when you experience emotions such as sadness, entertainment, fear or awe is a part of the human condition. As television often prompts these emotions, it is not surprising that more of us are taking advantage of evolving technology to share our thoughts as we watch TV, even if we are home alone."

What does this mean for television of the future?

In a two-screen-viewing culture, broadcasters know a significant chunk of their audience doesn't just want to sit back and watch TV – they want to be a part of it as well. Broadcasters are investing time and money in bringing an extra layer of enjoyment to those viewers.

Victoria Jaye, Head of IPTV and TV Online Content, BBC Vision:

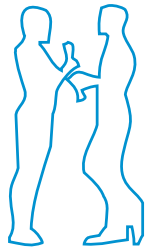
"Exploring how second screen connectivity can enhance the way audiences access, discover and enjoy BBC TV programmes is a key part of the BBC iPlayer strategy. We have a number of ambitious projects in development, following dual screen pilots conducted over the past year with Secret Fortune, Frozen Planet and AutumnWatch. Our approach to dual screen will be built on insights into what audiences truly value around the TV viewing experience, drawn from years of offering companion content and functionality on BBC Red Button and BBC Online."

Richard Davidson-Houston, Head of Channel 4 Online:

"We're building on the already very successful two-screen innovation in propositions such as "Million Pound Drop", "Food Hospital" and "Fish Fight" with new, even bolder and more engaging creative ideas. We're looking at how advertisers can come with us on that journey and are deepening engagement with social spaces where our key audience of 16 to 34s spends so much time."

Being a TV socialite is not just about social media

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.



When TV becomes antisocial...

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. The top places for inappropriate TV watching are:

At work

When out with friends

At the library

The Future



This report has explored how rapid innovation in TV technology has shaped our relationship with television - what devices we have in our homes, as well as how, what and when we watch.

Many of us are quick to adopt new technologies in an effort to improve our viewing experience. As innovation continues apace, and a wider range of content and more sophisticated viewing devices enter our lives, three experts share their predictions for our evolving love affair with television.



TV is about storytelling, but the genius is it offers two very different experiences. In 'sit-back' mode, it tells us stories that are involving and fascinating: look away from a TV drama and you miss something important. In 'sit-forward' mode, it offers stories you can be a part of: vote, comment, network on a second screen - you are part of event TV. The challenge is how TV continues to do a mix of both well as consumers' viewing habits evolve around changing technologies.

For example, in the 'on demand' world, TV drama is most vulnerable; unlike event TV, nothing says you have to watch it live. To date, schedules have been highly effective at creating and organising demand by creating 'appointments to view'. However, programmes watched 'on demand' struggle to find an equivalent, and until it does, broadcasting and scheduling will still make or break a drama.

To engage consumers as live TV does, on demand services will need to develop easier ways for users to find their way to the content they want. And, as convergence between TV and social networks continues to grow, it is inevitable the creators of these navigation systems will seek to tap into the recommendations of users' personal contacts as well as their favourite public sources.

Meanwhile, TV screens will continue to improve, but 3D... are they joking?

*John Ellis, Professor of Media Arts,
Royal Holloway, University of London*



The set, the box and the tube are all descriptions of television as a physical device. It's an object that's had a huge cultural impact. But what happens if the TV set is no longer a dedicated appliance?

We are already seeing television content being delivered through phones, tablets and computers. These 'companion devices' have screens and it is not surprising that we have carried over the use of the phrase 'watching TV' to them.

And this year manufacturers are releasing, 55" Organic Light Emitting Diode televisions that are only 4mm thin. But what is the next step?

Some are imagining that all surfaces in the home and workplace will be made from or incorporate very thin and inexpensive display panels. In this vision of the world where every wall, window and tabletop is a media display, the TV in the corner of the living room sounds antiquated.

If the TV set we know and love was replaced by the ubiquitous screen, our strong relationship with 'the box' could be weakened. Coupled with a method of delivery that's no longer exclusive to broadcasters the viewer might even start to question what television really is.

So what separates one moving image from another in the hearts and minds of these wall gazers? The same as always - a good story, well told. That will always be at the core of what 'watching television' is.

Richard Robbins, Senior Technologist, BBC Blue Room



To watch the action as it happens on television, to see the most-talked about shows at the first possible opportunity, has always been a central attraction of television.

What is shifting however, is the location of the TV water cooler moment. It used to be next day in the office or the playground, but now there's no need to wait. We're starting to use 'Bellyvision' (the resting place of a smartphone, tablet or laptop around stomach level whilst watching TV) and use social media to comment on programmes with friends.

The growth of on-demand technology hasn't rendered the old-fashioned concept of a television schedule redundant but it has allowed viewers to embrace technology in ways that experts, analysts and trend-spotters could not have predicted.

As a result the ability to expand the live television experience to become more interactive and engaging has greatly increased, so there's an opportunity for broadcasters, for commissioners, for channels to deliver and build on the unbeatable experience of live television.

To embrace this, understanding the consumer's relationship with TV and technology is key. No technology can succeed in the next decade without an appreciation of what normal people want. And for the majority, they are looking for innovation that offers an enhancement rather than a major step change.

In other words, we are talking evolution, not revolution.

Ilse Howling, Managing Director, Freeview

Glossary

3D TV

A 3D TV projects a TV programme into a realistic image by providing the illusion of depth. Some 3D screens use special projection hardware; others require eyewear when viewing.

Analogue

Analogue transmissions broadcast encoded analogue audio and video signals to analogue TVs. Prior to the introduction of digital TV, all broadcast TV systems used analogue signals.

Catch-up TV or time-shifted viewing

The delivery and act of selecting and then watching a programme which has already been shown on TV.

Cathode-ray (electron beam or e-beam)

Cathode-ray creates the image on a classic TV set. Technologically, a beam of electrons is emitted from the cathode of a high-vacuum tube which is then deflected by electric or magnetic fields to create the image on a classic TV set.

Chatterboxing

The act of watching a programme on TV whilst simultaneously talking to others about that programme online, normally via a social media platform.

Digital switchover

In the UK, the analogue TV signal is being replaced with a new, stronger digital signal and by the end of 2012, almost everyone will be able to receive digital TV through an aerial or satellite dish. Anyone wanting to watch TV after then will need to have converted their signal receiver to digital.

Digital TV

TV broadcasting in which pictures are transmitted as digital signals and then decoded by the receiving TV set.

Flatscreen TV

TV sets with fully flat screens which are lighter and thinner than traditional versions. They can be LCD, LED, OLED or plasma.

High-Definition TV (HD TV)

Film that has resolution substantially higher than that of traditional TV systems. HD TV is digitally broadcast.

Internet connected TVs

TV sets with internet access. This term also covers set-top boxes offering access to the internet via TV.

LCD (liquid-crystal display) TVs

LCD TV images are created through a network of pixels behind the screen which produce an electric current when backlit. This electric current determines the colour, and light variations produce the image. LCD TVs are thinner and lighter than cathode-ray sets and are available in much larger sizes.

LED (light-emitting diode) TVs

LED televisions are LCD TVs with one difference – the back light lamps which illuminate the screen have been replaced by hundreds of smaller LEDs.

Live TV (linear TV)

Scheduled TV programmes which the viewer watches as they are shown on TV.

Mobile technologies

Communication devices which can be easily transported during use e.g. smartphones, laptops and tablets.

OLED (organic light-emitting diode) TVs

OLED TVs are brighter, thinner, and feature better refresh rates and contrasts than LED, LCD or plasma TVs.

Plasma TVs

A plasma display panel consists of tiny gas cells sandwiched between two sheets of glass. Each cell gives off ultraviolet light which then produces red, green and blue spots on the screen. These spots build the perception of a picture.

Small screen technologies

Portable and hand-held devices which have screens on which images and videos can be displayed and viewed e.g. smartphones and tablet PCs.

Smartphone

A smartphone has more advanced computing and a larger than average screen than a standard mobile phone.

Social media

Internet services which can be used for real-time interaction online with others. Social media allows the creation and exchange of user-generated content. Services include blogs, forums and video-sharing platforms including Facebook, Twitter, Tumblr, YouTube, Pinterest.

Tablet

A mobile computer which is operated by touching the screen rather than using a physical keyboard.

Two-screen-viewing

When someone watches TV whilst simultaneously using a mobile device or laptop.

Foreword

Executive
Summary

Kit

Control

Content

Company

The
Future

Glossary

References

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