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Pipa Doubtfire,
Head of Revenue
Management,
TV Licensing



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TV continues to be a constant pleasure we all embrace, bringing us news from across the globe, sporting events which keep us on the edge of our seats, dramas which move us and comedies which make us cry with laughter.

As technologies evolve and become commonplace, our viewing habits adapt too. We've seen home ownership of tablet computers more than double since 2012, with around a third of the population now using one on a monthly basis. Over 55 per cent of adults now say they watch video content, such as TV programmes, on these devices. The living room is still, even with the rise of mobile devices, our favourite place to watch 'must see' programmes – naturally enough in the company of our friends and family.

This year, for the first time, we focus our report on children's television. The programmes we enjoyed as kids have a huge impact on us in our formative years and so have a unique nostalgia value. Everybody can remember what his or her favourite programme was and many people have a second chance to appreciate a new generation of shows and characters, as they watch with their own children. This common experience is what makes the results of our nationwide survey on the top kids' shows so fascinating.

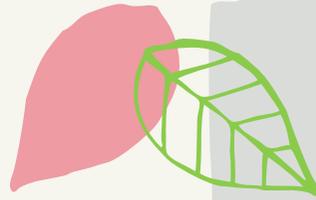
Children's TV – as well as wider family entertainment programming – continues to play a central role in households. The families we spoke to during our research for TeleScope had a wide variety of watching habits, but all found TV programmes had the ability to bring the family together.

With dedicated children's channels, such as CBeebies, CBBC, and The Disney Channel, the viewing options for today's children are greater than ever. They can also watch their content on a multitude of mobile devices, but the licence fee payers of the future still choose to view most of their television 'live' as it is broadcast.

Whether your era was Grange Hill, Sooty, the Teletubbies or Bagpuss, children's TV has the ability to make a lifelong impression. I can also revel in the indelible memories being formed as my own children now relish the likes of Horrible Histories and Deadly 60. I hope you enjoy our look at children's TV through the ages as well our exploration of the viewing habits of the nation.



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Smart TVs, 4K TVs, tablets and smartphones can all be used to watch live TV. Here we look at the nation's buying habits, where we're watching TV, and on what devices.

What's Hot, What's Not Page 3

Our TVs are getting bigger. Jumbo screens accounted for 16 per cent of last year's telly sales.

Measuring Up Page 3

Across the UK, the majority of TV is watched on a family-sized big screen. However, there are regional differences.

The TV in Your Pocket Page 3

More of us are using our tablets to watch TV. In fact, over half of tablet owners use it to view their favourite programmes.

Children's Tech Toys Page 4

Children are tech savvy. A quarter of 3 to 4 year olds use a tablet at home.

Section 2 We ♥ Live Page 5

Even with 25 per cent of adults regularly using catch up services, we still love tuning in to our favourite programmes as they are shown live. Here we find out why.

Live Events Page 6

TVs Top Tens of 2013.

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In fact, 90 per cent of our viewing is live with the remaining 10 per cent time-shifted.

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Fewer children have a TV in their bedroom, down seven per cent on last year.

Section 3 A Trip Down Memory Lane Page 7

From the early days of Muffin The Mule, we trace the history of children's television on the UK's small screens. All you'll need to read this section is some sticky tape, an old washing-up bottle and some tissue paper.

The Genres of Children's TV Page 7

Hard hitting dramas, news and current affairs, factual and the definitive pre-school programme, children's TV has the lot.

A Recipe for Children's TV Page 8

See the ingredients of the nation's favourite children's programmes.

Section 4 Made in the UK Page 9

The UK has made some of the world's greatest and longest running children's TV programmes. This section zooms in on the UK, where our favourite children's TV was made.

Made at Home Page 10

From a converted cowshed in Kent came Bagpuss, Ivor the Engine and The Clangers.

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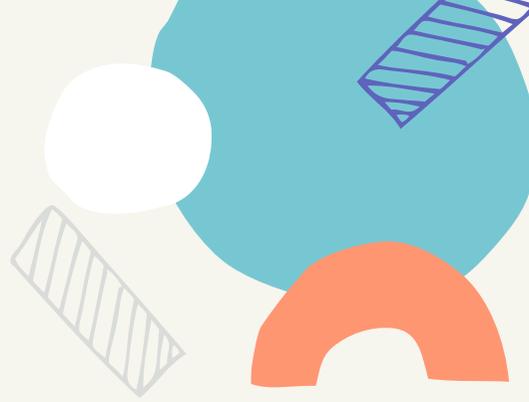
Section 5 A Timeline of Children's TV Page 11

We chart children's TV from its inception through to today highlighting key programmes and moments along the way.



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UK flatscreen and smart TV sales: GfK
 Smartphone sales: Kantar Worldpanel ComTech
 PC/tablet sales: Worldwide tablet sales: IDC
 Mobile viewing: Thinkbox
 Tablet usage: eMarketer

What's Hot, What's Not

In 2013, the sales of smart TVs, tablets and smartphones continued to climb. We're now viewing programmes on different devices as we continue to sample and upgrade a variety of new technologies.

Jumbo Screens

Since 2004, approximately 60m flat panel TV sets have been sold in the UK. This trend towards bigger screens continued in 2013, with figures showing seven in ten sets sold are classified as 'big' (between 26 inches–32 inches) while jumbo screens (43 inches plus) now account for nearly 16 per cent – an increase of four per cent on 2012.

Tablets

More than one in three consumers in the UK – 20 million people – use a tablet. This includes individuals who own their own tablet and use it at least once a month, as well as people who share a tablet with family members or others and all use the device on a monthly basis. It's estimated by 2017, the tablet will become a mass-market device with more than half the UK population using one regularly.

Smartphones

Smartphone penetration across the UK stood at 69 per cent in November 2013. In the last quarter of 2013, 86 per cent of phones sold were smartphones.

Smart TVs

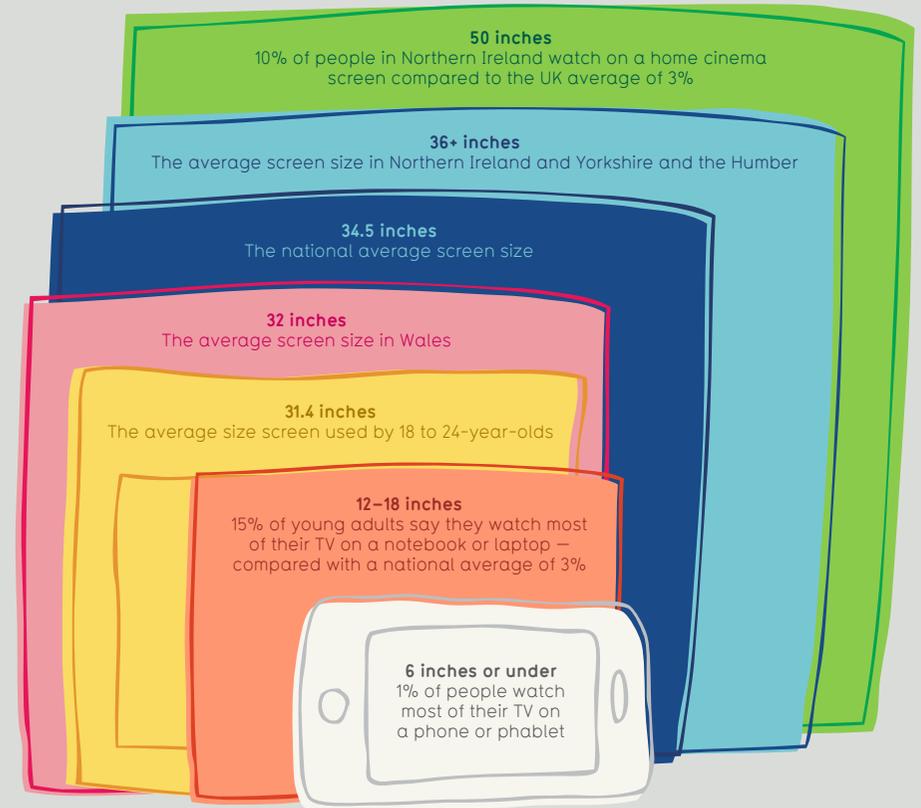
Sales of smart TVs continue to increase, with sales in 2013 touching 1.5m.

The TV in Your Pocket

Superfast broadband is now available to almost three-quarters of UK homes, up from 65 per cent in 2012. This, combined with a doubling of public Wi-Fi spots from 16,000 in 2012 to 32,000 in 2013, means viewers can access catch up and live TV content online via faster connections.

Just over 55 per cent of tablet owners use their device for viewing video content such as TV programmes. With tablet sales expected to surpass PC sales by 2015, the number of people using tablets to watch TV is likely to increase.

People watch an average of four hours of TV per day. Despite this, the average time spent watching on mobile screens (such as tablets and smartphones) is a fleeting three-and-a-half minutes each day.

Measuring Screen Sizes Across the UK**Measuring Up**

Across the UK, the majority of TV is watched on a family-sized big screen (34.5 inches). However, there are regional differences. In Yorkshire and the Humber most viewing is on screens averaging more than 36 inches whilst 10 per cent of people in Northern Ireland watch on a screen bigger than 50 inches. Viewers in Wales have the smallest TV screens, averaging 32 inches. Just one per cent of people watch most of their TV on a screen sized six inches or under.

We're finding tablets are outstripping mobile phones and laptops as children's preferred digital device. The mobility, instant internet access, ability to film and take photographs, and the larger screen of a tablet enables children to be creative and to multi-task. TV is viewed on or alongside the tablet. Importantly, they are using the devices for research and schoolwork, and are becoming adept at judging trustworthy content.

Dr Barbie Clarke,

Managing Director, Family Kids and Youth,
 a global market research agency



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3D TV sales:
Futuresource-Consulting
Mobile phone ownership:
Ofcom/ITV

The future of 3D and 4K TV

While 3D TV is not as popular as last year's predictions suggested, analysts think by 2017 more than 58 per cent of TVs sold globally will be 3D enabled. With different UK broadcasters adopting different 3D approaches, suggestions are the format may be more suited to premium and on-demand services. 4K (four times the resolution of HD) is the ultra high-definition TV technology which manufacturers hope will have viewers desperate to upgrade. This year's World Cup final will be filmed in 4K.

Given the relatively high cost of 4K TVs and the slow rollout of 4K services, it will take time for ownership levels to grow. The other major development in broadcasting, 3D TV, is not to be written off as some have suggested. In the UK the landscape is mixed. While the BBC postponed services, BSkyB and Virgin have indicated their continued commitment to 3D. Sales of 3D TV will continue to increase, so over time we may see services grow to cater to them.

Jack Wetherill, Senior Market Analyst,
Futuresource Consulting



Although the TV market is far from buoyant at the moment there are a number of 'premium' features out there to keep consumers interested. With the approach of the 2014 Football World Cup, large screen smart TVs — including the even more exciting Ultra HD and OLED sets — will be in high demand. There have been over four million smart TVs sold to date in Britain and, in the last 12 months, their sales already accounted for 52 per cent of the total market value. With ownership levels still low (approximately 15 per cent of the UK households own a smart TV), growth is likely to continue.

Zhelya Dancheva
Senior Account Manager,
GfK, Market Research and
Consumer Insight Agency



Ofcom reported a 38 per cent increase in children's use of tablets last year. The take-up has been phenomenal. Children use them to watch TV and to play, and kids love to play — it's what they do best. Children expand their relationship with TV brands and characters in spin-off games, and soon we'll see them playing along on apps which allow them to interact with their favourite TV shows.

Greg Childs, Director,
Children's Media
Foundation



Children's Tech Toys



Ownership of smartphones is on the rise. Among 12 to 15 year-olds, 52 per cent now use a smartphone to access the internet (up from 44 per cent in 2012).

According to a 2013 survey by ITV/Tonight, 40 percent of UK children use a tablet or smartphone at home and 17 per cent of parents surveyed said their child had a device of their own. However, seven per cent of 5 to 15 year-olds do not use the internet at all, in any location.

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Unlike many other countries, the main terrestrial channels still dominate most people's broadcast choices in the UK. The increasing number of +1 channels has intensified their dominance. It's not surprising: the terrestrials invest more in UK originated programming, and provide more 'must watch' TV events. So most people check out what these channels are up to before looking further afield. They might flick through the channels using their remotes, scan their programme guides or look at their listings apps. After that, it's a choice between other channels, iPlayer or Personal Video Recorders. Choice is now an option for most viewers, but they still prefer to have it done for them by the main terrestrials.

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



Some people are confused by the fact the vast majority of TV – some 89 per cent – is watched live. With on-demand TV so easily available, we need never watch anything scheduled again surely. Yet we do. Why? The underlying reasons are emotional. In fact, we identified six emotional reasons why we watch TV and knowing them explains why the live experience is so fundamental. The reasons are to unwind, for comfort, to connect, to experience, to escape, and to indulge. Live TV meets all of these needs brilliantly. Man cannot live by video on demand alone so live lives on and, together, people have perfected the TV experience.

Neil Mortensen,
Research Planning Director, Thinkbox,
a marketing body for commercial TV in the UK



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Children's Viewing Habits

Viewing Time

In 2012, 4 to 15 year-olds spent on average 16 hours 42 minutes watching TV a week.

Live TV

A sizable 89 per cent of all viewing done by 4 to 15 year-olds is of live broadcasts. Close to 12 per cent of their viewing is time-shifted.

Pre and Post Watershed

The vast majority of children's viewing is early morning and early evening (7pm–9pm). However, 13 per cent of 4 to 15 year-olds also watch after the 9pm watershed.

Away from the Bedroom

With tablet ownership increasing among children, the number who have TVs in their bedroom has fallen. In 2013 52 per cent of 5 to 15 year-olds had a TV in their room compared to 59 per cent in 2012.

Tablets on Top

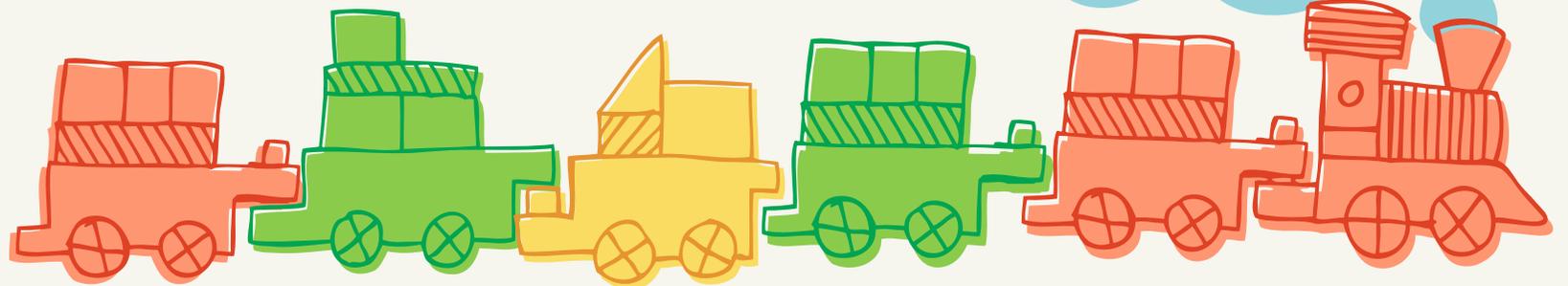
The use of tablet computers has increased. Tablet viewing among 5 to 12 year-olds has tripled since 2012 (14 per cent to 42 per cent).

TV Content in Many Ways

Virtually all 5 to 15 year-olds watch TV programmes on a traditional TV (98%). However, in 2013 just under half of children (45%) also used another device, such as a PC or tablet, to watch TV, an increase of 11 per cent on 2012.

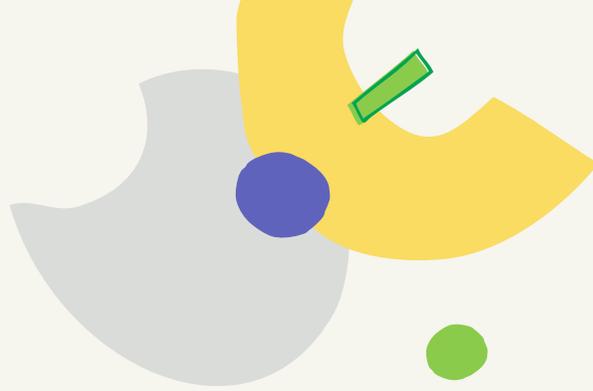
People Prefer Live

Across the UK we watch, on average, over four hours of TV per day (15 minutes more than in 2008), with 90 per cent of all viewing being live. The remaining 10 per cent is time-shifted (either programmes recorded on PVRs or watched via catch up services like iPlayer or 4OD). According to BARB, 81 per cent of all time-shifted viewing is watched within two days of recording.



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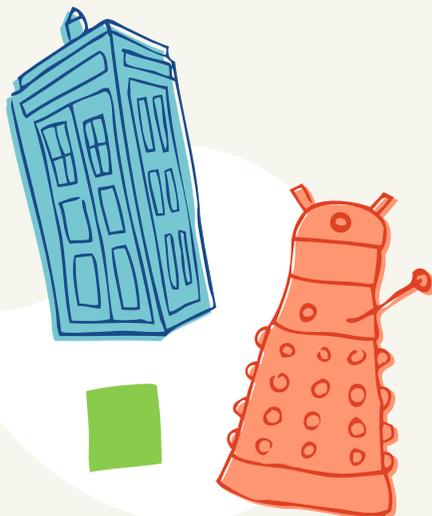
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Live TV on the Move

Internet streaming services such as iPlayer and 4oD mean we can watch live TV outside of the home, at work or on the move. The funeral of Baroness Thatcher, which took place on a Wednesday morning in April, was viewed by over 850,000 people live via an iPlayer stream.

Live Events Still on Top

The 50th anniversary episode of **Doctor Who** attracted more than 10 million viewers, showing live TV events still have the ability to bring people together.



References
iPlayer requests: BBC
Viewing figures: BARB

Children's TV by Numbers

- 7** **Wombles** living on Wimbledon Common.
- 25** Languages **Fireman Sam** has been translated into.
- 32** TV channels dedicated to children's content in the UK.
- 37** Hours of live children's TV available on free-to-air services each day (CBBC, Ceebies, CITV).
- 65** Age of **Noddy** in 2014.
- 100** Pounds paid in 1963 to TV artist Tony Hart to design the **Blue Peter** galleon.
- 4.5m** Four to 12 year-olds watching TV after 7pm.

Top 10s of 2013

Below are the Top 10 programmes from 2013, including the Top 10 live programmes of the year and Top 10 shows for children.

KEY

- Top 10 live programmes
- Top 10 live programmes for ages 0 to 6
- Top 10 live programmes for ages 6 to 12
- Top 10 Live iPlayer Requests



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The Genres of Children's TV

Due to the unique demands of its audience, children's TV is arguably one of the hardest genres of television to get right. Children can be the fiercest of critics. In this section we've looked at four genres of children's TV and highlighted some of the programmes which broke new ground and have stood the test of time.

News

Newsround, or John Craven's Newsround as it was first called when it came to air in 1972, was the world's first 'news' programme aimed specifically at children. Reporting on national and international events, Newsround didn't sugarcoat the stories but presented them in a way children could understand. It has also proved to be a springboard for many of today's news presenters. Past presenters of Newsround include Krishnan Guru-Murthy, Julie Etchingham, Lizo Mzimba and Jake Humphrey.

Factual

Factual has always been a mainstay of the children's television schedule. **Blue Peter** is perhaps the most widely known, having been on our screens since 1958. With its format of filmed reports, studio demonstrations and finding countless uses for old washing-up bottles and sticky-back plastic, it came to define children's factual television.

More recently, programmes such as **Horrible Histories**, with its humorous and quick-fire take on past events, has become the must-see programme of the genre.

Learning

Pre-school and schools TV during the 1970s and 1980s made up the daytime schedule on BBC One and BBC Two. Starting in 1964 and running for nearly 25 years, **Play School** became the definitive pre-school programme. Following a tried and tested formula, the show sought to educate through songs, stories and a trip through 'which window'. It also made national treasures of the four toys; Big Ted, Little Ted, Jemima and Hamble. **Mr Maker**, **Balamory**, and **Something Special** have carried on the tradition.

Drama

Running from 1978 to 2008, **Grange Hill** was a genre-defining series with a reach exceeding the world of children's television. The series caused controversy from the very beginning, and over the years storylines included serious sexual assault, knife crime and suicide. But the 1986 storyline involving Zammo's descent into drug addiction really captured the public and the media's imagination. **The Dumping Ground**, set in a children's home, followed suit with equally gritty and challenging storylines.

As a young lad I loved watching **Dr Who** and **Daktari**, and can still sing the theme tune of the African-based safari hospital programme with Clarence the cross-eyed lion. I also loved watching football. My best day of the year was **FA Cup Final** day and I would post the latest score up on the lounge window to keep any passers-by up to date. I was in a way already broadcasting then, albeit it to a cul-de-sac in Hertfordshire. The FA Cup final programme on the BBC had inspired me to get involved.

Mike Bushell,
Presenter, BBC Breakfast



Children's programmes create new worlds and call upon imagination, engagement and make-believe, from children behind the camera and those in front of the TV set.

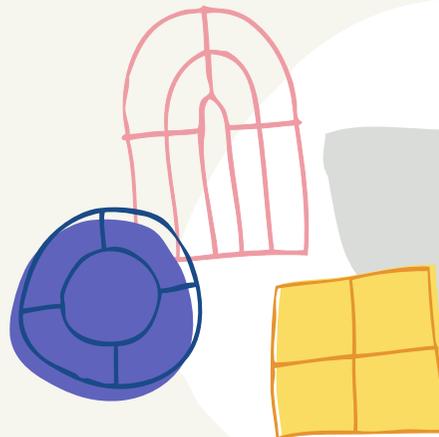
Most recently I have been working on the CBBC show **The Dumping Ground**. I hope when the new series airs, viewers enjoy watching it, and it maybe helps some children with problems they are facing.

Kia Pegg, Actor,
The Dumping Ground, CBBC



It is a wonderful thing to work for children, particularly young children. There is a different perception and the trick is to try to see the world from their point of view. As I see it, the role of young children's television is to reflect their world back to them. This is what **Teletubbies** did and it is why small children love **In the Night Garden**. They are absorbed in situations they recognise and can smile about. Making them smile is very important. Television is not a teacher — it simply confirms what children have already learned. All we have to do is celebrate that with them.

Anne Wood, Founder
and Creative Director,
Ragdoll Productions Ltd,
creators of Teletubbies



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Recipe for Children's TV

We asked adults across the UK about their favourite TV programme as a child. The magic of puppetry and the creativity of arts and crafts were favourite themes for every age group. BBC standard, **Blue Peter**, was popular across all age groups and was nominated by almost one in ten of all respondents as their favourite programme.



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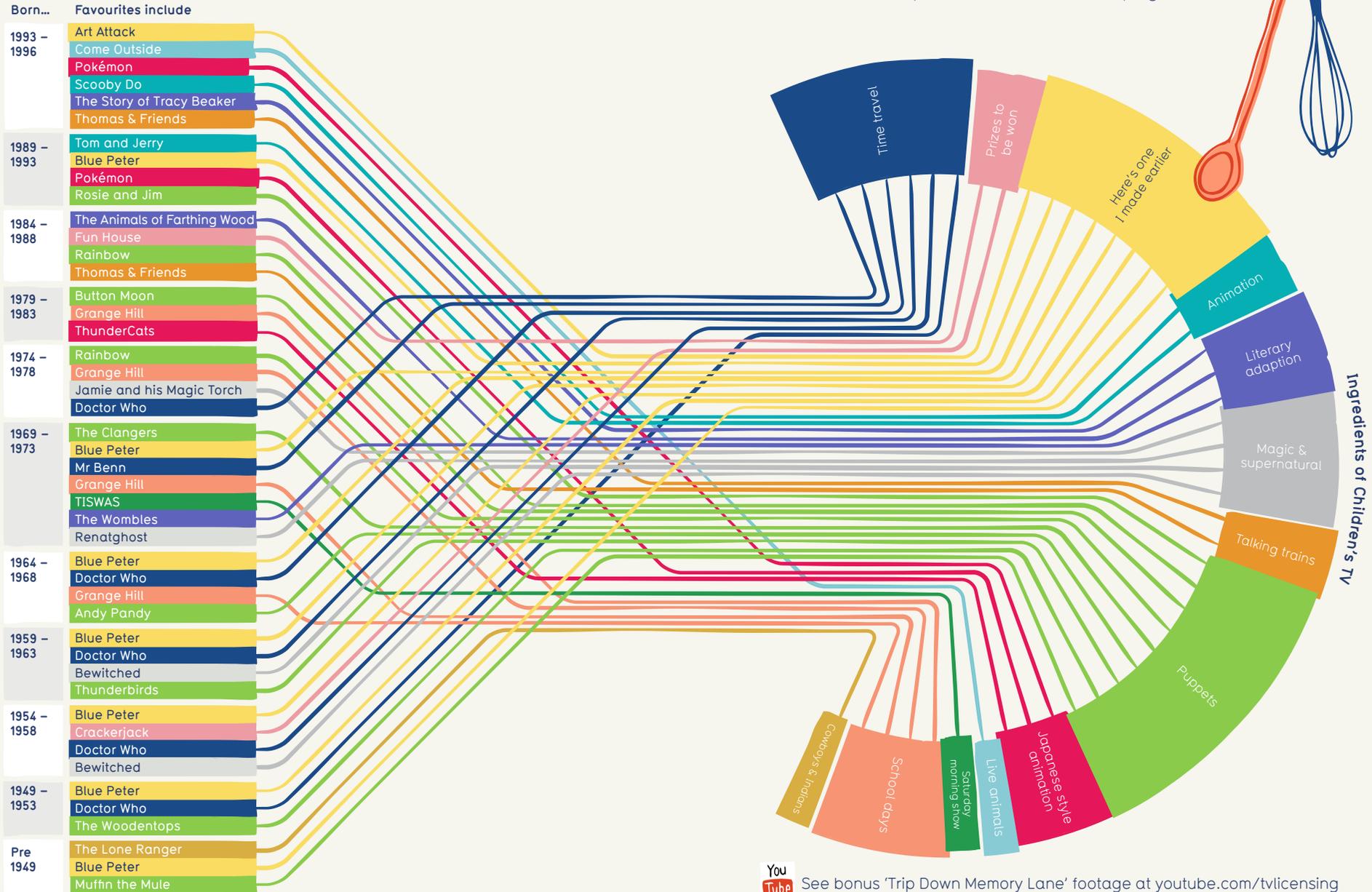
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Bringing Families Together

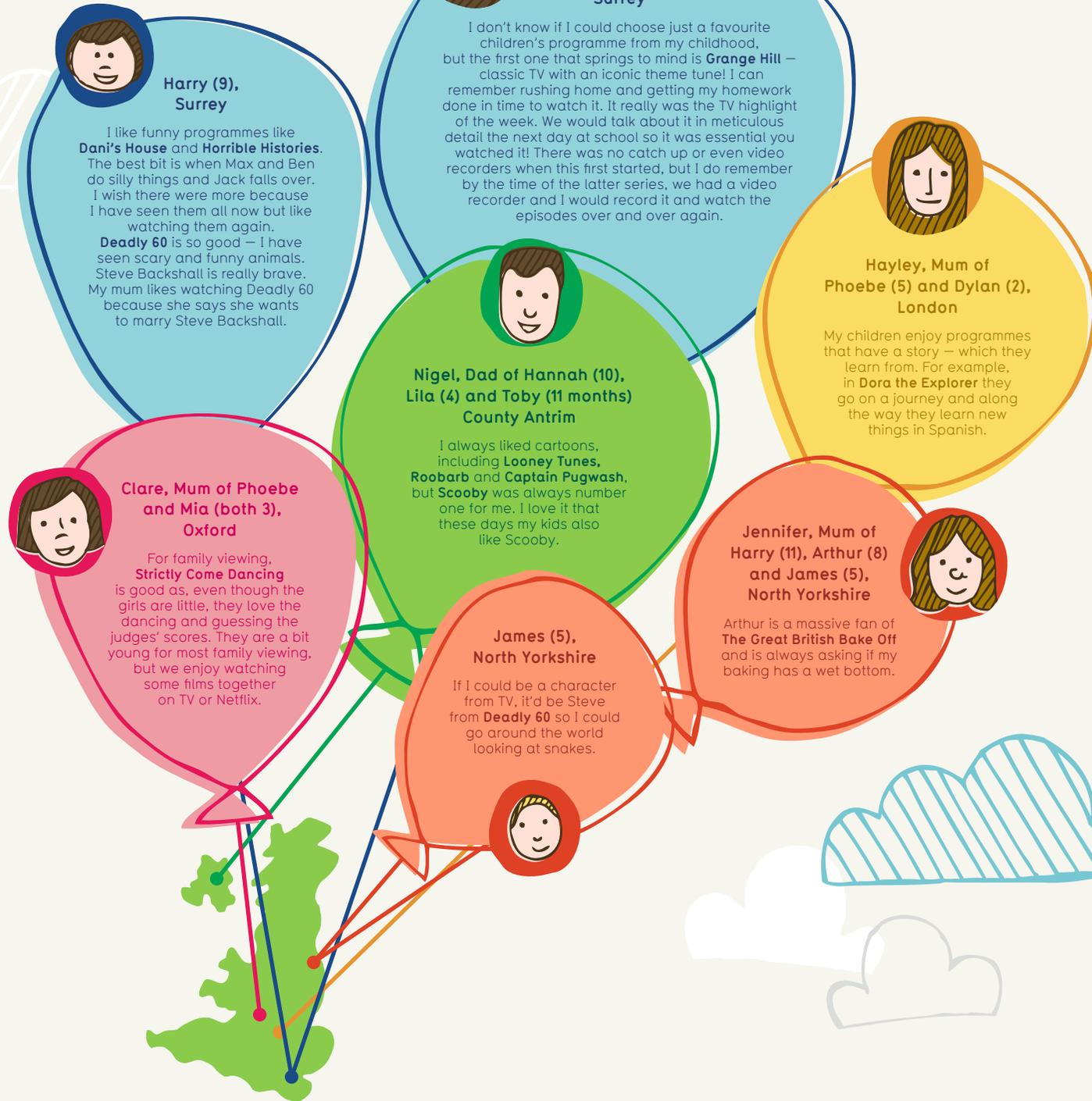
We asked families from around the UK about the TV they watched at home over the course of the week. They told us about their favourite programmes to watch together, and which programmes their children enjoy watching as a family and on their own.

We found that for families with children of varying ages, it's not children's programmes which can keep the whole family entertained but the family-friendly appeal of programmes such as **Strictly Come Dancing**, **The Great British Bake Off** and sporting events, which bring generations together.

Our survey showed for young children, TV is another way to enjoy a story – just like the ones they read at bedtime – and animated programmes like **Dora the Explorer**, **Doc McStuffins** and **Peppa Pig** are popular.

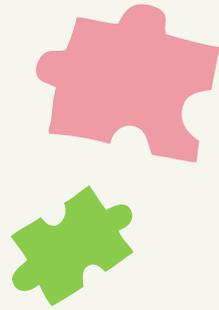
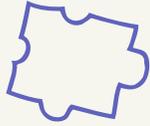
As children grow older they are more likely to enjoy live action programmes with an element of adventure or silliness, such as **Absolute Genius with Dick & Dom** or **Diddy Movies**.

Family Favourites



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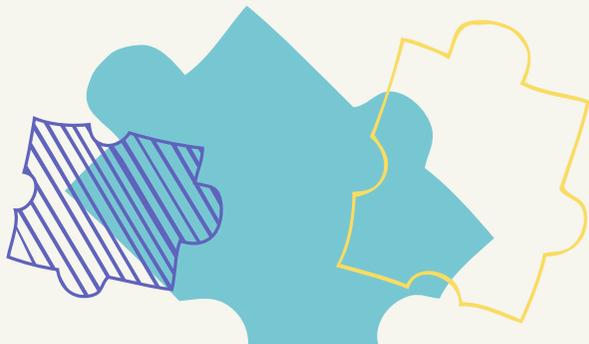
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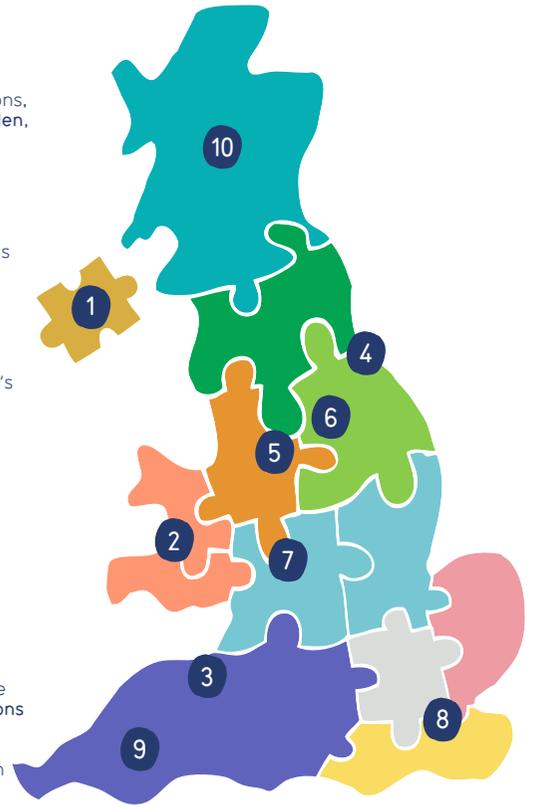
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The UK has a rich history of making and providing the backdrop for some of the world's most iconic and timeless children's television programmes. From a converted cow shed in Kent came such classics as **The Clangers**, **Ivor The Engine** and **Bagpuss**. The West Midlands gave us Tinky Winky, Dipsy, Laa-Laa and Po whose adventures have been translated into 45 languages and shown in 120 countries. CBeebies show **Balamory** sparked a new economic phenomenon – toddler tourism – when hundreds of thousands of fans of Penny Pocket and friends visited Tobermory to see where the programmes were filmed. There are very few areas of the UK which haven't played a part in the history of children's TV, whether home to the studios which gave us the likes of **Chorlton and The Wheelies**, **Morph** or **In The Night Garden** or having provided the visual backdrop to series such as **Fraggle Rock**, **Byker Grove** and **Something Special**.



Here, There and Everywhere

- 1 Northern Ireland**
Brought us **Romper Room**, **Big City Park**, **Lifeboat Luke**
- 2 Wales**
Rastamouse was made by Dinamo Productions in Treforest whilst **Sarah Jane Adventures** and **Wizards vs Aliens** were both filmed in and around Cardiff.
- 3 Bristol**
Animal Magic was filmed at Bristol Zoo and the city is base to Aardman Animations, creators of **Morph** and **Shaun the Sheep**
- 4 Newcastle**
Newcastle and the North East provided the setting for **Byker Grove** and **Tracey Beaker**
- 5 Manchester**
Was the base for Cosgrove Hall Films, creators of **Chorlton and the Wheelies**, **Danger Mouse**, **Count Duckula**, **Jamie and the Magic Torch**
- 6 Leeds**
My Spy Family and **My Parents Are Aliens** were filmed in Leeds using the same studios as long-running quiz **Countdown**
- 7 West Midlands**
Home of Rag Doll Productions, makers of **In the Night Garden**, **Teletubbies**, **Rosie and Jim**, and **Pob's Programme**
- 8 Kent**
From its shed Smallfilms produced children's classics including **The Clangers**, **Noggin the Nog**, **Ivor the Engine** and **Bagpuss**.
- 9 South West**
External shots of St Anthony's Lighthouse, near Falmouth, were used in the filming of **Fraggle Rock**.
Something Special was filmed in Salcombe, Devon
Brum opening credits were filmed at the Cotswold Motoring Museum in Gloucestershire where the model car used is still on display
- 10 Scotland**
The Glasgow Science Centre is where **Nina and the Neurons** conduct experiments. The colourful town of Tobermory was the location of **Balamory** whilst Glasgow and Edinburgh provide the back drop to **Me Too!**



TISWAS was the catalyst for slapstick on Saturday morning children's shows – you could programme what you liked and ratings soared. It was a regional concept – edgy, breaking new territory and we could only have done it in Birmingham. There was something about the ATV (production company Associated Television) culture at the heart of the Midlands which came directly from Lew Grade. We were loud, ground-breaking and showbiz. Who wouldn't love a custard pie and a bucket of water?

Peter Tomlinson,
Creator of TISWAS



The BBC has for many years produced strands of children's TV away from its London base, with Bristol being the home all those years to studios making **Vision On**, **Animal Magic**, **Take Hart** etc. Indeed it was these programmes that brought the fledging partnership that became Aardman to Bristol in the first place. Producing quality work for children has always been a primary aim of the studio. This young audience is also your future audience for other production and could also be your future employees, so why would you short change them? Many of our crew have young children and they are producing work they will watch with them, so they want to be proud of what they do. Being based in a city like Bristol, away from the hubbub and stresses of London, allows people time to think more and deliver perhaps more considered work.

David Sproxtton, Aardman co-founder and Executive Chairman.



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Children's Favourites Through the Years

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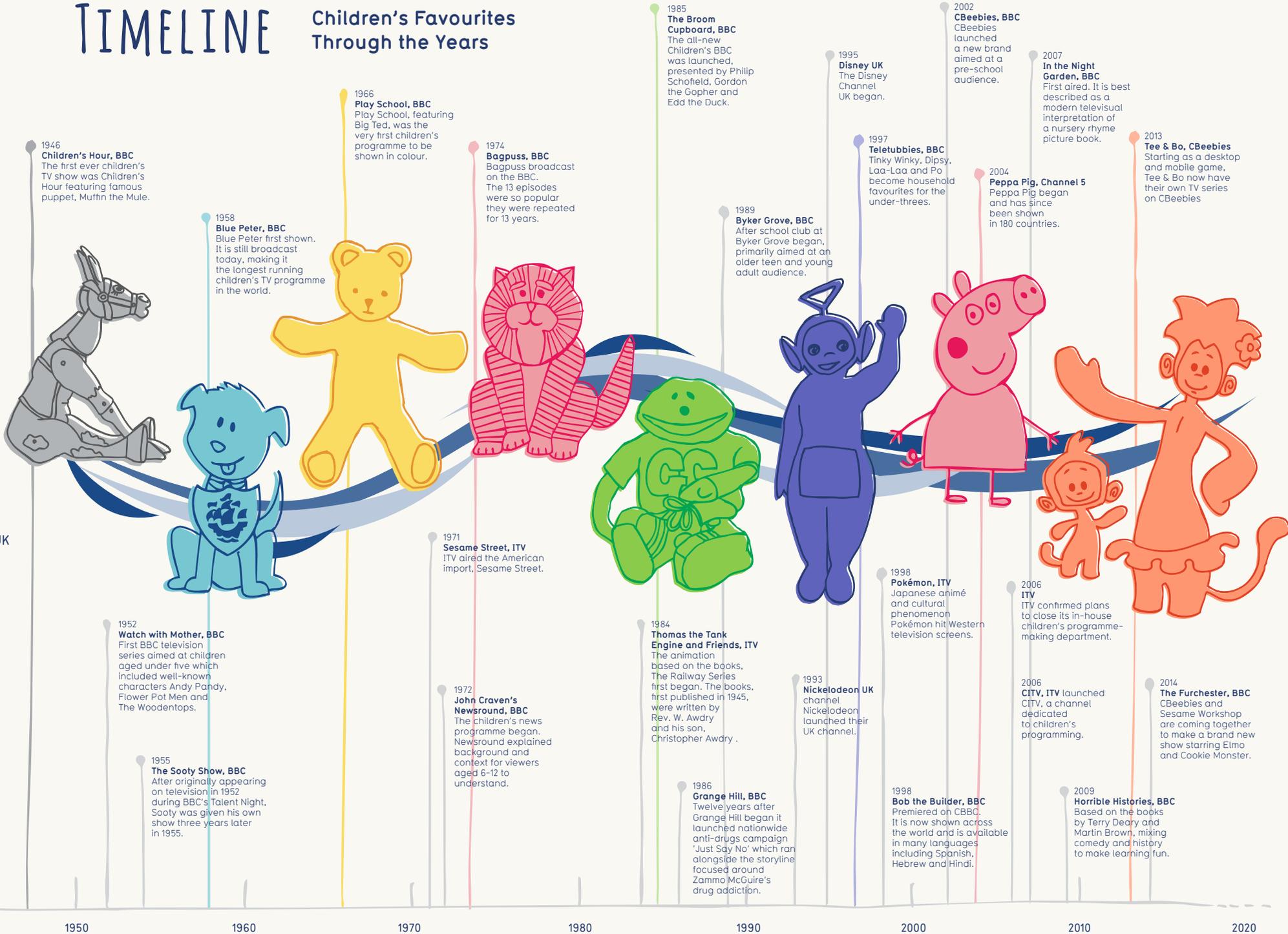
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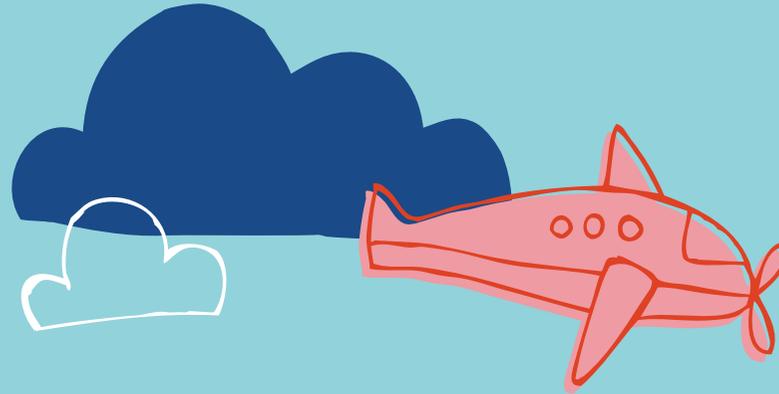
1990

2000

2010

2020

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3D TV

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

4K TV (Ultra HD)

4K is four times the resolution of standard consumer high definition (HD) resolution.

Catch Up TV

Catch up TV services (such as BBC iPlayer or 4oD) allows users to watch TV programmes after they have been broadcast using a smart TV, computer, phone, tablet etc. that is connected to the internet.

Connected TV

TV which is connected to the internet either directly or via another connected device, such as gaming console, digibox (also called smart TV).

Digibox

A desktop box which receives and decodes digital broadcasts.

Digital TV

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

Flatscreen TV

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

High-definition TV

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

Jumbo Screen

Large TV screen, usually with a screen size of 43 inches or bigger.

LCD TV

Liquid Crystal Display TV images are created through a network of pixels behind the screen which produce an electric current, determining the colour and light variations to produce the image.

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. Live TV can also refer to live events as they are broadcast on TV.

Mobile Devices

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

OLED TV (organic light-emitting diode TV)

The latest innovation in home televisions. As the screen doesn't require a backlight it means the TV can be extremely thin (approx. 4.3mm thick) and also curved in shape.

Phablet

A mobile device with the functions of a smartphone combined with a larger screen, typically with a diagonal size between 5 to 6.9 inches (130 to 180 mm).

Plasma TV

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 impression of a picture.

PVR

A Personal Video Recorder, sometimes called a digital video recorder, is a device which records live TV programmes in a digital format to a disk drive. A PVR function is often built in to a digibox.

Small screen technologies

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

Smartphone

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

Smart TV

See Connected TV.

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 and Pinterest.

Tablet

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

Time-shifting

Watching programmes after they have been originally broadcast through recording them (to a digibox/PVR) or using a catch up service such as iPlayer or 4oD.

Two-screen Viewing

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



REFERENCES & ACKNOWLEDGEMENTS



FOREWORD

EXECUTIVE SUMMARY

THE STATE OF THE NATION

WE ♥ LIVE

A TRIP DOWN MEMORY LANE

MADE IN THE UK

TIMELINE

GLOSSARY

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For more information or to arrange an interview with a spokesperson, please call the TV Licensing press office on 020 8752 6606 or email media.enquiries@tvlicensing.co.uk

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