

SONY

# Why we watch television

# Foreword

## Television is facing unprecedented disruptive change.

Companies are placing big bets on new forms of video distribution, without necessarily understanding why people might want to watch.

There's a popular perception that the traditional model of television is broken, but it's far from clear how it will be replaced.

To understand this transformation of television, we really need to appreciate the nature of the medium, the needs it addresses and the ways it's used.

Sony has a long tradition of leading and supporting the industry through transformation and technology innovation.

This report provides a personal view to help inform the way we think about television and video.

It aims to address the apparently simple question of *why we watch television*.

It considers what we mean by television, what television means to us and how that might evolve.

Television has typically provided mass audiences with shared experiences. And it will continue to do so.

But now, in the era of connected television and online video available on demand, it's possible to focus on the needs of the individual viewer.

We're all individuals, with different backgrounds, identities and perspectives.

**We all have our own reasons for watching television and they vary according to the viewing context.**

By studying the fundamental psychology and sociology of our behaviours as human beings, we can better understand why we watch television, and how we may view in the future.

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# Introduction

## What do we mean by television?

The very concept of what constitutes television is constantly evolving.

Television can no longer be defined by the way it's transmitted or the screen on which it's seen.

Although the way that television programmes are delivered and viewed are changing, we're spending more time watching video than ever.

Television is difficult to define, but we know it when we see it.

The idea of television includes:

- The **screen** on which it's generally seen
- The **medium** of broadcast, one-to-many transmission
- The **channel** for delivering scheduled output
- The **form** and format of programmes
- The **function** of public service broadcasting
- The **business** models of commercial and pay television
- The **regulation** systems under which it operates.

These are now becoming absorbed into a wider domain of video media, which can deliver many of the features we have traditionally associated with television.

We can now view high-quality online video on a handheld screen. Whether we call that television depends on what we're watching as much as how it's delivered.

We still think in terms of reading a book, whether we bought it from a bookshop, ordered it online, or downloaded it to a tablet.

**The medium of television is determined as much by the form of its programmes and the way they're viewed as any particular delivery technology.**





## What does television mean to us?

It's become fashionable to assume that we're now in a post-television era. Yet we should be wary of premature proclamations of the death of television.

Despite the ever-increasing availability of online video on demand, the vast majority of our viewing is still of programming delivered over traditional channels, seen on a television screen.

**For decades, television has played a leading role in our lives. Television is part of our popular culture.**

Television opens a window that frames our view of the wider world.

Coverage of global events can bring the world together. It shows us things we would not otherwise see and provides a context for our own experience.

It provides an important public and social service. It offers us a constant companion and a sense of connection to the wider world.

More than any other medium, television can:

- talk to us
- look us in the eye
- show us new things
- tell us extended stories
- move us.

Watching television allows us to express our emotions, to laugh out loud, or have a good cry.

Television is also often simply part of the background while we're doing other things.

## How will television evolve?

Some might argue that television, the dominant medium of the late twentieth century, is in inevitable decline and will be displaced by other forms of video viewing enabled by new digital networks.

With rare exceptions, fewer people are watching any particular programme at the same time.

Much is made of new delivery technologies establishing different viewing patterns.

We can now watch programmes at our convenience, but the impact of this is often overstated.

There's a prevalent view that we will all want to watch whatever we want, wherever we want, whenever we want.

Yet we still want to watch programmes that other people watch. It's an experience that we want to share with others, even if we're viewing alone.

Many of us watch television in much the same way as we ever did, largely through habit.

In fact, many of our underlying behaviours remain the same, driven by the same fundamental human needs. It's just that they manifest themselves in apparently different ways.

**New ways of viewing are likely to displace, but not entirely replace, the function of television.**

However programmes are delivered, we'll still see them on a screen and we'll probably think of them as television.

Other forms of online video and social media will address some of our needs. But there'll still be a place for scheduled programming, and in particular live broadcasting.

Rather than viewing other forms of video as a threat to traditional television, we should see them as a way of adapting and extending the television experience to fit the way we live our lives.



# Television features

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# Television offer

The main promise of television, its premise and value proposition, is that there'll always be something new to watch.

Whether we can actually find something we want to watch is another matter.

The overall output has broad appeal, whether it's free to view or through a subscription, however it's delivered, to whatever screen.

Television covers multiple genres, from factual to fictional, from live events to recorded drama.

These all have different characteristics, making them more or less open to substitution by different modes of distribution and competing activities.

Television remains relatively cheap, virtually unlimited, entertainment.

It's an effortless all you can eat buffet that never runs out. It's food for thought.

**Watching television is our most popular pastime. For many of us it's our default leisure activity. It's what we do when we're not doing something else.**

On average we watch for about a day a week, a seventh of our lives.

For all those that watch less, there are those that watch even more.

The range and quality of programmes that we can now access is incredible.

Once the poor relation to movies, television dramas are increasingly epic in cinematic scope and ambition, extending over many seasons.

Sound and vision reproduction is higher fidelity than ever.

In many ways, television has never been better. It offers more choice, higher production values, better sound and pictures, and more ways of watching.



# Viewing context



The typical marketing picture of people watching television shows a happy family group, with someone excitedly pointing a remote control at the screen.

They'll often be eating popcorn from a bowl while watching a movie, or punching the air in support of a favourite sports team.

Yet this isn't how we generally watch television.

If we're holding a remote control we're probably looking for something to watch.

These days we're as likely to be holding a phone or a tablet and looking for something else to do.

**Once the focal point of the living room, the television screen no longer commands our complete attention.**

Television is still a feature of most homes. We acknowledge its presence and live our lives around it, like a family pet.

If anything, we take television for granted.

The more viewing options we have, the less we feel compelled to gather around a single screen.

Watching television is generally a discretionary, substitutable leisure activity.

We don't have to watch television. It's an amenity rather than a utility.

We could do other things to pass the time. That includes other forms of media that compete for our attention.

So why do we watch television?

# Ambient media

Television is an ambient medium that fills the room with sights and sounds. It's there with us whenever it's switched on, whether we're really watching or not.

The continuity and familiarity of television reassures us. It can be comforting, like having someone else with us, providing companionship, much like radio.

Sound is generally as important as pictures in holding our attention, or enabling us to follow a programme while we do something else.

Of course a noisy programme that we're not interested in can be distracting, intrusive, or even a reason to change channel, switch off or leave the room.

Television frequently provides the background for other things we're doing.

Although this is often referred to as multitasking, we're actually rapidly switching our attention from one thing to another.

**A lot of the time we're really only half watching or half listening.**

The obvious advantages of a fixed screen, other than size, are that it can be easily watched by more than one person and allows us to do other things at the same time.

It was always like that. It just used to be knitting or the newspaper.

We now have more screens in our homes, including phones and tablets that can compete directly for our attention.

They offer features that have similar properties and meet similar needs: games, social media and other online services.

These could erode television viewing. Although of course they can also be done at the same time.

They're also equally capable of showing video, so can potentially substitute for the living room screen.



# Constant flow



Television programmes are always delivered at a constant rate, irrespective of content or context.

Television flows over us and will continue to do so until the end of a programme. Then there'll be another one to watch.<sup>1</sup>

Television constantly appeals for our attention. It appears to offer limitless novelty.

It never ends. It's never used up.

There's always a sense that we may be missing something by not watching.

Television encourages us to keep watching or channel hopping in the hope of something interesting that we might otherwise not see.

With countless channels running around the clock, there's too much television, yet it can still be difficult to find something to watch.

**We often seem to watch television as an activity, rather than any particular programme. The selection of what to watch is sometimes secondary.**

Digital video recorders and online services now enable us to tame the torrent of countless channels flowing to our screens.

We can pause a programme, or catch up on a show we may have missed, but there's still a sense that television output will carry on regardless, in a relentless flow.

The same can be seen in social media. A constant flow of updates feeds our appetite for novelty and our fear of missing out. The desire to keep up to date becomes an activity in itself.

# Available to view

Our viewing is largely determined by our availability. This varies by the time of day and day of the week, based on our lifestyle and other commitments.

It's also seasonal. We watch more in the winter months of long dark evenings and less in the summer, when the warmer weather encourages us outdoors.

It differs by country, climate and culture, but otherwise we watch about the same amount of television irrespective of what's on.

**It's not so much that we watch particular programmes as television itself.**

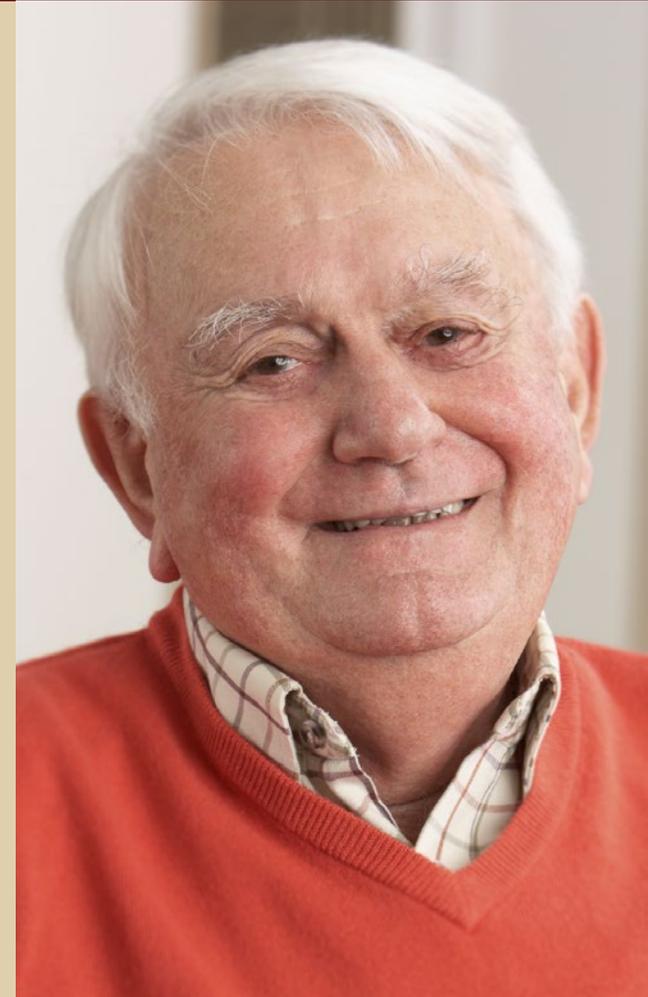
We seek something to watch from the available alternatives vying for our viewing time and attention.

So we tend to decide what to watch based on our mood and the time available.

We typically prioritise watching current programmes on the basis that we don't want to miss something new.

We fit our viewing into the rhythm of our lives, as if making efficient use of our spare time.

*'I'll watch this before I go to bed.'*



# Convenient viewing



Television has become much more convenient to use. There are now many more ways to watch television programmes.

We can watch more flexibly and even more efficiently, whether its live or recorded, on demand or online, on different screens.

We can be more discerning in our viewing choices, watching more of what we want on our own terms.

The more commitment we make to a viewing choice, the more likely we are to watch and enjoy a programme in its entirety.

**As it becomes easier to choose what to watch, we might expect our appreciation of television to increase.**

Despite the availability of digital video recorders and catch-up television services, only a minority of all viewing is currently on demand, although the proportion continues to rise.

The choice and convenience now available is only valuable if we know what we want to watch.

Many services offer a bewildering array of titles. The experience is rather like wandering through the aisles in a vast virtual video store, with only the cover art and a brief synopsis to inform our choice.

Irrespective of the selection available, we may not know what to pick.

Since we can always watch something another time, we may defer it for another day, perhaps indefinitely.

So we can end up feeling less satisfied and resort to our old favourites.

# Live or recorded

## The distinction between live and recorded programming is critical.

The television industry tends to talk about live viewing in terms of watching at the time of transmission, or even on the same day as broadcast.

Much of this programming may actually be pre-recorded, rather than really live.

Even programming that's broadcast live generally contains recorded elements.

Relatively little of the television that's viewed is really live, taking place at the same time that we're watching.

This live characteristic is typical of certain genres: news, sport, weather, events, and some entertainment shows.

These programmes carefully create the sense of being spontaneous. They naturally tend toward being viewed at the time of transmission, or shortly afterwards.

**The impression of a shared, simultaneous experience lies at the heart of much television viewing.**

Recorded programming is more amenable to being distributed and viewed on demand.

Yet a recorded programme offers a different experience, which may not be as pleasurable as watching in the virtual company of a large audience. Like yesterday's newspaper, it loses its currency and relevance.

Drama series are typically less topical. They may benefit from viewing multiple episodes in a single session.



# Direct address



A frequent feature of television programming is that it seems to speak to us personally, typically with direct eye contact and a sense of immediacy.

It attracts our attention and appears to acknowledge our presence, as if the face on the screen is talking to us.

This form of direct address partly fulfils our human desire for social contact and connection. It provides a surrogate for personal social interaction. It seems intimate. We feel involved.

We're hard-wired to respond to a face looking straight at us, which makes it difficult to ignore.

**We can experience more eye contact with people on television than our family or friends.**

Even when it's not looking at us, television is often talking to us.

This uniquely televisual form of address, inherited from radio, has its roots in the way we naturally communicate.

Sustained direct address has rarely been used in other moving picture forms, such as cinema.

The powerful illusion of direct communication is strongest when it's taking place at the time we're watching.

When recorded it becomes a visual convention. We intuitively sense that the person isn't really speaking directly to us.

# Unseen observer

The main dramatic mode of television presentation involves us as an unseen observer, unacknowledged by those on screen.

This dramatic convention maintains the invisible fourth wall of the traditional proscenium theatre, as developed by mainstream movies.

The camera placement and editing serve to stitch us into the scene in such a way that both we and the camera appear invisible.

This supports more complex narratives, through changes in viewpoint, in time and space. By hiding the means of production it allows the creation of a coherent story world.

We're a witness to events, which appeals to our natural curiosity.

This approach is used in many television genres, from fiction to factual.

Of course, some formats may mix direct address and the invisible observer for effect.

News, for instance, combines presenters and reporters telling us what has happened with other sound and pictures presented as evidence.

Sports coverage typically allows us to participate as an unseen spectator, providing multiple perspectives to give us a better view than if we were actually at the event.

**Narrative fiction generally conforms to this convention of the unseen observer. Such stories do not depend on the live nature of television and are more amenable to being viewed on demand.**



# Television research

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# Viewing figures

The television industry spends a lot of time and money trying to measure what people watch, but not necessarily why.

There's a great deal of advertising revenue at stake, but it's based on extraordinary assumptions about who's watching.

Statistical panel approaches can be valuable in establishing ratings but they have their limitations.

They're mainly concerned with measuring audiences in broad socio-demographic groups.

**Even the industry definition of watching television is problematic: being in the room with the television switched on. This says little about emotional or intellectual engagement.<sup>2</sup>**

Audience appreciation research attempts to measure the appeal of programmes but not why people watch them.

New platforms can measure in considerable detail what individual users are actually watching, for exactly how long.

This provides an incredible competitive advantage to service providers.

For this reason most platforms don't share any detailed data. At most they may talk about numbers of views.

So we still know relatively little about online viewing behaviour, or watching television in general.

Much of what we know about television viewing seems self-evident. Or those in the industry feel that it's intuitively understood.

Yet the question of why people might want to watch a particular programme, genre, or television in general, seems fundamental.

For such a large business, it's been subjected to very little rigorous research.



# Consuming television



We don't consume television content. We watch programmes, shows, events, or television in general.

Television is not consumed like food or drink. It's still available for others to watch when we've finished. It seems like it's there anyway, whether we choose to watch or not.

This makes it difficult for viewers to attribute value to a television programme.

The concept of the television viewer as a consumer recognises that as viewers we have active choices in where to spend our time and money.

This is an advance on the traditional assumption of a passive member of an assumed audience. But it doesn't reflect that television viewing is a social, emotional experience.

We might assume that the reason we want to watch television is all about the programmes, the characters, the storytelling, the subject matter, or the content.

Yet it seems to be more about the experience of watching than the substance of the programme.

The programme may simply be a proxy for some other, deeper, social or psychological need.

**Watching television is all about the way it makes us feel—our emotional response.**

# Television studies

Television viewing can be studied from a psychological, sociological or anthropological perspective.

A well-established approach is based on understanding so-called uses and gratifications.

This has its roots in attempts to understand the radio audience in the 1940s.<sup>3</sup> It was first applied to television in the 1960s.<sup>4</sup>

It assumes that people aren't passive consumers of media but play an active role in interpreting media and using it in their lives.

It focusses on how people use media to satisfy specific needs.

If we consider a basic hierarchy of human needs, at the bottom are basic biological and physical requirements, followed by the need for security and safety.

Above this comes a need for social belonging, a sense of self and self-respect.

Once these are met, there's a need for self-actualisation or achieving personal potential.<sup>5</sup>

So one way to appreciate why we watch television is to look at the social and emotional needs that it fulfils in us as human beings.

**Television does more than inform, educate or entertain. It contributes to our sense of self and social connection.**



# Industry research



More recent industry research has attempted to understand why we watch television.

One study offers six reasons based on different need states:<sup>6</sup>

1. **Unwind:** defer life's chores or de-stress from the pressures of the day
2. **Comfort:** shared family time; togetherness, rituals, familiarity and routine

3. **Connect:** a sense of 'plugging in'—to feel a sense of connection to society, to time or to place

4. **Experience:** a need for fun and a sense of occasion to be shared

5. **Escape:** the desire to be taken on an enjoyable journey to another time and place

6. **Indulge:** satisfying your (typically guilty) pleasures with personal favourites, usually alone.

The research suggests that when a particular need is satisfied viewers become relaxed.

Video on demand is better at meeting the need to escape or indulge and the viewers are more likely to be watching alone.

The research concludes that live television remains important for viewers who want to feel that they are sharing a television experience with the outside world.

Industry-sponsored research generally fails to acknowledge that we often watch television out of force of habit or social compulsion.

**We may not even realise why we want to watch television.**

# Reasons for viewing

Asking people why they watch television isn't particularly useful. We might not necessarily know, recognise or want to admit the real reasons, either to themselves or others.

We tend to proffer preferred or socially acceptable answers.

We might say we watch television for relaxation or entertainment.

That's certainly part of it, a socially safe answer. There's no shame in seeking relaxation or entertainment. But there are many other ways to relax or occupy our time.

We're less likely to say we watch because we are lonely or bored.

We're generally unreliable in reporting our behaviour.

We naturally tend to reflect the personal importance that we attach to particular types of programme, rather than our overall viewing.

We may sanitise our viewing by talking about certain programmes, while watching others that might be considered less socially acceptable.

**We're more conscious of our considered choices of programmes.**

So we tend to over report our time-shifted or on-demand viewing.

Yet much of what we watch isn't so considered. It's often more of a compromise.

We might struggle to remember what we watched last night or last week, especially if it wasn't an active choice.



# Television viewing

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# Family viewing

Watching with others is still an important part of the television and video experience for many of us.

Some shows still bring families together, in the same way they have done for generations.

Television also provides a pretext for spending time together. It's a reason to be in the same room at the same time, or simply to sit next to someone.

We don't all necessarily get to watch what we want, when we want.

In the same way we don't always get to eat or drink whatever we want, whenever we want. It may not be good for our health or relationships.

We sometimes concede to the viewing preferences of others.

This is an important element of the family dynamic or relationship between partners.

In some cases there may be a dominant party who generally gets to choose what to watch and command the remote control.

Sometimes it may be a more negotiated experience.

*'What shall we watch?'*

**Shared viewing may involve a compromise, the lowest common denominator or the least offensive option.**

But it gives us a reason to be with family or friends—something to talk about and share.



# Gender and genre



Men and women often view television in different ways. Their emotional and social needs tend to differ, by cultural convention if not biology.

For some men, television may be all about live sport.

Some women may be more interested in episodic drama.

His sport. Her soaps.

While the audiences may skew, men and women tend to watch both.

Sport accounted for less than a tenth of all television viewing in the United Kingdom in 2014.

Drama, including series, serials and films made up just over a quarter of viewing.<sup>7</sup>

Our television viewing generally reflects a range of programme types.

**Most of us watch relatively less of our preferred genre than we might like to think.**

We each have our favourite programmes, but most of us don't only watch television for a single show.

Television fulfils a wider set of needs.

Some of these needs are more suited to scheduled viewing.

Others needs are better satisfied by watching programmes at our convenience.

# Generational difference

There's a popular view that young people simply don't watch traditional television any more.

Younger people tend to watch less anyway. This has always been the case. But they seem to be watching less than before.<sup>8</sup>

There's increasing evidence that a new generation of viewers is watching differently.

They're more likely to watch on a phone or tablet. That may be because they prefer the privacy of watching on a more personal screen. Or it may simply be that they don't have access to a large living room television.

They seem less concerned about the forms and norms of traditional television.

For them it's all about instant gratification. The idea of waiting a week to watch a programme appears preposterous. They're more likely to want to watch several episodes in succession.

**If they've not acquired an early habit of watching scheduled television the way their parents did, they may never do so.**

Some research suggests that younger cohorts of viewers do return to television, but not necessarily to the same degree as previous generations.<sup>9</sup>

Young people are likely to have developed different expectations of media that become permanent.

However, it may be more a matter of life stage.

People are moving into their own homes and forming families later in life.

When they grow up and have children, this generation may become more like their parents than they might wish to imagine.



# Individual viewers



The consequence of wanting to watch whatever, wherever, whenever we want is that we're more likely to be watching alone.

Many of us watch programmes alone. For some it's a private indulgence, a temporary refuge, or a way to pass the time on a long journey or regular commute.

We view video as an increasingly personal experience, rather than as part of an assumed mass audience.

For some people, watching television may provide their main social contact.

We're all destined to get older and we're living longer.

Older people are more likely to live alone, particularly women.

As we get older we have more time to view and therefore generally watch more television.

So older viewers tend to be over represented in the television audience in terms of total viewing time.

Around half of viewing of the two main BBC television networks in the United Kingdom is by people over sixty years old.<sup>10</sup>

The idea of watching television by yourself is not a popular image. There's a stigma attached, like eating or drinking alone. After all, television is promoted as a shared, social experience.

**The more we watch alone, the more important the sense of a shared experience becomes.**

# Personal identity

What we think or say we watch and what we actually watch can be very different.

Saying that we watch a particular programme is a personal statement about our sense of identity. It's part of the personal brand that we project to the world.

Like the car that we drive or the clothes that we wear, it says something about us and our personal set of social values.

Even to deny watching television is an assertion of identity.

It's always been fashionable to disparage television.

For some people, the idea of watching television is almost socially embarrassing. It's something that other people do.

So we tend to be rather selective in the programmes we talk about.

That leads to greater word of mouth awareness of programmes that are perceived as socially acceptable, which makes them even more popular.

**What we watch becomes part of our collective and individual experience, our sense of self, who we are and what we know.**

It's hardly surprising given that we watch so much.

In the course of a decade some of us might watch over a year and half of television. That's more than ten whole years over an average lifetime.



# Peer pressure



We watch television partly because other people watch television.

Television helps us to fit in—to our tribe, to society. It teaches us how to conform, from an early age.

Most of us want to be popular and tend to associate ourselves with things that are generally admired.

Some people want to be different and therefore value things that are more esoteric.

Television can embrace both the popular and the idiosyncratic.

There's an element of fashion and fandom in television viewing.

Our television viewing:

- Tells us about the world and how it's structured
- Provides a sense of belonging to a community or culture
- Shapes our aspirations and contributes to social cohesion
- Allows us to experience real and imaginary lives
- Offers a shared experience in a relatively safe environment
- Provides a topic of conversation.

*'Did you see that programme?'*

Not having had the same experience can lead to a fear or feeling of social exclusion.

That can in itself become a reason to watch a particular programme.

**We don't want to feel left out of the conversation.**

With the increased use of social media it can seem all the more important to conform, to integrate, to participate in the popular discourse.

We want to watch programmes as soon as possible in order to avoid spoilers revealing results or storylines.

# Brain waves

Our basic behaviours are driven by the processes in the brain that are responsible for keeping us alive, like making us want to eat and drink.

We're only beginning to discover what goes on in our brains when we watch television.

Neuroscience is unravelling the real reasons that we appear to enjoy watching television.

The reward pathway in our brains drives our feelings of motivation, reward and behaviour.

Our senses stimulate neurons in the reward pathway to release the chemical neurotransmitter dopamine that gives us a feeling of pleasure as a reward for doing something we like.

It also enables the brain to create a memory that associates the experience with feeling good.

This encourages us to repeat the experience whenever possible.

Television, video, and moving images in general, fulfil a subconscious biological desire to make connections, to seek information and patterns in our environment.

**Our comprehension of moving images appears to operate automatically, without conscious effort.**

While watching we're generally warm and safe with no need to worry about immediate danger.

We fall into a suggestive state and willingly suspend our disbelief.

Our viewing experience contributes to our knowledge of the world.

Memories of the things we see on the screen seem almost real.

Even if we find it difficult to recall something that we've watched it makes an impression.

Advertisers recognise this, which is why television remains a powerful medium for brand building and promoting awareness.



# Active viewers



Television is sometimes portrayed as a passive experience, but viewing video is actually an active cognitive process that engages the mind at many levels.

Sometimes we're more actively engaged in what we are watching, giving it our full attention.

At other times our viewing is peripheral. It's enough to hear the sound and occasionally glance at the screen.

Television occupies our minds, even if we're doing something else at the time.

It's sufficiently demanding to distract us from our routine reality.

Yet watching television doesn't feel like hard work.

To the extent that we're watching and listening, moving images constantly pose questions.

*Where are we? What are we looking at? What just happened? What will happen next?*

Television formats are often based on a mixture of familiarity and surprise.

**Watching television sets up these powerful reward mechanisms that draw us in and encourage us to watch more.**

For some people television is used as reward mechanism. It's an inexpensive treat that apparently does no harm, unlike snacks, alcohol, or tobacco.

# Viewing habits

We still watch television in very similar ways to how we did years ago, partly through conditioning.

Many of our activities are based around habitual, sometimes arbitrary, routines. Television is no different.

Television is habit forming. The more we watch, the more we want to watch.

Broadcasters work hard to establish and sustain these behaviours and viewing patterns.

This is central to the medium of television as opposed to video in general.

Our viewing behaviour has been trained over many decades and generations.

We watch television because we're told to, through constant promotions and calls to action, and through the implicit pressure to keep up with what others are watching.

The narrative structure of drama series and serials tends to demand sequential viewing and provides a powerful incentive to watch the next episode.

**The daily and weekly schedule and viewing seasons provide a structure for our viewing and the perception of a simultaneously shared experience.**

Despite the vast choice, many of us still select from a limited range of familiar channels.

We look forward to our favourite programmes. Anticipation is an important part of the reward cycle.

We might think we want to watch whatever we want, but without the ordered output of broadcasters most people would simply not know what to watch.



# Television evolution

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# Anytime, anywhere

We often hear that we want to be able to watch whatever, whenever, wherever we want.

However, even if technology and media rights allow this, we will not always want to watch television this way.

Viewing time shifted or on demand breaks the sense of a simultaneously shared experience that's often part of the appeal of a television programme.

**Paradoxically, the more choice we have, the harder it seems to choose something.<sup>11</sup>**

There's a limit to how much we really want to decide for ourselves. It takes effort. So we may still end up deferring to others.

If anything, we tend to watch the same things that other people watch.

By default, we prefer to watch something similar to something we have previously enjoyed.

Familiar faces, characters, celebrities and personalities guide our viewing choices.

We take our cues from trusted brands, personal recommendations, or the social validation of the wisdom of crowds—other people like it so it must be good.

The more apparent control we have in our lives, and the greater our availability to view, the less fixated we may be about controlling things like what we watch on television.

So for a young adult establishing his or her identity, the apparent ability to choose whatever you want to watch may feel like an important freedom.

An older person, with other things to worry about, might prefer the relative comfort of regular routine viewing.



# Personal preferences



An important function of any television service is to provide some guidance on what to watch.

This doesn't necessarily imply some technical form of recommendation based on our stated or implied preferences or the choices or behaviour of others.

It might be as much about the channel brand, scheduling and conventional marketing.

There's a common assumption that personalisation is the answer to everything.

This is the view that the perfect television service would know exactly what we want to watch and offer it to our personal preferences.

But often we don't know what we want to watch.

**We like to think our choices are more individual and less predictable than perhaps they are.**

We also like to feel a sense of serendipity or discovery.

The idea that a system can predict our personal preferences may even be perceived as rather disconcerting.

We want to feel that we're personally choosing what to watch.

So traditional trails, marketing, public relations and media coverage remain important in promoting programmes, creating awareness and interest.

Programmes can be available on demand, but that demand has to be created.

# Playing out

The technology of television transmission has shaped its cultural form as a mass entertainment medium.

The need to fill the schedule with programmes that will appeal to a broad audience at the same time has characterised television output for decades.

In this world of television, other people decide what we can watch and when.

That may seem rather restrictive.

Yet the system of commissioning and regulation provides some guarantee of consistency and quality. It takes some of the responsibility for deciding what is appropriate and acceptable to watch.

The channel schedule helps organise the viewing experience, building habit and loyalty.

It makes it easier for us to watch programmes, by limiting choice and providing currency, even if we watch at our own convenience.

As viewers become more discerning and discriminating about what they watch, there'll be less opportunity for some types of programme that currently fill the schedules.

**A lot of television output has a very short shelf life. Television is a topical, ephemeral medium.**

Online catch-up services allow us to watch programmes that we might otherwise miss.

Yet some programmes genres are less suited to viewing on demand or a long time after they're broadcast.

The challenge for television channels is to continue to address large audiences in real time, while providing a more personal experience to individual users.



# Publishing



Recorded programming provides a different experience to live television.

Publication involves making material available for distribution so that it can be viewed on demand on diverse devices and displays.

This need not necessarily involve the traditional model of television commissioning and production, or regulation.

The publishing business has existed for hundreds of years. Now it seems anyone can become a publisher.

It's becoming easier to produce and distribute high quality video, directly to the viewer.

The barriers to entry have never been lower.

There's less need to reach a large audience at a particular time.

What matters more is the relevance to each individual potential viewer.

The total addressable market is much larger, as is the potential cumulative audience.

Publishers can use data from actual users to inform their business.

They can build a personal relationship with real people and provide a product or service that's tailored for a particular target market.

This enables direct payment and subscription models that are less reliant upon advertising revenue.

**Attracting an audience remains a challenge. Just because something is available to view on demand doesn't mean we'll necessarily know about it or want to watch.**

# Fidelity

Broadcasters are no longer the sole gatekeepers to television and video technical standards.

Online services can be more agile in adapting to change, without having to maintain compatibility with a large population of legacy devices.

Broadcasters and television service providers need to continue to invest in their platforms to remain relevant.

Television cannot afford to rest on its tradition. It needs to improve its proposition.

People's expectations are rising as a result of rapid changes in consumer electronics technology.

From superior sound to increased clarity in vision, we now expect continuous improvement in the quality of experience.

We want and expect television to be bigger and better, with multichannel sound and more accurate rendition of colour, light and shade.

Large screens are getting larger and higher in definition.

We have more screens in the home.

The quality of video on handheld displays is getting better and better, competing with the living room screen.

**Our window on the world is wider and clearer than ever and we have more windows to look through.**

The sounds and images television presents provide an increasingly powerful illusion of a representation of reality.

These screens can now provide a truly cinematic experience.

Whether we call it television, video, or a movie, it's a more engaging and immersive experience, which makes it all the more powerful and compelling.



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# Definition

Television isn't a single coherent experience. It consists of a complex mix of modes, genres and forms.

We tend to watch television as an activity. The choice of programme may be secondary.

Television has substantial strengths as a distribution system, but it also has structural weaknesses.

There are certain experiences that only live television, directly addressing the viewer, can deliver.

Other programmes, particularly narrative forms, may be more amenable to being viewed at our convenience.

Many aspects of what we think of as television can be better served by other means.

Our view of television is changing.

Television is not defined by the display on which it's watched.

The means of distribution isn't necessarily limited to broadcast transmission.

Scheduled channels have lost their effective monopoly on the delivery of television programmes.

The forms and features of programme formats are being reproduced outside traditional television.

The function of public service broadcasting provides no particular guarantee of quality or originality.

New subscription video services are beginning to complement or substitute established commercial and pay television business models.

Television viewing is not exclusively subject to broadcast regulation and legislation.

**We can no longer define television by screen, medium, channel, form, function, business or regulation.**



# Meaning



Television is ultimately defined by what it means to its viewers.

Television programming remains an important part of our lives, however much we watch.

We shouldn't underestimate the social and emotional importance of television.

Traditional television fulfils our basic need for company, social connection and participation in a shared experience.

It talks to us, tells us stories, and gives us something to talk about.

As the mass television audience disintegrates into individual viewers, we become more critical and discriminating.

We have increasingly high expectations of television. We expect to be able to stream and download programmes and watch them at our convenience.

Yet the ritual of watching television remains remarkably resilient to change. We still watch the vast majority of video on a television screen.

Broadcast and on-demand distribution are co-dependent and complementary. They're simply different channels of distribution, with distinct advantages.

There's a continuing role for:

- **Live television** and direct address presentation
- **Broadcast distribution**, both for live events and popular programming
- **Scheduled programmes** and events promoted to appeal to a mass audience.

**Television will mean more to its viewers but traditional channels will still be seen as the best way to watch new and live programmes.**

# Opportunity

We should view new ways of watching as an opportunity.

Rather than denial or despair of unavoidable decline, the rational response to disruption and displacement is to adapt and innovate.

Successful media organisations will embrace competition by building on their strengths and core competencies.

That means delivering the highest possible sound and picture quality to any screen, particularly the largest one in the home.

It means continuing to produce and promote new programmes and live events that people want to watch.

The future of television will be secured by quality rather than quantity, while online networks will deliver virtually infinite choice.

As the choice and convenience of viewing increases, the skills that broadcasters have learnt over decades to enable them to attract a mass audience remain valuable.

The biggest challenge for existing channels is to think not of a massive passive audience, but in terms of valued individuals with their own needs and shared interests.

Service providers have always thought of viewers as customers, but rather than considering subscribing households as revenue generating units, they need to appeal to individuals, wherever they may be watching.

New screens create new viewing opportunities, increasing available time to view, watching in different contexts: on the train, during lunchtime at work, or in bed. It's our time, not just prime time.

**We'll end up watching less traditional television but valuing our viewing more. If anything, our overall video viewing will increase.**





## We all have different reasons to watch television.

Television and video viewing appeal to us in diverse ways and fulfil different functions at various times.

We only have to look at the many types of programme we watch to see that television addresses distinct emotional and social needs.

Some of these needs can be best met through traditional television channels.

Others needs will be better delivered on demand—when we know what we're looking for.

We don't always know what we want to watch, or why we watch what we do.

Television can engage us like no other medium, or it can be on in the background.

The value of the television experience is that there's always something new to watch, that's comfortably familiar.

Television channel schedules provide a valuable service in helping to organise our viewing and co-ordinate it with others.

As individuals we value a sense of connection and community through our viewing experiences.

We also want to feel valued as individual viewers, to feel that television is there for us.

We want to be comforted by familiar faces and voices.

We enjoy regular routines and anticipating variations on experiences that we previously enjoyed.

As we progress through life we'll have more reasons to appreciate a wider range of programmes.

The best programmes will be bigger and better than ever. And we'll still want to see them on the biggest screen in the house.

**The future of television remains to be seen. One way or another, we'll still be watching television for many years to come.**

1. Raymond Williams popularised the concept of 'flow' in relation to the viewing experience in *Television: Technology and Cultural Form*, published in 1974.
2. BARB, the Broadcasters Audience Research Board for the United Kingdom, defines viewing as being "present in a room with a television set switched on".
3. Herta Herzog studied the reasons that people listened to American radio soap operas in 1944.
4. Jay Blumler and Denis McQuail studied the reasons that people watched political programmes in terms of uses and gratifications.
5. Abraham Maslow first proposed his 'hierarchy of needs' in 1943, developed in *Motivation and Personality*, published in 1953.
6. Thinkbox, *Screen Life: TV in demand*, published in 2013.
7. Ofcom, *The Communications Market Report 2015*. Based on BARB research, total hours of viewing per year by all individuals aged 4+.
8. Ofcom, *The Communications Market Report 2015*. Daily television viewing in the United Kingdom by those aged 4-15 declined by 22% between 2010 and 2014.
9. BBC Audiences research on BARB data by age cohort, 2015.
10. BBC Trust, *Review of BBC television*, published in 2014.
11. Barry Schwartz explored consumer choice in *The Paradox of Choice: Why more is less*, published in 2004.



# We all have our own reasons to watch television



## About the author

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William has extensive experience in understanding how and why we watch television.

After starting out as a broadcast journalist, he continued his media interests as an academic researcher. His PhD in Communications explored the 'video literacy' we all use in watching television.

William went on to become Head of New Media Operations at the BBC, where he was operationally responsible for online and interactive television services.

He then established a consultancy specialising in internet and television convergence, advising clients worldwide.

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Contact Sony Professional Solutions Europe to discuss how to evolve your media workflows and optimise your video distribution to realise the transformation of television viewing.

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