

The background of the entire slide is a repeating pattern of various icons. These icons include a blue thumbs-up (like), a green speech bubble with a white telephone handset (WhatsApp), a brown vintage television set, a black smartphone with a grid of app icons, and a white desktop computer monitor with a blue screen and a keyboard. The icons are arranged in a grid-like fashion, slightly offset from each other.

#29

TV TODAY AND TOMORROW

" I don't imagine that the levels of watching TV will decrease in the future. I do think it will become very high-tech though. "

Will, 20, Leading Edge, Indie Scenester




THE LANDSCAPE OF TV

Over the last 10 years there's been a monumental shift in the TV landscape - audiences are firmly in the driving seat, with full control over what they watch and when they watch it. It's no surprise, then, that viewing behaviors have changed; young people in particular are consuming TV in much more diverse ways than previous generations.

Along with this, there's a widespread view that young people are watching less TV, instead choosing to spend time on other digital activities. However, we want to challenge this view and illustrate in the pages that follow, that for Tribes, despite being time poor and spoilt for choice when it comes to filling their free time, there is still a strong place for TV in their lives – we've heard it from the horse's mouth! Not only this but it also supports a recent study by **Thinkbox, who suggest that TV still accounts for 65% of 16-24's overall video consumption.**

Contrary to popular beliefs, what has shifted is not the extent to which young people watch TV, but instead, **how they are interacting** with this much loved activity and how video has proliferated into more aspects of their lives.



"When it's too cold to go outside I spend the majority of my time watching TV or on social media."

Olivia, 17, Mainstream, Townie

UK TRIBES ON THEIR TERMS

Tribes Live #29

Thanks to advancements in broadcaster on demand services, developments in PVR offerings, streaming and popular OTT platforms such as Netflix, TV viewing is now increasingly on Tribes' terms. For older Tribes the days of rushing back from school to catch Grange Hill is a distant memory. The youngest Tribes have pretty much grown up with these advancements and are fully accustomed to being able to schedule TV around their lives rather than vice versa.

PICK 'N' MIX MENTALITY

Better yet, the options of what to watch are endless and can be found at the press of a button or tap of a keyboard; Tribes have an unlimited number of shows to select from and a pick 'n' mix mentality has become the norm when it comes to show selection.

The ability to watch TV outside of the constraints of live TV is a welcome innovation for time poor Tribes, who form a key demographic of the 'I want it now generation'. This is a growing consumer segment that demands complete control over the brands and content they consume. Not only are Tribes in complete control when it comes to what and when they watch, they are also becoming increasingly accustomed to having everything all at once; patience is no longer a virtue required when it comes to TV viewing.

Whilst not required however, it seems patience is a virtue that young people are still keen to exercise when it comes to TV. **Thinkbox found that 73% 18-24 year olds prefer the slow reveal over the quick and dirty binge watch when given the choice between downloading an entire series to watch in one go or watching one episode week by week on live TV.** It would appear that the social currency and excitement of being part of the chatter and buzz of a new series may actually win-out over the "I want it now generation".

"E4 feels like a community because of its online community through Facebook and Twitter that gets people fully involved within the show. I love tweeting them!"

Ian, 18, Mainstream, Townie

VIEWING TODAY

HOW ARE TRIBES WATCHING TV

While the TV landscape has diversified significantly, TV is very much a medium that's here to stay. Despite claiming to have limited free time due to other responsibilities such as school and work, and having an increasingly diverse range of activities to keep them busy when they do catch a break, Tribes are staying loyal to TV. Most turn to this form of entertainment as a welcome relief from their daily grind, watching in the comfort of their homes. What is clear, however, and reflective of modern day living, is that their attention is in high demand and multi-tasking with a number of other screens at the same time has become common behaviour.

Stat: 87% of consumer's multi-screen while watching TV. Sparkler & Microsoft 2015

While this may initially seem like a negative, in reality it is quite the opposite. It means that young people are open to multi-platform interaction with content and brands, increasing the access points for advertisers. Young people may look up products or celebrities they see on TV or jump onto Twitter to check out what others are saying about the shows they're watching. Consequently, they're helping to drive the buzz around the show, which in turn increases the likelihood they'll go back for more.

Other potential benefits of having another screen to hand could be that young people are more likely to actually stay in front of the TV when the ad-breaks are on. Furthermore, the proliferation of iPads and smartphones may mean that young people are able to share more time with family; watching a program you're not fully into becomes a lot easier when you have your phone to hand to occupy you when things get dull!

A DAY IN THE LIFE OF...

A look at how Tribes are watching TV throughout the day

Passive viewing

- In the morning, when getting ready, evening with friends
- The TV is on but it's a secondary element to other activities
- TV or laptop
- Low engagement with content

Binge viewing

- Anytime (weekend/evening)
- Scheduled viewing of pre-recorded, on demand or streamed shows
- Viewing multiple episodes all at once
- On weekends or in the evening
- Likely to be on portable devices
- Either high buzz shows or their personal favourites
- High engagement with content

Default Viewing

- Fills empty spaces
- As part of a routine e.g. getting ready in the morning
- Throughout the day but common in the afternoon esp. amongst students
- Often going for fail safe shows they are familiar with
- Watched on a TV set
- High level of multi-screening taking place – watching whilst on phone/laptops

Focused viewing

- Later evening – post 9pm
- Scheduled viewing of pre-recorded, on demand or streamed shows
- Often alone and in the evening when Tribes can fully focus on their favorite shows
- Likely to be on portable devices
- Shows which have often made it into the social media buzz and a serve as valuable social currency when talking amongst peers
- High engagement with content

Social viewing

- Early evening and weekends
- With friends and family
- Viewed on a traditional TV set
- Collaborative decision on choice of show – crowd pleaser and often dictated by parents (if in company)
- Less engaged with TV chatter, high level of multi-screening taking place

***"In the future,
I think you will have
the ability to see
what others are
saying about the
show by having a
Twitter/Facebook
feed on the screen as
a sidebar."***

Hannah, 22, Mainstream, Townie

CHANGING WAYS

TV 'WE' OR 'ME'

Which takes us onto our next question: is TV still a social activity? With an increase in portable devices leading to a slight move away from the traditional sense of 'social viewing' e.g. all being gathered around the TV set, one could be forgiven for thinking that TV has become a 'me' activity – an act for the individual rather than a group. Yet despite the fact that Tribes do watch more shows on their own, where they can control the content, the social value of TV viewing is still an important one. They still value TV time with their families and are more prepared to compromise on the content in order to spend the evening surrounded by their nearest and dearest.

What's more, and as mentioned previously, Tribes still subscribe to the weekly live TV episode, enjoying the suspense and showing that the social element of TV viewing now extends beyond the living room. Now it takes place via social media where conversations that create news stories happen regularly between fans, friends and followers pre, during and post viewing.

"Sometimes it depends on what my parents are watching, as some shows we all watch together and it becomes a family viewing situation. This is when we are all free to sit down together, usually at the weekend."

Ian, South East, 18, Male, Mainstream, Townies

GREAT EXPECTATIONS

And it's not just behaviours around how, when and with whom Tribes are viewing TV that are evolving. Audiences are now able to handpick from a vast range of shows available at any time of the day. The result? Tribes are becoming more demanding about the TV they consume. They expect a certain level of quality and content that grabs them emotionally if they are to give half an hour or more of their day to a show.

Consequently, shows that may have previously made it onto their watch list by default are now going down in their estimations and, in many cases, dropping off the list completely. Take for example music shows such as MTV and Viva. These are generally now skipped over by Tribes or only put on in the background, largely due to the lack of interesting, engaging and quality content, that is felt to offer nothing over and above what they can find on YouTube.

"I find that I have barely any patience for any kind of daytime or cheap documentary/reality shows these days. I know I could be watching anything I like at any time on my laptop."


Hope, 17, Urban, DIYers

"Music channels should look to shows like Pop World, or documentaries, or anything factual and interesting about music rather than a) endless videos or b) tangentially-related celeb reality shows."

Anna, 18, TBC

WHAT ARE TRIBE WATCHING NOW?

Light-hearted comedy sitcoms such as The Big Bang and British comedy series continue to be a widespread fail safe for Tribes. Similarly, dramas fulfill the need to disconnect from the 'real world' whilst at the same time allow for popular talking points amongst peers so they feel part of the wider cultural conversations going on around them. Cutting edge documentaries that lift the lid on society feed Tribes' desire to learn about the hot topics they're interested in. These also allow them to source opinions from less formal, unofficial channels - something seen as much more authentic and believable. Reality TV still holds its place as the go-to for easy viewing; that said, interest in this category is waning, and while more reputable and innovative shows such as The Great British Bake Off (GBBO) and The Apprentice remain popular, music related reality TV has lost its spark for Tribes, who are now watching less of these.



"I like dramas and documentaries most as I think they are the best to teach or help you discover something true about life. Although I really like light-hearted, comedy sitcoms as well"

Samara, 23, Urban, Styler

"I'm a big comedy fan because I want TV to cheer me up, although an impressive intense drama will always get me."

Rachel, 24, Mainstream, Townie

CONTENT AWARENESS

GETTING IT RIGHT

With so much content available, there is added pressure to choose wisely. Tribes don't want to spend time on something that is not worthwhile, however when it comes to TV there is no 'try before you buy' option, so instead, Tribes default to fail safes that they know and love or digital word of mouth and peer recommendations. These latter sources play the biggest role by far in creating awareness and driving Tribes to watch shows. What's more, they allow them to become part of the TV chatter which is still an extremely valued source of social cache amongst peers. As well as WOM, Tribes value trusted online reviews to suss out programs before they view, showcasing evidence of a more active, participatory approach to seeking out new content to watch.



***"I usually
go on personal
recommendations from
friends and family."***

William, 20, Leading Edge, Indie Scenester

*"I feel there should be more mediums helping
you decide what to watch. I would prefer my
evening watching to be saturated with choice
rather than just returning to a few favourites that I
love to watch."*

Samara, 23, Urban, Styler

UK TRIBES

TV TOMORROW

SUPPORT TRANSPARANCY

In today's consumer led society, Tribes have become accustomed to, and connect with, brands and companies offering choices that provide them with options that meet their demands. Tailored content is becoming an expectation but Tribes are aware that there's a quid pro quo and that in order to create content that matters, they in return, must respond with a certain level of transparency. This transparency comes in the form of online monitoring - something that they are well accustomed to. They are used to having their online activity monitored around entertainment and purchase decisions and are willing to help brands and broadcasters understand them better, under the proviso that it will enhance their experience.

"BARB doesn't bother me as I don't consider it to be overly personal information. I think the main benefit to this measurement is ensuring the most popular programmes remain on TV so well loved shows don't get cut."

Jemma, 21, Mainstream, Chavs

LOOKING FORWARD

In terms of expectations for the future, Tribes have seen impressive digital advancements in their lifetime so aren't afraid to dream big when it comes to what they would like to see from TV. From personally controlled content to interactive TV anytime, anywhere, they are full of ideas for the future of TV and just waiting for those dreams to be fulfilled. But, don't take our word for it...

Tribes Live #29

When it comes to the future of TV what are Tribes wishing for...

@TVGENIE-
A TV channel that I control what is shown and when at a time to suit me!
IanB, 18, Mainstream, Townies

@TVGENIE -
I think holographic television will be a thing - at the touch of a button you can make a screen wherever you are
LaurenH, 18, Alternative, Nerds

@TVGENIE -
You will be able to inhibit TV shows and play roles yourself being able to project the show into your living room.
LeodisSam, 24, Leading Edge, Indie Scenesters

RECENTLY THE TRIBES HAVE BEEN TALKING ABOUT...

Blossoms
Charlemagne

Chewing gum

UK education



Wikipedia's
own cookbook

Christmas
presents

Black Friday
amazon deals



DISTILLED **INSIGHTS** FROM RECENT TASKS...

1. BARB IS WATCHING YOU!

- The majority of Tribes see the value in BARB and think it's a very powerful measurement tool.
- However, some are quite indifferent to the tool, perceiving it as outdated and unreliable given the changes in their TV behaviour from live to on demand.
- Tribes acknowledge that BARB helps to tailor programs based on what's popular and helps to get rid of shows that have lost their appeal.
- They also recognise that it helps broadcasters to understand the appropriate time and channel for certain programs.
- Tribes are very open engaging with channels and are happy to help broadcasters understand their viewing habits.

2. HOW DO YOU FEEL ABOUT CONTROVERSIAL SPEAKERS WITHIN EDUCATION

- Tribes think everyone should have the right to freedom of speech, especially in education – consequently they think nobody should be banned from publicly speaking at Universities.
- A majority of Tribes think academic institutions have a responsibility to present a wide range of perspectives to students, so controversial speakers should be invited.
- Despite this, Tribes think that whenever a speaker intends to spread extremist ideas based on hatred and intolerance of others, a line should be drawn.

4. HEY BOOKWORMS

- Books are viewed with high regard – they're seen as a great learning opportunity as well as something to get lost in.
- Tribes who read recognise the value and benefits and so tend encourage others to take up reading too.
- Schools play a vital role in determining the perception of reading – as such, Tribes think schools should implement ways to make reading feel more exciting e.g. introducing more interesting, modern books into the curriculum.
- Unlike other products that have been phased out due to digital advancements, Tribes still value physical books.

4. LET'S TALK ABOUT SEX AND CONSENT?

- The majority of Tribes liked the Home Office's advert, aimed at driving awareness around sex and consent through the analogy of tea – they felt the lighthearted approach around a tricky subject worked well.
- However, some Tribes worried that the humorous factor in the video undermines the seriousness of the subject and questioned whether this was the best way to communicate the consequences to acting without consent.
- Overall, Tribes reacted very positively to the video and think the same kind of videos could be effective in addressing more difficult societal problems in the future.

DISTILLED **INSIGHTS** FROM RECENT TASKS...

5. Bacon is good for me??!!

- A majority of Tribes are health conscious when it comes to food.
- However, Tribes vary in commitment to healthy eating – while some make sure to stay away from unhealthy foods such as processed meats, fizzy drinks etc. others take a more relaxed approach, allowing themselves the occasional junk food treat.
- Despite advocating healthy eating, the majority of Tribes are skeptical about media coverage around healthy food and think the media focus on this trend leads to over-hyped drastic behaviour.

6. TOO COLD TO GO OUTSIDE...

- Many Tribes have owned a Nintendo at some point and the majority grew up with the Gameboy.
- While almost all Tribes have played on games consoles, the majority indicate that their lives are far too busy to spend gaming.
- With that in mind, Tribes tend not to own the newer or newest models.
- Nintendo is famous for: being around for a long time, targeting both males and females, creating consoles for the whole family, and having a gameplay that is very different from other consoles.

7. RESPONSE TO PARIS TERROR ATTACKS

- Most Tribes do not back France's immediate reaction to the Paris attacks - they are seen as rash, lacking thought and endangering innocent lives.
- Almost all Tribes think the UK should have a pacifistic approach when it comes to Syria and don't want to follow the USA and France's lead.
- They reject a violent approach and feel that every military form of aggression towards the Middle East in previous years has had long term, negative consequences.
- They believe a more thoughtful approach is required - they hold the belief that regardless of attempts to stop attacks on the UK, they are an inevitability
- They feel better education around the subject is the best prevention

8. HEALTHY CAN BE FUN!

- A majority of Tribes live a very healthy lifestyle - watch their calorie intake and exercise three to four times a week.
- Many of the Tribes have changed their food intake over the last year - adopting a healthier, more careful approach to eating– vitamins, proteins, calories, water consumption.
- For Tribes, it is very important to be balanced-to be healthy while still having fun e.g. It's perfectly acceptable to indulge if exercising regularly.
- This new approach to health has stemmed from their awareness of generations before – they've seen the consequences of unhealthy living and are not keen to follow suit.



UK
TRIBES

THANKS FOR READING