Routes to Content:
How people decide what TV to watch

In an increasingly fragmented media landscape, people face an abundance of content and a growing array of technologies and services through which they can discover television programmes. This research sought to ask how people find and make decisions about the television content that they choose to watch.

Key Insights

1. Default TV

People adopt defaults: habitual ways in which they access television. The more established defaults based on the electronic programme guide (EPG) and linear schedules are being replaced by a new '1 world' default in which discovery takes place within the 'worlds' of devices, pay-TV services and/or subscription video-on-demand (SVOD) services.

2. Awareness and Decision-Making

Multiple factors (platform/service features, word of mouth, marketing and reviews) combine to inform people's awareness of and decision-making about the content that they watch. The decision about what to watch is also shaped by the values placed on content and services, including attitudes to illegal streaming.

3. Recommendation Algorithms

Recommendations shape routes to content and are valued by many participants. However, some participants found algorithmic recommendations worrying and felt that they were no longer in control of their exploration.

4. Household Dynamics and Technological Literacy

All participants juggle multiple technologies to access TV. Older women and younger adults are less likely to control the main TV set, often resorting to other devices for viewing TV. Some older women lack technological literacy and depend on their partners to find TV to watch.

5. Netflix as the New PSB?

Public service broadcasters (PSBs) have clear brand identities and are valued, but their video-on-demand (VOD) services are often not associated with discovery, while for some younger participants values that should be associated with public service broadcasting (PSB) are applied to Netflix.

'Our viewing habits have shifted quite a lot in the last few years. […] streaming technologies and such like gives you freedom from the schedules.'
(Fred, 65, M, White, B)

'Most of my life watching TV would have meant sitting down in like the evening with my parents and watching either the news or like a documentary or something. Then I got a mobile phone [laughs] and a laptop and now watching TV just means mostly watching Netflix… […] …or stuff on iPlayer usually in the evenings in my room by myself just like chilling out.'
(Rebecca, 18, F, White, C2)

Routes to Content:
Background

University of **HUDDERSFIELD**
Inspiring global professionals

Context:

The contemporary media landscape has altered the discoverability of television content. On-demand services – from SVODs like Netflix to social media platforms like YouTube – have become mainstream, and the majority of UK adults watch television on an internet-connected device, from smart TVs to tablets. The rise of on-demand and internet-connected television has increased the range of routes that people can take to television content. For the television industry, this means adopting new strategies to increase the discoverability and accessibility of their content. Content providers, pay-TV operators, platforms and devices are competing to control access to content, viewers and data.

Prominence:

Prominence legislation has aimed to ensure that public service programming is easy to find within the EPG. However, with the expansion in viewing devices and services, people have a wider range of routes to finding and watching television programmes. Ofcom's review of prominence for PSB recommends revising prominence legislation to focus on devices (smart TVs, streaming sticks and set-top boxes). It emphasises the need to ensure the high visibility of PSBs' on-demand services and content in the search results, recommendations and homepages of TV devices.

The TV Ecology:

Routes to television content involve navigating a TV ecology made up of a network of interconnected devices, services and content:

53% of UK households have a TV set connected to the internet.

Half of UK households subscribe to at least one SVOD service.

42% of adults consider online video services to be their main way of watching film and TV.

YouTube is the most watched platform by 16-24 year-olds.

(Ofcom, Media Nations, 2019)

Viewing Devices	Add-on Devices	TV Services	TV-Related Content
Digital TV set	Remote control	Freeview, Free-to-air channels and VOD	Newspapers and magazines (reviews, listings, publicity)
Smart TV set	Set-top box	Pay TV: - Satellite/cable - SVOD (e.g. NowTV)	Film and TV review sites (e.g. IMDb, Rotten Tomatoes)
Portable device: - Laptop - Tablet - Mobile	Games console	Platforms: - SVOD - Social media (e.g. YouTube)	Fan sites
	Streaming stick (e.g. Roku, Apple TV)		Social media
			Marketing

Routes to Content:
Activities

There is a lack of audience research on how people find and choose TV content to watch. We sought to test industry assumptions to understand how people find and access television and what shapes their choices and behaviours.

Ofcom's review of prominence legislation was informed by detailed industry research by MTM which set out the following industry assumptions:

'There is a strong consensus across the TV industry that certain areas and positions within UIs [user interfaces] are more desirable than others'

'A presence on the homepage is highly valuable'

'The EPG is still the core discovery method'

'Review of TV user interfaces in the UK market' (MTM, 2019)

Activities

- We undertook qualitative research that asked people how they found and made decisions about what television to watch.

- We consulted with Ofcom to shape the research direction, but the design and analysis of the research was conducted independently by a team of researchers at the University of Huddersfield.

Method

- Hour-long semi-structured interviews with 30 participants in their homes conducted between 5th August and 10th September 2019.

- Participants were asked questions about awareness, promotion and marketing, the role of friends, family and communities, and whether routes to content varied according to viewing mode, technology, content and time of day. They were also asked to demonstrate how they typically use devices to find something to watch.

Sample

- Range of socio-economic groups, races and ages, including disabled participants.

- Mix of engagement with left/right-wing news.

- Mix of hours spent watching TV.

- Range of devices used to watch TV.

- Mix of services (Freeview, pay-TV, VOD, SVOD etc.) used to watch TV.

- Participants based in Manchester and Nottingham from rural, suburban and urban locations.

1. Default TV

Defaults are the habitual routes that people take to television content. Our research revealed **four** default routes to content.

EPG Default: habitual scrolling through channels in the electronic programme guide (EPG). Primarily associated with older participants and with distracted viewing.

'I'm so used to doing it in the same way, I have this routine, it's not OCD or anything, it's just it makes it easy for me. But the Sky box is, like, where this, where you go onto the home, the TV guide, and you've got those [channels].'
(Musa, 50, M, Asian, C1)

3-Digital Default: habitual navigation to a preferred channel. Some participants memorise channel numbers to circumvent the EPG hierarchy. Primarily associated with older and lower-class participants and with solo viewing.

'The first thing I will do is put it on 503. There, that's my channel. So I will watch news on that. That's my news channel.'
(Jumana, 54, F, Asian, D)

3-Step Default: habitual defaulting to 'My Recordings' in a set-top box. For many participants 'My Recordings' is used for directed viewing (to watch a specific show) and exploratory viewing (to find something to watch). Most participants are unaware that the recordings could be algorithmically suggested. Primarily associated with older participants.

'R: I have got the TiVo. […] Right so I have gone to My Shows.
I: Ok, is that a button that you press specifically?
R: Yep. […] I've got everything that I have recorded.'
(Helga, 54, F, White, B)

1-World Default: habitual defaulting to the 'world' of a particular technology (smart TV or connected device), VOD or pay-TV service. Participants use a range of features within the 'world' to find content, from search and categories to recommendations and watchlists. This is the most common default that cuts across all demographics, but is dominant with younger participants and is associated with participants that own smart TVs and/or subscribe to VOD services. Netflix and SkyQ are the primary 1-world defaults.

'I: So this is where you would normally start from? Is from Sky.
R: Exactly this is like the Sky homepage. You got home here, so you've got *Dragon's Den*, *Peaky Blinders*, *Untouchables*, not even seen that.'
(David, 28, M, White, C1)

'When I'm in SkyQ world I will, I've now started to use my voice, […]. So, if I'm looking for a film for the kids I'll just put in, like *Incredibles*, and it'll come up with all the *Incredibles* and stuff linked to it.'
(Ruth, 35, F, Black, B)

1. Default TV cont.

Most participants have multiple default routes to content, which vary according to the viewing mode (engaged or distracted, exploratory or directed), technology, time of day and content.

Engaged vs distracted viewing

Marlon defaults to either Netflix or Twitch (1-world defaults) depending on whether his viewing is engaged or distracted:

'*There is two really that I use the most. So Netflix would be the first one. And Twitch would be the second most used one I would say. And it really depends on what I am doing. If I just want some background noise, like I say I work from home a lot, so sometimes it is nice to have something on in the background, that is not too distracting. If that is the case, I will use Twitch, otherwise I go into Netflix.*'

(Marlon, 30, M, White, C1)

Directed vs exploratory viewing

The EPG default was mainly associated with exploratory viewing, while the other defaults were used for exploratory and directed viewing. For example Liam adopts the EPG default when he doesn't know what to watch, but goes to the apps in his smart TV (1-world default) when he knows what he wants to watch:

'*The guide [EPG] is one of the things that we tend to use very frequently. […] If we're not actually specifically watching something and know it's on, then we'll have a look and see is there something that we'd be interested in watching live. If there isn't, then the easy answer to that is then with this [smart TV] it's very easy.*'

(Liam, 68, M, White, B)

Technology

Helen watches on her Freeview television set with lunch and dinner (EPG default), but otherwise will access on-demand apps on her iPad (1–world default) because it gives her more choice and mobility:

'*If I'm having something to eat […] I will watch something [on the TV set]. Sometimes in the evening, if I've got my tea, so it's normally when I've got food really and it's like that comfort kind of thing [laughs]. But with my iPad, I do that sort of in bed, in the evening, if it's late, I'll watch the ITV Hub […] or I'll watch dramas on here as well that I've missed.*'

(Helen, 30, F, White, E)

Time of day

Randell has three default routes to content depending on time of day. During the day when he doesn't know what is on he will scroll through the EPG (EPG default). Most evenings he will turn on live TV and watch what is on (3-digit default). Several times a week he will browse the drama section of SkyQ and look on Netflix because he can't find anything else to watch or has been recommended something to watch (1-world defaults).

(Randell, 44, M, White, D)

Content

Polly will use different routes depending on the content she wants to watch. For news she goes straight to BBC Scotland News (3-digit default). For drama and entertainment she goes to her recordings (3-step default).

(Polly, 67, F, White, C2)

1. Default TV cont.

Default behaviour means that some participants miss prominent features in the user interfaces (UIs) of the devices and services that they use.

David was showing the interviewer how he uses Sky to access the Netflix and Vice apps from the 'on demand' page. The interviewer asked him to explain which apps he did and didn't use. Prompted to take a closer look David discovered apps that he had never noticed before that interested him, stating *'you've opened my world just sitting here.'*
(David, 28, M, White, C1)

When Polly showed the interviewer how she uses her Sky box she completely ignored Sky's top picks on the homepage, even though they covered half of the first page. When asked about this by the interviewer she exclaimed, '*I don't know why I've never noticed that […] but I will use it in future.*'
(Polly, 67, F, White, C2)

Default TV Summary:

- All participants adopt defaults: habitual ways in which they access television.

- The 1-world default, in which people go straight to the 'world' of a connected device, smart TV, pay-TV or VOD service is the most common and particularly associated with younger participants and those with smart TVs and/or SVOD. Netflix and SkyQ are the most common 1-world defaults.

- Most participants adopt multiple defaults depending on technology, viewing mode, time of day and content. The EPG default is mainly used for exploratory viewing (when people don't know what they want to watch). The other defaults are used for both directed and exploratory viewing.

- Default behaviour can lead participants to miss prominent features in user interfaces. Although the homepage is important for many participants, default behaviour can circumvent the homepage.

- The primary 1-world defaults in our sample are Netflix and SkyQ. If prominence legislation was only extended to TV devices (smart TVs, streaming sticks and set-top boxes), it would overlook the importance of SVODs as a significant route to content. Therefore, prominence legislation should be extended to cover the UIs of SVODs as well as connected TV devices.

2. Awareness and Decision-Making

Participants were asked to name **the one most important factor** in helping them to decide what to watch. From this we identified **five** factors that raise awareness of and inform decisions about what to watch. Most participants are influenced by a combination of these factors at some point in their routes to content.

Platform/service features, including EPGs, recommendations, categories, search and descriptions within UIs. Platform/service features help people to discover new content and to make decisions about what to watch. This was mentioned as the most important factor by eight participants.

Word of mouth. Recommendations from friends, family and colleagues are crucial in raising awareness about programmes and making decisions about what to watch when browsing or searching. However, word of mouth is typically not seen as enough on its own and is often combined with social media, descriptions within UIs and marketing. Word of mouth was mentioned as the most important factor by eight participants.

Marketing, particularly trailers broadcasted and distributed on-air and through social media, as well as within Netflix's UI. As with word of mouth, marketing helps in raising awareness of new and returning programmes and in making decisions about what to watch when browsing or searching. Marketing was typically combined with word of mouth, ratings and fan interests. This was mentioned as the most important factor by five participants.

Content features, particularly the desire to watch a specific programme, sometimes combined with a fan interest in a particular genre, talent or buzz on social media. This was mentioned as the most important factor by five participants.

Reviews in newspapers, TV magazines and online. Reviews raise awareness of new and returning programmes and are particularly important in helping people to decide what to watch. This factor was mentioned as the most important factor by four participants.

These factors can shape **awareness**, alerting people to the presence and availability of a particular programme. Or they can shape **decision-making**, helping people to make specific decisions when they sit down to watch television. Platform/service features, word of mouth, marketing and reviews all operate to raise awareness of new and returning content *and* to drive decision-making about what to watch. By contrast, although content features are an important factor in shaping decision-making, participants will already be aware of the content through one of the other factors. For example, the most important factor for a participant might be the desire to watch a specific programme, but their awareness of that programme will have been generated by UIs, word of mouth, marketing and/or reviews.

2. Awareness and Decision-Making cont.

The factors that shape people's routes to content vary depending on whether they are **researchers** or **browsers**.

Researchers will only go to a TV service once they have decided what to watch. They will gather information from multiple sources, such as professional reviews, trailers, social media, platform recommendations and searches. Researchers typically don't want to waste time on content that isn't considered to be high quality or important to them. They are less likely to be swayed by word of mouth and are often TV literates who value respected opinions.

'I am a researcher. I like to, if I see something, I think oh I'll find out a bit more about that.'
(Helga, 54, F, White, B)

'The first thing I usually do is, have you heard of IMDb or Rotten Tomatoes? […] Cause there's so much content out there now, I usually look on there to see what's popular or what's got good ratings.'
(Jaisal, 25, M, Asian, B)

'I don't kind of get influenced at all by other people's opinions. I kinda like to make up my mind. But I'd be influenced by those threads that I see on the Guardian app […] if you do the research, you're gonna have a better quality [content].'
(Alex, 65, M, White, B)

Browsers will explore the UIs of TV services to help them decide what to watch, whether scrolling through the EPG or browsing the recommendations of pay-TV and VOD services. Their viewing choices are shaped by platform/service features, but are also likely to be informed by word of mouth, marketing and content features.

'So often I will go to search [in Netflix] and I might type something in, and it might not have it, but it'll show you things that are like it. So just use that or I might go to like films for example if we're looking for a film to watch then I'll go to films and have a flick through'
(Linda, 31, F, White, C1)

'I'd go on recently added [in Netflix] or latest movies […] I always just stay on that newly added or newly released or something and I just go along with it and finding something that I wanna watch. […] I might go on to my sister's accounts or my brother's accounts and see oh they're watching something. I'll go on to my account and watch it, add it to my list.'
(Uri, 36, F, Asian, D)

'*Mind Hunter*, look at the trailer and then make quite a quick decision as to whether I actually fancy watching it or not.'
(Sally, 42, F, White, B)

'I: So is there anything on there that you think oh, that would be interesting to me? R: I think it's if I've heard something about it.'
(Meera, 20, F, Asian, C1)

2. Awareness and Decision-Making cont.

Once people have decided what to watch, their route to content is also shaped by the value placed on content and services.

Content chasers will seek out the content that they want to watch, sometimes illegally downloading if their chosen content is not available on a service they can access. Fan interests often drive their awareness of new programmes and they adopt strategies (e.g. series link, following on social media) to avoid missing favoured content. Fear of missing out means that they will take shortcuts to view straight away.

'I don't wanna spend all that money just for watching one TV series that I'm interested in. So for me, it doesn't matter what the platform is, that's why I stream it online. And usually the quality is the same, so it's not, so I don't have any loyalty to any of them.'
(Jaisal, 25, M, Asian, B)

'it doesn't matter to me [what website I watch on] because they're all the same. As long as I can watch the episode that I want to watch, I'm not really bothered which one it is.'
(Jumana, 54, F, Asian, D)

Content stoics are prepared to wait for, or even miss out on, content that they want to watch if it is not available on a service they can access. They may be time poor or financially strapped, and are unlikely to pursue content on services they don't subscribe to. They are also morally against, fearful or unaware of illegal streaming.

'I'd really like to have watched one called *The Crown* […] but it was on something we haven't got […] I have sort of let that one go and think "oh well it will probably might come back somewhere."'
(Gemma, 60, F, White, C2)

'I've never pirate streamed anything. […] You could be getting it from anywhere in the world, it's illegal. […] Even if you're very keen on seeing something, wait, you know what I mean?'
(Jarred, 19, M, White, C1)

Service jugglers carefully weigh up the cost of subscribing to a service to access the content that it offers. They will typically let one service (and set of content) go in exchange for being able to access another service (and set of content). They carefully weigh up the financial implications of accessing the television that they want to watch.

'We came to Virgin for BT Sports, but in doing so, I lost *Game of Thrones*. If we'd stayed with Sky, I'd have got *Game of Thrones*, but my husband would have lost BT Sports …. It's the same with Now TV and Netflix, we've pretty much done the same again and it's, you know, a bit of a toss-up, you know, between the two, but you don't seem to get everything in one place.'
(Carrie, 35, F, White, C1)

2. Awareness and Decision-Making cont.

Awareness and Decision-Making Summary:

- People's routes to content are shaped by five factors that typically combine to inform their **awareness** of content and their **decisions** about what to watch:
  - Platform/service features
  - Word of mouth
  - Marketing
  - Content features
  - Reviews

- How these factors combine to shape exploratory routes to content (when viewers don't know what to watch) depends on whether participants are primarily researchers or browsers.
  - **Researchers** will gather information from multiple sources before deciding what to watch. They are particularly influenced by reviews, which they value more than word of mouth.
  - **Browsers** will explore the UIs of TV services to help them decide what to watch. They are particularly influenced by platform/service features, but also use word of mouth, marketing and content features to inform their responses to the content that they encounter within TV services.

- Once people have decided what to watch, their route to content is also shaped by their attitude to content and services:
  - **Content chasers** will seek out content regardless of the service it is on, preferring to illegally download rather than miss out.
  - **Content stoics** prefer to wait for content to become available on the services they can access and are prepared to miss out on content that they want to watch. They are opposed to, fearful or unaware of illegal streaming.
  - **Service jugglers** make decisions about which services to subscribe to according to the content available, weighing up the cost and benefit of each service and letting one subscription (and its content) go in order to take out another.

3. Recommendation Algorithms

Recommendation algorithms are valued by many participants and play a crucial role in shaping routes to content.

'That's what I like about Netflix, it like, your genre it kind of just recommends loads of stuff, so pretty much everything that it recommends I'm like "oh I wanna watch that"'
(Ruth, 35, F, Black, B)

'Recommended for you, actually, on iPlayer, often does recommendations that are often of interest to me.'
(Sally, 42, F, White, B)

For some participants algorithmic recommendations were seen as inaccurate, limiting or worrying.

'Netflix has the very handy like 'trending now' tab so I can go on there and be like, "what is everybody else watching?" Also, when you get like, 'you might also like,' BBC iPlayer does 'if you watch this you will also like this.' And I used to be really snobby and be like, "you don't know what I'd like." And then one day I was like, "oh I'll check that out," and I was like "oh no! They do know what I would like." This is worrying.'
(Rebecca, 18, F, White, C2)

'So because I watched a certain programme [in Netflix] , it is a bit hit and miss to be honest, but I think genuinely … when I used to watch *Breaking Bad* on here, which is a programme about a chap who starts dealing drugs, it recommended *Shrek* to me … so like … it is seems to me that the parallel … drawing the line between those things seems a bit off.'
(Marlon, 30, M, White, C1)

'Are they watching what you are watching so that they can suggest these things, or they know your interests? It is a little bit unnerving to answer your question.'
(Nigel, 56, M, White, C2)

'If I'd have just stuck to looking through Netflix recommendations, I would have been stuck on *Friday the 13th Part 1599* or whatever […] just the same thing over and over again.'
(Jarred, 19, M, White, C1)

Some participants felt that they were no longer in charge of their exploration and bemoaned the loss of serendipitous discovery.

'I miss, like, Blockbuster [stores], when you could go up and pick up and look at the thing. […] in a sense with Netflix it's sort of gone because of the recommendations, because you can continuously get something, watch it, and then it recommends you something else. […] It loses that whole surprise element. […] It's lost that sort of independent, like, hand-holding, not hand-holding thing, it's just like oh, watch this, watch that, watch this. People like this, people like *13 Reasons Why*, watch this. People like *Stranger Things*, watch this. And you almost feel compelled to like it, even if you don't think it's very good, or it's mediocre.'
(Jarred, 19, M, White, C1)

4. Household Dynamics and Technological Literacy

Routes to content are shaped by household dynamics and technological literacies that inform who is in charge of the technology and how television is accessed.

- TV viewing is significantly shaped by household hierarchies and family negotiation. In most households TV viewing involves negotiating multiple devices, including set-top boxes, connected devices, smart TVs, a number of remote controls and portable devices.
- Viewing on the main TV set is often subject to negotiation and tends to focus on pre-determined content (e.g. programmes recorded and saved for viewing together, continuing series on VOD).
- In many participants' households the husband was understood as in charge of the main TV set in the living room.
- Adult children lack control over the main TV set and resort to watching on other devices (games console, laptop, secondary TV set) in their bedrooms.
- A number of older female participants rely on their partners to access some forms of TV. Juggling multiple remotes, turning on TV sets and/or using VOD services prevent these participants from accessing entire routes to content.
- Some women find portable devices to be a more accessible way of watching VOD that enables them to manage household dynamics or bypass the difficulties of using TV sets, for example by watching TV on a tablet in bed.

'This normally gets used by my mum and dad […] they normally watch it down here, cause this is almost like their room. Cause we've got that room in there, which is more so like my brother's TV room […] And then up in my room, that's where I normally do my, like, streaming and stuff like that.' (**Jarred, 19, M, White, C1**)

'You don't get taught how to do these things, do you, you know, as older people. […] But I've never really realised what it is, BBC iPlayer. What is that? And what's ITV Hub? You see, I don't even know what they are.' (**Natalie, 54, F, White, C1**)

'R. This [Netflix] is set up with [husband's] preferences. […] I'm gonna have to try and figure out how to set up a Netflix account. […]

I. So when you sit down to watch TV together, who has hold of the remote?

R. Nine times out of ten, it's [husband]' (**Carrie, 35, F, White, C1**)

'I rarely use the remote. Right. It is mostly my husband that does the remote. As most blokes do. He has the remote. This is why probably most of it is done when he is here. He is the one who puts it on.' (**Melissa, 55, F, White, C1**)

'If [my partner and child] are in here and watching something on there and I want to watch something different, I'll like take my laptop into the bedroom.' (**Linda, 31, F, White, C1**)

5. Netflix as the New PSB?

The public service broadcasters tend to have clear brand identities, but these can be limiting as they are not always associated with a breadth of options or exploring and discovering new content.

PSB brands: strong but limiting?

- Most participants have specific associations and expectations for PSBs.
- The BBC has a particularly clear and consistent brand associated with quality programming, event TV, regional content, news, drama and documentaries.
- The PSBs and their VOD services are widely valued. However, their VOD services are often not associated with a breadth of options or exploring and discovering something new.

'If something is on BBC One then it holds much more high status in my opinion than something on Channel 5.'
(**Edward, 20, M, White, C1**)

'I know some channels, like Channel 4, they have sort of like obscure films on and their documentaries are sort of like quite hard-hitting and near the knuckle so I quite like Channel 4, whereas BBC One I think sometimes can be a bit woolly… ITV is a bit family, Channel 5's a bit like hard-core tough.'
(**Helga, 54, F, White, B**)

'If you're watching something on BBC One, it feels different to, like, if you're watching it on some obscure channel, especially like a big event, or cause you know millions of others are watching it as well.'
(**Martin, 45, M, White, C2**)

'I get different things off different places thinking about it. The Beeb, I would tend to go for documentaries and comedy.'
(**Sally, 42, F, White, B**)

'I: How often do you tend to use BBC iPlayer?

R: Only when we know we've got something to watch on there.'
(**Meera, 20, F, Asian, C1**)

'ITV Hub, Channel 4, 4 On Demand, or BBC iPlayer, I'll never go into there to browse what they have because it's so limited.'
(**Jaisal, 25, M, Asian, B**)

'I: So Netflix is kinda the default?
R: Yeah, it's cause I think it's got a bigger, wider range of things that's on it. … Whereas obviously BBC only has what's on BBC.'
(**Hank, 22, M, White, C1**)

'The thing about iPlayer is I think it's quite limited the time that things are on there… Like available to watch for.'
(**Linda, 31, F, White, C1**)

'If you go onto iPlayer with BBC, or ITV Hub, it just gives you the most popular ones. […] as soon as it's not one of the top ones, it's very hard, it's quite difficult to get a selection of it.'
(**Liam, 68, M, White, B**)

5. Netflix as the New PSB? cont.

Public service TV is considered harder to find beyond the EPG, and the VOD services of PSBs suffer in comparison to Netflix.

PSBs struggle in an on-demand environment
- Public service TV is understood as easy to find on the EPG. Some participants feel that public service content is harder to find within the '1-worlds' of connected devices, smart TVs, pay-TV and VOD services.
- A number of participants find the VOD services of the PSBs difficult to use, particularly in comparison to Netflix.

'I: How easy is it to find public service TV?

R: Not always that easy. It doesn't get publicised in the same sort of way and you need to be interested in it to find it quite often.'
(Liam, 68, M, White, B)

'I: How easy is it to find public service TV?

R: I think it's fairly tricky if you are not looking for a specific thing, like if you're browsing. I think it can be quite, quite difficult. I kind of, I rarely find the things on Channel 4 or on iPlayer that if I'm just browsing, I'm not looking for something specifically. Whereas on Netflix, I would just stumble across something I like.'
(Linda, 31, F, White, C1)

'iPlayer, I have real trouble with cause it just takes ages to like load and I don't know if it's just our internet or anything but we don't have any problems with the streaming services or anything […] So iPlayer, I'm, if it's on something other than iPlayer I'll watch it there rather than on iPlayer cause… it just doesn't seem like the best like audiovisual quality.'
(Rebecca, 18, F, White, C2)

'I did go to use the channel [All4] for on demand the other day and then I had trouble logging into it. It said you're already registered. I thought, am I? And then I couldn't remember my password. And I had to set up a new password and wait for them to email me back and, you know, took a while, and then I've missed, like, quarter of an hour of it.'
(**Martin, 45, M, White, C2**)

'I think BBC iPlayer you've gotta sign into that one […] And my husband probably knows the details to that one. It might be signed in actually […] Oh look it's asking me to sign in.'
(Uri, 36, F, Asian, D)

'[Trying to access iPlayer] No it is not going to show the password. I would have to … now that does drive me mad. Normally that would make me go off it, and it is probably that every time I have been on it lately it has done that.'
(Mary, F, 58, White, C1)

5. Netflix as the New PSB? cont.

For some younger participants, the values that should be associated with public service broadcasting are allocated to Netflix, at the expense of the BBC in particular.

Netflix: the new PSB?

- Netflix was associated with novel and risk-taking content and has become the go-to television for some participants.
- For some participants there was misunderstanding about what PSB was. Because some perceived the BBC as funded directly by the government, they felt that Netflix was more independent and able to take risks.
- For younger participants, values that should be applied to PSBs, particularly around diversity and providing access to a wide range of content, were denied to them and applied to Netflix. In addition, they saw Netflix as more geared towards young people than the BBC.

Despite being a massive fan of *Inside Number 9*, which he knew was from the BBC, Jarred claimed:

'the BBC just doesn't take enough risks with its content, whereas Netflix, because it's independently supported, whereas BBC is run by, like, licence fees […] and also the government funding, so they don't wanna risk things. […] Netflix is more progressive basically […] you still don't see a lot of minorities on TV, whereas on Netflix they are all over the place […] and they often portray them how it is […] they just present them as people.'
(Jarred, 19, M, White, C1)

'BBC is, kind of, I think it's probably geared less towards the younger generation, I think people go onto there and watch it for either the news or traditional English television.'
(**Jaisal, 25, M, Asian, B**)

When asked how easy it is to find public service TV, Liam replied:

'See, we haven't got a public service television programme as such in the UK, whereas in some countries they've actually got their dedicated ones, haven't they? … I suppose it's sort of…I would tend to start from BBC for the simple reason that the most likelihood is that they're most likely to provide something of that nature.'
(Liam, 68, M, White, B)

'The way that you can use things like Netflix is so much more congruent with like life now and modern life and technology than BBC iPlayer is. It's so, like it's almost like stuck in the ages and like slow, not very user friendly. But then as well as that they've not got the content that everything else has got so it really isn't looking good [laughs].'
(Edward, 20, M, White, C1)

'my fall-back is always Netflix cause Netflix always tailors it to be what I've watched […] If I don't get something on Netflix, I know I'm not gonna get anything.'
(Ruth, 35, F, Black, B)

Routes to Content:
Key Takeaways

Prominence

- More established defaults based on the EPG and linear schedules are being replaced by a new '1 world' default in which discovery takes place within the 'world' of a particular technology, on-demand or pay-TV service. This research supports Ofcom's recommendations that current prominence legislation needs to be revised for the on-demand environment of contemporary TV viewing and additionally recommends that prominence legislation be expanded beyond devices to include SVOD services.
- The homepage of UIs plays an important role in shaping people's routes to content, but default behaviour means that people can miss prominent features, services and content on the homepage. Any revision to prominence legislation therefore needs to include prominence in recommendations and search.
- Algorithmic recommendations are valued, but some find recommendations limiting or are concerned about data privacy and surveillance. People would benefit from more transparency around the use of data and algorithms within TV services and the ability to turn algorithmic recommendations on and off..

External Factors

- Platform/service features, word of mouth, marketing and reviews combine to raise awareness and inform decisions about what to watch.
- The technology to access television has become more complicated with most households juggling multiple devices. Some older women lack the technological literacy to access television on certain devices, missing out on whole routes to content. Tablets are seen as a more user-friendly device for accessing on-demand television.
- Device manufacturers need to improve the usability of the technologies for on-demand TV, particularly smart TVs, set-top boxes and connected devices.

Exclusivity

- Exclusive licensing strategies are likely to be counter-productive. Most people will either illegally download or miss out on a show if it is not available on a platform that they can access. Some people will juggle subscription services, letting one subscription (and its content) go in order to take out another.

Public Service Broadcasting

- PSB is seen as easy to find on the EPG, but harder to find within the '1-worlds' of smart TVs, streaming sticks, set-top boxes, pay-TV and VOD services.
- PSBs are widely valued, but some found their VOD services difficult to use, particularly in comparison with Netflix. PSBs need to invest to improve the accessibility and quality of their VOD services.
- For some younger participants values that should be associated with PSB were allocated instead to Netflix. There is limited understanding of PSB, and PSBs need to better communicate their role, value and significance in society.

Routes to Content

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