UKTV wanted to understand how viewers discover content in light of developing TV interfaces, and how this could change

Fast-changing and competitive TV landscape:

- Competition from global players (e.g. Netflix)

- Decline in the EPG and channel brands

- An ageing audience contrasting with behaviour of young people

- Fight for prominence on home / menu pages

- Pressure from pay TV companies and VOD rights

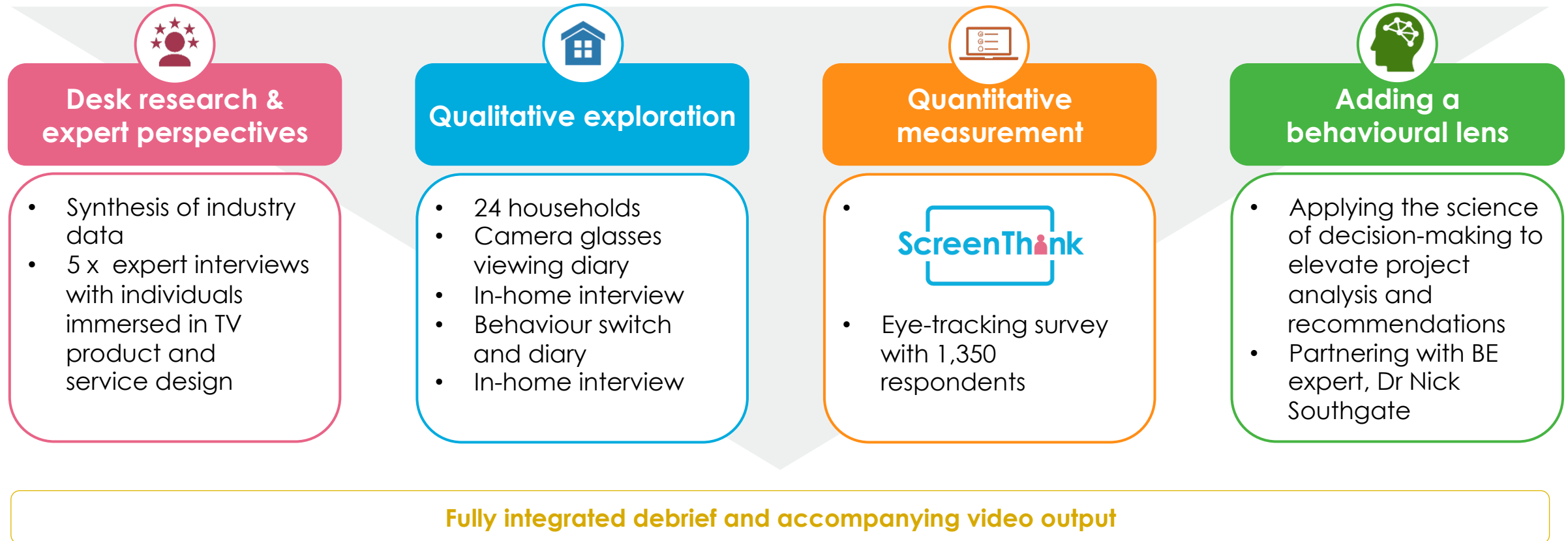**1. Content discovery now**

- To understand the paths to content and the process of content discovery on the TV, with a focus on pay-TV platform navigation, UKTV rights provision and in-platform promotion and communications
- To establish how discovery fits into wider TV viewing habits and attitudes
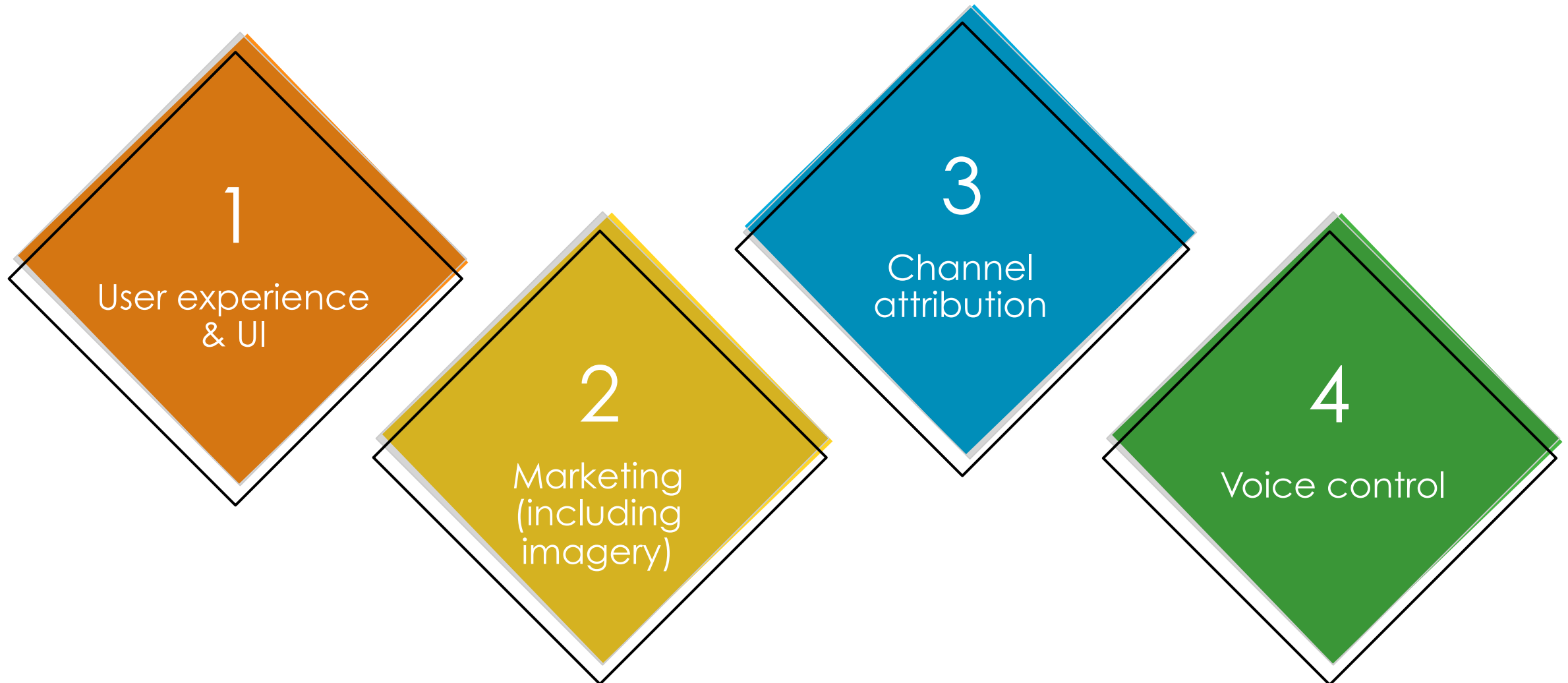
2. Content discovery in the near future

- To understand how content discovery is likely to evolve over the next 2-5 years, with a particular emphasis on the role of voice technology as well as the recent integration of Netflix into the Sky Q platform
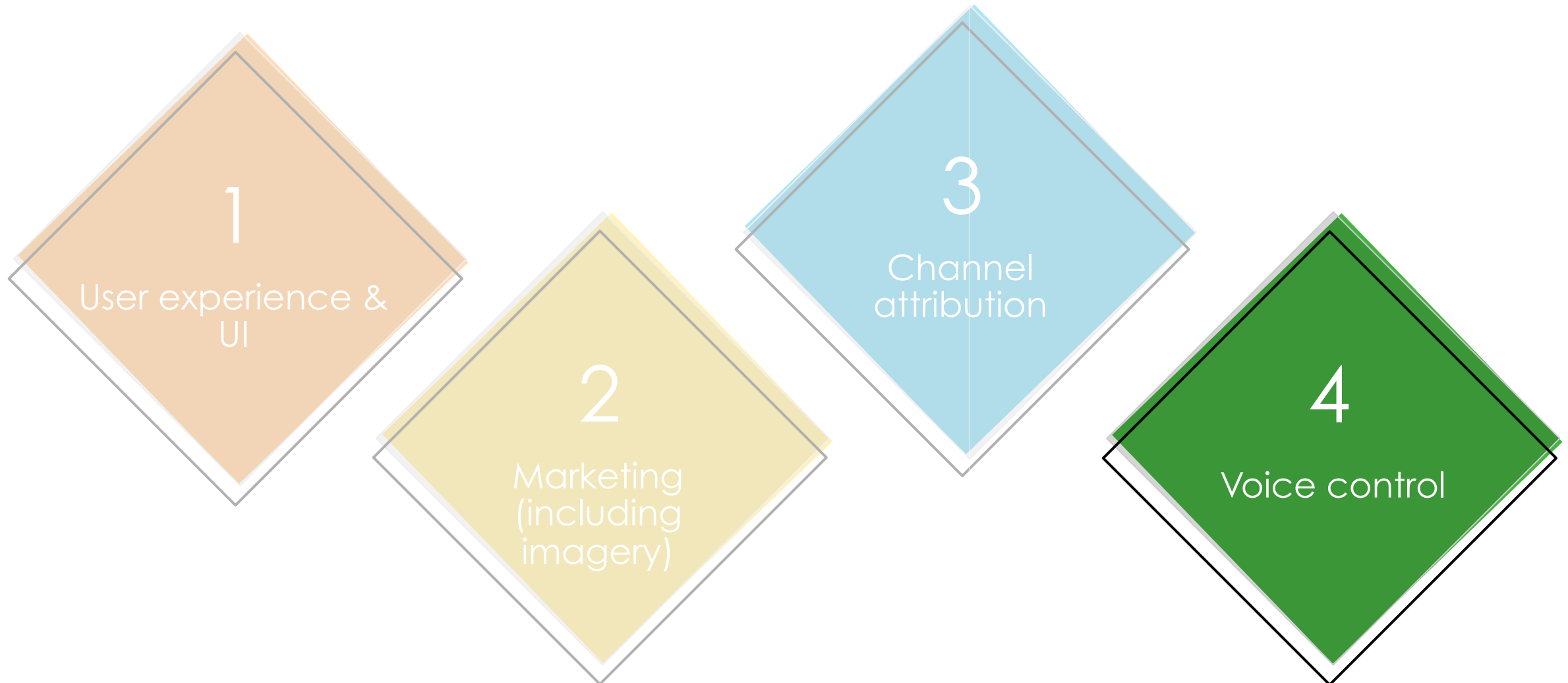
MTM carried out a bespoke, mixed-method approach to tackle the wide-ranging objectives

Desk research & expert perspectives

- Synthesis of industry data
- 5 x expert interviews with individuals immersed in TV product and service design

Qualitative exploration

- 24 households
- Camera glasses viewing diary
- In-home interview
- Behaviour switch and diary
- In-home interview

Quantitative measurement

-
ScreenThink

- Eye-tracking survey with 1,350 respondents

Adding a behavioural lens

- Applying the science of decision-making to elevate project analysis and recommendations
- Partnering with BE expert, Dr Nick Southgate

Fully integrated debrief and accompanying video output

The project examined and provided recommendations on a breadth of issues…

1 — User experience & UI

2 — Marketing (including imagery)

3 — Channel attribution

4 — Voice control

...today we will focus on findings and implications related to voice control on TV

1

User experience & UI

2

Marketing (including imagery)

3

Channel attribution

4

Voice control

Behaviours and attitudes today

Before talking above voice specifically, it is important to remember how and why people watch TV

According to BE theory, consumers tend to fall into one of two camps when it comes to how they approach decision-making
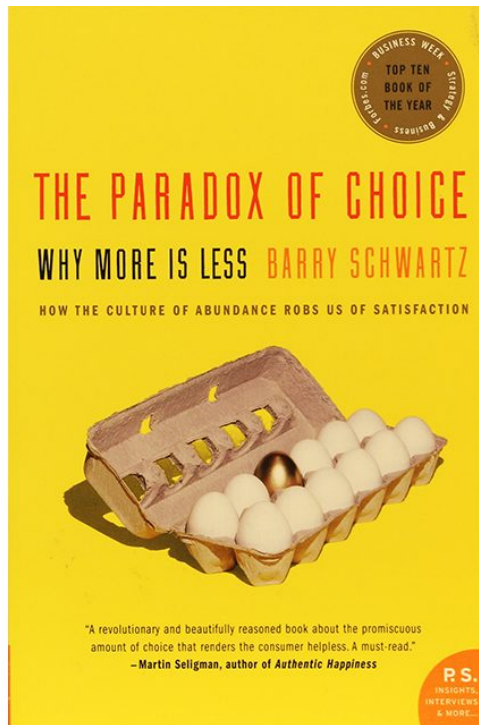
'MAINSTREAM'

- **Happy to settle** for content in their current repertoire

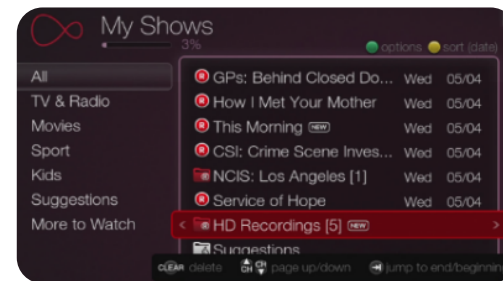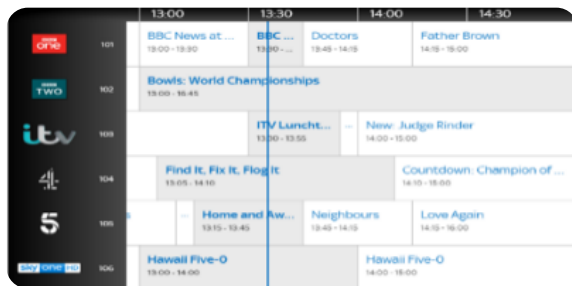- **Rely on existing routes to content** i.e. linear, PVR rather than trialing the new

'EARLY ADOPTERS'

- More open and actively **seek out new TV shows**

- **Wider range of journeys** to content including voice

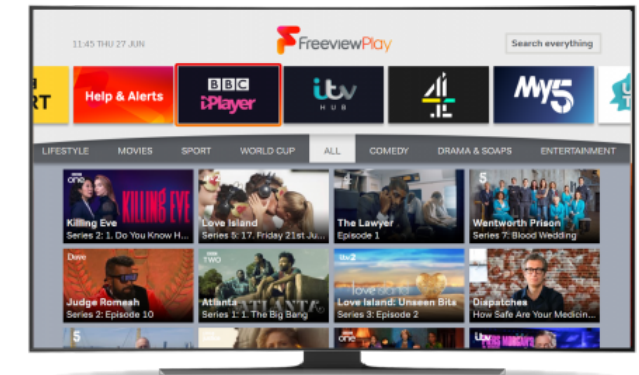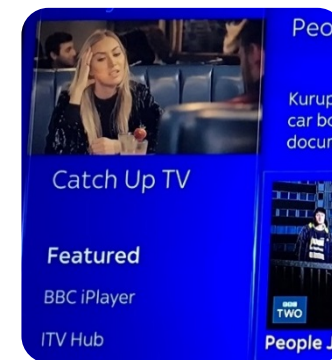# We can take learnings from today's behaviours to make assumptions on tomorrow's content discovery routes

TV guide and PVR

Cognitively easy

Catch-up / On demand

Cognitively difficult

Ultimately, people want 'TV' to be easy and effortless (even if the content they're watching isn't!)

Early adopters are using voice search to get to specific programmes or channels, but there are barriers that stop other audiences with voice capability from using it

Early adopters turn to voice for quicker and more user-friendly journeys to specific pieces of content

Most common uses

- Getting to a **programme** on linear / VOD

- Going to a **channel**

- **Navigating** to areas of the TV
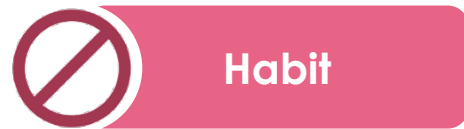
SHORT-CUT TO A KNOWN END-POINT

Occasional uses

- Browsing **genres**

- Browsing content from specific **talent**

- Getting to **other types** of content (e.g. YouTube)

- Getting to **content promoted** in the hero image

BROWSING WITH AN UNKNOWN END-POINT

However, voice hasn't become an engrained behaviour for all users, and there are barriers among those with the capability
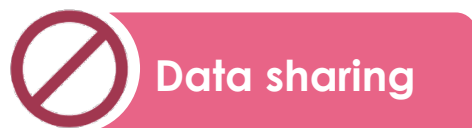
Habit — Muscle memory and speed of existing journeys

Physical — **27%** would use voice command on TV more if it didn't involve a remote

Effectiveness — Mixed experience with voice in the past, and queries over how it would aid discovery

Confidence — Uncertain of search terms, worried of doing something wrong, or feeling 'silly' using it

Data sharing — **49%** concerned about how voice-enabled devices use personal information[1]

[1]G3. Now please think about all your video viewing across all devices, including live TV, recorded TV, video on demand, DVDs, Blu-Ray Discs and any other video viewing. Please tell us how much you agree or disagree with the following statements. Base – All respondents (3,009)

A sneak peak into how viewers use voice control on TV
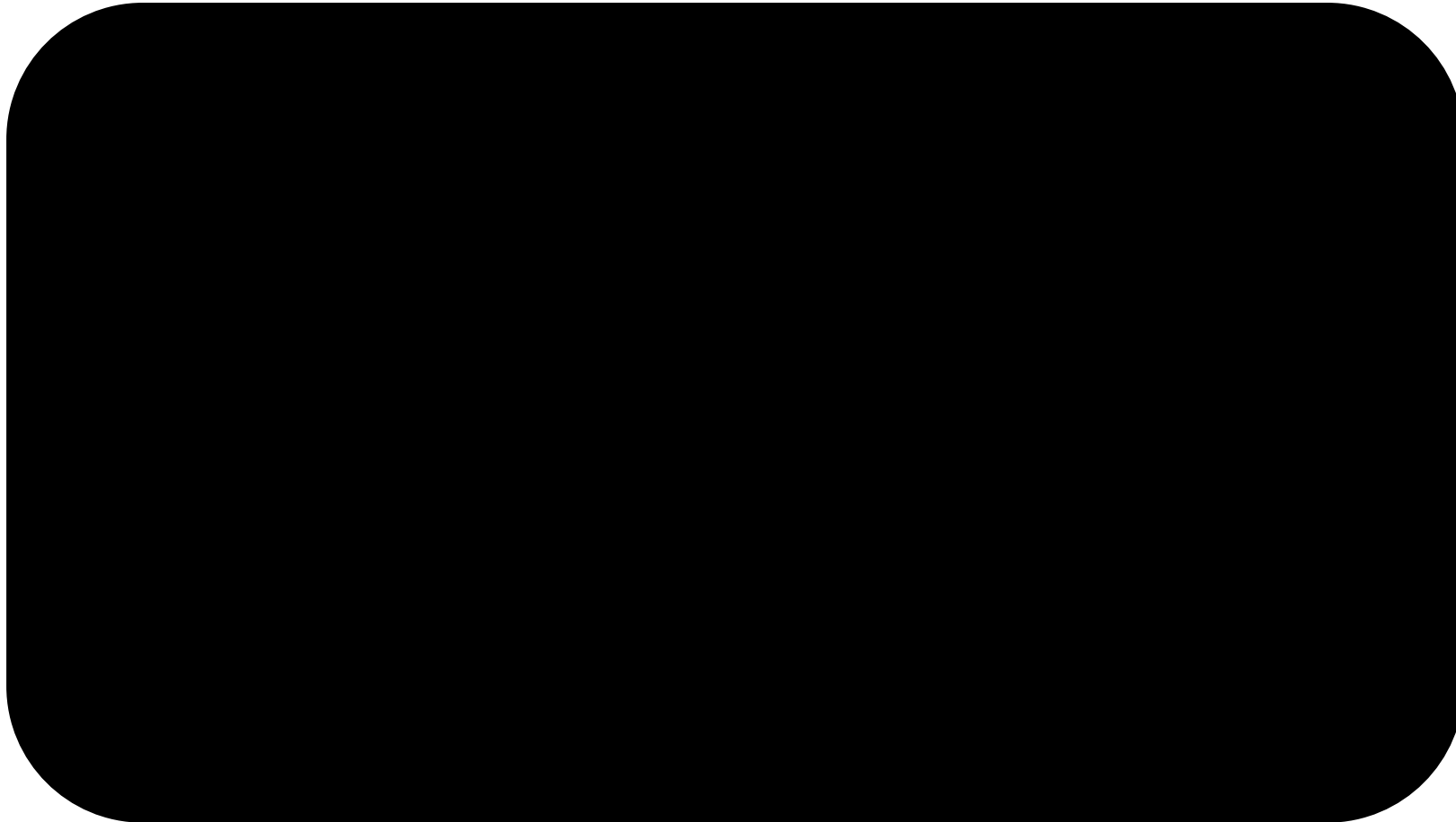
Behaviours and attitudes tomorrow

There have been significant breakthroughs in the penetration and functionality of voice and artificial intelligence

22% of Brits now use voice search 3-5 times a day (on any device)[1]

23% Own a home assistant[2]

8% Own a wireless speaker with in-built virtual assistant[2]

FUNCTIONALITY		**ADVISING USERS**	**BRAND INTERACTIONS**
amazon	G	NHS	JOHNNIE WALKER
10+ products with integrated Alexa voice assistant	Voice assistant booking appointments on behalf of the "client" 'Google Duplex'	The NHS is collaborating with Amazon to provide reliable health information from the NHS website to answer basic health-related queries	Brands are moving towards two-way conversations, changing how consumers interact with brands

Additionally, there have been some voice advancements in TV that will help further shift behaviours towards voice

Voice integration on hard/software   **Far-Field Voice Control**   **Alternative Search Terms**

There's some consumer interest in how voice can improve TV journeys, and positive experiences of using it in the switch-task

A SENSE THAT 'VOICE' IS WHERE THE FUTURE IS HEADED

32%
Strongly / slightly agree

I think using voice command to control some of my devices and gadgets will **become a part of my everyday routine**

POTENTIAL TO IMPROVE THEIR TV EXPERIENCES

23%
Strongly / slightly agree

There are **benefits** to using your voice to control your TV

BETTER TV EXPERIENCES

Get to desired content more quickly

Smoother and easier search experiences

Easier to discover some types of content

Feeling that they get more out of their subscriptions or services

But it's acknowledged that voice control for TV is still in its infancy and will continue to be so for the foreseeable future

"Voice recognition is just so bad at the moment… until you get that next-generational shift, or everyone starts licensing Google's voice recognition, I think the barrier will be a little bit high"

5% of all viewers **claim to use voice control** on their TV in the last month, which has remained constant since Q4 2017[1]

And, it will take time to move away from task-led commands, and functionality needs to significantly improve to shift usage
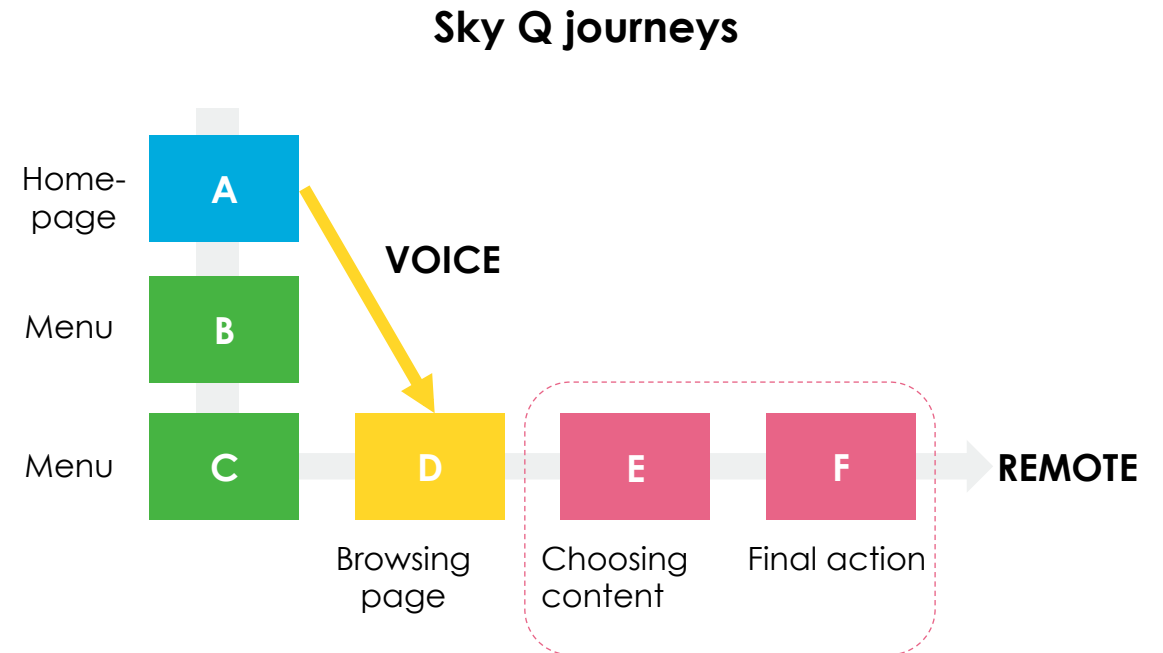
Sky Q journeys

1 Difficulty thinking beyond voice as a **replacement for the remote**

2 **Hit and miss** results

3 Voice **can't complete the full journey**

Home-page **A**

VOICE

Menu **B**

Menu **C** **D** **E** **F** **REMOTE**

Browsing page | Choosing content | Final action

> Voice was very frustrating, it could only get you so far, it won't let me play [the programme]
> 55-65, Sky Q, Mainstream

> If you say BBC on Wednesday etc… if you give it too much information, it says 'Sorry I didn't understand that command' or something
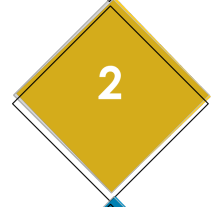> 45-54, Sky Q, Early adopter
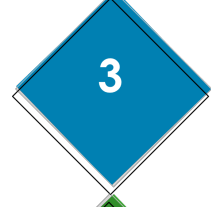
Implications for broadcasters

The future take-up of voice search has several implications for broadcasters, in both the short and long-term

1 — **Will your programme get surfaced?**

2 — **How do audiences notice that the content they've chosen is from you?**

3 — **Which channel or provider will a viewer select, given the choice?**

4 — **How easy is it for audiences to discover your brand?**

5 — **What does your brand sound like?!**

Thank you!

Georgie Coad
Associate Director, MTM

Sheri Cladd
Senior Insight Manager, UKTV