

mtm

Decoding Discovery

How viewers are really
deciding what to watch

mtm

SONY
PICTURES

With an increasing control
over what viewers watch,
**the risk of choosing now
lies with them**

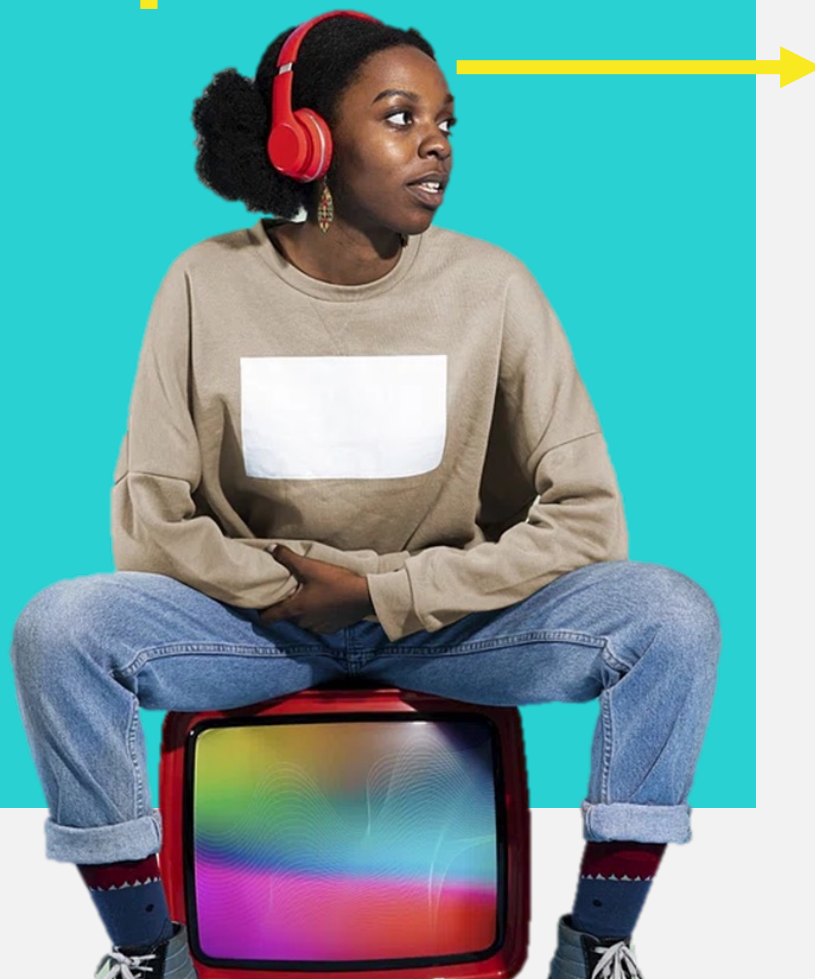


“

I love that there's so much to choose from, but it's quite overwhelming, isn't it? You can spend the whole night trying to find something, flicking through trailer and the rest of it, and you end up not watching anything.”

45-54, Sky & Netflix user

& Content choices
have never
been **so important**



#1

Connection

#2

Return on
home
investment

#3

Cost of living

“ When the kids were little, we used to limit their TV time but now I feel like we draw them to it. It’s one of the few things we can all do together. For me, it’s replaced the family eating together... it can carry on the whole week, we’re still talking about what we watched and remembering jokes from it.”

45-54, Sky & All4 user

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SONY
PICTURES

How do
viewers
actually
discover what
to watch?



Methodology (Part 1):

We approached this question by getting into viewers minds and homes



Immersive
pre-task
(2 weeks)

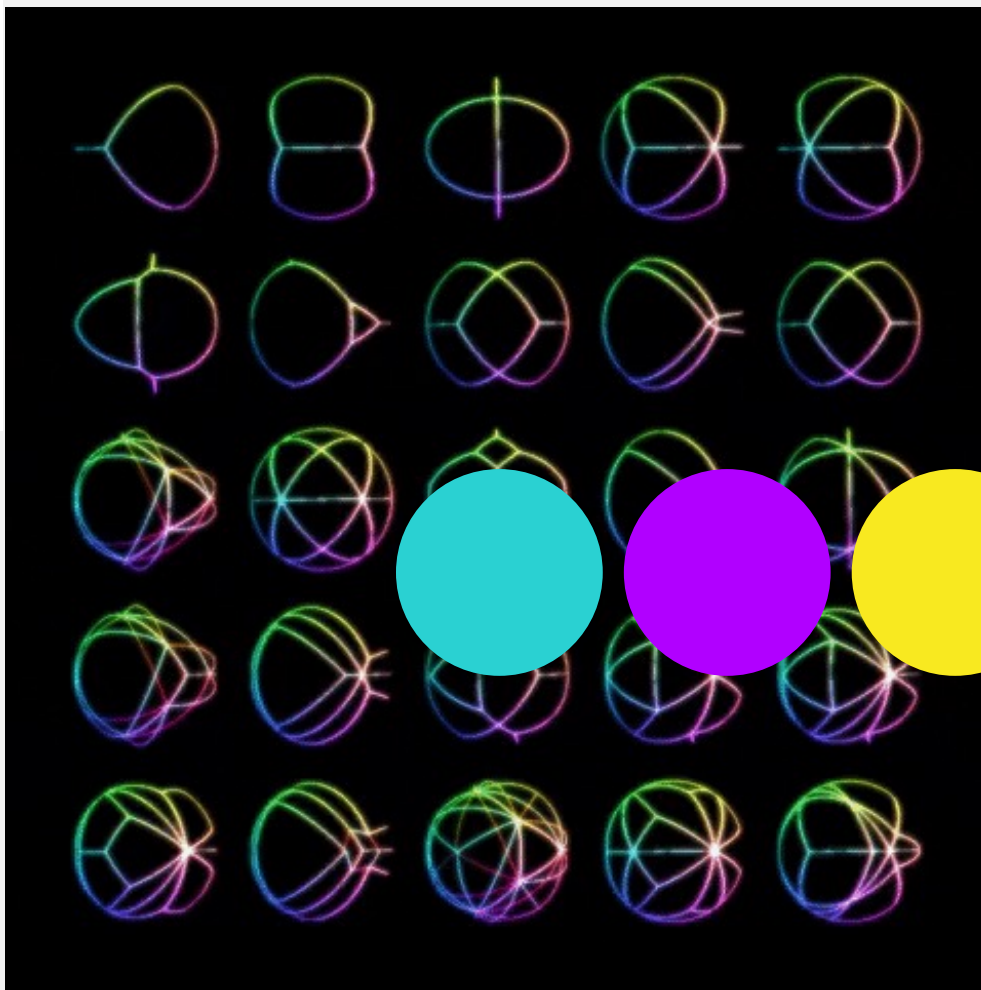
Gathering real-world contexts that viewing takes place within.

Ethnographic
interviews
(2.5 hr in-home)

Exploring motivations and influences shaping viewer choices.

Behavioural
science lens
(throughout)

Inputs from Partner Dr Nick Southgate pre and post interviews.



So,
what did
we **find**?

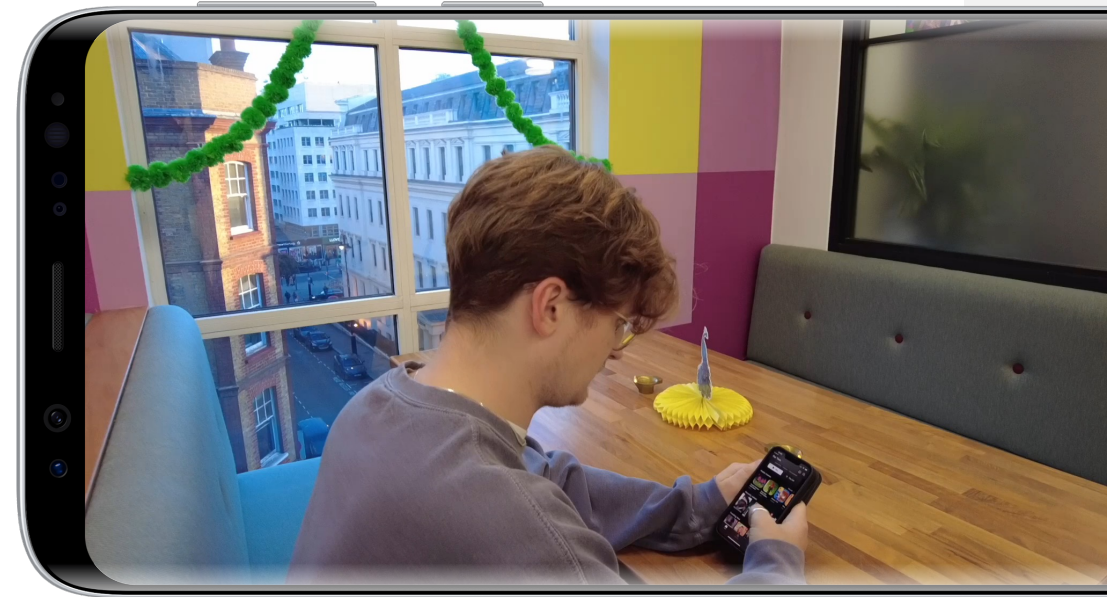


Deciding is
fast and **slow**:

at times it's
quicker than
you think

but also, **slower**
than you think

How **quickly**
are viewing
decisions
made?



Mindset
heavily
influences
how viewers
come to a
decision

Hot
emotional
decisions



Cold
rational
decisions

How do you
make most
of your TV
decisions?



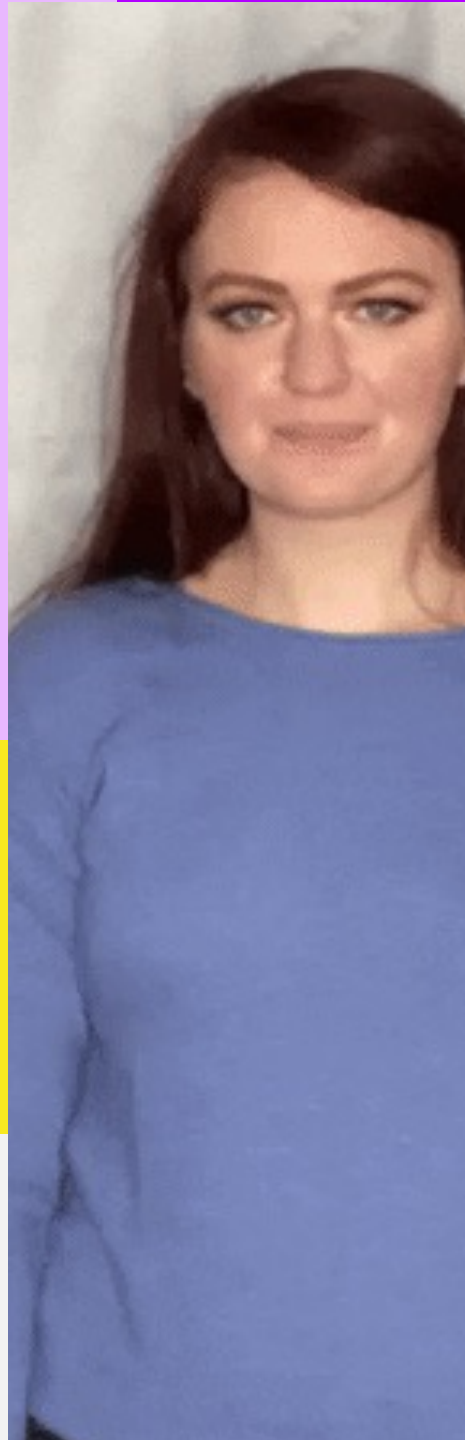
Hot



Cold

How do you
make most
of your tv
decisions?

Most viewers
come to viewing
decisions in a
HOT mindset
but...



Hot

Creating moments to browse in **cold mindsets**



- **Avoiding the pressure** of deciding in the moment
- Taking time leads to more **open exploration**
- **More information**, off platform and unbiased sources



“ When I’m sitting on the bus I scroll through Netflix ‘New and Hot’ and add things to my watchlist. That’s what we’ll go through first when we’re looking for something to watch together. We used to argue and take ages finding something, but it works much better now!”

24-35, Sky & Netflix

We call these people, **Viewing Shepherds**

“ I guess I enjoy recommending things to other people because it helps me bond with them and shows off my personality through my taste in shows.

45-54, Sky & All4

“ During the week I’m always on the lookout for things we might all enjoy and note them down or add them to recordings...when we sit down together on a weekend, we’ll go through these first and often pick a film from them.”

45-54, Sky & All4



Who are
you?



Shepherd?

“Paving the way for my household”

“Spending time reading synopsis, checking reviews etc”



Sheep?

“Happy to let others recommend and narrow down choices”

“I like to keep the peace when it comes to deciding what to watch”

How do viewers
discover content
in a **hot mindset?**



By process of **elimination...**

When navigating, viewers are led by a mix of **good and bad signals** as they eliminate down options.

Quick to dismiss content that **doesn't immediately meet** personal, mood or occasion preferences.



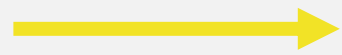
“ In a matter of seconds, I need to be told exactly what's happening on that program. That helps you make a judgement on whether that's something that you're going to then watch for the next hour.”

25-34, ITVX & All4

“ The image is what initially grabs you something. The trailer might be amazing, but I'm going to scroll past it because the image is crap. The image grabs your attention first of all.”

25-34, Sky & Netflix

Eliminations happen so quickly, viewers often unable to explain why...



Impacted by biases;

Limited
information
available

Ingrained
habits and
routines

Pre-existing
perceptions

Gravitating to
decisions
that are **easy**



**Easy to
find**

explained via
availability bias



**Easy to
process**

explained via
cognitive ease

Making sure audiences **don't miss out** on content

- Better understanding of how viewers **discover content**
- How **personality, risk and mindset** influences the decision-making process
- **Where** viewers discover content (incl. off-platform)

What's next

Understand confidence in viewer choices?

How can we optimise consideration on-platform?

Methodology (Part 2):

A 2,000 UK survey to validate the first stage insights and further explore the nuances of content discovery



Viewing
Diary
(5,288 viewing
occasions)



Gathering insights on what
& why people are watching.
Who makes the decisions
about what to watch.
Platform perceptions.

Viewing
Contexts
(e.g. Unplanned
vs. Planned)



Exploring content discovery
within different
decision-making contexts
Planned vs. **Unplanned**
Familiar vs. **Unfamiliar**
Shepherd vs. **Sheep**

Gamified
Content selector
(80 content titles)



Size the importance of
on-platform information
and determine conversion
to watching content on
platform UIs.

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Thank you!

