



STRAT7



# BBC Online Services Research

Qualitative Research Report

March 2023



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## Ofcom's preface

The BBC's Mission is to serve all audiences in the UK by providing duly impartial, high quality and distinctive output and services which inform, educate and entertain. Ofcom became the first independent regulator of the BBC in 2017. We must hold the BBC to account for fulfilling its Mission and promoting the Public Purposes on behalf of audiences, protecting fair and effective competition, and securing content standards in BBC programming.

Public Purpose 3 focuses on the BBC delivering the most creative, highest quality and distinctive output and services. The Charter defines distinctive output and services as:

"..taken as a whole, that are substantially different to other comparable providers across each and every UK Public Service both in peak time and overall, and on television, radio and online, in terms of:

- (a) the mix of different genres and output;
- (b) the quality of output;
- (c) the amount of original output produced in the UK;
- (d) the level of risk-taking, innovation, challenge and creative ambition; and
- (e) the range of audiences it serves."

As part of the development of the new BBC Operating Licence, we are introducing new requirements for the BBC's online services, including to make important content easily discoverable and requiring the BBC to explain how it uses online services to fulfil the Mission and promote the Public Purposes, and how they contribute to its performance.

A key way we fulfil our regulatory duties with respect to the BBC is by seeking the views of its audiences and the wider UK public. We do this through audience research, including an annual survey - which we use as part of our annual performance assessment of the BBC - as well as other ad hoc research to get a deeper understanding of particular areas relating to the BBC's delivery of the Mission and Public Purposes for audiences.

We commissioned independent research organisation Jigsaw Research to conduct a qualitative study to understand audience perceptions of the BBC's online services in relation to their distinctiveness and the discoverability of content on those services. For the purposes of the research and to use language appropriate for audiences, definitions of both distinctiveness and discoverability have been simplified.

The findings of this report reflect the views of the audiences Jigsaw Research spoke to and should not be considered a reflection of any final policy position that Ofcom may adopt as part of our regulation of the BBC.

## Executive summary

### Key Findings

Ofcom commissioned Jigsaw Research to conduct qualitative research into discoverability and distinctiveness across the BBC's different online services, including BBC iPlayer, BBC Sounds and the BBC websites and apps (BBC News, BBC Sport etc.). The research sought to understand audience relationships with these services and experiences of the services in relation to distinctiveness and discoverability. Participants took part in a pre-task, including a media diary and behaviour change exercise. The research involved 21 focus groups among both frequent and less frequent users of the different BBC online services. Follow-up depths with one participant from each group explored their experiences and usage of the relevant BBC online service in more depth and detail.

### Audience relationship with BBC online services

Participants had very different relationships with each of the BBC online services included in the research in terms of each service's role in their media lives.

In terms of **BBC iPlayer**, live TV often shaped awareness and assumptions about what content would be available on the service, which could often be seen as more of a catch-up service than a browsing destination in its own right.

Regarding **BBC Sounds**, participants' usage was often defined by live radio and sometimes catching up on a specific programme. Radio listening tended to be structured around the participants' day and routine. Many expressed a relatively strong emotional relationship with BBC radio programmes or presenters and habitual preferences for specific stations.

On-demand listening, including catching up on broadcast programmes as well as podcasts and other content, was mixed across the sample. Many participants were often unaware of the extent of available on-demand content. For those participants who had adopted more on-demand listening habits, BBC Sounds was often seen as a rich source of varied content.

Relationships with **BBC websites and apps** were much more varied depending on the site or app used. However, in different ways, they were often heavily relied upon by many participants who felt they played a valued role in their lives. For many, these services were seen as practically helpful, informative, and also delivering educational value.

### Distinctiveness of BBC online services

Participants highlighted a number of specific points of distinctiveness that relate to each of the services. These included the following:

**High-quality:** Across all services, the BBC was seen to deliver high-quality content, and participants felt there would always be a minimum standard that had been met. BBC iPlayer, in particular, was often commended as consistently high quality and catering to a range of different audiences. On BBC Sounds, the variety and range of content were widely seen as a unique and salient strength, and this was across both music and speech content.

**Representing UK creative output and the nations and regions:** BBC online services were seen as strongly representing UK culture and delivering consistently high-quality content across all services. Some participants also highlighted local, regional and nations' content as one of the salient strengths

of BBC online services, whether this was a radio station, news features or nations and regional content on BBC iPlayer. Most participants were aware of the *presence* of this type of content across the BBC online services without prompting during the discussion. However, the *extent* of such content tended to be less well-known.

**Educational impact:** Overtly educational services, such as BBC Bitesize, were just a small part of a much broader educational impact that BBC online services were seen as having. BBC websites and apps, in particular, were seen as distinct in offering a portfolio and range of information services.

**Trustworthiness and safe for children:** Due to their association with the BBC, participants felt that these BBC services were generally trustworthy in terms of providing content of a consistent standard of quality and also credible, reliable and accurate factual information, as well as seeing them as safe for children.

## Discoverability

Several behavioural factors shaped participants' usage of the different BBC services:

- **Entrenched habits and routines:** Usage of online services was often very habitual, and these ingrained behaviours often acted as barriers to exploring BBC online services more widely.
- **Participant purpose:** The individuals' purpose when using the service typically defined what participants paid attention to and what they screened out when navigating the service.
- **Low-effort and low-risk decisions:** Participants wanted to make low-effort and low-risk decisions and were often drawn to both services and features that helped them do this.

These behavioural factors influenced participants' propensity to spend time and effort searching for or exploring content across BBC online services and underpinned the appeal of services that presented personalised and tailored content.

The feedback from audiences highlighted that discoverability is a process that includes several elements:

- Awareness: being made aware of content available on the service prior to using it
- Visibility: surfacing and presenting new and appealing content
- Evaluation: being able to judge the potential appeal of the content easily
- Retrieval: being able to save and retrieve content easily

At an overall level, across the BBC online services, finding something specific was seen as easier for more popular, mainstream content. However, less familiar and more specialist and niche content could be more challenging to find.

However, in terms of discoverability, entrenched habits and the desire to make low-effort and low-risk decisions acted as powerful behavioural barriers to participants' propensity to explore and seek out new and fresh content. The research also indicated a tension between wanting to readily find and access the content participants went to the services for and being exposed to brand-new content, even if it was tailored to them based on their previous behaviour.

Many participants did not necessarily see that being served personalised content could potentially limit discoverability by making it harder for them to discover content that was *genuinely* different from what they had consumed before. There were some participants, however, that *did* recognise this tension between personalisation and discoverability and suspected their reliance on personalised

recommendations might mean they were missing out on broader and potentially appealing content unrelated to previous consumption.

With **BBC iPlayer**, participants were often familiar with using the service for specific content and had very few issues. Equivalent services were seen as broadly similar in terms of finding something specific. However, some participants observed that BBC iPlayer could come across as less personalised than other streaming services.

When it came to discoverability, showcasing key titles and a relatively smaller range of high-quality and well-presented content, encouraged the exploration of that content. For example, giving prominence to a select range of drama titles on the homepage and then inviting viewers to stream every episode of all the series that were available meant the homepage was not overwhelming the audience with too much choice, and was encouraging them to 'binge watch' what was on offer.

Participants who often tended to use BBC iPlayer for catch up viewing, found it easier to access well-known BBC shows which were often prominent via the BBC iPlayer homepage, whereas discovering lesser-known or more niche content required more effortful browsing. Some felt a better balance could be struck between helping audiences find familiar and known content and helping them discover 'new to them' options.

With **BBC Sounds**, a range of homepage design features were valued for aiding the search for specific content, which tended to be relatively straightforward.

When it came to discoverability, this worked best when participants were presented with a mix of personalised recommendations and curated content they might not normally consume. However, some participants questioned the level of personalisation offered by BBC Sounds and found that content positioned as personalised suggestions could feel less relevant and tailored to them compared to other services.

Promoting on-demand content via live radio was also seen as an effective means of encouraging broader discoverability for BBC Sounds, whilst a range of ways of displaying and categorising the content worked well to encourage exploration. Beyond relatively low awareness of on-demand content on BBC Sounds, the main barrier to discoverability on the service was a lack of clear, programme-level information to help the user judge and select content.

In terms of **BBC websites and apps**, overall, participants generally felt they could easily find the content for which they were looking. One of the main reasons for using BBC websites and apps was to get an update on the main news stories, including sports. When it came to finding and discovering more of this type of content, participants felt well catered for by this area of BBC services.

Participants felt these services were typically well structured and less cluttered than equivalent services, with clear categories and homepages that prioritised the presentation of the main stories of which they needed to be aware, particularly with BBC News and BBC Sport. However, participants were often unaware of the existence of some BBC websites and what they had to offer, particularly the BBC homepage, [bbc.co.uk](http://bbc.co.uk).

In addition, wider content, such as local news, lighter and more human-interest content, or feature content, could be more challenging for participants to discover. Still, they could be attracted to this broader range of content once they were exposed to it through the research. Accordingly, many participants suggested that such content be given greater prominence on relevant BBC websites and apps such as BBC News and [bbc.co.uk](http://bbc.co.uk).

## Background and approach

Ofcom commissioned Jigsaw Research to conduct audience research, with a specific focus on distinctiveness and discoverability across the BBC's online services. This included BBC iPlayer, BBC Sounds and the BBC website/apps (for example, news and sports).

In summary, the objectives of the research included:

- Understand the audience relationship with BBC online services
- Understand the provision of distinctive content across all BBC online services and comparison to other services
- Understand audiences' perceptions of discoverability of content on BBC online services – coming across content you were not looking for that is 'new to you', in contrast to finding specific content for which they are looking
- Providing initial insight into how Ofcom might measure these concepts in the future

Jigsaw Research was commissioned to conduct a programme of qualitative research in 21 locations across all four nations.

All participants took part in an individual pre-task prior to the fieldwork for seven days that encompassed:

- An exploration of their attitudes towards the service they were focussed on
- A media diary of the use of that service over three days
- A sponsored behaviour change exercise, where they were asked to do without their preferred service and find an alternative
- A focused discoverability task where they were tasked to find content they were interested in that was new to them.

This was followed by convening participants together in online focus groups of between five and six participants per group across the 21 locations. Each group led with a particular online service, with seven groups allocated to BBC iPlayer, BBC Sounds and BBC websites and apps accordingly. The sample was recruited across a range of audiences defined by age groups, from 18-75, a range of socio-economic gradation, life stage and household circumstances. The groups were also structured around different levels of usage of the relevant online service - so we had occasional users (use the service at least once a month) or often users (use the service at least once a week). Stimulus material was shared with the groups during the discussion, including screenshots of the relevant online service to help extend discussions.

The group discussions built upon the pre tasks and explored participants broader usage and relationship with the relevant service, before discussing perceptions of distinctiveness, and participants views on how each service helped them find and discover content. Following the focus groups, 21 individual participants were chosen (one from each group) to take part in a follow-up depth interview exploring their experiences and usage of the relevant BBC online service in more depth and detail.

Full details of the research approach, including a description of the different components of the research, the stimulus material, sample criteria, and pre task and core discussion guide are provided in the appendix.



# 1. Audience relationship with BBC online services

Participants had very different relationships with each of the BBC online services included in the research in terms of the role that each service played in their media lives. Findings for each online service are outlined separately below.

## 1.1. BBC iPlayer

### Participants' relationship with BBC iPlayer and perceptions of the content that the service offered were often shaped by live TV

Participants' overall relationship with BBC iPlayer was often influenced by their relationship with live TV across much of the sample, including among frequent users of the BBC iPlayer. Live TV often shaped their awareness and assumptions about what content would be available on BBC iPlayer, particularly among older participants. In light of this, the service could sometimes be seen as more of a catch-up service than a browsing destination in its own right. Consequently, audiences were sometimes less inclined to approach the service with an exploratory or browsing mindset. They were instead often looking to access an episode of a series they had missed, or to make a relatively quick choice for a title they were already familiar with, to meet their viewing need at the time.

*I use it really as catch-up. When you've missed something on TV, but I do think there's more content in it now than there was. I know things just move on, but there is more content in it, there are more films, when you search for films, there are much more films in it. I just wasn't aware that there was more in it than when it maybe first started, but that's because I've not been searching around it, and I have just had that mindset of using it for catch-up. (BBC iPlayer, Often, Man, 46-60, ABC1, Urban, Scotland)*

*A lot of the time, it's a catch up for what's probably happened in the last 48 hours. So, things perhaps which have clashed with other programmes, and so I've just made a note, and they will be, you know, real-life documentaries predominantly. But Peaky Blinders was something which I watched predominantly just all on the iPlayer, binge-watched. (BBC iPlayer, Occasional, Man, 25-45, ABC1, Urban, England)*

*I would use the iPlayer for certain programmes that I want to catch up on, like Strictly and, yes, tend to stick to the one, those three or four programmes I want to watch. (BBC iPlayer, Occasional, Woman, 18-34, ABC1, Urban, Northern Ireland)*

*I just have that mindset of using it for catch up. I've never thought to search iPlayer in the way I would do other streaming services. Maybe that's just your mindset. (BBC iPlayer, Often, Woman, 46-60, ABC1, Urban, Scotland)*

The perception of BBC iPlayer as a catch-up service amongst some participants was reinforced when viewing the main homepage for the service, as well-known BBC titles such as Eastenders, Strictly Come Dancing, and Top Gear were featured prominently or multiple times.

### In contrast to older audiences, younger participants were more engaged by on-demand viewing and demonstrated greater potential to see BBC iPlayer as a service in its own right

Younger participants demonstrated relatively less engagement with live TV than their older counterparts. Their viewing preferences and habits tended to be more weighted towards on-demand viewing and streaming services. Live TV, therefore, appeared to play less of a role in prompting younger audiences to engage with BBC iPlayer, and younger participants who were using the service appeared to be using it as more of a destination service in its own right as opposed to just a catch-up service.

Whilst there was less evidence of live TV prompting young viewers to use BBC iPlayer than older audiences, the research found evidence that some were prompted to use BBC iPlayer by relevant BBC content on social media. This revealed the potentially influential role that social media could play with younger audiences, particularly in prompting them to use the service.

*I saw an advertisement on TikTok. It was on BBC's iPlayer page, and they had a clip of a documentary in the Serengeti, and I actually went on to iPlayer and watched it for that reason. It was really good, I watched Season 1 and Season 2, and I wouldn't have seen it other than the fact that it was on TikTok. (BBC iPlayer, Occasional, Woman, 18-34, ABC1, Urban, Northern Ireland)*

## 1.2. BBC Sounds

### Relationship with BBC Sounds was primarily anchored in their engagement with BBC radio.

Participants' use of BBC Sounds was often defined by live radio and sometimes catch-up with a specific programme. Many often had radio on in the background whilst engaged in another activity, with live radio listening tending to be structured around participants' days and routines.

*Basically, I just listen to music, the radio during work, I work from home, so I have BBC Sounds on, and pretty much it's BBC Radio 2 or BBC Sounds I listen to first thing in the morning until the last thing at night. At night times I'll often put on BBC again, Sounds, BBC Radio 5 Live for the sport. That's just normally the things I listen to, and BBC Radio 2 has got music quizzes, phone-ins, discussion shows, so it's a little bit of a mixture during the day. (BBC Sounds, Occasional, 46-60, Man, C2DE, Suburban, Scotland)*

Some participants expressed a relatively close relationship with, and emotional attachment to, certain BBC programmes or presenters, demonstrating strong preferences for specific stations. These preferences and listening habits were often long-standing. They appeared to be relatively stable, and such participants expressed little interest or inclination to explore outside their established listening habits and routines.

*Live and catch up would probably be about 60%-40%. If I had missed something or there's someone that I want to listen to, then I would listen to it at a later stage rather than listen to it live, like Steve Wright on a Sunday morning or something like that. (BBC Sounds, Occasional, 55-75, Woman, ABC1, Suburban, Northern Ireland)*

*I just feel comfortable with it, and it's my go-to thing. It's like reaching out for a bar of chocolate because that's your comfort, BBC Sounds. I can go XYZ, and within 2 minutes, it's there, leave it on. It's like putting a nice woolly jumper on, I suppose, I know that sounds strange. I might like Spotify, but I think the BBC it's trusted, what the BBC deliver, I trust. (BBC Sounds, Often, Woman, 46-60, ABC1, Urban, England)*

*I have been doing the same thing for years; it's just the way I like to listen and always have. People like me don't want to change. (BBC Sounds, Often, Woman, 46-60, ABC1, Urban, England)*

How participants accessed the service could reinforce these habits around live radio or catch-up on specific programmes. For example, those using smart speakers were restricted to using voice commands to tell the smart speaker what station or, sometimes, programme to access. For this means of access to work, the voice commands had to be directive and specific, and this could again be more conducive to listening to live or catch-up radio as opposed to exploring on-demand content more widely.

In addition, participants typically accessed BBC Sounds via the app on their smartphone, where the design of the interface could also reinforce the habit of engaging with live and catch-up radio. Participants highlighted the top half of the interface, which features the distinctive radio dial design. They felt this gave more prominence to accessing live stations and schedules before potentially seeing any on-demand content by scrolling further down the homepage.

*I like the radio at the top, where you could see all the different radio stations you could choose. You didn't need to search for them, they were arched at the top, Radio 1, Radio 2. (BBC Sounds, Occasional, 55-75, Woman, ABC1, Suburban, Northern Ireland)*

### **On-demand listening via BBC Sounds varied across the sample, but exposure to on-demand content significantly enhanced perceptions of the breadth and depth of the service and what it had to offer**

Many participants were often unaware of the extent of on-demand content available on BBC Sounds and had not yet fully explored this side of the service. In addition, there was also evidence of participants consuming BBC on-demand audio content that was available on BBC Sounds, but doing so via other services such as Apple Podcasts. In some of these cases, they did not always consciously attribute such content to the BBC. For those participants who had adopted more on-demand listening habits or had been exposed to on-demand content through the research, BBC Sounds was often seen as an abundant source of varied content, particularly in terms of offering a wide range of different speech content.

*I use Castbox a lot for podcasts, and I didn't realise until I came to do this research that all of the podcasts that I listen to are actually based around Radio 4 and produced by Radio 4. (BBC Sounds, Often, Man, 46-64, C2DE, Urban, England)*

*Most of my listening tends to be podcasts, which I listen to via Apple Podcasts, a lot of them are BBC Sounds podcasts, but I listen through Apple because I have other non-BBC podcasts, and I like stuff all in one place, it is easy to access my library. I do have BBC Sounds, which I use when I don't have a podcast to listen to, or I'm driving, and I want to listen to something like BBC Radio 6 or another radio station. (BBC Sounds, Often, Man, 46-60, ABC1, Urban, Scotland)*

*Everything that I've found on BBC Sounds has been really good, as I say, it's all straight to the point, there's no waffle, and I like it, and there was a lot on there...and there is a lot of good stuff on there (BBC Sounds, Often, Man, 18-34, ABC1, Urban, England)*

Exposing participants to the range of on-demand content available on BBC Sounds through the research also had a noticeably positive impact on perceptions. Across the different BBC online services explored in the research, exposure to content on BBC Sounds was often the most eye-opening experience for participants. The majority claimed they would use the service a lot more in the

future, having seen what the service had to offer. This highlighted the importance and potential impact of raising audience awareness of the range and variety of on-demand content on BBC Sounds to encourage engagement and exploration.

*Normally you just go in, and you go to what you normally do, but when I looked at it with fresh eyes, I found a lot more stuff that I was interested in, and even today, for Diwali, that's on all today, and I thought, 'Oh, never really noticed that before.' There's much more on it than I was even aware of. (BBC Sounds, Often, Woman, 46-60, ABC1, Urban, Scotland)*

### 1.3. BBC websites and apps

#### Participants' relationship with BBC websites and apps depended on which site and app they were using, but a number were playing a valued role in participants' lives

Relationships with each service were varied, but overall usage of BBC websites and apps was often very habitual and relatively purposeful and informational. These services were often relied upon by many in the sample, and participants felt they played a valued role in their lives in a number of respects, including the following:

- Making them aware and keeping them informed of the latest events and what was going on in the UK and the wider world, particularly news but also sports
- Helping them understand different topics, whether through educational services like BBC Bitesize or through online news output that provided clear explanations of different news stories
- Playing a functional role in participants' lives, whether via the BBC weather app or providing easy-to-use recipes

Participants often commended BBC websites and apps for providing high-quality, useful, reliable and trustworthy information. In addition, many also highlighted the absence of advertising as a valued point of difference in the context of BBC websites and apps specifically. Online adverts in the context of websites were regarded as a disruptive irritant by many participants when using other online services, and the absence of adverts within BBC websites and apps was seen as significantly improving the user experience in comparison.

#### In light of the diverse range of services and content offered through BBC websites and apps, participants' relationship with each individual service was very different

The different relationships that participants had with each BBC website and app are outlined separately below.

**BBC homepage (bbc.co.uk):** In terms of the bbc.co.uk homepage, many were simply unaware that it existed and generally had not come across it before the research. Participants tended to use the different BBC sites and apps, such as news and sports, in isolation. When they looked at the bbc.co.uk homepage as part of the research - although some of the content had potential appeal for participants - most felt it was dominated by news coverage and perceived it more as an extension of BBC news services rather than a portal into a broader range of different BBC online services.

**BBC News:** This was one of the most familiar areas of the BBC's website and app offering to participants, and it could dominate perceptions of what this area of BBC online services had to offer. For those regularly using BBC News via the website or app, it was generally well-regarded for providing a reliable, credible and trustworthy news service. Even those who used the service less still felt it played a valuable role in providing them with news updates when required.

However, while some participants valued news content as one of the key strengths of BBC websites and apps, responses also indicated that some participants could be turned off using some BBC services if they felt overly dominated by news coverage. This was particularly the case when reviewing the [bbc.co.uk](http://bbc.co.uk) homepage, which could feel excessively dominated by what was seen as serious and often challenging news content. A sense of news fatigue could prompt some participants to disengage from the service and deter them from exploring further.

**BBC Sport:** Participants mainly used BBC Sport to obtain updates on the latest competition results in their preferred sport and/or team, and users generally felt well served in this respect. This primary need was followed by potentially reading more in-depth coverage and contextual commentary around the relevant sport, team or sports person. The BBC Sport website and app were generally highly valued for the quality of its journalism and the range and reliability of its coverage. Participants also valued the service for including coverage of a wide range of sports, including those that the BBC did not necessarily have in its broadcast TV output, such as Formula 1.

**BBC Bitesize:** In households with primary or secondary school-aged children, BBC Bitesize was a highly valued service that elicited praise from parents whose children had used and benefited from the service. Responses indicated that BBC Bitesize was being promoted by teachers and schools, further enhancing its value and credibility, and parents strongly commended the service for matching the national curriculum. Participants felt they could trust the quality of the service, and many thought it had benefited their children by helping them improve their learning outcomes across a range of subjects. Some participants also recalled how valuable the service had been during the pandemic when it helped them cope with the challenges of home-schooling during lockdowns.

*Both of mine have used Bitesize purely because the school had used it. My older one and my younger one used it during lockdown, but not so much now...I think it was just the fact that he found it really easy to use. I didn't even have to really help, and this was when he was only 4 or 5. (BBC website/app, Often, 25-45, Woman, ABC1, Urban, Wales)*

**BBC Food:** Some participants were using recipes from BBC Food. However, content from the BBC Food pages tended to be accessed by participants searching for a specific recipe via a search engine, such as Google, with very few participants going directly to the wider BBC Food webpages (contained within [bbc.co.uk](http://bbc.co.uk)) to search for a recipe or article. Participants who had used individual BBC recipes were generally positive about how easy they were to follow and reliably execute. When participants reviewed the wider BBC Food webpages through the research process, they were generally impressed by what they came across. As with BBC Sounds, the BBC Food web pages were another online service that participants felt they were likely to return to in the future now that they had seen all that it had to offer.

## 2. Distinctiveness of BBC online services

The research explored participants' perceptions of distinctiveness concerning BBC online services and the extent to which audiences felt they offered something different or unique that other online services did not. Responses revealed a range of points of distinctiveness that cut across the individual services explored in the research, as well as service-specific points of distinction.

These points of distinction did not only highlight differences between BBC online services and other equivalents; they were also seen as important sources of value to the audience.

### Participants sometimes highlighted the distinctiveness of BBC online services in terms of the overall platform, particularly BBC Sounds and in terms of the range of BBC websites and apps

At an overall platform level, BBC Sounds stood out as the most distinctive online service that the BBC offered. Participants that had gone beyond live and catch-up radio listening, and were using BBC Sounds for more on-demand content, tended to perceive a stronger sense of overall distinctiveness concerning the service. BBC Sounds was seen as a unique and distinct platform due to the combination of live radio and on-demand listening and the wide range and variety of music and speech content hosted by the service. This sheer variety and range of content was widely seen as a unique and salient strength. Participants felt that they were likely to see a genre, topic or subject that was new and different on BBC Sounds, particularly the wide range of speech content.

*I don't know another service that could provide that type of content like that, that variety. So I would say that it is unique, rather than it just being music. You've also got radio shows you can listen to. You've got radio stations you can listen to. So it is unique, having all of that, having that much and amount of stuff. (BBC Sounds, Occasional, 46-60, Man, C2DE, Urban, England)*

*The fact that I could get such a range of stuff is one of the things that struck me as appealing. Probably the range in one place because I use different apps for different things. I use Amazon Music for music, I use Audible for podcasts and books. So yes, it's got everything in the one place rather than having to go to different apps for it. (BBC Sounds, Occasional, 46-60, Woman, C2DE, Suburban, Scotland)*

*I was really astounded by how much there was available. I was amazed, really, the different categories, sciences, and documentaries, and you name it, and, you know, it's very visible and well displayed, it made me very curious to search about. (BBC Sounds, Occasional, 55-75, Woman, ABC1, Suburban, Northern Ireland)*

In terms of BBC websites and apps, overall, the range of different websites and apps available from the BBC was seen as a unique suite of services, offering a wide range of genres and types of content. This overall sense of distinctiveness was enhanced for participants when the BBC linked together related content across the different services it offered, for example linking articles on BBC News with articles on BBC Sport or [bbc.co.uk](http://bbc.co.uk), or when BBC Sounds provided podcasts related to specific programmes found on BBC iPlayer. Making these links had the potential to increase participants' appreciation of the total sum of online services that the BBC offered.

*The overall variety. Not the news website, but specifically the overall BBC website, it has got a lot of different types of content that others don't have. Like children's topics and that. (BBC website/app, Often, 25-45, Man, C2DE, Urban, Scotland)*

*I feel like it's got a broader choice than other websites in the sense of where it links you to other things, like you can get linked to BBC sounds, which is all podcasts. There is loads of*

*content on BBC Sounds, and then you can go to BBC Food which has loads of chefs with massive archives of recipes, and then you've got the normal stuff. I do think they cover a wider breadth of things in a really kind of sleek way. (BBC website/app, Often, 35-55, Woman, ABC1, Suburban, England)*

At a platform level, BBC iPlayer was seen as similar in look and feel to other services. Where participants identified a number of attributes of distinctiveness, this was mainly in relation to the content BBC iPlayer offered, as outlined below, rather than at an overall platform level.

In terms of the main attributes of distinctiveness that participants identified across all three services, these included the following:

### **Consistently high quality:**

#### **Participants regarded BBC online services well in terms of the level of quality across different forms of output, whether TV, audio or online articles.**

Participants sometimes highlighted the prevalence of low-quality content they could come across on some other services, but they often felt the BBC provided, at the very least, a minimum standard of quality.

*I do think I'm more likely to stick with something on the BBC if it's a series that I've started. I think there's a drama or a thriller or things like that, that are usually really good. It does have that hook...I do think there are good quality programming on BBC....The quality, the programming, your Peaky Blinders, Killing Eve, Line of Duty, things like that, I just think they're really good programmes. (BBC iPlayer, Often, Man, 46-60, ABC1, Urban, Scotland)*

In particular, for many participants, BBC services could be the first port of call for high-quality drama, documentaries and factual output, including news and sports journalism. They were also particularly highly regarded for children's content, as well as the range and diversity of different music genres that could be accessed via BBC Sounds, for example.

*I think the thing that makes BBC Sounds may be slightly different to what the other streaming platforms do is the reassurance that it's the BBC. I think it's just the fact that it carries the BBC name, it just makes you think that the majority of the time, it will be unlikely you'll come across a podcast and think this is either rubbish content or it's been recorded awfully, or the production is not there. I think that's what makes Sounds unique over just the bigger platforms like Spotify or whatever. (BBC Sounds, Often, Man, 18-34, C2DE, Suburban, Wales)*

*I think because BBC cover the sport...because they actually cover the sport for TV coverage, so I knew the content would be good on the podcasts as well. I started listening to it at the start of the week, and I could feel the correlation between the TV stuff and the quality of what I was then listening to on the podcast. (BBC Sounds, Often, Man, 18-34, C2DE, Suburban, Wales)*

#### **BBC iPlayer was frequently commended by participants for its high-quality content, as well as for catering to a range of different audiences.**

BBC iPlayer appeared to have a strong reputation for high-quality content amongst participants. It was generally not perceived as offering a particularly large volume of content to watch, but what it did offer was expected to be of consistently high quality. This could be contrasted with competitor services that were perceived as offering higher volumes of content but of lower average quality in comparison. In

addition, BBC iPlayer was commended for its variety of content that catered to a range of different audiences.

*Obviously, it's BBC, but it's very, very similar in the way that there has to be something for everybody on there, and it's not until you dip into these apps that you realise just how varied the different genres and all the different programming is. It's the same when you go on iPlayer as well. I think there is definitely something for everybody on there. (BBC iPlayer, Occasional, Man, 18-34, ABC1, Northern Ireland)*

*Where there is probably maybe less on the BBC, and so you go in, and you maybe find something quicker than you would, where you have to go through and actually hunt on Netflix. (BBC iPlayer, Often, Man, 46-60, ABC1, Urban, Scotland)*

For participants, genres such as dramas, documentaries, and investigative journalism stood out as particularly strong in quality. In addition, BBC iPlayer was commended for providing creative and sometimes 'edgy' content in terms of drama and comedy output. Examples included titles such as Fleabag and Small Axe.

*It pushes the envelope a bit, it is a bit more risky. Like Fleabag, for example. (BBC iPlayer, Often, Woman, 46-60, ABC1, Urban, Scotland)*

*They're quite good at doing investigative programmes as well, aren't they? They go undercover too, like, research topic areas that maybe other people either don't really want to uncover or, in that sort of sense, I guess they're a little bit risky, or they've obviously taken the time to send someone undercover to do something. And then, you know, it whistleblows on things. So, I think they're quite good at things like that. (BBC Websites & apps, Often, Woman, 35-55, ABC1, Suburban, England)*

BBC Sport also stood out as high quality to some participants, in particular, due to the range and breadth of its sports coverage. BBC Sport was also commended for showing all sports in-depth, not just those broadcast by the BBC. For example, whilst the BBC might not broadcast F1 coverage, it is perceived to have good coverage on its website.

*I think for Scottish football especially, the BBC is probably way ahead compared to Sky. (BBC website/app, Often, 25-45, Man, C2DE, Urban, Scotland)*

*Sky seemed to be obviously really heavily biased to the games that they were showing on Sky. I'm a big boxing fan and stuff, and the fights that aren't on Sky, they just don't report on them, whereas on the BBC, you can go and find it. (BBC website/app, Often, 35-55, Man, ABC1, Suburban, England)*

### **Strong representation of UK creative output:**

#### **Participants felt that BBC online services, particularly BBC iPlayer and BBC Sounds, strongly represented UK creative output.**

Participants highlighted this attribute of distinctiveness in two main areas. Being a platform for UK drama and comedy, particularly via BBC iPlayer, was seen as a distinct feature of the platforms, as was hosting a wide range of UK artists across many different UK music genres, in particular via BBC Sounds.

*Even comedy is going to be diverse, naturally, but it's going to be British comedy. Even if it's from people from different backgrounds, it's also that kind of comedy from maybe London, wherever, it's going to be different to say, American comedy. Even music, if you get grime, it maybe varies to say if you're listening to music from around the world, yes. It's local*



*broadcasting stations which have an impact on what kind of you're listening to. (BBC Sounds, Often, Woman, 18-34, ABC1, Urban, England)*

*British, that's what makes it unique. Apple obviously has a lot of stuff, same as Spotify. A lot of other streaming services have a lot of variety. It's the fact that with BBC Sounds, it maybe is more tailored to what we're going through at the moment. The music is tailored towards the genres we have, and the topics trending would, more or less, have a focus on our British identity. (BBC Sounds, Often, Woman, 18-34, ABC1, Urban, England)*

### **Local, Regional and Nations content:**

#### **Participants often highlighted local, regional and nations content as one of the salient strengths of BBC online services in several respects.**

Participants valued the provision of local, regional and nations content across all three services in a number of different ways. The content provided, especially regionally and locally focused news and current affairs output, helped make the BBC services feel closer to home for participants by having content situated in their area. This was particularly noted across BBC Sounds and the BBC websites and apps.

*Local politics, local news, local issues, the cost of living, local artists from the UK, that sort of stuff. The influencers, everyone that's local, celebrity stuff that is going to be highlighted more because we're living in Britain, so we're going to be interested to listen to our stories. (BBC Sounds, Often, Woman, 18-34, ABC1, Urban, England)*

*What I find interesting is the regional websites, that you just click on 'London News' if you just wanted to know what was going on in London, you're not necessarily worried about what's going on up north. (BBC website/app, Occasional, 55-75, Woman, C2DE, Urban, England)*

*I think the BBC, in general, are very good, you know, at the local thing, between Ulster, Wales, they really do cover the regions, and they give us so much choice. I have a Welsh friend, so occasionally, I might tap into BBC Wales. But I really do think the way they cover all the different regions, you know, nobody does it better than the BBC. (BBC Sounds, Occasional, 55-75, Woman, ABC1, Suburban, Northern Ireland)*

In addition, participants highlighted the value of nations-focused channels and their programming, including services in languages such as Gaelic, across the different BBC services. This nations-focus was also noted in relation to BBC Bitesize.

*I really appreciate the BBC having regional television stations, not just in Scotland but throughout the UK. BBC Alba as well. It's a great resource for Gaelic communities. I think that is a really brilliant thing that they do. (BBC iPlayer, Often, Woman, 46-60, ABC1, Urban, Scotland)*

*There are more regional programmes generally to do with Northern Ireland in general, and that's like the new documentary series and other things. (BBC iPlayer, Occasional, 18-34, ABC1, Urban, Northern Ireland)*

*The BBC have also got the Welsh curriculum as well as the English curriculum, so it's specific to Wales. So everything that's there is relevant. (BBC website/app, Often, 25-45, Man, ABC1, Urban, Wales)*

Participants from across the nations also pointed to nations and regional programmes being of a high quality, with examples including programmes such as the World Pipe Band Championships, SportsScene, Hidden, and Yorkshire Midwives.

*I think one programme that I absolutely love is The World Pipe Band Championships which they cover in Glasgow. It happens in August once a year, and they actually show it, they absolutely nail it because they show every individual pipe band. You can go back six months later, and you can listen to a pipe bands performance. (BBC iPlayer, Often, Man, 46-60, C2DE, Very Rural, Scotland)*

*Hidden is really, really good, and it's filmed in Anglesey and Bangor, and because it's Welsh, it's home, isn't it? It's something local. I don't know about Netflix, but I don't think you'd get options like that. (BBC iPlayer, Often, Woman, 55-74, ABC1, Suburban, Wales)*

Some participants also saw locally relevant content as a point of distinctiveness in the context of BBC Sounds. This included both access to local radio and features such as 'Local to me' on the home page, which stood out in particular. The distinctiveness of 'Local to me' stood out even more to participants by not just being local news content but also including wider locally relevant output.

*It's relevant to what's local to you. The trending topics, say if it's politics or history, it may be focused towards obviously what's going on. Even like Black History Month, it's relevant to the Black History Month they have in the UK, so it's a lot more relevant to what's going on within the UK. (BBC Sounds, Often, Woman, 18-34, ABC1, Urban, England)*

*I just find it very interesting, the poet earlier, Henry Normal, he was born in Carlton Road, so again, it was local to me, so. And it was what he was doing which was in conjunction with Nottingham because he did a Radio 4 programme about growing up in Nottingham, so I heard that. (BBC Sounds, Often, Woman, 40-64, C2DE, Urban, England)*

However, despite local content being seen as an important strength of these BBC services, in terms of local news coverage, participants were aware that BBC local news output was not as hyper-local as other media sources they may have been consuming. This was particularly the case with local newspapers, which some were following via social media and other nations-focused websites.

*I tend to find there's maybe a little bit less for the regional news. There will be, you know, maybe the bigger stories, whereas, with Wales Online, you'd find all the stories then in the area, whereas BBC Wales news would be the main stories. Yes, the main stories would be there, but not all of them that you'd find on other sites. (BBC website/app, Often, 25-45, Man, ABC1, Urban, Wales)*

### **Trustworthy:**

#### **Participants felt BBC online services were widely seen as services they could rely on and trust.**

The services were perceived as trustworthy as they were seen to provide content of a consistent standard of quality and also credible, reliable, and accurate factual information – from the news service, sports journalism, documentaries, and current affairs output, through to other content, including the weather, Bitesize and recipes.

*There's a kind of calibre that you expect and from the BBC that you'll get an unbiased and a balanced report. (BBC Sounds, Often, 46-60, ABC1, Urban, Scotland)*

*As for news, I would use BBC if for UK-based news, and I would trust it. (iPlayer, Occasional, 18-34, ABC1, Northern Ireland)*

*I think it's definitely the trustworthiness is more, you expect what you're seeing there is more factual, as I say, I find it unbiased, and I read the newspapers, but you know that slant is to the right, the same as you do with them, whereas with the BBC, I feel you get both sides of whatever is happening. (BBC website/app, Occasional, 55-75, C2DE, Urban, England)*

High-quality, trusted, and reliable information was particularly important in the context of BBC News but also extended to other areas such as BBC Sport and BBC Bitesize.

*I've noticed that the news on BBC is sometimes that they're the last to publish it than a lot of the other websites. It's almost because they're just waiting for that official confirmation or whatever, you know, just seems they're more, sort of, trustworthy in that sense. (BBC website/app, Often, 35-55, Man, ABC1, Suburban, England)*

#### **Safe for children:**

**An additional dimension of trust was from a parental perspective, where relevant participants felt that BBC online services were generally considered safe for their children.**

This perception of being safe for children included the general absence of what could be seen as more controversial or sensationalist content that some felt would be unsuitable for children but might be available via other competitor online services.

*If my kids were suddenly like, 'Right, I've got to be in my room for a day, I'd be happier they were watching BBC. (BBC iPlayer, Often, Man, 46-60, ABC1, Urban, Scotland)*

*One of the other things I would say personally with the BBC is generally you can leave them on it, and you don't have to worry, from a sense of what [my son] is going to see. Because one thing with all the other advertisement paid for apps is sometimes you will get adverts that are for something maybe a little bit more adult. (BBC website/app, Often, 25-45, Man, ABC1, Urban, Wales)*

#### **Educational:**

**BBC Online services were also perceived to be distinctive regarding their educational value and impact.**

The BBC was perceived as educational across much of its output for children and adults. Services such as BBC Bitesize were just a small part of the broader educational impact of BBC online services across the sample. BBC Bitesize, in particular, was seen as adding value by supporting the education of school-aged children, as well as being entertaining.

*With regards to the play side of things for my son, it's quite unique in that sense that they have those apps where all those different games, learning games, they're all in one place. We all rely on the BBC. It's a name we all trust. (BBC website/app, Often, 25-45, Woman, ABC1, Urban, Wales)*

However, the educational value of BBC online services also went beyond supporting school education by helping audiences understand a range of different topics. In addition, the wide range of factual content in different forms, from news and sports to documentaries, was seen as helping participants understand a diverse range of topics and perspectives. In this regard, BBC online services were commended for helping to broaden the audience's horizons – making participants aware of and helping them to understand a broader range of different subjects and topics.

*Education, there is a wide variety of stuff, so I know that there's history, culture, arts, music, sports and all varieties of them so if you want to learn, educate yourself, you can get that, if*

*you just want entertainment, if you want to broaden your horizons, again in a safe way, you can do that. (BBC Sounds, Often, Man, 46-60, ABC1, Urban, Scotland)*

*What the BBC offers, I suppose it's kind of a sense of integrity and trying to broaden people's lives for the better, I think about going to a festival or show you don't know what you're going to expect and I suppose that's the kind of, because like my [music streaming service], yes I'm picking the songs on the whole and selecting things, even though they make suggestions for me, but yes, I think it's the range and the options and the choice on BBC Sounds. (BBC Sounds, Often, Man, 46-60, ABC1, Urban, Scotland)*

BBC online news was also seen as being particularly good at explaining different topics and helping participants understand complex issues. Participants felt there were more explanatory articles on BBC online news and valued how online articles often linked to other BBC articles and sources of information that also aided understanding.

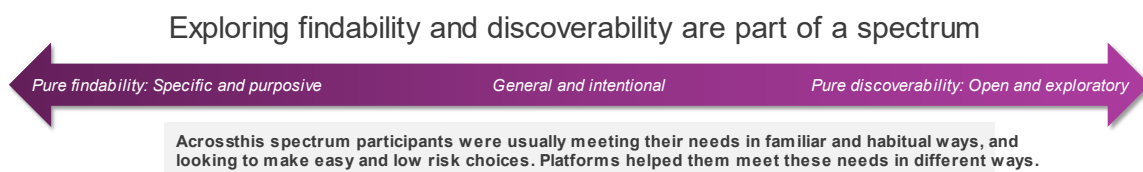
*Sometimes BBC is quite good at explaining what does this actually mean, or what is this in a basic term, so then you can understand what's going on a bit easier if you're not necessarily economically minded or whatever. (BBC website/app, Often, 35-55, Woman, ABC1, Suburban, England)*

### 3. Finding and discovering content on BBC online services

For the purposes of the research, findability was explained to participants as the ability to find something you are specifically looking for, and discoverability was explained as coming across content you were not looking for that is ‘new to you.’

Overall, when it came to finding something specific, BBC online services were perceived as largely on par with competitor services. However, more focused and personalised services in audio, such as Spotify, were often highlighted as particularly effective in enabling the audience to find what they wanted. The main impediment to finding specific content beyond anything more mainstream and popular was often awareness of the availability of broader and more niche content. But if participants were interested in something specific and seeking it out, they tended to be able to find the content they wanted to engage in via BBC online services.

**When using BBC online services, finding specific content and discovering ‘new to me’ content were part of a spectrum of audience journeys and behaviours.**



Depending upon where a participant’s journey was situated along this spectrum, there could be implications in how they judged their experiences of BBC online services in terms of aiding finding specific content and also discovering content that was ‘new to them’.

At one end of the spectrum was ‘pure findability’, a purposive pursuit of a very specific goal or mission, such as finding a particular title, topic, or item that the audience already had in mind.

At the other end of the spectrum was ‘pure discoverability’, which was a much more exploratory mode of engaging, where the audience was typically browsing through a service in a very open-minded way. Here participants were looking to read, watch or listen to something that would engage them but were browsing through without anything specific or defined in mind. Instead, they were looking to be inspired by something on offer.

Between pure findability and pure discoverability was what could be described as ‘open findability’ or ‘channelled discoverability’. This middle way of journeying through a service and its interface was more general and open but still intentional, pursuing a goal but with a broader, less specific aim. It could be based on the participant’s mood or having a broader category or genre in mind. It was semi-purposive and/or more open to being swayed by different options presented through the interface.

**Participant opinions of finding specific content and discovering new content were influenced by several factors that shaped behaviour when using these services**

Across this spectrum, participants were often meeting their needs in familiar and habitual ways and looking to make easy, and low-risk choices that they felt were ‘good enough’ for what they needed. Their experience of finding specific content and discovering new content was influenced by several

factors that shaped participants' behaviour when using the different services. These factors included the following:

**The power of habit:** Participants were very habitual in their usage of often familiar interfaces – using the same service and the same sections of those services in the same way. Their approach to engaging with and navigating the different interfaces often followed relatively consistent patterns. These established habits and routines could, therefore, act as behavioural barriers to exploring BBC online services more widely, diminishing the potential for participants to discover new content. This habitual behaviour was observed across all three services but was more prevalent with BBC Sounds and BBC websites and apps, than with BBC iPlayer.

*I'm kind of a creature of comfort. I do listen to similar things the majority of the time. Occasionally I will try something new, but it's generally similar sort of stuff, really. It depends on what takes my fancy. I might swap genres depending upon what sort of mood I'm in or how I'm feeling. (BBC Sounds, Occasional, 46-60, Man, C2DE, Urban, England)*

*We're sort of creatures of habit, aren't we? At our sort of age, we just use these things for what we need to look at rather than just browsing. My daughter's constantly on her phone looking at, you know, random things, but I think at my age, I'm just going on there to look at something specific these days instead of browsing. (BBC website/app, Occasional, 55-75, Woman, ABC1, Suburban, Wales)*

**Audience purpose:** Participants' individual intentions at the time of engaging with a given service shaped what they paid attention to and defined their focus for navigating through the interface. This tendency for a participant's individual purpose to shape what they paid attention to, could also be a barrier to exploring BBC services more widely.

*I've really liked iPlayer and the content that it has had, but I must admit we always stick to the big brands. The big titles, and it's almost like you know perfectly well that you're missing stuff. You know you're missing stuff, but I'm not going to spend 20 minutes searching and looking for stuff. (BBC iPlayer, Often, Man, 46-60, ABC1, Urban, Scotland)*

**Least effort:** Participants generally wanted to make quick and easy decisions with minimal effort and were, therefore, often inclined to follow the path of least resistance in fulfilling their purpose at the time of engagement. In light of this general desire to minimise the cognitive and behavioural effort involved in decision-making, they were often drawn to interface features that helped them make easy and relatively low-effort decisions and returned to platforms they were most familiar with.

*I find that with Netflix, I get irritable with it because I can't find what I want, and it's a bit clunky to use, maybe. Whereas I'm more familiar with iPlayer and happier. (BBC iPlayer, Often, Woman, 55-74, ABC1, Suburban, Wales)*

Aspects of the service that helped minimise the effort involved could be features and information that helped participants filter and judge potential content, such as 'top 10' lists. In addition, services that presented personalised and tailored content were also seen as helping to minimize the effort involved in finding and discovering. Participants were often happy to let the service do the work of filtering content and assumed that the options presented were likely to be appealing.

*I know where that is on the Telegraph. I don't waste all my brainpower; I just can't be bothered. I go to where I know stuff is, I haven't got time. And I'm lazy. (BBC website/app, Often, 46-60, Woman, C2DE, very rural, England)*

*I'm lazy, so I don't really like having to click into the different, like BBC One, BBC Two, BBC Three, just to find them all. Whereas you go on Netflix, it's just one thing, with all these different shows, it doesn't have the different types of channels and stuff. (BBC iPlayer, Occasional, Woman, 18-34, ABC1, Urban, Northern Ireland)*

**Lower risk decisions:** Participants wanted to make the right choice for content that was 'good enough' and not have to invest time and effort in finding out they did not like what they ended up selecting. This underpinned the appeal of personalised recommendations as they were often assumed to be lower-risk choices and the value of content level information that helped the audience judge and evaluate individual items of content.

*I don't have to spend hours looking for something and I'm not going to spend 10 minutes looking at something that I don't want to watch. I suppose if there was some better preview system and something like what other people have suggested. That thing where you don't actually have to watch it for 10 minutes. (BBC iPlayer, Often, Man, 46-60, ABC1, Urban, Scotland)*

*Rather than just flicking through some podcast names and small logos on my phones, [BBC Sounds] had something big or a bit more appealing with a little, kind of, almost a plot of what it is there as well, a little description of what the podcast is that makes you want to click on it and made me a tiny bit more curious than it has in the past about podcasts that I wouldn't normally listen to. (BBC Sounds, Often, Man, 18-34, C2DE, Suburban, Wales)*

These behavioural factors influenced participants' propensity to spend time searching for and exploring content across BBC online services and how much time and effort they were prepared to invest into making choices. Consequently, these factors also shaped how many judged their experience of BBC online services both in terms of finding specific content and discovering 'new to me' content.

### **Finding specific content worked well when it was more mainstream, but less familiar and more specialist content could be more challenging to find.**

Participants sometimes felt that more specialist and niche content, such as arts, religious or regional content, was relatively more challenging to find than mainstream options. This was raised spontaneously and when engaging with different BBC online services as part of the research.

*If you look at the drop-down menu, you get Home, Sport, iPlayer, Bitesize, CBeebies, News, Weather, Sounds, CBBC and Food. There's nothing there that says arts, culture, theatre. Nothing like that. And I was sitting there, and I was thinking, 'Right, well, how do I find it?' So, I want to find out, there's something on at the theatre at the moment in London that I want to go and see, but I want to find the reviews on it. I genuinely sat there and went, 'I've got, you know, two degrees and all this, and I can't figure it out,' sort of thing. And that is, I think, why I'm reliant on other sites. (BBC website/app, Often, 46-60, Woman, C2DE, Very rural, England)*

*It's more the music and the entertainment section - I think it's good coverage, and it's got coverage worldwide, I just feel as if you have to really go investigate to get to those kind of topics. The main page, doesn't really focus on these sub headings and I think that's quite crucial. (BBC website/app, Often, 25-45, Woman, C2DE, Urban, Scotland)*

*I like up to date music but also 80s and 80s rock, trying to find things that are a little bit different for me can be quite challenging. (BBC Sounds, Often, 40-64, Woman, C2DE, Urban, England)*

Discovering 'new to me' content was a journey that potentially involved a number of steps that, taken together, encompassed the different ways audiences discovered 'new to them' content. These different steps are outlined below.

#### **Awareness: Audiences could become aware of the content before they went onto the service**

Participants could be made aware of content before engaging with BBC online services via several different inputs. Word of mouth was often an influential factor in prompting them to consider different content, particularly on BBC iPlayer, but also BBC Sounds to an extent. For some participants, social media was also playing some role in raising their awareness here, occasionally including BBC iPlayer content. However, for those participants that came across BBC content on social media, the BBC's profile was perceived as being more dominated by news content than any other form of BBC content.

Some participants were also made aware of content via other BBC services. There was some evidence that cross-promotion, whereby different BBC services recommended associated content on other BBC services, was effective in encouraging discoverability.

#### **Visibility: Beyond raising awareness, discovering 'new to you' content required visibility of potential content via the earlier screens or pages of the service**

From the participants' point of view, discovering 'new to you' content also required them to see the relevant content via the initial screens or pages of the service. If participants could not see the content at some point, they were far less likely to discover it. In this context, surfacing the content was key, with the visual display and layout of the relevant screen or page (such as content icons and thumbnails) central to how well the different services fulfilled discoverability.

Participants expressed a reluctance to spend too much time scrolling through pages of content or clicking through multiple steps to discover something new. New content therefore needed to be surfaced and presented to the audience through the earlier stages of the interface. Participants therefore valued being served with suggestions that had been brought to the surface and placed in front of them, preferably on the homepage, rather than having to search through different categories or lists. This included suggestions they may not usually seek out or were not necessarily associated with previous usage.

#### **Evaluation: Once exposed to potential new content, audiences needed to be able to judge its potential appeal quickly**

Participants would assess whether they would like a particular item of content and generally needed to make this judgement relatively quickly. To make these judgements, participants often relied on various decision-making shortcuts that enabled them to assess the appeal of an item of content quickly. These shortcuts included the following:

- **Structure and layout:** The structure and layout of the interface were very influential. Participants found that an intuitive design with granular categories to help them navigate was helpful in discovering content that was new to them. The categories that were useful to participants could take different forms, including being genre based in a conventional sense, being themed around different types of content, or sometimes based on audience need states or moods.
- **Personalisation:** Participants often relied upon personalised suggestions made by the service based on their preferences or what they had consumed previously. This was a commonly used means of evaluating and choosing content likely to appeal. Many often judged their experience of



discoverability with a given service based on how well the service matched suggested content with their tastes and preferences.

- **Using social norms:** Participants highlighted several ways social norms were used to evaluate new content. This was delivered via devices such as UK top ten ratings, most viewed or read content, trending indicators, and audience reviews. What others were consuming could be an important indicator of potential appeal.
- **Content level information:** Supporting information pertaining to an individual item of content also played an important role in participants being able to discover and select 'new to them' content. This content level information acted as micro cues to help the participant assess and decide whether or not they wanted to engage. These cues included information such as trailers, playing samples, audience and critical ratings, and potted summaries.
- **Editorial curation:** Editorial curation could also play a role in helping participants judge the potential appeal of content. Curation could suggest that the content had been selected by 'an expert', which could sometimes be the service itself or a presenter or personality known to the audience. This impression of curation helped to raise audience expectations vis a vis the potential quality of the content in question.

#### Retrieval: Easy and straightforward retrieval was also important in aiding discoverability

A final step in fulfilling the discoverability journey entailed allowing participants to easily select and save content unless they chose to engage immediately. If they did not choose to engage immediately, then it was important to be able to save the content and return to it later on. The more steps involved, the less likely participants were to save content for later. Therefore, the ease of saving and retrieving content was key and an additional factor in judging whether a service was seen as being good in terms of discoverability.

#### It can be inferred from the research that there was a tension between the desire for personalisation and encouraging the discoverability of content the audience might not normally consider

It can be inferred from the research that one of the challenges for maximising discoverability and exposing an audience to content that was genuinely 'new to them' (including content they might not normally consider) was the strong appeal of personalisation and the desire to see tailored recommendations that were based on what they had already watched, read or listened to. Across the different services, there could therefore be a tension between discoverability and the appeal of personalisation.

For participants, personalisation was a very appealing trait in the online services included in the research. Many commended personalisation as it helped with both finding specific content and also discoverability in their minds. They were generally aware that algorithms could learn their watching, listening, and reading behaviour and then suggest associated content that felt relevant and tailored to them. Accordingly, participants felt such content came with a higher likelihood of appealing, potentially making choosing that content an easier and lower-risk decision.

In light of this, the research can infer that personalisation could, therefore, potentially be at odds with discoverability. Participants might have felt they were consuming 'new to me' content, but it could still be derived from genres or themes closely associated with content they had previously consumed rather than exposing them to a variety of content.

Despite this tension and the challenges, it posed for discoverability, some participants also highlighted the potential for algorithms and personalisation to limit their exposure to content that they might not normally consider but could still potentially find appealing. Some participants were, therefore, keen that online services still made some effort to expose them to new content that may not be associated with previous usage, thereby broadening their exposure. Some on-screen features were seen as helping in this regard. For example, on BBC Sounds, features such as 'Unmissable Sounds'<sup>1</sup> were understood as bringing genuinely new content to the fore for the user that was potentially outside of their usual patterns of consumption.

Overall, despite the appeal of personalisation and a strong behavioural tendency to let algorithms do the work of filtering content for the audience, ideally participants were looking for a balance to be struck between being served personalised and relevant content whilst also being exposed to a variety of content that they may never have considered before. This balance was seen as the optimal way a service could potentially support discoverability.

### **Behavioural habits often acted as barriers to participants' propensity to discover new to them content on online services**

In the context of BBC iPlayer, preconceptions and usage of the service as a catch-up service could influence the propensity to explore more widely. The same was also true for ITV Hub (now ITVX), All4 and My5, whilst services such as Netflix and Amazon Prime Video tended to be seen and used more as destinations for browsing for new content.

*I wouldn't have really realised the iPlayer had films on, I know that's maybe silly, but I would have always associated iPlayer and the BBC with just TV shows that was on TV. I wouldn't have ever thought to go on to watch a film. (BBC iPlayer, Occasional, Woman, 18-34, ABC1, Urban, Northern Ireland)*

With BBC Sounds, a key behavioural barrier was often the propensity to go to live and catch-up radio options when radio listening was structured around the participants' routine and day. When listening in this context, participants often opted for habitual usage or wanted to make a very quick and easy choice to fit in with another activity.

*I think it depends on what mood I'm in. If I'm working and I want to listen to something in the background, then I would go to whatever I'm used to. (BBC Sounds, Often, Woman, 18-34, ABC1, Urban, England)*

*Most of the time, if I'm listening to a podcast, it's kind of as a background for if I'm going somewhere or doing something. So, I don't want to spend too long distracting myself, finding something anywhere. (BBC Sounds, Often, Man, 18-34, C2DE, Suburban, Wales)*

This habitual usage was sometimes coupled with a lack of awareness of the wealth of on-demand content that was available, all of which acted as substantial barriers to discoverability.

With BBC websites and apps, usage was dominated by behavioural habits and routines, which acted as a barrier to discoverability. In addition, many users' primary needs and expectations were that they would be served and updated by the BBC on the stories they needed to be aware of rather than more actively exploring the content themselves. Therefore, BBC websites and apps were expected to serve

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<sup>1</sup> Now called 'New and Trending'

the user with what they needed to know, and this was far removed from approaching the service with an exploratory mindset.

**The desire to avoid making the wrong choice also acted as a behavioural barrier to discoverability and exploring more widely**

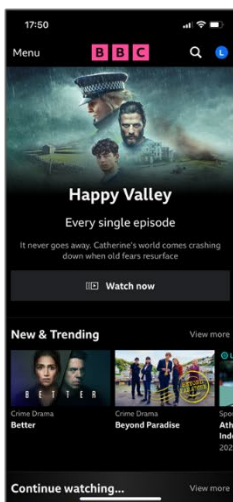
The desire to make the right choice or decision of what to watch on BBC iPlayer could be a further behavioural barrier to exploration. Participants did not want to spend time watching something they did not like and, therefore, could tend to look for familiar and well-known titles or genres rather than try something new.

BBC Sounds users also did not want to spend time listening to content they might end up not liking, in particular speech content that required more engagement and investment compared to music, which could often just be played in the background. However, much of the on-demand speech content on BBC Sounds was hard for participants to evaluate when browsing potential content and required choosing to listen to the content in the first place to judge its appeal. In light of this barrier, it was often easier for participants to return to familiar, habitual listening or more personalised competitor services that offered a range of lower effort and lower risk choices in comparison.

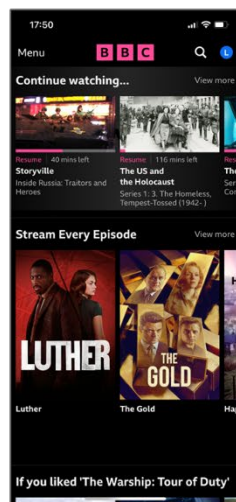
*Probably previewing things, so for example, if you go on YouTube, if you just hover the mouse over it, it might start playing the video so you can actually see a bit of it before clicking it. Maybe something like that, if you just click on it, it's got, like, a little snippet of what's going on, and then so on. (BBC Sounds, Often, Woman, 18-34, ABC1, Urban, England)*

*Almost a mini-trailer or scene that you can get. How things are these days, I think they've changed a lot, like, we're more watching or listening to snippet information, so like how Snapchat and Instagram stories and Facebook stories are, they're 10, 15, 30 seconds or whatever. So, I think if they could combine, like, a preview of something, almost like a reel, and then if you want to follow through or save it for later, then you can watch the whole thing. (BBC Sounds, Often, Man, 18-34, ABC1, Urban, England)*

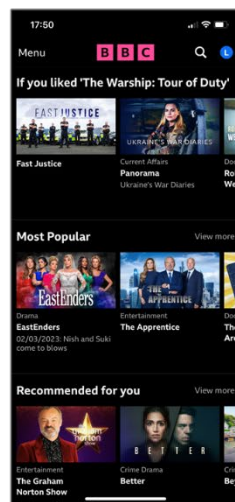
3.1. BBC iPlayer



iPlayer home page



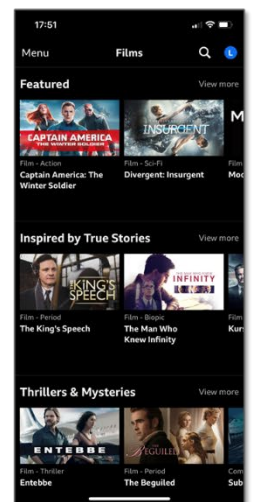
iPlayer continue watching and stream every episode



iPlayer tailored recommendations



iPlayer watching full series



iPlayer themed genres

### Overall, BBC iPlayer was perceived as an intuitive design and layout for finding something specific.

Clear categories that made sense to most participants played a valued role when finding content on BBC iPlayer via a smart TV, as typing words into the search function using a remote control was often cumbersome. Daily schedules were seen as particularly handy for those seeking to catch up on something on their smart TV that they had missed on live TV - finding it quicker and easier to scroll through schedules than to use the search function.

When using tablets and smartphones, participants appreciated the quick and easily located search function that often worked on the first word. Across all devices, 'continue watching' provided convenient and straightforward access to a series or programme you had already been watching.

*You can look at the programmes that were on BBC One yesterday and just scroll through and 'oh, there's the programme I was looking for' and find it that way. (iPlayer, Often, Woman, 55-74, ABC1, Suburban, Wales)*

### However, some participants experienced challenges with finding specific content on BBC iPlayer, although these were perceived as relatively minor.

With smart TVs, the search process could be seen as cumbersome and glitchy compared to the smartphone/tablet experience, which was primarily driven by having to use the TV remote control to execute the process. However, this was also the case across all comparable services when using any smart TV and trying to access specific programmes by typing the title in through the remote. Accessing such services via a smartphone or tablet tended to be seen as easier in comparison.

Some participants also felt it was not always simple to identify the latest episode in a series, and it was sometimes easy to start watching the 'wrong' one

Occasionally it was hard for participants to determine in which category a specific programme might be. However, this could be circumvented by using the search function or looking at programmes by viewing the A-Z listing instead.

*Even searching for a programme, you've got the keypad of your remote control, you go up, press a letter, down two to get the next letter, even that can just take time. You've typed a word wrongly, 'Oh, no, I have to go back,' it's just glitchy doing it via the TV. (BBC iPlayer, Often, Man, 46-60, ABC1, Urban, Scotland)*

*I really like The Adventure Show, but initially, it was difficult to find – knowing what category to go into. Does it fall into Sport, under Entertainment? In the end, I just had to search under A-Z. (BBC iPlayer, Often, Man, 46-60, ABC1, Urban, Scotland)*

### Participants found that a relatively smaller range of high-quality and well-presented content helped discoverability on BBC iPlayer

Specifically, participants highlighted a range of attributes that they felt helped encourage discoverability on BBC iPlayer.

Themed content categories helped encourage exploration, for example, films and dramas themed in helpful or appealing ways indicating both the genre, potential quality, and expected experience. In addition, special topical categories could also add appeal and freshen the interface. At the time of research, '100 years of BBC' was an example of this to which some pointed. 'New and trending' was a familiar layout that helped point towards potentially engaging content. This labelling was felt to mirror other equivalent services and helped focus discoverability towards sometimes new and fresh choices.

*It varies, actually, what I really like about BBC iPlayer is you can look at all the films, which you can't do on Netflix. You've got the A-Z, so you can scroll through it. There's obviously not so much of a choice, but it's actually sometimes easier to find a really good film. So, we'll go to that first if there's nothing there, and then we'll go to Netflix. (BBC iPlayer, Often, Woman, 46-60, ABC1, Urban, Scotland)*

*From the archives, that would draw you in – 'oh, what's this, what's in the archive?' (BBC iPlayer, Often, Man, 55-74, ABC1, Suburban, Wales)*

Offering complete series could help some participants with discoverability - 'stream every episode' can catch the eye and engage those looking for their next series to binge. Although the titles that were positioned as box sets were often well-known BBC series and required some investment in terms of time, participants who had not yet engaged with such reputable titles valued the opportunity of starting at the beginning and being able to enjoy the whole experience

*If something new comes on [iPlayer], and then you can watch episode 2, 3, 4, 5, you can watch the whole series. If you're thinking, 'Well, I really enjoyed that, and I don't want to wait until next week, or the week after, or whenever it's going to be on again,' you can do the sort of, 'Well, I'll watch that now.' (BBC iPlayer, Often, Man, 55-74, ABC1, Suburban, Wales)*

*That [stream every episode] is definitely me because I prefer to binge-watch something rather than watch it on normal TV and have to wait a week between each showing. (BBC iPlayer, Often, Woman, 25-45, C2DE, Suburban, England)*

*I'm just sitting here thinking that maybe I should pay more attention when they go, 'This is on BBC iPlayer,' or, you know, 'All episodes available.' That's what I heard over the weekend, 'All episodes available,' and I'm thinking, 'Oh, that's quite good because I don't want to wait until next week to find out what the next episode is.' If I can binge, I will. (BBC iPlayer, Occasional, Female, 46-60, C2DE, Urban, Scotland)*

The suggestions provided by 'if you liked' could appeal to some participants by presenting content associated with previous usage.

*'If You Liked' gives you suggestions. It's the same genre, the same area, the same ballpark. (BBC iPlayer, Often, Woman, 55-74, ABC1, Suburban, Wales)*

Individual programme icons (i.e. a small image representation of a specific item of content) engaged and encouraged participants to explore and potentially helped them judge whether the content would appeal. However, how to access more information on a title at icon level was not always clear. Most participants tended just to click through if they were interested in the programme, and few were aware that if they hovered over the icon, they could get a little more information. However, even when exposed to this information, some participants often wanted more information to help them decide. Many were unaware of any means of accessing more information than the one or two lines provided.

### **Participants could find it easier to access well-known BBC shows on BBC iPlayer, but less familiar but potentially appealing content needed greater prominence and visibility**

Many highlighted that some of the content available on the BBC iPlayer homepage could already be very familiar titles and sometimes for what the BBC was most known. For example, titles such as Top Gear, Strictly Come Dancing, and Eastenders were considered very recognisable, long-running, and signature BBC shows. Therefore, to some, they did not appear to deliver discoverability benefits in

terms of 'new to you' content. Participants typically assumed the well-known shows were always on BBC iPlayer, and some did not necessarily value being reminded multiple times by the interface.

In contrast, accessing 'new to you' or lesser-known content could sometimes be seen as more challenging for participants to come across if it was not at some point displayed on the overall homepage or the homepages for different genres and channels. However, this also highlighted a tension between enabling users to find specific content more easily and discoverability, with aids to both competing for the same space on the interface. Those wishing to catch up on shows they had missed expected the main BBC shows to be prominent on the BBC iPlayer. They would consider it strange if a high-profile programme, such as *Strictly Come Dancing*, was not front and centre on the landing page in the days after it was broadcast.

In terms of specific points that participants felt were barriers to discoverability, displaying very familiar BBC content on the homepage could reinforce perceptions of the BBC iPlayer as a catch-up service rather than a browsing destination. In addition, for some participants, potentially engaging content could feel hard to access if it remained contained in siloed categories and was not surfaced and made visible on the home page. Categories of content were not always felt to be sufficiently distinct or intuitive; for example, some questioned the difference between 'new and trending' and 'most popular.'

For some participants, visual displays and limited trailers also constrained discoverability compared to other services. The prominent display of featured content was fixed and static and did not change whilst the participant was on the homepage, and trailers were embedded within individual items of content rather than being played whilst still looking at the homepage. In comparison, some competitor services were seen as having more dynamic displays and more prominent trailers, allowing the audience to preview content more easily on their homepage.

*You're not going to find Stanley Tucci's Italy thing through 'most popular' or 'recommended for you', so I think they're doing themselves out a bit by 'recommended for you' and 'most popular'. Strictly is on both. I think they need to be a bit more clever if they're really going to get you trying to scroll and find new stuff. (BBC iPlayer, Often, Man, 46-60, ABC1, Urban, Scotland)*

*I probably never, ever went on BBC iPlayer when I was not looking for stuff, because it's Strictly, it's EastEnders, Dr Who, it's all the stuff that I would expect to be on BBC, and I just don't necessarily watch. So I think it seems, you're scrolling down, there's five different categories and I think Strictly is on four of them, SAS is on three of them, so I don't think they're really enticing you into searching further like I did. (BBC iPlayer, Often, Man, 46-60, ABC1, Urban, Scotland)*

The content suggested under 'If you liked' did not always feel relevant to individual participants and could feel generic to some participants, for example, focusing on the 'popular' shows rather than something more directly relevant to them. Whilst this did potentially expose participants to content they might not have usually considered, it could also feel too at odds with their tastes and preferences, and as a result, some could be reluctant to consider the suggestions being presented.

*Whenever I finished a show on BBC iPlayer, for some reason, the same police drama comes up as recommended. Every single time I finish a show, it goes to this police drama – like a reality show, they follow police cars or something in England. But the same series comes up, I'd be more inspired if it gave me some different options. (BBC iPlayer, Occasional, Woman, 18-34, ABC1, Urban, Northern Ireland)*

**Netflix stood out to participants as the main competitor comparison point and was seen as doing a number of different things that encouraged discoverability among participants**

In terms of comparing BBC iPlayer to competitor services, Netflix stood out as the main comparison point for most participants. It was often seen as particularly strong for discoverability.

One area which potentially helped with discoverability on Netflix was the 'Top 10 in the UK', category; this was often the first area that many looked at when browsing and could act as a powerful social norm that encouraged exploration of the content contained on the list.

*I think that 'Top 10' is a hook. To be honest, you just want an easy life, especially as we're all busy and working and families and life. It can take a really long time to find something, so to have that process made easy for you is actually quite useful. (BBC iPlayer, Often, Woman, 46-60, ABC1, Urban, Scotland)*

Categories such as 'Surprise me' could be intriguing to some participants, particularly with respect to films and dramas; it, therefore, helped expose users to content that they might not normally consider.

Dynamic and more frequent trailers continually displayed on the home page were seen as helping increase exposure to new content in an engaging way, as well as helping participants assess whether the content would appeal.

*On the other services, there are little trailers that really grab you. iPlayer is just static. (BBC iPlayer, Often, Woman, 46-60, ABC1, Urban, Scotland)*

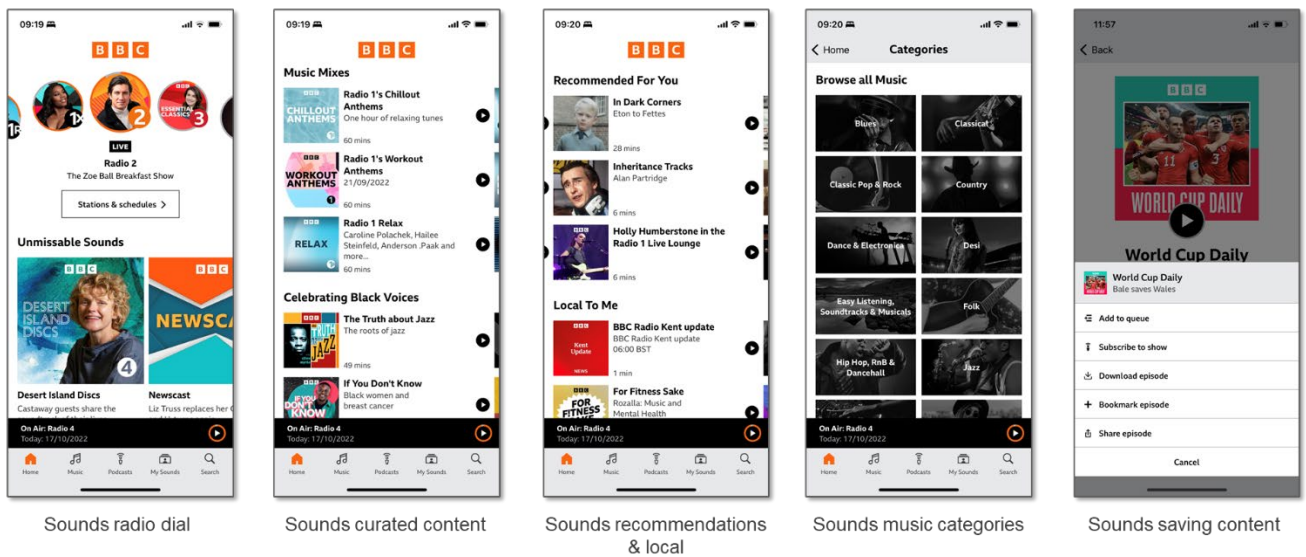
*Just things like having the trailers make it seem more dynamic. (BBC iPlayer, Often, Woman, 46-60, ABC1, Urban, Scotland)*

Services such as Netflix and Amazon were seen by some participants as relatively strong in providing the user with a range of information and prompts when browsing through content. Participants saw this as helpful in choosing what to watch. For example, the use of matchings and ratings such as Netflix percentages or Amazon Prime's IMDB meant there was less of a need to research titles with these services.

*So Netflix has ratings, like a 90% match or something. Usually, I go by that. Especially on Amazon Prime – people rate it and then depending on how many people rate it good, then I'll watch it. (BBC iPlayer, Occasional, Woman, 18-34, ABC1, Urban, Northern Ireland)*

It was perceived as easier to save and retrieve content on services such as Netflix, where the user could more easily add individual items to a personalised list without having to click through to the content itself.

### 3.2. BBC Sounds



When participants had specific content in mind, finding it on BBC Sounds tended to be relatively straightforward. The signature dial at the top of the interface enabled quick access to different stations and facilitated catching up on specific programmes they may have missed.

*I use the app, and they [the BBC radio stations] are always at the top of, like, your screen as soon as you go through, and then you can just scroll through them all. (BBC Sounds, Often, Man, 18-34, C2DE, Suburban, Wales)*

The 'continue listening' option was seen as a convenient and helpful means of picking up where you left off. Generally, the different categories and genres displayed on BBC Sounds were also seen as relatively easy for participants to navigate, and searching by subject-specific categories was regarded as helpful. The search function itself was also seen as useful for navigating the wealth of content. For those using smart speakers to access BBC Sounds, they were seen more as an effective means of accessing live content, primarily when the audience had a particular request for a live radio station in mind.

*I think BBC Sounds is really, really easy, literally, just use the search bar, type it in, it finds it for you, off you go, so that's it. (BBC Sounds, Often, Man, 18-34, C2DE, Suburban, Wales)*

*All you need to do is put a subject you want to listen to, like the podcasts I was looking at there, you do that, and then it opens up, and then it just gives you the whole list, the headings of the podcasts, and once you open them up again, it's endless. It's actually quite easy, I think if you're used to using the search on these apps, you will find it quite easy to adapt to. So, once you click on it, you know how to navigate your way through it, it then becomes quite easy. There are not very many hidden things in there that you can't find without much ease. (BBC Sounds, Occasional, Open, Man, C2DE, Suburban, Scotland)*

*And then when you go down, you notice that there are things that they're recommending to you, and you go down, and you see categories, and you go, 'Oh, I'll pop on there,' and you go on there and you see all these different myriad of things, and you're going. It really is easily navigated. (BBC Sounds, Occasional, 55-75, Man, ABC1, Suburban, Northern Ireland)*

The main challenge for finding specific content on BBC Sounds was that the wealth of often unknown content could result in a sense of choice overload. Many participants were often unaware of what



specific on-demand content they could access via BBC Sounds and, therefore, what to search for specifically. Because participants often were unaware of the breadth and depth of content available, time spent on BBC Sounds often became an exercise in discovering new content rather than finding specific programmes or shows.

Some participants perceived competitor services as more helpful than BBC Sounds in terms of easily finding content they were likely to enjoy through access to more personalised content. With competitor services, participants found retrieving their own curated content simpler and relatively easy whether accessed via their own library or playlist – with BBC Sounds, personalised content was perceived as less obvious, less well-organised and ‘deeper’ into the platform under ‘My Sounds. Whereas with competitor services, such as Spotify, curated personalised content was seen as featuring heavily on the homepage. The abundance of content available on other services was also sometimes seen as easier to navigate, and this was often because participants felt that such services frequently served tailored suggestions based on previous usage.

In light of these experiences, some participants questioned the level of personalisation offered by BBC Sounds. Some of the suggested content felt less relevant and appealing to participants in these instances. Potentially relevant content was not felt to be as readily served up to participants compared to competitor services such as Spotify.

In addition, in the context of music, although BBC Sounds was not designed to enable searching via a specific artist or album, participants were still inclined to judge the ease of finding specific music content against services like Spotify in particular, which was very much designed to enable the user to search and find specific artists, songs and albums.

*It's not quite so easy to navigate; I think that's because there is so much content in there. There's something for everybody in there, you've just got to find it, and that is a frustration, but that will probably lessen over time. You know, the more you use it, the easier it is to find something. I was absolutely useless on Spotify when I first used it. I had to get my son to sort it out for me because I just didn't know what I was doing or how to find stuff, you know. But the more you use it, the easier it will become, I think. (BBC Sounds, Occasional, 46-60, Man, C2DE, Urban, England)*

### Discoverability worked best on BBC Sounds when participants were presented with a mix of personalised recommendations and curated content they might not normally consume

There was some evidence of effective promotion of on-demand content via live content on BBC Sounds. Given the importance of live listening for some audiences, participants considered promoting on-demand content key to encouraging broader discoverability for BBC Sounds.

‘Unmissable Sounds’ could help encourage discoverability for some participants by providing an impression of curated and acclaimed content for consideration.

*I think if you're looking for something, like, truly different to what you usually listen to, then Unmissable Sounds would be the place you'd look because I think, yes, recommended for you whether it is based on the algorithms or not. Whereas Unmissable Sounds would be in my head, just a complete mix of random stuff across the whole site and, like, see if any of this interests you. (BBC Sounds, Often, Man, 18-34, C2DE, Urban, Wales)*

‘Local to me’ had a strong appeal and was seen as relevant and interesting to participants, particularly when displaying locally relatable content that went beyond just local news output.

'Recommended for you' could feel relevant and helped encourage some participants to choose what felt like personalised and tailored suggestions.

*I wonder how they use an algorithm, like, to see what you listen to. So 'Recommend for you' is that what like you're listening to, this is something similar? I think that's very good because that's stuff that you are interested in, so if it gives you a wee bit of difference but still on the same guidelines. You like your football, obviously. (BBC Sounds, Occasional, Woman, 55-75, ABC1, Suburban, Northern Ireland)*

However, participants were sometimes unsure how tailored and personalised the recommendations were. In general, the levels of personalisation offered by BBC Sounds were regarded as not as good as other services, such as Spotify.

Categories and genres could help participants discover appealing content, and the range of different categories also helped convey a sense of depth and abundance to the overall service.

Some content associated with specific presenters, or playlists curated by well-known DJs, also helped attract participants and encourage them to discover content that was potentially 'new to them.'

*I think the way Spotify, if you listen to something, or they see like a trend, they might recommend something for you, but with BBC, when you're listening to programmes, they'll tell you about, 'There's a podcast about this.' Or, 'You can continue this on a podcast.' It's really interesting as well to go and listen to something that someone has recommended if you're interested in a specific subject. (BBC Sounds, Occasional, 55-75, Woman, ABC1, Suburban, Northern Ireland)*

*Even if you do search for that particular podcast, it will then give you some other suggestions that are similar, so then you can just choose, do I want to listen to something a bit different, but it's on the same lines as what I was after in the first place. I think it's pretty intuitive for that. (BBC Sounds, Often, Man, 18-34, C2DE, Urban, Wales)*

### **Participants' awareness of on-demand content was a barrier to discoverability, whilst a lack of information at content level could also be a further barrier to trying something new**

The main barriers to discoverability on BBC Sounds were both participants' awareness of on-demand content and a lack of information and prompts at the content level that would help them select from content that was often unknown or unfamiliar to them, particularly speech content.

*I wasn't really aware of what was on BBC Sounds, and I don't think that it's widely known just what a vast amount of different things are on there. You know, 'If you like this programme, catch up on our podcast,' that's about all that I ever hear about BBC Sounds. I think just putting out the information that there is a vast, vast library that you can dip into, not just myself, but even my family were just totally unaware. (BBC Sounds, Occasional, 46-60, Woman, C2DE, Urban, England)*

Generally, across the sample, many participants were less aware of the wealth of on-demand content available on BBC Sounds. Exposure through the research process was frequently described as eye-opening by participants. Live radio could dominate perceptions of what was available on BBC Sounds, and access to live or catch-up radio could dominate the more visible elements of the interface, further reinforcing a live mindset and habits when engaging with the service.

*I think it would make it easier if they took the little radio station wheel away and actually made that just one tap for radio stations where you could go down it and then put the available bits along the top of the homepage. So people who are going into it and seeing it*

*for the first time will maybe find it more interesting than just thinking it's radio stations because that's the first thing you think about when you go on there now. It's all about the radio stations that BBC do. But I'm very happy with BBC Sounds and this week I've discovered an awful lot more about them than what I did two weeks ago. (BBC Sounds, Occasional, Open, Man, C2DE, Suburban, Scotland)*

In addition, whilst participants were struck by an abundance of content available on BBC Sounds, exposure to the full range of categories could feel overwhelming and activate a sense of choice overload and paralysis amongst some participants. Furthermore, some participants also highlighted a lack of information and prompts related to specific programmes that would help them evaluate and judge whether they would find individual items of content appealing or not. Much of the content was unknown and unfamiliar to participants; therefore, it was hard for them to judge whether they would like it or not. This acted as a further barrier to fulfilling discoverability on the service.

*I find that BBC Sounds, the intelligence of the analytics that they use to pull your data together isn't as good as, for example, Spotify or YouTube, because what I find with Spotify is it's more tailored to my needs, and it's more accurate whereas, I think, it's more of a generic list, so I don't know if the data analytics that they use is as powerful as what Spotify use. (BBC Sounds, Often, Woman, 46-60, ABC1, Urban, Scotland)*

*I know they have, like, 'Recommended for you,' and stuff, maybe have a short summary of a weekly something, a catch-up, or a weekly promotion, or maybe even a notification saying, 'Your weekly specials are ready,' or maybe you can slot in certain times that you are available to listen to a podcast usually, like a commute and it gives you a reminder. Something along those lines, the app, basically, to make it easier. (BBC Sounds, Often, Woman, 18-34, ABC1, Urban, England)*

### **The perceived discoverability strength of audio competitors was mainly being served relevant tailored content that participants felt they were more likely to find appealing**

Competitors to BBC Sounds were seen as offering participants several advantages with respect to discoverability.

Participants often perceived competitors as more focused on a more specific audio proposition. For example, Spotify was seen as primarily good for music and playlists, while other services could be considered particularly good for podcasts. This meant that participants could feel less overwhelmed by different choices and more inclined to browse through what was a slightly more focused range of audio content.

Participants also commended other services and audio products for allowing them to preview content before engaging, which was also seen as helpful in fulfilling discoverability. This included the option to be able to listen to a sample of an audiobook or podcast.

*Probably previewing things, so for example, if you go on YouTube, if you just hover the mouse over it, it might start playing the video so you can actually see a bit of it before clicking it. Maybe something like that, if you just click on it, it's got, like, a little snippet of what's going on, and then so on. (BBC Sounds, Often, Man, 18-34, ABC1, Urban, England)*

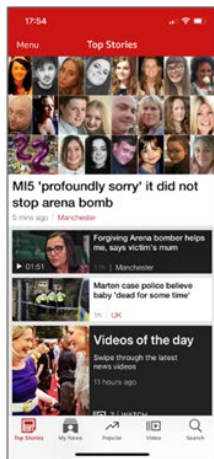
Many participants also felt other services served them well in terms of presenting relevant and personalised recommendations and suggestions, which they saw as a key means of exposing them to new content and helping them make easier and lower-risk decisions. They often felt that the algorithm was doing the work entailed in discoverability for them and that, as a consequence, there was a higher chance that they would like the suggestions presented.

*I think for me, I know it's good they have the algorithm stuff, but sometimes it would also be good, especially when you start off like they do with Spotify and Amazon Music, they ask you, 'What are your interests?' And stuff, it would be good if you could select some categories and sub-categories, so they can remember that for the future. (BBC Sounds, Often, Man, 18-34, ABC1, Urban, England)*

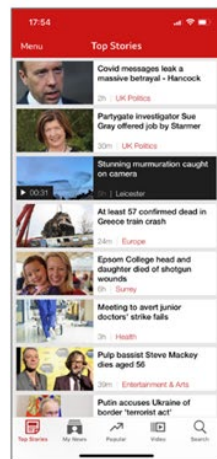
*It's the algorithm on Spotify because it kind of detects what you've been listening to, and it gives you the same vibe. Whereas BBC Sounds is completely different. So, you have that option of just listening to something completely new. (BBC Sounds, Often, Woman, 18-34, C2DE, Suburban, Wales)*

However, despite the perceived discoverability value of personalisation and algorithms on services such as Spotify, some participants did recognise this potential tension between personalisation and pure discoverability. In these instances, algorithms were sometimes seen as a weakness compared to services like BBC Sounds. Participants sometimes suspected that they might be missing out on content outside their algorithm and that reliance on algorithm-driven suggestions meant that they were underexposed to genuinely fresh or different content to which they may not usually listen. Participants who perceived this potential drawback could then regard BBC Sounds as offering greater potential for exposing them to more genuinely fresh and new content for the audience, as BBC Sounds was less bound by the more powerful algorithms that were perceived to characterise other services, in particular, Spotify.

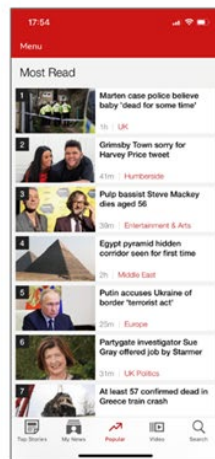
### 3.3. BBC websites and apps



BBC News homepage



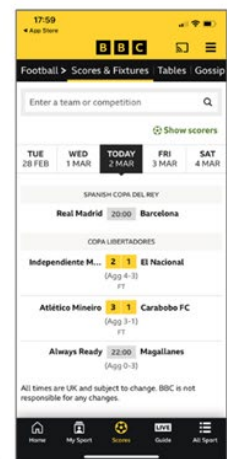
BBC News scrolling down main stories



BBC News Most Read



BBC Sport homepage



BBC Sport Football scores

**Overall, participants often felt they could easily find the content they sought across the range of BBC websites and apps.**

Although participants did raise some issues with finding specific content, these were perceived as relatively minor.

The 'top 10 most popular articles' were felt to facilitate finding specific content. This was seen as particularly helpful in fulfilling what was often the primary purpose of visiting the website, which was to get updated on the most important stories. The option to personalise news on the app potentially helped participants find news stories that were relevant to them and in which they were more likely to

be interested. Having clear and well-structured categories, particularly BBC News online, also allowed participants to find the topics and articles they were looking for.

*Navigation is just really clear, I think. It shows what's obviously popular in the news, like Ukraine and what's going on in politics and stuff, but then it also has broader topics, then you've got most watched videos, most watched articles. So, I think it gives you lots of options to find content. (BBC website/app, Often, 35-55, Woman, ABC1, Suburban, England)*

*There's a section where you can have your own, like feed of stuff you're interested in, wide topics that you can add. (BBC website/app, Often, 35-55, Woman, ABC1, Suburban, England)*

*I think the BBC News categorises things better, and I think they put them into subheadings so that you can concentrate on what you really want to know about and to read. (BBC website/app, Often, 25-45, Woman, C2DE, Urban, Scotland)*

### **There were a number of challenges that were seen to hinder finding specific content on BBC websites and apps.**

The volume of content could be overwhelming for some participants who felt it was hard for them to wade through. From the participants' perspective, they were often unwilling to scroll through lots of content to find what they wanted on BBC websites and apps. Many were typically looking for a quick update on the key stories and often expressed a reluctance to search through to broader or deeper content.

*Sometimes the annoying thing that I found was on one category, you might have to go through two or three pages. Maybe on the second or third page would be something that I'd be really interested in, and quite often, I would see something, like, in the science and history category, too, which makes sense, but I think it was just quite overwhelming for me with so many categories. (BBC Sounds, Often, Man, 18-34, ABC1, Urban, England)*

*There is so much on it that the BBC can't be beaten for the breadth and the depth, but that also is its own point. I find it just so laborious to plough through, whereas others sort of direct me much more quickly. (BBC website/app, Often, 46-60, Woman, C2DE, Very rural, England)*

However, there were some exceptions to this behaviour; for example, during a lunch break at work or when at home in the evening, when participants could be in a more browsing and discovery mindset. In these instances, participants' willingness to scroll through more content therefore increased. This, in turn, increased the chances of them discovering content that was new to them and that they might not normally consume on a routine basis.

Some participants perceived the categories in the main menu of the BBC website as too broad, and participants could struggle to find categories such as arts and culture.

*There's nothing there that says arts, culture, theatre. Nothing like that. And I was sitting there, and I was thinking, 'Right, well, how do I find it?' (BBC website/app, Often, 46-60, Woman, C2DE, Very rural, England)*

Some participants also reported difficulties finding content using the BBC homepage search function. To these participants, Google sometimes appeared to be a more effective means of finding specific content on BBC websites rather than using the navigation bar or search function.

### **In terms of comparing BBC websites and apps with competitor services, it was challenging for participants to define a set of competitor services in this context.**

However, when asked to compare BBC websites and apps, online newspapers were often the participants' main reference point. They also provided a similar range of content, from news and sport to lifestyle content, human interest and other content categories. Overall, newspapers could be perceived as better at providing access to broader content such as arts, culture, human interest, feature articles and lifestyle. Newspaper sites were seen as offering relatively richer and more extensive content in these categories compared to BBC websites and apps, presenting more specific menu choices across these areas and giving greater relative prominence to wider categories of content beyond the main news stories.

However, BBC websites and apps were often seen as easier to navigate than other comparable websites. Generally, they were felt to be well-structured and less cluttered. This was partly because the BBC websites and apps do not include on-screen advertising, which was perceived as a drawback of commercial equivalents.

**Participants felt well catered for by BBC websites and apps in terms of main news stories, which was often their primary interest in using the services.**

One of the main reasons for using BBC websites and apps was to get an update on the main news stories, including sports. When it came to both finding and also discovering more of this type of content, participants felt well catered for by this area of BBC services. Accessing the main news was, of course, a key reason why participants would engage with BBC websites and apps in the first place.

**Getting beyond main news content could be challenging for some participants as it was often the dominant category of information, including the main BBC website, bbc.co.uk.**

Some participants felt that BBC websites and apps could feel overly dominated by what was regarded as serious news content and often negative news coverage, including sites like the BBC homepage as well as the main BBC News site. Whilst this was meeting a core audience need in terms of being updated on the news stories that the audience needed to be aware of, it could also be a barrier to exploring the news site more widely. It was not clear or obvious that the site contained broader articles that may be of interest. This could result in some participants being less inclined to browse the rest of the BBC website.

*It's the difficulty of browsing on the BBC website, that's why I don't browse as much. Once I start, I find there's stuff there. But I don't sit there and think I'll have a flick through. I just generally find it a little bit harder. And, again, that volume. So, if I was to find out the government news today, looking at it, there are about 75 articles just on Rishi Sunak. (BBC website/app, Often, 46-60, Woman, C2DE, Very rural, England)*

*I just find the news so negative, I've absolutely zero interest in it whatsoever, and I just flick past it. (BBC website/app, Often, 25-45, Man, C2DE, Urban, Wales)*

*The BBC website is basically telling you what to read. So, things like the cost of living and Ukraine is front of mind. It's obviously topical, and people want to read it, or they're forcing people to read it. During the Coronavirus, literally, all of the front page would have been about the Coronavirus, now it's moved on to the war in Ukraine, and it'll be something else next. It's not that you are forced, but it will be front of mind, so you will tend to click on those rather than delving a bit deeper. So, maybe they need to look at a rotation of their top tabs. (BBC website/app, Often, 46-60, Woman, C2DE, Very rural, England)*

*The news is very, I wouldn't say mundane, it's not mundane, it's totally the opposite, but it just can really wear you down; you need something a tiny bit off-piste from that is nice to*

*look at and learn about something as well. (BBC website/app, Occasional, 55-75, Woman, C2DE, Urban, England)*

In light of this, new and different content often struggled to cut through to participants and get their attention. Broader cultural or educational features or human-interest content required more digging and scrolling down on the part of the audience. Still, participants found the broader range of lighter news stories and more human interest and feature content engaging when they discovered it. It can be inferred from the research that visibility of such content at an earlier point in the user experience (compared to the main news stories) could encourage further exploration as participants were motivated and intrigued to explore further.

*You've got the main news page but all these ones down the side, they kind of, the individual interests and music content and stuff, I don't think they stand out enough to people to be able to look at them, because up the top it's just more so for news, These headings should have more of a main part in this front page. (BBC website/app, Often, 25-45, Man, C2DE, Urban, Wales)*

*I do think that putting a bit more light-heartedness, maybe, at the forefront, I think that would encourage a lot more browsing. Because you see a miserable story and you think, 'I can't be bothered.'* (BBC website/app, Often, 25-45, Woman, C2DE, Urban, Wales)

*Articles or maybe things that aren't read too much because maybe people aren't finding them, they could bring them to the forefront of the page, which might just help people to discover something that they hadn't read or an area that they hadn't looked at before. (BBC website/app, Often, 35-55, Woman, ABC1, Suburban, England)*

*If I have to delve down the website to find what I want, you can bet your bottom dollar I'm not going to bother unless I really, really want to read that particular article. (BBC website/app, Often, 46-60, Woman, C2DE, Very rural, England)*

Other attributes that hindered discoverability of wider content via BBC websites and apps included the following:

- Many were unaware of wider content outside of the news and sports web pages or apps
- Participants were very rarely using the main BBC website (bbc.co.uk) – instead going straight to the news or sports homepages – and so many were unaware of the broader content it contained

### **Local news content, in particular, was of strong interest and value to many participants, but it could be seen as a more challenging category of content to find**

Local news content was a strong area of interest for many participants but was seen as relatively hard for them to find on the relevant website or app compared to national and international stories. Overall, many felt there were too many stages to finding local news content. Options to access more local content, for example, via the news site, were much further down the home page, and many participants were unaware of the option of being able to enter their own postcode for local, tailored content. However, upon exposure in the research, many saw this as an appealing feature and claimed they would use it in the future.

*I think it's harder to find localised stuff. I think from memory if I clicked on UK, and then you can click on England, Northern Ireland, Scotland, but I think it's about 4 or 5 clicks away in terms of, like, local news and regions and stuff. So, it's not front of mind of the front page in*

*even the top tabs as well, so it's probably 4 or 5 clicks in. (BBC website/app, Often, 46-60, Man, C2DE, Very rural, England)*

Participants could also be encouraged to explore and discover new content when the different BBC websites and apps were more overtly joined up in terms of linking together associated content across the different services.

*It might be that if there's a link below that article that takes me to another article. (BBC website/app, Often, 35-55, Woman, ABC1, Suburban, England)*

*I'll sort of mindlessly be looking at one thing, and then it [links on related articles] just takes me on that journey with all these related topics. It does happen a lot when I'm on the BBC website. (BBC website/app, Often, 35-55, Man, ABC1, Suburban, England)*

Recommendations outside of personalised suggestions also helped to encourage discoverability, including features such as most watched videos, most read articles, and other content curated based on what the rest of the UK was engaging with.

Specific, curated categories could also stimulate further exploration, particularly as they were often seen as more positive and uplifting than news content, for example: 'Three things we love today.'

*I think they miss a trick with a lot of those links. They're just like, 'Oh, you're reading something about Rishi Sunak, therefore, you probably want to know all about the economy.' Well, actually, I work in charity, so I actually want to know what his policies are around supporting people because that's where I'm interested in. (BBC website/app, Often, 46-60, Woman, C2DE, Very rural, England)*

Providing different perspectives on a given topic also encouraged wider exploration and discoverability, for example, by providing links to wider content, including different perspectives or implications on the main topic featured in the primary article.

*Some of the news is a bit depressing, or you know, I've got a bit more time to kill, I might be more inclined to browse what the other options are as well. So using that top ribbon to see what else is going on. (BBC website/app, Often, 35-55, Woman, ABC1, Suburban, England)*

*I'd be more inclined to find stuff through the website rather than the app, though, because I think it's easier to discover more. Whereas the app is more condensed, obviously, I don't think it's as easy to find something different. (BBC website/app, Often, 35-55, Woman, ABC1, Suburban, England)*

*I think they're good, the links because sometimes you want something a bit more specific than the general article and I think that takes you to those points. (BBC website/app, Often, 46-60, Woman, C2DE, Very rural, England)*

*Whenever you read one of the stories, when you get the bottom of it, there's usually three or four links and you can click on them and it'll bring you up all the previous on that story. (BBC website/app, Occasional, 25-45, Male, C2DE, Rural, Northern Ireland)*

### **Both social media and notifications played a role in encouraging the discoverability of content on BBC websites and apps**

This was also mainly in relation to news content and sometimes sports. Some participants saw social media as an important means for being exposed to news content and being kept up to date, including



sports news. It was also sometimes acknowledged as an important route into accessing content via the main news BBC website if they chose to engage further with a given article. Some participants also highlighted notifications in terms of prompting them to engage with BBC content, such as via a breaking news story.

In this way, distributing news content via social media and push notifications encouraged further usage and potentially discoverability of the relevant BBC sites via clicking through.

However, this mode of engagement also reinforced perceptions of BBC services being dominated by news content more than any other category of content and also that the news service was the 'go-to' for breaking news and news updates, rather than potentially seeing the news site as having wider content beyond the announcing the main stories and breaking news.

*"I go on [the BBC website] quite a lot because if I go on social media, it's always stuff about BBC. You never really see Sky sharing stuff on social media. Like, you can scroll through your Facebook, and every second post has got something from the BBC. That's why I think to use it more (BBC website/app, Often, Woman, 25-45, C2DE, Urban, Scotland)*

*With breaking news, that came up on my phone, so I was able to read it. Twitter, or it might have been Facebook and taken me to BBC sports as well. (BBC website/app, Occasional, Woman, 55-75, C2DE, Urban, England)*

## Appendix

A qualitative approach was taken among audiences across the UK. There were two different stages to the research; the first stage was the core of the project, and included focus group sessions, with all participants taking part in a 7-day pre-task prior to the sessions. These were supplemented by a second stage of reconvened depth interviews amongst a selection of participants from across the first stage of the research. All fieldwork was conducted online.

### A. Pre-tasks

All participants took part in an individual pre-task prior to the fieldwork for a seven-day period prior to attending the sessions.

The overall objective of the pre task was to build a picture of an individual's current engagement with BBC Online Services (for 'Often' BBC users) and for 'Occasional' BBC users – engagement with competitors online services. In particular, focusing on aspects of discoverability and distinctiveness of content within these services.

The pre task included written entries. This provided the research with an initial record that was then used as a basis for exploration in the focus groups, as well as a source of data in its own right. Participants were directed to give as much detail as possible in their entries.

The number of questions that can be asked has to be kept to a minimum so as not to overload the overall task – which ultimately leads to lower participation and drop out.

Participants were recruited on the basis of their relationship with one particular BBC platform – the platform type formed the focus for their pre task as well as the subsequent groups. Six separate versions of the signed off pre-task were used to accommodate this. The pre-task consisted of the following four components:

- Usage diaries recording daily usage of the service: around five minutes a day across days 1-3 where participants were asked to behave naturally, focusing on one specific BBC platform for the 'Often' groups and competitor services for the 'Occasional' users.
- Quantitative survey on day 4: Included a set of quantitative questions relating the service
- Sponsored behavioural change: asking participants to change their behaviour for two days (10 minutes a day over days 4-6), both depriving them of their current main platform to draw out distinctiveness and providing comparisons with an alternative platform (the alternative being the BBC for 'Occasional' users).
- A focused discoverability task: On day 7 asking participants to go onto the relevant BBC platform and find and consume something completely new (i.e. not just a new season/news article etc.) that they would enjoy watching/listening to/reading.

### B. Fieldwork and sample criteria

The pre-task was then followed by convening participants together in online focus groups of between five and six participants per group across the 21 locations. Each group led with a particular online

service with seven groups allocated to BBC iPlayer, BBC Sounds and BBC Websites and apps accordingly.

The sample was recruited across a range of audiences defined by age groups, from 18-75, a range of socio-economic gradation, life stage and household circumstances.

Following the focus groups 21 individual participants were chosen (one from each group) to take part in a follow up depth interview exploring their experiences and usage of the relevant BBC online service in more depth and detail.

The fieldwork was carried out in October and November 2022.

#### **21 x online focus groups with general audiences:**

- 21 x online focus groups – 6 respondents per group
- Across the UK including 10 in England, 4 in Wales, 4 in Scotland and 3 in Northern Ireland respectively
- Each group split by usage of relevant BBC Online service i.e. BBC iPlayer, BBC Sounds, and BBC Websites and Apps (7 groups per service)
- The groups were also structured around different levels of usage of the relevant online service in terms of either being occasional users (use the service at least once a month) or often users (use the service at least once a week).

#### **21 x reconvened depth interviews from across the sample:**

- One participant selected from each focus groups to take part in depth interview
- Interviews to enable more personal and individual exploration of relationship with BBC Service and explore usage and journeys in more detail

Detailed sample tables have also been provided in the appendix

## **C. Stimuli**

In preparation for the sessions, stimuli were developed in conjunction with Ofcom. Stimulus material was shared with the groups during the sessions to help extend discussions.

Stimuli for the sessions included:

- Slides detailing different pages of the relevant services.
- The relevant BBC Online service brand together with a selection of potential competitor brands

## D. The pre-task

### Ofcom – BBC Online Services – combined version

#### Introductory paragraph

We are conducting a study looking at the different ways people [watch/listen to/read] [FOR IPLAYER AND BBC SOUNDS: on demand rather than live] content using online media services

[FOR BBC SOUNDS SAMPLE: such as Spotify, Apple Music, YouTube and on demand content on BBC Sounds. We are interested in all the different types of online audio content you may listen to such as radio, music playlists and speech content, such as podcasts.]

[FOR BBC IPLAYER SAMPLE; such as Netflix, Amazon Prime Video, Disney+ and on demand content on BBC iPlayer. We are interested in all the different types of content you watch on these services.]

[FOR BBC WEBSITE/APP; such as features and information you read on the BBC website or app (be that BBC Homepage, BBC news, BBC sports, weather, food and recipes, Bitesize and other articles or features) online newspaper services like the Daily Mail or The Times and other broadcasters websites/apps like Sky News or Sky Sport and/or information you get from social media platforms such as YouTube, TikTok and Facebook. We are interested in the whole range of content you might find on these sites or apps such as news, sport, general interests, educational content and current affairs.]

We are particularly interested in how you choose what to [watch/listen to/read], how easy it is to discover new content and whether the content you come across feels distinct in terms of quality or range and in some way different from what you could get on other competitor services.

In your answers we would be very grateful if you could please give as much detail as possible.

#### Day 1-3: Listening/Watching/Reading Journal

Over the next few days, we would like you to tell us a bit about

INSERT AS APPROPRIATE:

- The TV and online video streaming services (such as BBC iPlayer, Amazon Prime Video, Netflix and Disney+) you use
- The online audio services you use such as BBC Sounds, Spotify and Apple Music
- The features and information websites or apps you read such as the BBC and other apps and websites providing news, sports, features, stories, weather, food and educational type content.

Please record ALL the different [online audio/online video services /information websites or app] you visit and use and answer a few short questions about the experience.

Please **repeat the questions for each** [online audio/video service/website or app] you visit today.

- a) Which [online audio/online video/information website/app] services did you use? Please write in both service
- b) How did you access this service it [BBC IPLAYER: e.g. via a smart TV, their website, using their app or via their own social media channel e.g. BBC's channel on YouTube, Instagram, Facebook or Snapchat.] [BBC SOUNDS e.g. via their app, their website, on your smart speaker, or via their own social media channel e.g. BBC's channel on YouTube, Instagram, Facebook or Snapchat]. [BBC WEBSITE: e.g. via their website or their app or via their own social media channel e.g. BBC's channel on YouTube, Instagram, Facebook or Snapchat]
- c) What time was it and how long did you spend on the service?
- d) What types of content did you [watch/listen to/read] whilst there?

**FOR BBC 'OFTEN':** Thinking specifically about anything you [watched/listened to/read] on [BBC iPlayer/BBC Sounds/the BBC website or app]: If you haven't used today type NONE (& PROGRAM TO SKIP)

- Why and how did you go onto on [BBC iPlayer/BBC Sounds/the BBC website or app]:? Did you go on: IF YOU WENT ON MORE THAN ONCE MULTI CODE
  - To [watch/listen to/read] something specific
  - To browse and be inspired
  - Out of habit/routine as this is where you usually go
  - By clicking on a link on social media that interested you
  - Through a link from on another app or website (e.g. a news app or review site)
  - Other (please specify)
  - something specific, were you just looking to browse and be inspired, was it just out of habit or did you go on via another route e.g. through a link on social media or from another service? (if you went on more than once please number each time)
- Which specific programmes or types of content were you looking for? Or if you didn't have anything in mind what need were you looking to fulfil by looking for something to [watch/listen to/read] at this time?
- How did you go about finding what you were looking for?
- How easy was it to find something you wanted to [watch/listen to/read]?
- IF WENT ON TO FIND SOMETHING SPECIFIC: When you were looking for something specific, did you end up [watching/listening to/reading] what you originally went on there for? IF NOT: Why not? PLEASE DESCRIBE ANY ISSUES RELATED TO FINDING SOMETHING TO [WATCH/READ/LISTEN TO] IN FULL E.G. IF IT WAS TOO MANY CLICKS, THERE WAS TOO MUCH SCROLLING OR YOU COULDN'T FIND ANYTHING OF INTEREST)
- IF THEY WENT TO BROWSE/BE INSPIRED OR OUT OF HABIT: When you were browsing or visiting out of habit, what did you end up [watching/reading/listening to]?
- Did you discover anything new you wanted to [watch/read/listen to] either for today or to save for another occasion? IF YES: What was this and how did you come across this?

- Do you think something very similar to what you [watched/listened to/read] today would be available to you on another service? IF NO – Why not? IF YES: How do you think it would compare?

**FOR BBC ‘OCCASIONAL’:** Thinking specifically about anything you [watched/listened to/read] on the main [online video service] you used today: If you haven’t used any today type NONE (& PROGRAM TO SKIP FOLLOW UP QUESTIONS)

- When you went on, were you going for something specific or just to browse and be inspired? (if you went on more than once please number each time)
- Which specific programmes or types of content were you looking for? Or if you didn’t have anything in mind what need were you looking to fulfil by looking for something to [watch/listen to/read] at this time?
- How did you go about finding what you were looking for?
- How easy was it to find something you wanted to [watch/listen to/read]?
- Did you end up [watching/listening to/reading] what you were originally went for? IF NOT: Why not? PLEASE DESCRIBE ANY ISSUES RELATED TO FINDING SOMETHING TO WATCH IN FULL E.G. IF IT WAS TOO MANY CLICKS, THERE WAS TOO MUCH SCROLLING OR YOU COULDN’T FIND ANYTHING OF INTEREST)
- How, if at all, does what you got from this particular service differ from what would have been available to you on another service? IF YES: What was this and how did you come across this?
- Do you think something very similar to what you [watched/listened to/read] today would be available to you on another service? IF NO – Why not? IF YES: How do you think it would compare?

**ASK ALL:**

- Did you come across any BBC [video content/audio content/news or sports stories] on social media today? IF YES: How did you come across it and which social media platform were you using?
- What did you do when you came across it?
- Did this alert you to anything new that you were interested in [watching/listening to/reading] that you maybe hadn’t heard of or thought about [watching/listening to/reading] before? Please explain your answer.

## Day 4 FOR HEAVY/MEDIUM BBC USERS/DAY 6 (AFTER BEHAVIOUR CHANGE) FOR LIGHT BBC USERS: Testing the quantitative questions

Today we are going to ask you a short series of questions.

First of all, how important is it for you to discover new content [ i.e. programmes//playlists or podcasts/ on [BBC iPlayer/BBC Sounds/BBC websites]? By discover we mean content you weren’t particularly looking for but came across while looking for something else or browsing in general. Give a score of 1-10 where 10 is extremely important and 1 is not at all important.

Now we are going to show you a series of statements. For each one please give a score on a ten-point scale where 10 is agree strongly and 1 is disagree strongly that [BBC iPlayer/BBC Sounds/the BBC website and/or app]:

- Provides a wide range of genres such as science, arts, culture and religion in its [programming/podcasts and speech content/it in its articles and reporting]
- BBC IPLAYER & BBC SOUNDS ONLY Makes it easy to discover new content or genres on [BBC iPlayer/BBC Sounds/the BBC website or app]
- BBC WEBSITE/APP ONLY: Makes it easy to come across new stories, articles or features I wasn't originally looking for whilst on the site or app
- BBC IPLAYER ONLY Is good at making recommendations for new content or genres that helps me to discover something different or new
- BBC SOUNDS ONLY Is good at making recommendations for new content, music or podcasts that helps me to discover something different or new
- BBC WEBSITE/APP ONLY: Is good at including relevant articles and topics of interest to me
- Makes it easy to find content I want to [watch/listen to/read]
- Has content that helps me see things from a different angle/perspective
- Provides innovative, creative and ambitious content
- Provides content that is important to me
- Provides content that appeals to a range of different audiences
- BBC SOUNDS ONLY: Develops new and interesting podcast content
- BBC SOUNDS ONLY: Takes a chance on new or less well known music
- Stands out from other providers because of the quality of what they provide
- BBC IPLAYER & BBC SOUNDS ONLY: Has a good selection of content made specifically for UK audiences
- You can find content on [BBC iPlayer/BBC Sounds/the BBC website/app] that feels a bit different from what you get from other providers
- I tend to enjoy [watching/listening to/reading] content on [BBC iPlayer/BBC Sounds/the BBC website/app] more than other services

When you use [BBC iPlayer/BBC Sounds/the BBC website or app] to search for a particular [programme/playlist or podcast/article or story], how often do you browse to see what else is available that may appeal to you? Would you say it is: Every time I use it; most times I use it; sometimes, rarely, never

Do you think the BBC could do more to help you discover new content on [BBC iPlayer/BBC Sounds/the BBC website or app] [FOR WEBSITE ONLY: such as local or different types of news, sport or relevant features]? By this we don't mean new, recently released, content just something that is new to you. Please write yes/no or don't know

Do you find it easier to come across new content on other similar services? Please write: yes/no or don't know. Which ones?

ASK FOR IPLAYER/SOUNDS ONLY: Do you ever turn to [BBC iPlayer/BBC Sounds] for news? IF NOT: Why not?

ASK FOR BBC ONLINE ONLY: Do you ever turn to the BBC website or app for more local, nations and regions based, content such as news, sport or relevant features?

ASK FOR BBC ONLINE ONLY: How easy is it to find more local, nations and regions based, content on the BBC website or app? Would you say it was: Very easy, fairly easy, neither easy nor difficult, not very easy, not at all easy or you don't know/have never looked.

Finally, how regularly would you say you discover new content on [BBC iPlayer/BBC Sounds/the BBC website or app]? Would you say it is: Every time I use it; sometimes; very occasionally, rarely, never

## Day 4-6: Behaviour Change Deprivation

### General Instructions (will reflect the above specification)

- We often don't fully appreciate why we value something until we try to do without it, so for the next two days- please do without ['Often': BBC iPlayer/BBC Sounds/ the BBC website and apps and instead use alternative platforms, websites and apps to meet this same need] [BBC 'Occasional': your current audio/video platform/news and sports websites and apps and instead use [BBC iPlayer/BBC Sounds/ the BBC website and apps] to fulfil this same need]
- BBC IPLAYER ONLY: So, for example, if you would typically watch things on BBC iPlayer in the evening, please find an alternative platform to watch video content on instead during this same time period e.g. on ITV Hub, All4 or Netflix (if you have it) or You Tube
- BBC SOUNDS ONLY: So, for example, if you would typically listen to things on BBC Sounds in the evening, please find an alternative platform to listen to audio on instead during this same time period e.g. Apple Music, Spotify (if you have them), online radio websites/apps, TuneIn or You Tube.
- BBC WEBSITE ONLY: So for example if you would normally go to the BBC website or app for a particular type of content (such as news stories, sport, articles, features, recipes, education and so on) please can you try alternative sources to get this same type of information.
- It is important you genuinely replace this behaviour with a similar activity at the same sort of time using an alternative online or in app service that [is/is not] provided by the BBC – so not going to watch the BBC on live TV instead for example.
- It is really important that you do this rather than just stop [watching/listening/reading the same information] altogether as we are keen to understand how these alternative sources compare to [the BBC/your preferred source].
- Once you have done this over the two days, please answer the questions sent to you about the experience.

### Feedback on task

Please tell us how you found the experience of doing without ['Often' BBC - BBC iPlayer/BBC Sounds/ the BBC website and apps] ['Occasional' BBC - your preferred source] and using ['Often' BBC – alternative services] ['Occasional' BBC - BBC iPlayer/BBC Sounds/ the BBC website and apps] instead:



- ONLY ASK FOR 'OCCASIONAL' BBC GROUP: What source(s) did you do without?
- Which alternative source(s) did you use and how did you access this? (Please include how you accessed the sources i.e. whether it was online, on the TV, radio or in print)
- How did you find the experience, how easy or difficult did you find it to make this switch?
- Please describe what you missed the most when you did this?
- How did ['Often' BBC – the alternatives] ['Occasional' BBC - BBC iPlayer/BBC Sounds/ the BBC website and apps] compare with ['Often' BBC - BBC iPlayer/BBC Sounds/ the BBC website and apps] ['Occasional' BBC - your preferred source] in terms of the ease of finding something you wanted to watch? Did you find more or less new content on this service? And why?
- Did you find anything new you wanted to [watch/listen to/read]?
- How did it compare in terms of your ability to discover new things you wanted to watch/that interested you? Please give examples.
- How unique or distinct does the BBC content feel from that you find on alternative services? Did you find anything similar to what the BBC offers? Why do you say that? Can you give examples?

## Day 7: Focused Discoverability Task

### General Instructions

- For this final day of the homework task we would like you seek out something totally new to [watch/listen to/read] on [BBC iPlayer/BBC Sounds/the BBC website or app] that looks interesting to you. It doesn't have to be brand new content just something that is totally new to you.
- By this we mean something you have never [watched/ listened to/read] before – [FOR IPLAYER SAMPLE: which doesn't just mean a new series or the next episode of something you have watched or listened to before but something you have never tried before.] [FOR BBC SOUNDS SAMPLE: which doesn't just mean another podcast or DJ set from a series or programme you have listened to before but a new radio show, podcast or playlist] [FOR WEBSITE/APP – which doesn't just mean reading another news article or sports item, for example, on the home page it means discovering a new type of content or topic area on the website/app or it might be seeking out more locally based content.]
- We want you to discover something else that captures your interest after you have spent a bit more time browsing than you might do normally. We are trying to establish how easy or difficult it is to discover new content.
- We are also interested in seeing what you find and come across whilst you are exploring– do you come across other content that looks interesting along the way even if you don't [watch/listen/read] today?
- We will be asking you questions both about how easy or difficult it was to navigate to discover this content and then about the content itself.
- There are some basic rules:
  - a. You must not play/listen/read something that you would usually read or have [read/watched/listened to] before or something that you are already planning to [read/watch/listen to]- it is something totally new.

- b. must not go for a similar type of content from your favourite genre – it has to be something that is quite different from what you have used this service for before [BBC IPLAYER: e.g. if you normally watch crime dramas, don't just find another one, aim to discover a totally different type of programme or content you don't normally watch on iPlayer/ BBC SOUNDS e.g. if you normally listen to true crime podcasts, don't just find another one, aim to discover a totally different type of podcast or content available on sounds that you don't normally use Sounds for/BBC WEBSITE: e.g. if you would normally use the BBC website to read about football it's not just reading the next article about another sport, aim to discover a totally different type of article or content available on the website]
  - c. You must not use the search bar (as we want to see how you discover things when browsing normally) but you can use recommendations if they are things that interest you and are different from what you would normally [watch/read/listen to].
- Once you have done this, please answer the series of questions about the experience.

## Feedback on task

Please tell us how you found the experience of seeking out something new:

- What did you [watch/listen to/read] that was new to you?
- What other things did you come across along the way that you either [watched/listened to/read] or would like to in future?
- How did you find the experience of trying to discover something new in terms of the ease of navigation?
- How easy or difficult was it to find something new in terms of having new content available you wanted to [watch/listen to/read]? And why/why not?
- What would have made it easier?
- How does it compare with how other providers help you to discover new content?
- How unique or distinct from what you would be able to find on other services was the content you found? What makes you say this?
- What have you learnt about [BBC iPlayer/BBC Sounds/the BBC Website/App] from this experience?

Thank you for taking the time to complete these tasks, your help is extremely valuable. We will be reviewing all your responses with interest and look forward to meeting you in the group discussion.

## E. Discussion Guide focus groups - combined version

**NB. THE IN-DEPTH GUIDE WILL FOCUS IN MORE DEPTH ON MEDIA CONSUMPTION AND HABITS**

**MODERATOR NOTE: WHEN TALKING ABOUT 'NEW CONTENT'/GENRES ETC., WE MEAN 'NEW-TO-YOU RATHER THAN NEWLY RELEASED/AVAILABLE CONTENT.**

### Researcher introduction (5 mins)

- EXPLAIN: Today we are going to be talking about how people use online media services, with a particular focus on (read out as applicable):

- ONLINE: your usage and perceptions of information content such as news and sports, current affairs, cultural and religious information, recipes, hobbies and interests and local news and information on available on websites and apps, such as the BBC and other broadcasters, , newspapers and social media such as Instagram, YouTube, Facebook and Tik Tok. .
- VIDEO: your usage and perceptions of content available on **video on demand streaming sites** such as Netflix, Amazon Prime, Disney+, Now and so on as well as the broadcaster on demand services such as BBC iPlayer, ITV Hub and All4. We are less interested in broadcast media i.e., media you watch live on TV, it is about on-demand and catch-up services. By content we mean the whole range of genres be that factual (documentaries, current affairs, etc), dramas, comedies, films and so on.
- AUDIO: your usage and perceptions of the content available on audio streaming services such as Apple Music, Spotify, BBC Sounds and online radio apps such as TuneIn and other online radio music websites or apps (e.g., Kiss, Heart, Magic). This can be music or speech content such as podcasts. We are less interested in live radio it is more about streaming and catch-up audio services.
- As you know the research is on behalf of Ofcom, the communications regulator. In developing regulation and guidelines for our media in the future it is really important that they fully understand the needs of people like yourselves – which is why we are here today.
- Ground rules and reassurances:
  - There are no right or wrong answers to any of this, your opinions count, so please do be open and honest about how you feel and what you think
  - Not trying to sell anything and there will be no follow-up
  - Views and opinions will be held in strictest confidence
  - Sessions will be recorded – ensure they all completed the permission slip in advance
  - Ask to keep camera and sound on at all times so they can join in at any time.
  - Explain presence of observers if any (will just watch/not join in, may ask Qs at end)

## Respondent introductions and warm up (10 mins)

Thanks a lot for completing the homework exercise in advance – explain have looked at these and will be using this as the background to a lot of our discussions today.

- First name, where you live and who with (including age of any children)
  - What do you do?
- VIDEO ONLY: When you are watching video services, who are you watching with? E.g., partner, children, parents, friends etc?
- VIDEO: Favourite programmes have been watching (or streaming) recently, on your own, with your children, with your partner etc?
- AUDIO: What is your favourite radio programme, station or podcast?

- ONLINE: What is your favourite site or app to get information? What is an interesting article you have read recently – about anything? Where did you read this, how (website, app?) and why was it interesting?
- What makes these your favourites?
- When it comes to [things you listen to such as music and podcasts/things you watch on TV or online/the way you use websites and apps like the BBC or similar sites], do you tend to visit the same ones to watch/listen/read the same type of programmes/stations/articles? What are your habits or typical routines in this context? What do you do regularly?
- And now thinking about new things, new programmes, new stations, new website sections/content (and by new I mean content that is 'new to you' rather than newly released content), how would you describe yourself in terms of your willingness to try new things – do you often try out new things or would you rather stick to something you are familiar with? PROBE AS APPROPRIATE:
  - Why do you like to try new things?
    - Where is the best place to find new-to-you content (not newly released)?
  - Why do you stick with what you are familiar with?
    - What stops you trying more new content?

## Pre-Task Recap (10 mins)

USE PROBES FROM THE PRE-TASK ANALYSIS HERE & THROUGHOUT WHERE INTERESTING/RELEVANT ISSUES ARE NOT MENTIONED SPONTANEOUSLY TO PROBE ON RELEVANT PAIN POINTS AND HOW THEY DISCOVERED CONTENT

- Thinking specifically about the journal we asked you to complete last week, what were the best moments of your viewing/listening/things you read? What stood out for you as a highlight among the things you read/watched/listened to?
- So those were the best moments; let's think about what didn't go so well. What were the 'low points'? The pain points? MODERATOR: We are interested in issues with finding something to watch (for example) rather than issues with the content itself. Were there any issues to do with:
  - Finding things you want to watch/read/listen to?
  - The content you were able to find?
  - USE PROBES FROM THE PRE-TASK ANALYSIS HERE IF NOT MENTIONED SPONTANEOUSLY TO PROBE ON RELEVANT PAIN POINTS
- What, if anything, did you learn about your behaviour as a result of doing this task?
- What, if anything, did you learn about BBC iPlayer/BBC Sounds/the BBC website/app as a result of doing this task?
  - Did anything stand out that the BBC does that others don't?
- What content did you discover during your homework task that you hadn't watched/listened to/read previously?
  - How did you discover this? How did you come across the content you discovered?
  - What made his standout? What was it about that content that made you select it?

- How easy or difficult did you find new-to-you content in terms of ease of navigation to support you finding something that is new to you? Why/why not? And what are you comparing this too? Easy that what? More difficult than what?
- How did you think the platform you used do in terms of having new-to-you content available to you that appealed? Did it do well? Not so well? Why/Why not?
- UNPROMPTED: What types of genres do you tend to [VIDEO: watch] [AUDIO: listen to] [WEBSITE: read/consume] more regularly? What are your 'go to' genres?
  - And when you use on demand [video services] [audio services] [information sites] do you tend to have something in mind or do you tend to browse? And how do you browse?
  - Are some [video services] [audio services] [information sites] better than others about surprising you with new-to-you content? Who are these and why do you say that?

### **PROMPTED: STIMULUS A; LIST OF GENRES (FOR EACH SERVICE)**

- VIDEO What types of programmes do you like to watch or listen to using on demand and streaming services? Probe: news/current affairs, documentaries, history/science/arts, comedy, sport, drama, soaps, films, culture and the arts, religion, celebrity/talent/variety shows, quiz shows, chat shows, music shows, children's shows?
- AUDIO: What types of audio content do you like to listen to? Music radio, sports radio, pre-recorded playlists/music mixes, your own playlists, sports podcasts, entertainment podcasts, factual podcasts, sport, news/current affairs, interviews, audio books, soaps and dramas, comedies
- WEBSITE: What types of content do you use websites and apps like the BBC and other broadcasters, newspaper websites and social media sites for? UK news, nations news (e.g., Scotland, Wales, NI and England), regional/local news, international news, current affairs, business, sport, recipes, arts and culture, educational content (e.g., to help with homework), recipes and food, religion, entertainment news, science and the environment
  - How do you engage with these sites – does it tend to be more articles, videos or a mix of the two?
    - What types of content do you read articles about?
    - What types of content are you more likely to watch videos on?
- Which types of genres or different types of content did you watch/read/listen to last week?
  - How typical is this?
  - Did you read/watch/listen to any new-to-you genres or types of content as a result of this task?
    - How did you come across it?
    - Why have you not read/watched/listened to this previously?
    - How did you come across it? Will you keep watching/reading/listening? Why/why not?

### **Distinctiveness (30 mins)**

*READ OUT: For this next section we are going to talk more about the content itself and how unique or different the content feels on these services.*

- When you think about BBC content on [iPlayer/BBC Sounds/its website or app] what are the first words that spring to mind? Why those?

**SHOW STIMULUS B: A PAGE WITH BBC ONLINE SERVICE AND SOME COMPETITORS**

- What types of content do you associate with the BBC?
  - What types of content do you think the BBC provides?
- How does this compare with the content you would find on other services you use?
- Why would you go to BBC iPlayer/BBC Sounds/the BBC website/app in particular?
  - What would motivate you to go onto the service vs another one you could use?
  - What kind of content do you use it for?
  - Strengths – what makes it stand out?
  - Which service/platform is best in class? What could it learn from them?
- If I was someone from another country who had never heard of the BBC or used BBC iPlayer/Sounds/the website how would you describe what it offers that is similar to what you find on other services?
  - How would you describe what's different to what you'd find on other services?
  - What about the content on there specifically? How would you describe this?
  - What, if anything, make it different?
  - Who Which service/platform is it most similar to in terms of the content it provides? Why?
- What are the things you watch/listen to/read on the BBC that you wouldn't find elsewhere/find yourself watching/listening to/reading on other similar services?
- What would you miss the most if [BBC iPlayer/BBC Sounds/the BBC website and app] and the content you find on there disappeared tomorrow? What would you lose as a result?
  - What could you find elsewhere? What would be 'gone for good'? What could you not find anywhere else?
  - What impact would losing this service as a source of news have vs. other types of content available? Why is that?
  - OFTEN: How did you find it when you stopped?
- How important is UK content to you i.e., British based content? Why/Why not?
  - What do you get from this that you would not get from content made for example for more global audiences or for the US, South Korean, Australian etc market originally?
  - How well does the BBC iPlayer/BBC Sounds perform in terms of delivering 'British' content? How does this compare with other similar services?
  - And conversely, what about non-British content? How well does the BBC iPlayer/BBC Sounds do in terms of exposing people to content from other countries? Does this offer something distinct/different from other platforms?
    - What are the benefits of this do you think?

- PROMPT IF NEEDED: E.g. Scandinavian content which the BBC has bought
  - How does BBC iPlayer/BBC Sounds compare with regards non-British content? Is it doing anything differently? What might this be?
  - How easy is it to discover this sort of content on the BBC?
- And thinking about [BBC iPlayer] [BBC Sounds] [the BBC website/app] what does this offer that you don't get from other providers in terms of the types of content? SHOW STIMULUS C WITH CONTENT TYPES AND VISUALS OF PROGRAMME EXAMPLES & PROBE:
  - Regional/nations content
  - More individual interests
  - Specialist factual content
  - Specialist music content or types of music you don't get elsewhere
  - Arts
  - Religion
  - Comedy
  - Children's programming [for parents/carers only]
  - Trusted source of news
- Before coming along this evening were you aware of these types of content (listed in previous question) being on [BBC iPlayer], [BBC Sounds], [the BBC Website or app]?
  - Have you noticed these types of content previously when you have been on there? Which ones?
  - How do you come across these on the BBC? Would you know where to go if you wanted to find them?
  - Would you think of going to the BBC for such content? Why/why not? And which platform would you go to first – iPlayer, Sounds or the website?
- How well does the BBC cover these topics/types of content?
  - Where else do you/could you get these from?
  - IF RESPONDENT STRUGGLES TO ANSWER BECAUSE THEY DON'T USE THEM: What are your perceptions? How well do you think an organisation such as the BBC would cover these topics?
  - Do you expect the BBC to be different in this context? How and why is this?
    - Is there any other website like the BBC that offers this same range and types of content?
  - Could the BBC be doing more to make content such as this – that you might not be looking at - more appealing to you?
    - Or is it only the content you most regular watch that matters to you?
- How innovative, creative or ambitious does BBC content on this service feel?
  - Can you think of any content that feels innovative, or that the BBC did 'first'? Anything 'cutting edge' – that you might not find anywhere else?

- How good a job does BBC content do at helping you to understand different perspectives on a topic?
  - How good a job do you think the BBC does at informing/educating you on topics that interest you? Why do you say that?
  - How does it compare with other services providing similar content? Why is that?
- AUDIO: How good a job do they do at taking a chance with lesser-known artists, types of music or new-to-you type of podcast content?
  - How does this compare with other audio services you use?
- And what about local/regional content on [iPlayer] [Sounds] [Website/apps]
  - Do you know about this? Are you aware of this content?
  - Do you know how to find it? Where is this?
  - What do you think of this type of content? Can you find this elsewhere? Who else does this?
  - What about local or regional news content?
- Do you ever [watch] [listen to] [read] this same type of BBC content that is recommended to you by other services e.g., BBC content on social media or other streaming services? What?
 

*WE MAY WISH TO SHOW SOME EXAMPLES OF VISUALS OF CONTENT THEY MAY COME ACROSS ON OTHER SERVICES E.G. DESERT ISLAND DISCS?*

  - When you come across it on these services why do you watch/listen to/read the BBC content here rather than other content they provide – what makes it stand out?
  - What does it offer that feels unique or different in some way?
  - Why do you watch/read/listen on BBC iPlayer/BBC Sounds/the BBC website or app instead?

## Findability (7 mins)

*READ OUT: We are now going to spend a few minutes discussing how easy it is to find things you are looking for on the BBC and other comparable services that you use.*

- When using BBC iPlayer/BBC Sounds/the BBC website/app do you usually go on there with specific content in mind or do you look for inspiration when you go on there?
- How does this vary by occasion? When might you browse vs. search in a more purposive way?
- When you use BBC iPlayer/BBC Sounds/the BBC website/app do you ever find yourself browsing to see what else is available that might appeal to you? And when does this happen? When you open it, or after you've watched what you went there for?
  - How easy is it to find additional content you're interested in?
- What, if anything, stops you from browsing more?
- How easy is it to find specific content you are looking for on BBC iPlayer/BBC Sounds/the BBC website/app?
- How do you go about finding what you want in BBC iPlayer/BBC Sounds (including radio stations)/the BBC website/app.
  - Is there any type of content you find it harder to find than others?



- What makes it easy/difficult to do this?
- How does the BBC compare with other services you use for similar purposes in terms of finding something you are looking for? (IF HELPFUL) e.g.
  - ONLINE: other news and sports websites and apps, Sky News and Sky Sports, the newspaper websites and social media sites such as Instagram, YouTube, Facebook and Tik Tok.
  - VIDEO: video on demand streaming sites such as Netflix, Amazon Prime, Disney+, Now and so on as well as the broadcaster on demand services such as, ITV Hub and All4.
  - AUDIO: audio streaming services such as Apple Music, Spotify, and online radio apps such as TuneIn and other online radio music websites or apps (e.g., Kiss, Heart, Magic).
- What about functionality?
  - How does [BBC iPlayer] [BBC Sounds (including radio stations)] [BBC website/app] compare to other services you use for similar purposes?
  - Which services would you say have great functionality? And which have poor? Why do you say this?
- What about ease of use? How you find content?
  - How does [BBC iPlayer] [BBC Sounds (including radio stations)] [BBC website/app] compare to other services you use for similar purposes?
  - Which services would you say are the easiest to use? Easiest to find content? And which are most difficult to use? Why do you say this?
- What about layout?
  - How does [BBC iPlayer] [BBC Sounds (including radio stations)] [BBC website/app] compare to other services you use for similar purposes?
  - Which services would you say have great layout? And which have poor? Why do you say this?
  - SOUNDS USERS: Who presents content the best? What about the 'wheel' on the Sounds app? How does this compare?
- What about recommendations?
  - How do these compare to other services you use for similar purposes?
  - Who does recommendations well? And who does them poorly? Why is this?
  - Does it make a difference whether the recommendations are on the home page or at the end of a [programme] [podcast] [article] etc? Why is this?
  - What type of things are you being recommended to [watch] [listen to] [read]? It is content you might not have considered before (such as nations content, learning etc) or is it pretty much like the content you already [watch] [listen to] [read]?
- Do you come across BBC content on social media? So Facebook, for example, recommending/showcasing BBC content? Where have you seen BBC content promoted on social media?
  - Do you engage with this?

- What role does social media play in helping you to find new-to-you things on BBC iPlayer/BBC Sounds (including radio stations)/the BBC website/app.
  - Why might you use social media rather than going direct to the service to seek it out?
- What is it that others do to help you find content that you are looking for that the BBC could learn from?
  - What do other services do to help you find content that you are looking for? What could the BBC learn from this?

## Discoverability (25 mins)

*READ OUT: We are now going to be talking about how you discover new-to-you types of content or genres of content to watch/listen to/read. This is different from your ability to find content you know you want to watch/listen to/read, this is about the service bringing new content to you and helping you to discover it on their service.*

- What about when you don't know what to watch/listen to/read, what do you typically do when you want to come across or be inspired by something new-to-you?
  - Where would you typically go first?
  - How do you tend to go about finding new-to-you content on this service?
- Who does this well in terms of helping you to discover something new-to-you?
- Or maybe you do know what you want to watch/listen to/read, but are recommended or come across something to watch/listen/read while going on for what you initially want to find...
- What is the role of the following in helping you find something new-to-you?:
  - Recommendations
  - If you watched this
  - Most popular
  - Genre categories/groupings
  - Trailers
  - Watching live content (have you ever come across anything that's caught your interest when watching live TV?)
- Have you seen these things on [BBC iPlayer] [BBC Sounds] [BBC website or app]?
  - Which ones? Have you use them? How inspiring were they? Did you do anything as a result of seeing recommendations/if you watched this, etc.? What did you do?
- Which other services you might use does each of these well and why?
  - What do they do to achieve this? How do they compare to [BBC iPlayer] [BBC Sounds] [BBC website or app]?
- Would you ever go to the BBC iPlayer/Sounds/web if you don't know what you want to [watch] [listen] [read]? Why?
- Thinking about your usual behaviour and also what you learnt from the homework task, how does the BBC compare in terms of helping you discover its content? What could they learn from others?

- YOU SAID IN THE HOMEWORK TASKS THAT BBC COULD DO MORE/LESS/SAME TO HELP YOU DISCOVER NEW-TO-YOU CONTENT: Can you tell me a bit more about that?
  - How easy to do you find it to discover new-to-you content on BBC iPlayer/BBC Sounds/the BBC website or app? Why is this?

**SHARE SCREENS WITH PARTICIPANTS SHOWING THE RELEVANT BBC SERVICE I.E. IPLAYER/SOUNDS/WEBSITE.**

- So, what would you normally do when you come onto this site/service?
  - Where would you head first?
  - Where else would you look?
  - Where would you go if you were looking to find something new-to-you and didn't know what you wanted to watch/listen to/read?
  - To what extent do you rely on this service to learn what you like to watch/listen to/read, etc and suggest this content to you, or do you simply expect to be able to find it there and so browse until you find it?
- What more could the BBC do to help you discover new-to-you content on these services?

**SCROLL THROUGH CATEGORIES/MENUS**

- Which of these are helpful in discovering new-to-you content?
  - Which of the menus/tabs/scrolls would you use? How would you use this? Why/Why not use?
  - Who is doing this better? How? What could BBC learn?
  - What specifically makes this work better e.g., how much is this the content itself vs. the way it serves it up to you? How does this work?
  - What impact does these sites being better in this respect have on your use of these services? Are you more likely to discover and watch new-to-you content on these services as a result?
  - What impact does the way content is presented to you have in helping you to discover new-to-you things e.g.:
    - Autoplay trailer previews (as in Netflix) – where when you land on a films/series it automatically plays the trailer.
    - Imagery (what images?)
    - Descriptions
- STOP SHARING: How relevant are the recommendations for new-to-you things to watch/listen to/read from the BBC vs other providers?
  - How well does the BBC do in terms of making recommendations that help you discover something new-to-you or different?
    - IF NEGATIVE REACTION: How could this be made better?
  - Where do these recommendations come from on the BBC/which part of the page/which element of the site do you use?

- Which are the most useful elements in terms helping you to discover new-to-you content on the BBC?
- What role does social media such as YouTube, TikTok, Facebook and Instagram play in the discovery of new-to-you informational content?
  - Can you recall any occasions when BBC content has been promoted on these social media platforms and you have then gone onto the BBC platform to watched/listened/read this?
  - Do you ever watch/read/listen to BBC content on these social media platforms? When/What type of content? Do you like to see BBC content on these platforms?
    - Do you value this? Is it useful to see BBC content on social media? Why/why not?
- What about helping you to try out and discover new-to-you genres of content or types of content that you might not normally – QUICKLY SHOW STIMULUS A TO REMIND ON GENRES
  - How does the BBC compare with other services you use in helping you to discover new-to-you types of content?
  - How does the BBC help you do this?
  - What more could they do? Who does this better? How?
- Would you know where to find local and regional content generally on this service? Why/Why not?
  - What might make it easier to discover and explore this type of content?
- ASK VIDEO/AUDIO: You said in the homework task that you do/don't use BBC iPlayer/BBC Sounds for the News? Why is this?
  - Would you ever turn to these services for news?
  - What might encourage you to do this more?
  - How easy is it to discover news and current affairs content on this service? Is this something you recall coming across?
  - Do you ever use these services to find out about nations/regional news?
  - Again, how easy is it to discover this content on the service? Would you know how to find these programmes on iPlayer/BBC Sounds?
- ASK FOR BBC ONLINE ONLY: You said in the homework that you do/don't turn to the BBC website or app for more local, nations and regions based, content? Why is that?
  - Who, if anyone, does this better? Why?
  - How can the BBC make this type of content more interesting/appealing to you?
  - You said that it was easy to find this content on the BBC website/app? What makes it easy/difficult?
  - What could they do to make this easier? Where might you expect to find it?
  - What could they learn from others in this respect?
- How easy is it to discover learning based content on this service – be that for yourself or helping with homework? Why/Why not?

- What might make it easier?
- How does iPlayer/BBC Sounds/the BBC website and app compare with other services in terms of helping you discover learning based content?

## TO END (5 MINS)

- Go around the room and ask everyone to say the one key thing they would change about the BBC service or content to make it easier to discover new-to-you things?

# Ofcom: Reconvened Depth Interviews – customer journeys (60 mins) iPlayer version only

## Introduction (2 mins)

Thanks a lot for agreeing to take part in the follow up session today. We are keen to hear from you in a one-on-one interview.

**Overtly reference broad objectives:** As you are already aware a lot of this project is about how you use the different BBC services we talked about, and how easy it is to find what you want on BBC iPlayer and how easy it is to discover something new and also how distinctive the BBC iPlayer is and how distinctive the content is

We really enjoyed the group discussion and got a lot out of it from our point of view, but we also wanted to speak to people on an individual basis and really get into some of the detail about how you go about finding things to watch via the services we talked about in the group. Specifically, we are wanting to talk about the following:

1. A bit more about you and your consumption habits and behaviour in this area and in relation to the specific service we talked about
2. Explore how your journeys worked in the past, based on what you told us about in your original pre-task/homework
3. Explore a couple of 'live' journeys with you to really get into the detail of how you might go about accessing some content via BBC iPlayer and how this compares with alternatives

As a reminder:

- We are recording the session but your identity will remain anonymous
- There is no right and wrong – we are just really interested to get your views and also understand where these come from/what is driving these.
- The session is up to an hour.

## Overall impressions from the previous session (3 mins)

- Thinking about the last time we met in the group what were your impressions of what we discussed?
  - What struck you the most about what we talked about? What stood out?
- Did it make you think differently or consider anything new about the BBC's iPlayer that we talked about(reference relevant services)

- How, if at all, did what we discussed change how you have been thinking about or using the BBC iPlayer we discussed since?
- Is there anything that you have noticed or that has occurred to you when using the BBC iPlayer we talked about following the discussion?
  - Can you give examples of anything you have noticed?

### **Media consumption habits and behaviours re the relevant service (20 mins)**

**Please Note: Make sure that some of this doesn't repeat what has already discussed in the main groups**

It would be great if we can revisit some of the areas you specifically talked about in the group discussion, and talk a bit more in more depth and detail about how you actually go about watching content that you want – (focus on BBC Sounds, BBC Websites/apps, BBC iPlayer accordingly)

- Tell us a bit more about how you generally use this service
  - When are you using it, for how long, where are you, what are you doing at the time
- Thinking about the experiences you talked about in the group discussion - how would you describe what you were wanting to get out of the experience during these different moments when you might use the service
  - E.g. something in the background, keeping you informed, learning something, escape into something really engaging, matching or changing your mood etc
- Where does it fit into your usage of other services that you may use
  - What other services (non-BBC) do you compare it to that meet similar needs
  - Why go to the BBC iPlayer and not one of the other services you use
  - What differentiates the BBC iPlayer from the other services you use, what if anything is distinct about the BBC offer in this area
- Just focusing back onto the BBC iPlayer
- Generally, how easy or difficult is it to find what you want via this service
  - What things make it easier or harder to find what you want
  - What things do you find are most helpful in finding what you want?
  - What things do you feel make it harder or more difficult to find what you want?
- Again, just thinking about the BBC iPlayer that you use
- Thinking about new content specifically – and when we say 'new' we mean something that is new to you individually not just something that is newly released
  - How do you become aware of some new content that might be of interest to you
  - What are the different ways you become aware of something new that is available on the BBC iPlayer that you might be interested in?
  - For example, do you recall coming across any advertising/recommendation/word of mouth?
  - How much new content consumption is prompted by some external prompt like the ones we have just talked about, versus by browsing on the service
- Thinking about when browsing on the iPlayer
  - How easy or difficult is it to find something new to you that you want to watch

- What things make it easier or harder to discover something new to you
- In terms of finding what you want, or discovering something new to you - what other services do you compare it to that you typically use alongside the BBC iPlayer
  - How do they compare in terms of how easy or difficult it is to find content you want to consume
    - What can they learn from the BBC iPlayer in terms of being able to easily find things
    - What can the BBC learn from them
  - How do they compare in terms of being able to discover something new
    - What can they learn from the BBC iPlayer in terms of being able to discover something new
    - What can the BBC learn from them
  - What about the quality of what they provide, how do they compare in terms of quality
    - What could the BBC learn from them
  - What about offering something that is different or distinctive – how do they compare with the BBC iPlayer?
  - What is different or distinctive about the other service – how would you describe this?
  - What is different or distinctive about what the BBC iPlayer provides – how would you describe this?
- Revisit **behaviour change task** in light of overall impressions above
- Moderator: use respondents pre task responses to remind them if needed
- When you were asked to use an alternative service to the one you normally used how did you compare the experience
- How did it compare with what you normally use in terms of:
  - What differences really stood out to you
  - What did you miss the most about what you normally use
  - What did you like about the service you tried
  - How easy was it to find something in comparison
  - What made it easier, what were the pain points
  - How easy was it to find something new in comparison
  - How did you compare the BBC content with the alternative content
  - Was there anything different or unique about the BBC content compared to the other service – if so how would you describe this uniqueness?
- Revisit the **focused discoverability task** in light of previous discussion
- Moderator: use respondents pre task responses to remind them if needed
- How did you find the experience of looking for something that was completely new and different to you?
  - How did you go about finding something completely new or different to you?

- How difficult or easy did you find the experience of finding something completely new and different to you?
- What were the things that made it easier?
- What were the things that made it harder?
- Tell us about what you chose in the end, what was it and why did you choose it?
- Did you come across anything else that you remember that maybe you considered?
- Did you look at or consider anything else before that?
- If you didn't choose that content, why was this, why did you keep looking?
- What did you think about the range of possible options that you came across that were offered?
- What did you think about the quality of what was on offer and also what you chose?
- Having looked at what was available, and what you chose how does it compare with what you normally watch?
- How different or distinctive did it feel? Why do you say this?
- How does it compare to other non-BBC services that you have used?
  - How easy was it to find something completely new and different to you?
  - How different or distinctive did the content feel compared to other services?

### Setting live tasks for respondents (30 mins)

We now want to do some 'live' tasks and again really go through the journey step by step and for you to 'think out loud' about how you go through the journey. We will do two different journeys

Brief respondent on which pre task journey want to focus on

NOTE: Respondent will join interview on device that is relevant to their service and journey – (except TV)

- Ask the respondent to share their screen if appropriate
  - Screen sharing will be based on the device they used during their pre task i.e. either via their laptop/computer or smart phone
  - For TV related interviews the participant will need to be near their TV and talk the researcher through their journey – respondent to show them TV screen if able to
  - Researcher will need to have access to the service so they can also follow what the participant is describing – if not possible in every case respondent will just need to describe and show moderator
- Before we get into the actual journey can you just tell me a bit about what content you wanted to access
- MODERATOR NOTE: if respondent struggles with next question use pre task responses and what they may have said in group to help give them some options if they can't think of anything on the spot
- Live task 1: Imagine you already know what you want to watch/listen to/read
  - Think of something you know you want to watch/listen to/read



- Go on the **BBC iPlayer** and show us what you would do
- Again think out loud through each step
- Tell us about how easy or difficult you find the process
- Highlight the things that make it easier versus pain points
- Now think of something else you want to watch on a competitor service – please think of something in a reasonably similar vein/closely related
- Go on **a competitor service** and show us what you would do
- Again, think out loud through each step
- Tell us about how easy or difficult you find the process
- Highlight the things that make it easier versus pain points
- Overall how do you compare the BBC iPlayer with the competitor
  - Which made it easier to find what you wanted and why
  - What can they learn from each other about how to help you find what you want more easily
- Live task 2: Imagine you don't already know what you want to watch/listen to or read and you want to discover something new
  - Go on the **BBC iPlayer**
  - Show us what you would do and think out loud about each step
  - Tell us about how easy or difficult you find the process
  - Highlight the things that make it easier versus pain points
  - Go on **a competitor service**
  - Show us what you would do and think out loud about each step
  - Tell us about how easy or difficult you find the process
  - Highlight the things that make it easier versus pain points
  - Overall how do you compare the BBC iPlayer with the competitor
    - Which made it easier to find or discover something new
    - What can they learn from each other about how to help you find or discover something new via their service
- Explore and compare distinctiveness – how does the BBC content compare with the competitor content
  - What if anything makes the BBC content different
  - Does it feel distinctive in any way, how would you describe what is distinct or unique about BBC content

### **BBC Online services summary (5 mins)**

- Thinking about everything we have discussed over this research and the BBC iPlayer
- What should the BBC iPlayer do in terms of
  - Making it easier to find what you want
  - Making it easier to find or discover something new

- What things do they do that are most helpful and that they should **carry on with**?
- What things are the least helpful or most painful that they should **stop doing**?
- What things should they **start doing**?
  - Discuss responses and reasons behind them i.e. how these suggestions would help participants find what they want more easily and or discover something new

**THANK AND CLOSE**



# THANK YOU

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