Show Discovery & Tune-In
Understanding the Role of Advertising
Today’s advertisers must navigate a rapidly expanding entertainment universe, where premium content is more prevalent than ever before, and TV show fandom is increasingly viewed as a form of social currency. The number of platforms and devices used for content consumption has increased and new providers are constantly entering the space. Viewers are also adapting to these shifts, changing where they watch shows, how they watch shows, and what convinces them to even check shows out — all while trying to balance their entertainment endeavors with a seemingly endless list of commitments that demand a large portion of their time.

But how exactly are these behaviors of discovery and drivers of tune-in changing? And what can advertisers do to break through in this complex, crowded, and highly competitive environment?

Xandr partnered with Insight Strategy Group to find the answer. We conducted a nationwide survey among N=2,000 TV viewers, and virtual Discovery Diaries among N=25 respondents. Our findings unpacked the state of show discovery and tune-in, identifying the optimal role for advertisers and how they can best lean into this new environment in ways that captivate viewers and drive action.
Viewers today are voracious content omnivores. They average watching about 5 genres and 8 shows per week, representing a greater volume and breadth of content than ever before.

But this doesn’t mean their appetite for “new” has been satiated. While 74% of adults 18+ have watched a returning show that they’ve already seen in the past 6 months, 3 in 4 have watched a show that’s new to them during that same timeframe.

There are some shows that I am following right now that I really like such as FBI, Elementary, and Black-ish. This weekend I had some time to stream and decided to do House of Cards season six and to start Narcos: Mexico.

— Male, Age 41

Viewers are using all the content they’re watching to meet a range of needs that are satisfied by various genres and shows, across a mix of high and low emotional and time investment.
Given the weight viewers place on TV in their lives, advertising plays an important role. Ads help viewers learn about new shows and curate those that connect with their needs, saving them time navigating through the clutter on their own, and ultimately helping them choose something they’ll enjoy.

Making the right viewing choice is critical, especially given that the time viewers have to enjoy shows is finite, while the shows that they can pick from are practically infinite.

About 1 in 3 viewers say that shows remain on their watch list and unwatched because they don’t have the time to watch them, and 29% say that there are too many other shows they’d like to watch and that’s why they haven’t started another.

1 in 3
say they don’t have the time to watch shows in their watch list

29%
say there are too many other shows they’d like to watch
How Viewers Watch...

I didn’t start the show yet because I was in the process of moving and I wanted to make sure that I had enough time to complete the season in less than a week.

— Male, Age 28

Viewers are watching shows across linear and digital platforms, with roughly 2 in 3 viewers consuming content in both places.

However, connecting with viewers isn’t as easy and predictable as it used to be. Viewers have more control over when they watch TV shows and aren’t abiding by standard network schedules. Most notably they are creating binge-watching moments for themselves.

**Viewers plan opportunities to maximize their content experience and time, averaging about 5.5 hours per session.** As a result, the timeframe in which they actively watch and finish shows has been shortened and is more sporadic.

82% finish the show within a week when binge-watching
Although viewers have condensed and shifted the period of time spent watching a particular show or series, the length of time for consideration before watching is longer than anticipated. While TV show providers have historically advertised for their show 3 days before going live, the majority of viewers are actually first discovering and then considering shows at least a couple of weeks before tuning in.

Why is this the case? Audiences today have a higher bar for what they consume and need this time to strategize their viewing choices. This is especially true of shows that demand higher emotional investment. Think: story-driven dramas and world-building sci-fi narratives.

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**Roughly**

- 3 in 4 are first exposed to a show...
- 2 in 4 first consider a show...
- AT LEAST A COUPLE OF WEEKS BEFORE WATCHING

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I like hearing about premieres about a month in advance so that I can keep track of new shows coming up. A month in advance gives me enough time to prepare what my TV watching is going to be.

— Female, Age 28
The Role of Advertising

So, what does this all mean for advertisers?

Opportunity exists between initial consideration and eventual tune-in to remind viewers and help them decide which shows to watch live. The doors are open to connect with viewers earlier in their discovery journey and more often – driving both tune-in and continued viewership across their fluid viewing occasions.

Although viewers discover shows through many different avenues including social media, friends and family, and even recommendation algorithms, one thing rings true... TV advertising as a form of connecting with viewers hasn't gone away.
TV advertisements are the top way that viewers say they first remember hearing about a show. Overall, 56% of viewers see shows being advertised on TV, ahead of 43% who hear about shows through friends/family in person, and 22% who hear about them from friends/family on social media.

Not only is show advertising on linear TV memorable and still garnering high levels of reach, but it's also creating impact and driving action.

80% say that seeing a TV ad makes them more likely to watch the show

70% say that seeing a TV ad inspires them to do more research on the show

57% say that seeing a TV ad inspires them to tell their friends about the show

56% say that seeing a TV ad for a show makes them think that the show is more reputable

79% of those who watched a new show said that the TV ad they saw was the most influential of all ads they saw.

TV advertising for shows is able to drive these key behaviors because it's credible and is oftentimes most influential on the final decision to tune-in.

I like to find out about new shows mostly on TV. I like them to be put in front of me so that it’s easy to find.

— Female, Age 38
Successful advertising must always connect with viewers, inspire them to act, and drive on-going engagement. When it comes to show ads on TV, this means advertising must be relevant to viewers’ interests, come from a trustworthy source that they are comfortable with, and be informative about when, where, and how to watch the show.

90% remember that the influential ad they saw came from a network/platform they trust

88% remember that the influential ad they saw mentioned something relevant to their interests

88% remember that the influential ad they saw told them when they could watch (E.g., day, date, time)

An ad that is on a trustworthy network/platform is 60% more likely to inspire continued viewership.

An ad that mentions something relevant to their interests is 50% more likely to inspire continued viewership.

Leaning into these qualities in advertising helps shows stand out in viewers’ minds and gives them what they need to feel confident that a show is worthy of their time investment.

I would say that TV commercials have the most influence on me because they are able to give the most information about a show in the least amount of time.

— Male, Age 29
While linear TV is key to show advertising, cross-platform marketing is a must given that viewers rely on an average of 2-3 different modes of show discovery.

Although many of the top combinations rely on TV, word of mouth, and streaming algorithms, our research shows that those who are exposed to both linear and digital advertising for TV shows find TV advertising as more influential on their decision-making process than those who are not.

Of those exposed to both linear and digital advertising...

74% say that seeing a TV ad for a show makes them want to tell their friends about the show (+17 pts vs. overall)

85% say that seeing a TV ad for a show inspires them to do more research on the show (+15 pts vs. overall)

— Male, Age 29

My favorite way of learning about new shows is probably a combination of commercials and hearing about it from friends.
The End Result

Despite today’s increasingly complex, expanding media landscape, linear TV advertising remains a core mode of show discovery that can cut through the clutter to drive engagement. Its strength as a platform can be multiplied through effective marketing and promotion that feels relevant, trustworthy, and informative. Its impact is also amplified when combined with other forms of advertising, including on digital platforms.

As such, in a world where viewers are inundated with choice and new demands on their attention, TV advertising plays a pivotal role in managing this environment — helping viewers maximize their time by minimizing complexity. For show providers, this means TV ads remain a critical part of a strong cross-platform campaign strategy, and a key component in their marketing mix.