

# CUTTING THROUGH THE CLUTTER

---

**Driving tune-in and retention amid  
unprecedented show discovery**

Insights Powered by DIRECTV Advantage

**DIRECTV**  
ADVERTISING



## INTRODUCING DIRECTV ADVANTAGE

DIRECTV's Data Solutions Suite brings together the best of data, technology and people to better understand your audience, measure the impact of your media cross-platform, and unlock new value for your brand.

### AUDIENCE

IDENTIFY | TARGET

Leverage DIRECTV's deterministic audience and viewership data to identify and target your most valuable consumer using DIRECTV viewership data, third-party data, or your own first-party data.

### CONNECT

PARTNER | EXPERTISE

Tap into a qualified team of experts to help navigate your data needs. Leverage DIRECTV's data partner ecosystem to access third-party data or match your own first-party data in a safe and compliant way.

### IMPACT

INSIGHTS | MEASUREMENT

Understand the impact of your media against brand goals with transparent and robust measurement, while unlocking valuable pre- and post-campaign insights.

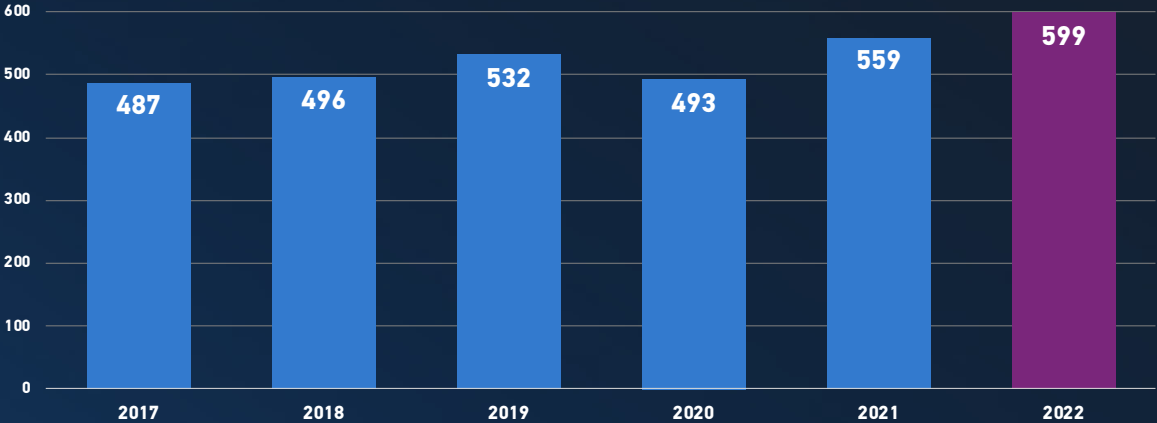


# QUANTIFYING CONTENT OVERLOAD

## Summiting Peak TV

Even the most passionate TV viewers would be hard-pressed to find the time to watch a single episode of each of the original scripted series that premiered across broadcast, cable, and streaming in 2022. According to FX Research, which has been tracking the annual volume of new programming for twenty years, **599 new English language, adult show titles aired in 2022, a 7% jump over 2021 and a 23% rise since 2017<sup>1</sup>.**

## Estimated Number of Scripted Original Series Across Broadcast, Cable, and Streaming<sup>1</sup>



With high production costs amid a souring economy, there is the chance that the content boom may soon go bust. Still, viewers today are toggling between video services as they discover an overwhelming amount of new content while also returning to the shows they enjoy. On DIRECTV alone in September 2022, 227 new seasons and series of general entertainment programming premiered and viewers **spent over a third of their time** with new programming on days with 15 or more premieres<sup>2</sup>.

## On DIRECTV in September 2022<sup>2</sup>...

227

new seasons and series premieres

Up to 39%

daily time spent with new entertainment programming



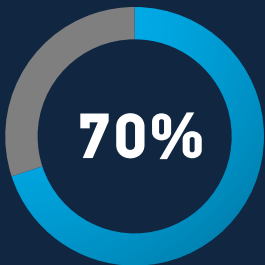
# CORD STACKING DRIVES SHOW DISCOVERY

## Majority of Viewers Subscribe to Live TV and VOD services

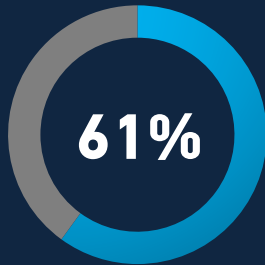
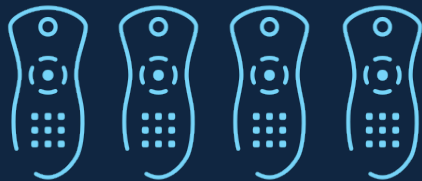
Driving the growth in program availability is the number of video services that have come to market in recent years, and **the majority of viewers are cord-stacking** – choosing to subscribe to streaming services in addition to traditional live TV.

According to a January survey of 3,000 US consumers A18-64 that watch at least an hour of TV shows or movies per week, **7-in-10 are paying to subscribe to both live and streaming on-demand video services**<sup>3</sup>. On average, this audience subscribes to 4 streaming video services, and 73% report that at least one of these paid subscriptions is ad-supported.

With access to so much content across platforms, **61% report keeping track of all the episodic series they want to watch but haven't gotten to yet**. Their lists run deep, logging an average 4-5 shows they plan on watching once they find time, which is no easy feat. Viewers are sampling from new series and seasons but they're also tuning in to news and sports on an at least weekly basis. For programmers, earning viewers' loyalty has never been more challenging.



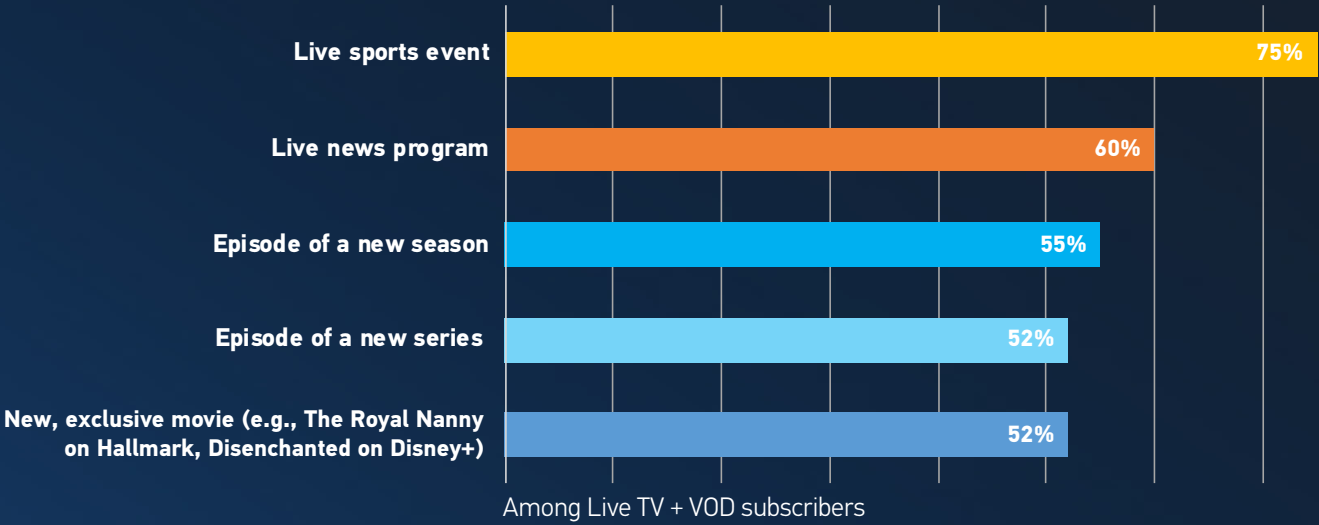
of viewers who pay for live and streaming VOD services subscribe to 4 VOD streaming services



of viewers keep a watch list tracking 4-5 shows they want to watch



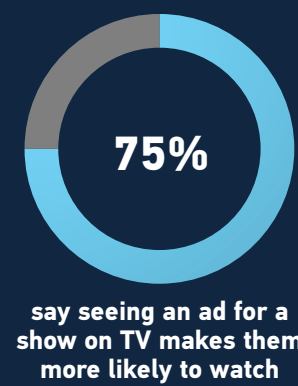
## % Report Watching At Least Weekly in December





# DRIVING INTEREST AND CONSIDERATION

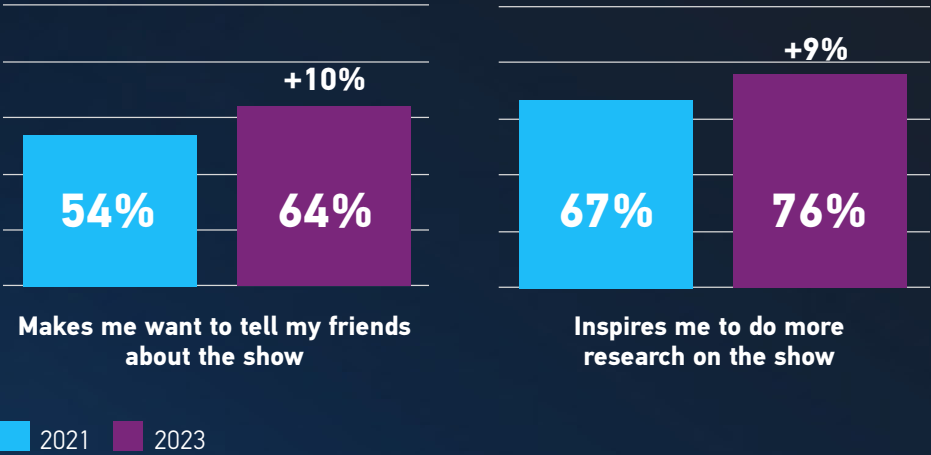
## Tune-in Ads on TV are Increasingly Influential



3-in-4 of all viewers say seeing an ad on their TV screen makes them more likely to watch the show that is being promoted. Compared to results from a 2021 survey<sup>4</sup>, viewers today are more likely to research the program they see advertised on their TV screens and to tell their friends and family about it.

Over the past two years, much more entertainment has been made available after 2020-2021 saw weaker supply due to pandemic-related production delays. With more shows to choose from than ever before, tune-in ads generate interest, consideration, and drive retention, especially when they appear on TV.

## Seeing an ad for a TV show on my TV screen...





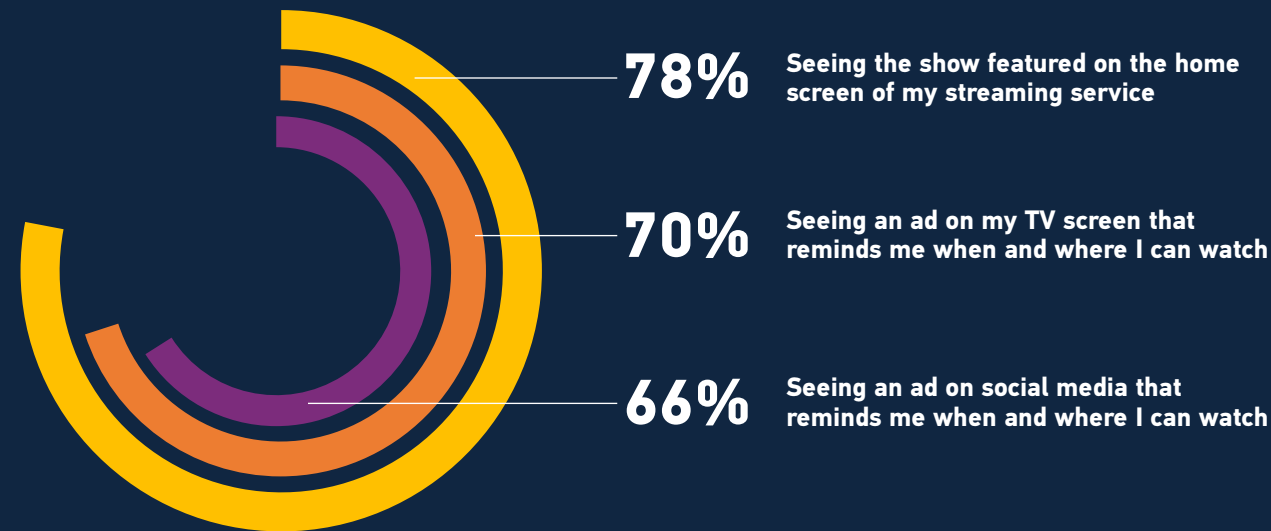
# DRIVING RECALL AND RETENTION

## A Holistic Promotional Strategy Drives Retention

Viewers watching live and VOD report the leading reason they'll tune back into a show is because they are excited to find out what happens next. In addition to imparting engaging storylines, shows must be top-of-mind so that viewers continue coming back for more. **78% say that seeing the show featured on the home screen of their streaming service will influence them to watch the next episode.**

Outside of in-platform promotion, advertising is key. Both ads that appear on a TV screen and on social media are considered very influential. **It is important that the ad communicate all the options for when and where viewers can watch as they are bouncing between their video services** and prioritizing which programs they'll binge, watch on-demand, or watch live when the episode airs.

## Factors Considered Very Influential to Watching the Next Episode



Among Live TV + VOD subscribers





# EFFECTIVE AD STRATEGIES

## The Advertiser POV



Whether based off years of internal learnings or viewership data from trusted sources, entertainment providers generally know who they want to reach when it comes to promoting their content. It's no surprise then that tune-in advertisers lead with an audience-first mindset.

**1-in-3 consider addressable TV advertising across linear and streaming to be a must-buy and nearly 9-in-10 are satisfied with the results from these campaigns.** Just over half say they use addressable to reach specific audiences.

Tune-in advertisers say more cross-screen opportunities would lead to their investing more in addressable. Reaching audiences on linear, CTV, and wherever they may be watching is important to all advertisers but especially to programmers who are looking to break through the crowded content environment.

## Tune-In Advertisers Weigh In on Addressable



**86%**  
are satisfied with their  
addressable campaigns



**51%**  
include addressable  
in their media mix for  
precision targeting



**33%**  
consider addressable  
a must-buy





# KEY TAKEAWAYS

1

**Tune-In Ads on TV Drive Results Across the Funnel**

Most viewers are watching content from both live and streaming video services. Ads that reach the right audience on their TV screens, whether via linear or digital delivery, can drive objectives from awareness and consideration to tune-in and retention.



2

**Drive Recall by Appearing Across Touchpoints**

Earning viewers' loyalty is challenging as the majority discover new content weekly. Keeping shows top-of-mind by advertising across media and taking advantage of promotional opportunities in-platform can help drive retention.



3

**Use Addressable and Audience-Based Strategies to Reach Likely Viewers**

Programmers can lean on supportive media partners to reach their intended audiences across screens as well as to identify new audiences that may be likely to tune in or return to watch the program being promoted.

