CONTENT DISCOVERY IN A MULTISCREEN TV WORLD

SURFING AND SCROLLING IN A SEA OF CONTENT

COMCAST
ADVERTISING

Contents

Introduction

For every viewer who has their heart set on their next show or movie to watch, there's another who has no idea what they will watch next – only that they want to watch something.

New research from Comcast Advertising shows that the process of discovering new content to watch across traditional TV and streaming can be impacted by factors in a provider's control (like platform interfaces), as well as those outside of it (like viewers' moods and social settings). Additionally, there are different trends in content discovery across the U.S. and Europe (EUR), which publishers and advertisers in both regions can use to shape strategies for raising awareness of content through ads and trailers.

This report analyzes trends for both Americans and Europeans in viewer satisfaction, decision-making behaviors, and technological features that publishers can leverage to strengthen provider recommendations and better understand viewer habits across regions.

Understanding Viewer Satisfaction

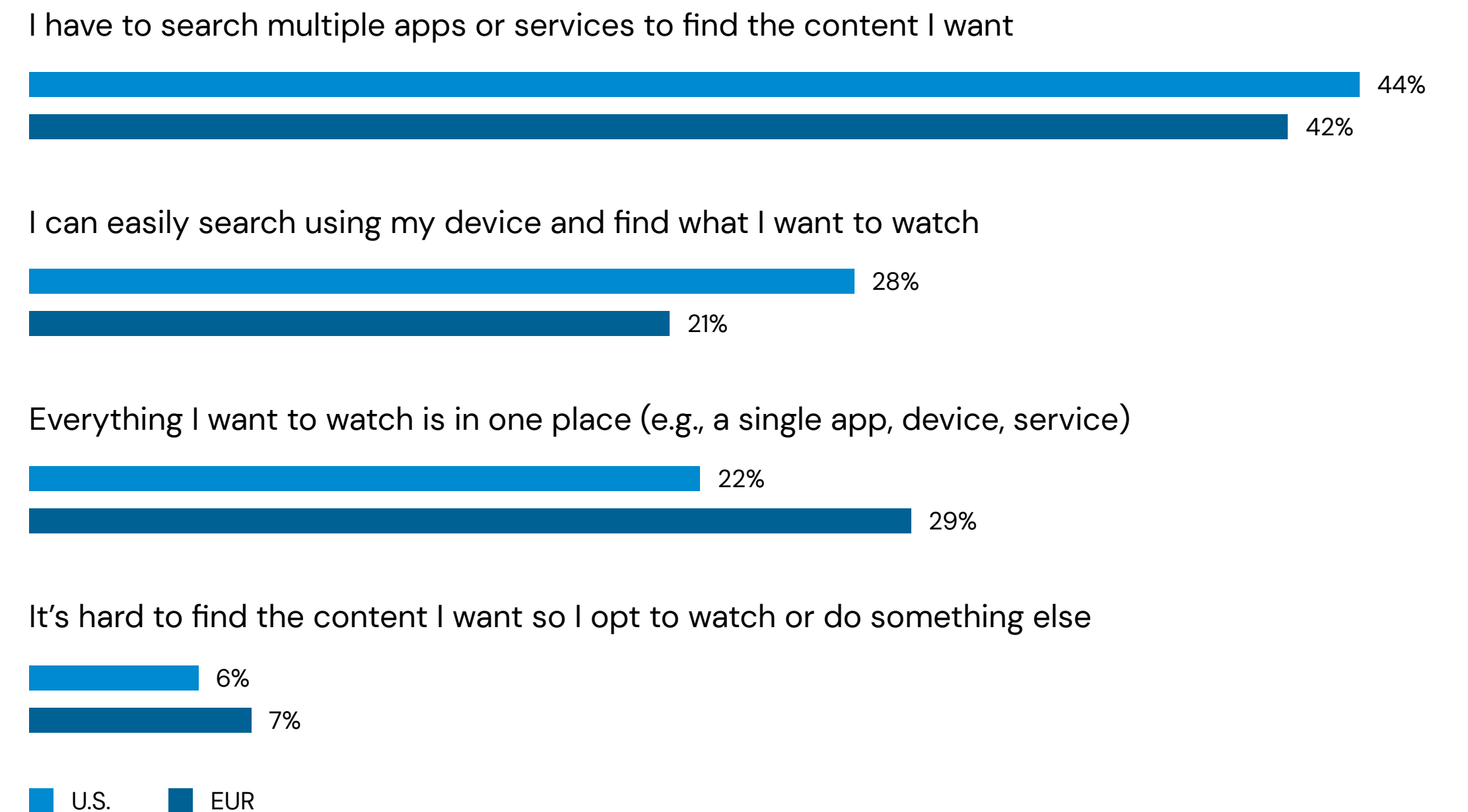## Fragmented experiences leave viewers frustrated

Only 28% of Americans and 21% of Europeans agree that they can easily find the content they want to watch on their device.

Only about a quarter of American and European viewers say they can easily find what to watch. In addition, **over 40% say they have to search multiple services to find their content**.

For those who have to search multiple apps or services, **51% of Americans and 46% of Europeans cited that the difficulty of finding new content can get frustrating** and lead them to rewatch something, a challenge for promoting engagement with new content.

Thinking about your experience when searching for something new to watch, which statement most accurately describes your experience?

I have to search multiple apps or services to find the content I want
- 44%
- 42%

I can easily search using my device and find what I want to watch
- 28%
- 21%

Everything I want to watch is in one place (e.g., a single app, device, service)
- 22%
- 29%

It's hard to find the content I want so I opt to watch or do something else
- 6%
- 7%

■ U.S.   ■ EUR

Viewers are spending a considerable amount of time searching for something new to watch

65% of viewers are spending 6+ minutes searching for new content, with decisiveness being key to search time. More decisive viewers begin the content discovery journey with a pre-established consideration set, creating a more intentional viewing experience.

European viewers tend to spend more time searching than Americans, since the majority are lean-in viewers (57% vs. 43%).

When looking for something new to watch, how long do you typically spend searching?
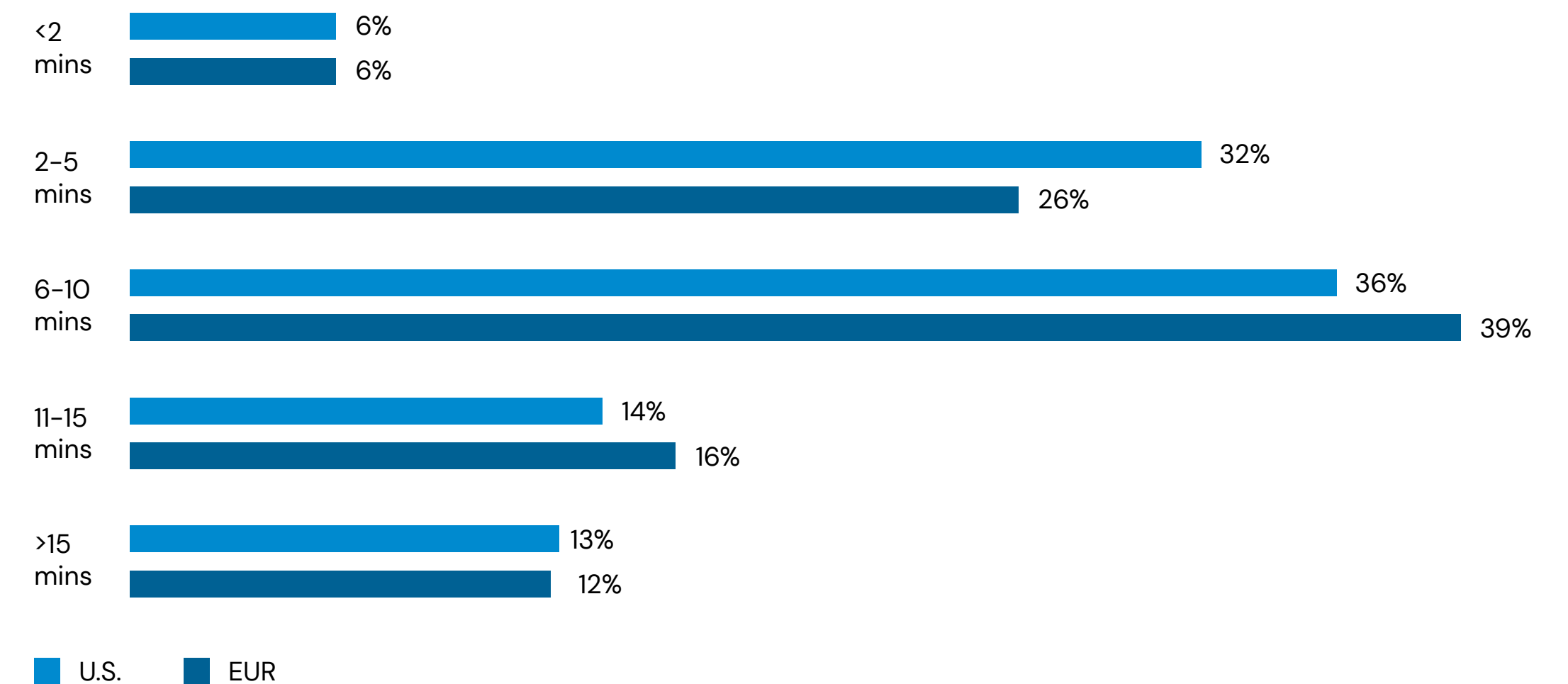
Time	U.S.	EUR
<2 mins	6%	6%
2–5 mins	32%	26%
6–10 mins	36%	39%
11–15 mins	14%	16%
>15 mins	13%	12%

■ U.S.   ■ EUR

Viewers' approach to content impacts how satisfied they are with the content discovery process

Audiences approach content in different ways. Their motivations, attentiveness, and decisiveness all play a role in how they feel about finding new content. It is important for content owners to understand these different motivations and offer different ways for viewers to experience new content.

01
Easily overwhelmed viewers

in the U.S. and Europe consider content volume the biggest challenge when finding what to watch.

02
Less attentive viewers

in the U.S. and Europe become frustrated more quickly than fully immersed viewers. Once they are frustrated, 53% will watch something they have seen before or watch something else entirely.

03
Indecisive viewers

in the U.S. are 80% more likely to spend 11+ minutes deciding what to watch, compared to decisive viewers.

04
Social viewers

in the U.S. are heavily influenced by the opinions of friends and family, and their overall satisfaction is contingent on the decisiveness of the group watching.

05
Detached viewers

in Europe – those who cite they are usually detached, rather than attached to characters in a TV show – showcase less satisfaction.

Source: Comcast Advertising survey conducted through Cint in December 2023. U.S. N=1500, EUR N=1000. Qualifying criteria: Adults 18+ who searched for or watched something new in the past three months.

Unpacking Viewer Decision-Making

Looking for content means a lot of surfing and scrolling

How multiscreen TV viewers find content:

Percentage of users who channel surf or scroll a guide/app

62%
of Americans

55%
of Europeans

Percentage of users who type or speak the name of a program

34%
of Americans

43%
of Europeans

Percentage of users who use a different method

4%
of Americans

2%
of Europeans

Source: Comcast Advertising survey conducted through Cint in December 2023. U.S. N=1500, EUR N=1000.
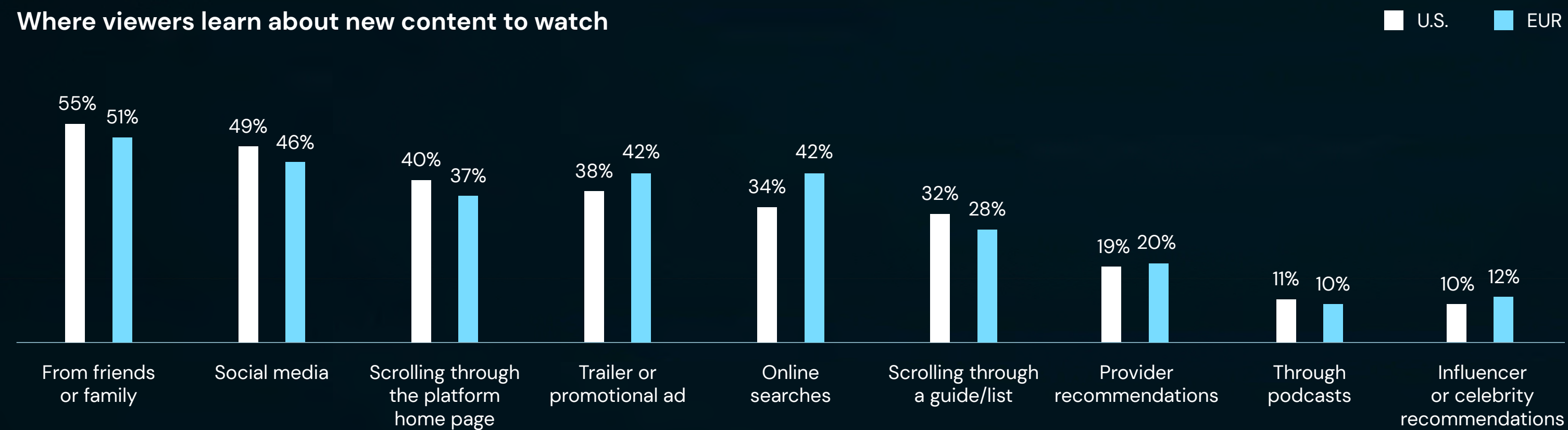Qualifying criteria: Adults 18+ who searched for or watched something new in th past three months.

As a majority of people surf or scroll to find content, they pass by a multitude of content they may or may not have heard of, presenting a huge opportunity for publishers to promote material.

Social circles play a big part in how viewers learn about new content

Where viewers learn about new content to watch

■ U.S.　■ EUR

Category	U.S.	EUR
From friends or family	55%	51%
Social media	49%	46%
Scrolling through the platform home page	40%	37%
Trailer or promotional ad	38%	42%
Online searches	34%	42%
Scrolling through a guide/list	32%	28%
Provider recommendations	19%	20%
Through podcasts	11%	10%
Influencer or celebrity recommendations	10%	12%

Source: Comcast Advertising survey conducted through Cint in December 2023. U.S. N=1500, EUR N=1000. Qualifying criteria: Adults 18+ who searched for or watched something new in the past three months.

Viewers in both the U.S. and EUR are most heavily influenced by socialization – receiving recommendations from friends, family, and colleagues –when it comes to finding new content to watch. U.S. viewers are more likely to be influenced by platform home screens, but EUR viewers are more often influenced by promotional ads and significantly more likely to do their own research via online searching.
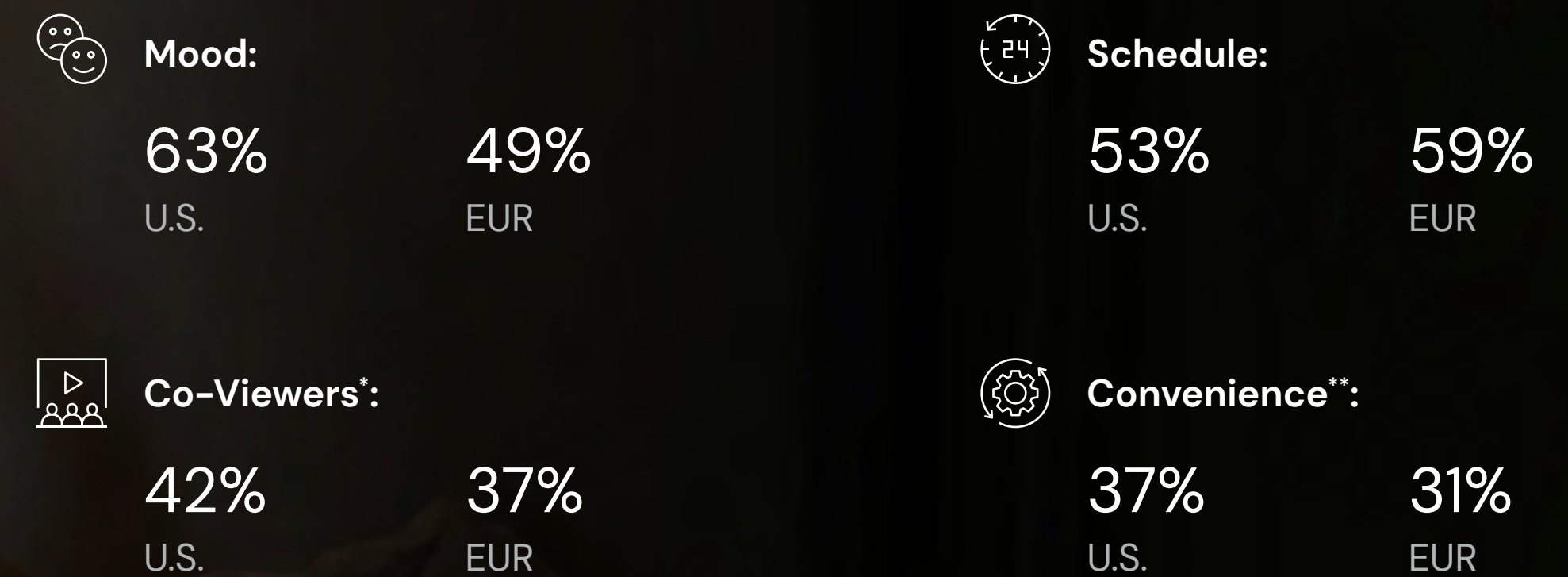
American and European viewers' social circles – both in person and online – serve as their most significant sources of learning about new content.

Genre is foundational, but situational factors also impact viewer choice

78% of Americans and 75% of Europeans say that genre will impact their decision to watch. Situational factors also impact their choice including:

Mood:

63%	49%
U.S.	EUR

Schedule:

53%	59%
U.S.	EUR

Co-Viewers*:

42%	37%
U.S.	EUR

Convenience:**

37%	31%
U.S.	EUR

💡 **Genre is foundational to content choice across the U.S. and EUR, but situational factors play a role in decision-making too. U.S. viewers are more likely to be impacted by their mood whereas EUR viewers' show selection is more dependent on their schedule.**

*In this case, co-viewers refers to who the viewer is watching with. **In this case, convenience refers to how easy the content was to find.

Source: Comcast Advertising survey conducted through Cint in December 2023. U.S. N=1500, EUR N=1000. Qualifying criteria: Adults 18+ who searched for or watched something new in the past three months.

Examining the Role of Recommendations and Promotion

Platform user experiences play an important part in highlighting content to viewers

Organizing content in an easily digestible way can help viewers who feel overwhelmed.

The home screen plays an important role for both U.S. and EUR viewers, with **more than half citing they have watched recommended content there**.
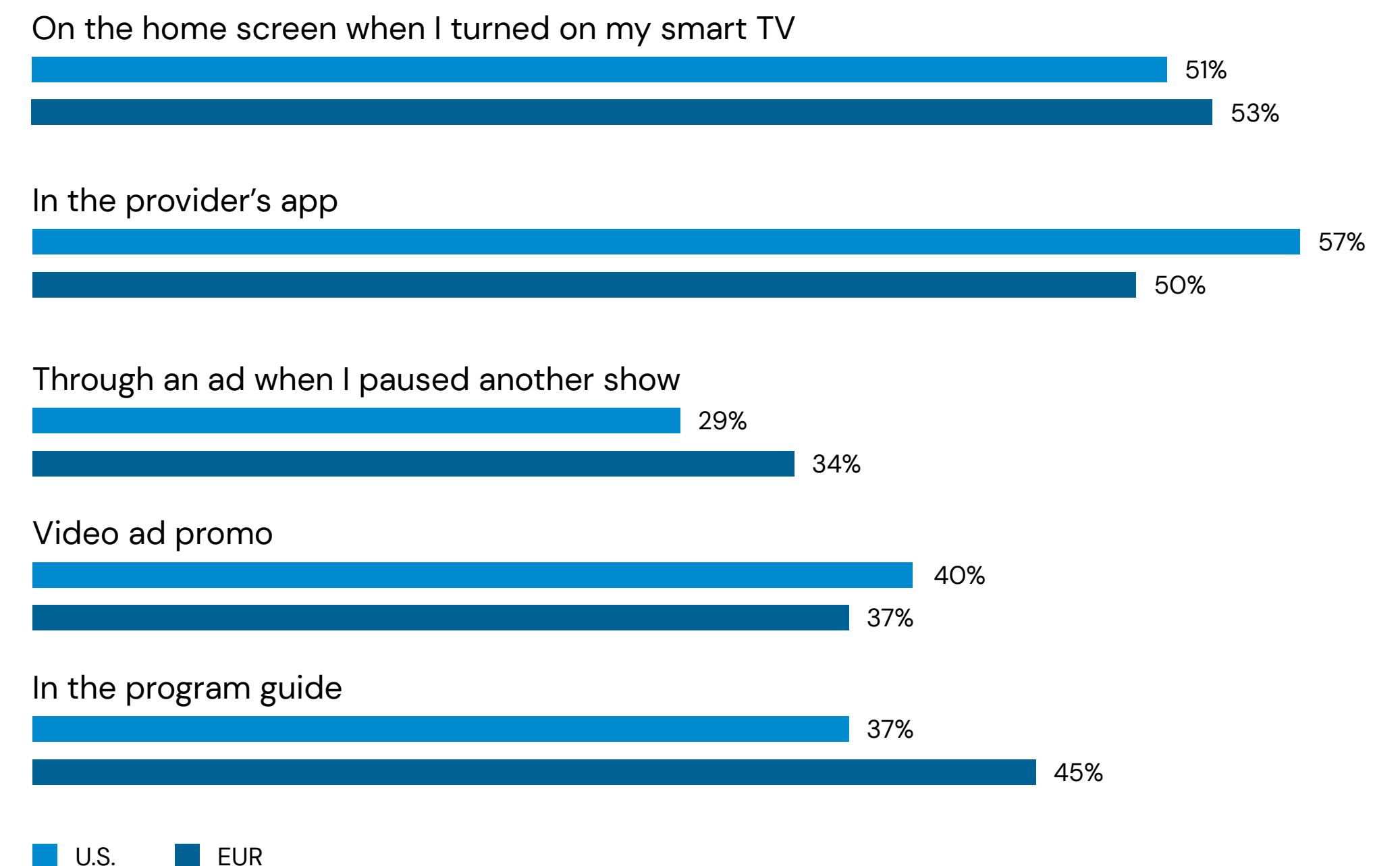
American viewers are 14% more likely (57% versus 50%) to find and watch provider-recommended content in the corresponding app, and European viewers are 22% more likely (45% versus 37%) to find and watch content through the program guide.

With just 53% of Americans and 56% of Europeans rating their experience of navigating streaming apps above average, providers play an increasingly important role in the viewer's content discovery process.

Where Viewers Have Found and Watched Provider-Recommended Content

On the home screen when I turned on my smart TV
- 51%
- 53%

In the provider's app
- 57%
- 50%

Through an ad when I paused another show
- 29%
- 34%

Video ad promo
- 40%
- 37%

In the program guide
- 37%
- 45%

■ U.S.   ■ EUR

# Provider recommendations have room to expand their impact

Most viewers do not regularly watch shows recommended by the provider. The top reason viewers are hesitant to do so is that the recommendations are not always reflective of their individual tastes in a multi-person household.

📢 **The Value of Promotion**

38% of Americans and 42% of Europeans typically learn about new content to watch through trailers or promo ads. However, 85% of consumers are likely to be influenced to watch provider-recommended content if they have seen an ad or trailer for the content previously.

How often do you watch shows recommended to you by the provider?

U.S.
- 59%
- 28%
- 8%
- 5%

EUR
- 47%
- 33%
- 15%
- 5%

- ■ Very Often
- ■ Often
- ■ Occasionally
- ■ Rarely/Never

💡 **Publishers must create multiple avenues of awareness, like reaching viewers while they are surfing with native ads and reaching viewers while they are watching with promo ads.**
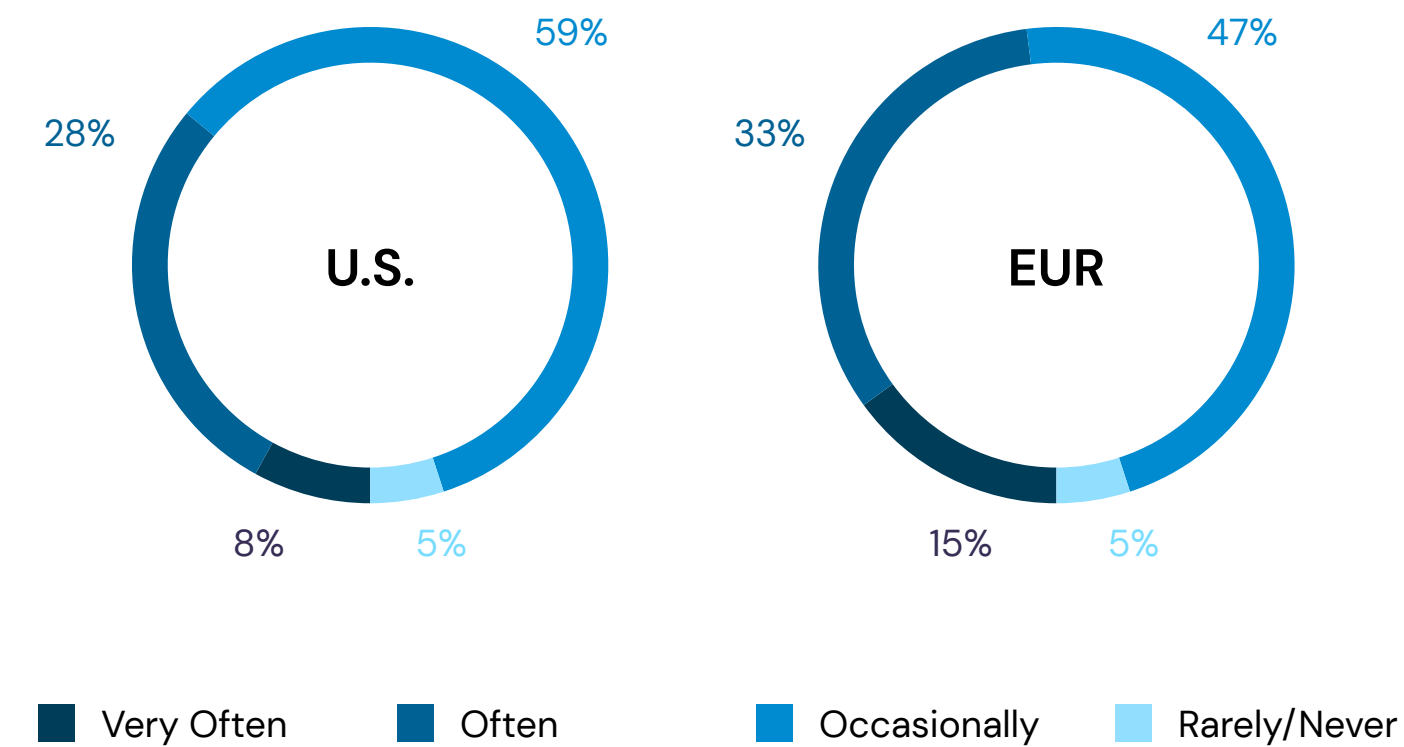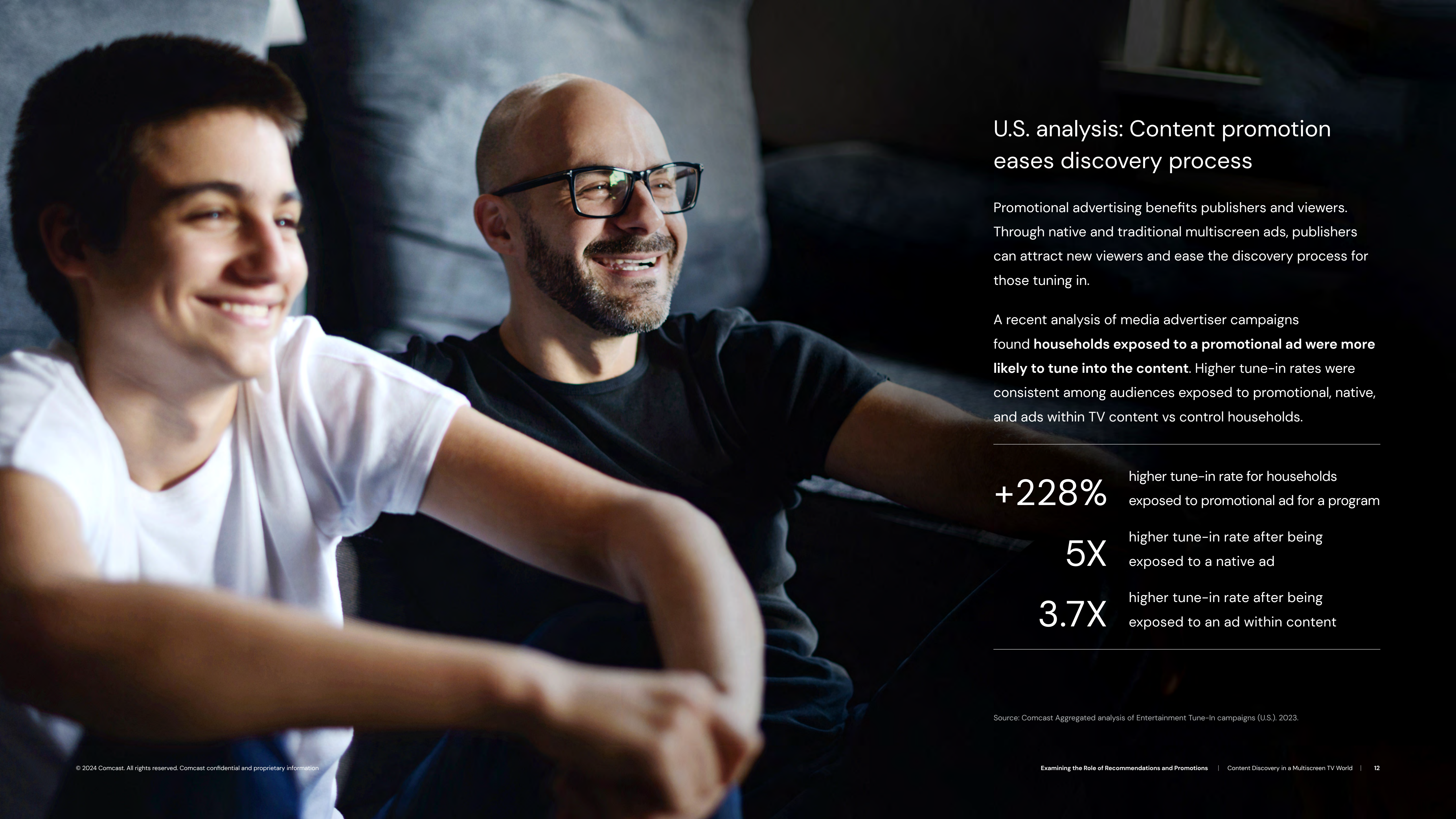
U.S. analysis: Content promotion eases discovery process

Promotional advertising benefits publishers and viewers. Through native and traditional multiscreen ads, publishers can attract new viewers and ease the discovery process for those tuning in.

A recent analysis of media advertiser campaigns found **households exposed to a promotional ad were more likely to tune into the content**. Higher tune-in rates were consistent among audiences exposed to promotional, native, and ads within TV content vs control households.

+228% higher tune-in rate for households exposed to promotional ad for a program

5X higher tune-in rate after being exposed to a native ad

3.7X higher tune-in rate after being exposed to an ad within content

Source: Comcast Aggregated analysis of Entertainment Tune-In campaigns (U.S.). 2023.

Conclusion

With the proliferation of content across platforms, viewers in the U.S. and EUR frequently use more than one single service or place to access all their content. Viewer satisfaction is largely contingent on the preference for choice, attentiveness, decisiveness, and with whom someone is watching. What they ultimately choose to watch often depends on their mood, schedule, co-viewers, and the convenience of finding the show.

Publishers can consider using these findings to continue to enhance the content discovery experience, especially for easily overwhelmed viewers who are eager for a trusted source to help them navigate the waters of options.

Viewers, too, can turn to connected devices that are dedicated to improving content discovery, so that they can more easily connect with content they love.

Appendix

European Market Comparison

Understanding Viewer Satisfaction

Finding content is a fragmented experience

41% of Europeans stated that they have to search multiple apps or services to find the content they want.

Searching multiple apps or services is particularly commonplace in Spain and the UK. In Germany and the UK viewers who go through multiple apps to find content are likely to get frustrated and often choose to rewatch content, a challenge for promoting engagement with new content.

Thinking about your experience when searching for something new to watch, which statement most accurately describes your experience?

Country	Value
UK	49%
France	31%
Spain	51%
Italy	38%
Germany	42%

■ I have to search multiple apps or services to find the content I want

Majority spend over 6 minutes searching for something new to watch

Globally, decisiveness is a key dictator of search time when looking for new content. **European viewers – with the exception of France – tend to spend more time searching than Americans since the majority are lean-in viewers (57% vs. 43%)**.

European viewers who like to be fully immersed in the shows they watch also spend more time searching for content (+11%) than those who rely on TV content to unwind or relax.

When looking for something new to watch, how long do you typically spend searching?

< 2 mins

UK	5%
France	9%
Spain	2%
Italy	3%
Germany	12%

2–5 mins

UK	27%
France	35%
Spain	26%
Italy	25%
Germany	19%

6–10 mins

UK	35%
France	39%
Spain	45%
Italy	35%
Germany	43%

11–15 mins

UK	17%
France	8%
Spain	14%
Italy	24%
Germany	18%

> 15 mins

|	
UK	17%
France	10%
Spain	14%
Italy	14%
Germany	9%

Source: Comcast Advertising survey conducted through Cint in December 2023. U.S. N=1500, EUR N=1000.
Qualifying criteria: Adults 18+ who searched for or watched something new in the past three months.

Unpacking Viewer Decision–Making

Looking for content is a lot of surfing and scrolling

When you're looking for a program to watch, where do you typically go first?[1]

■ Channel surf or scroll a guide   ■ Type or speak the name   ☐ Other
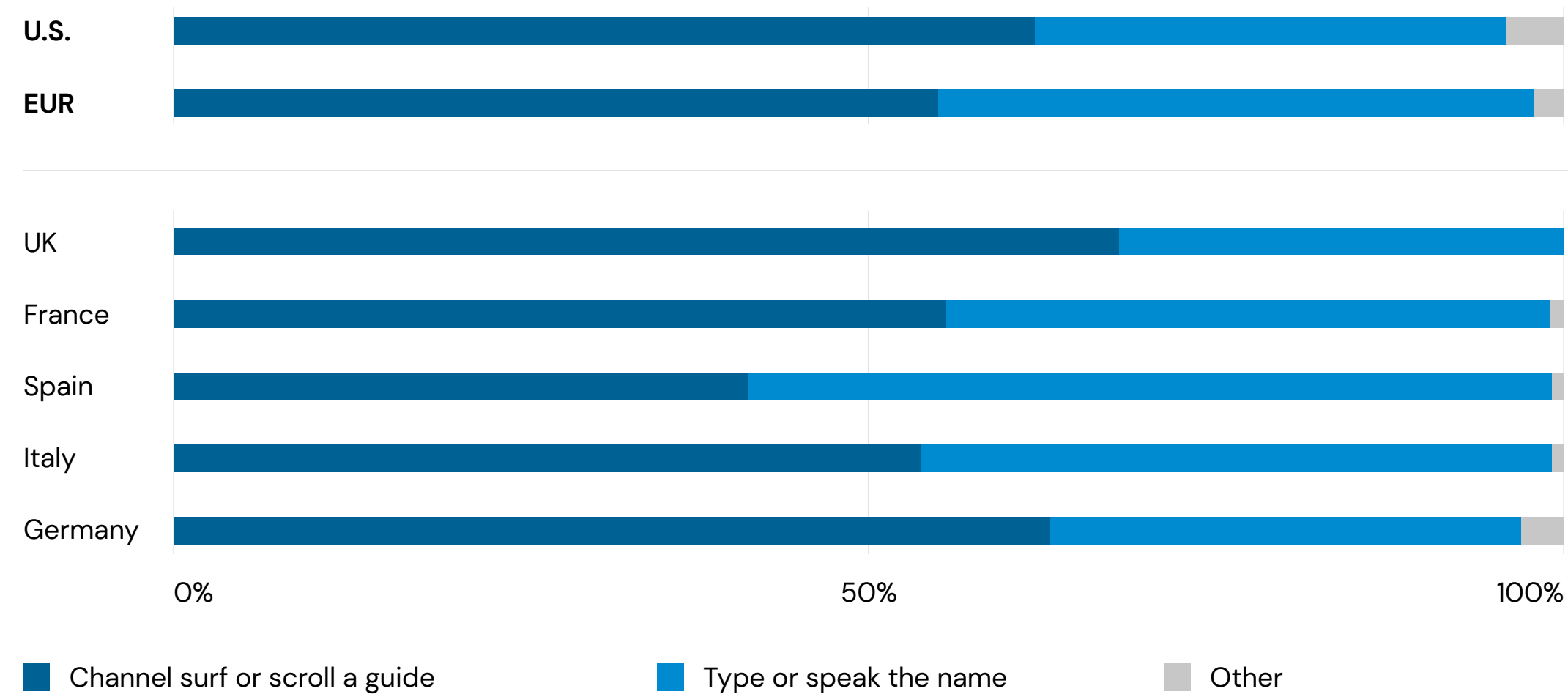
💡 **Europeans are slightly more likely to type or speak the name of the program or genre into their remote than Americans.**

Where do you typically learn about new content to watch?

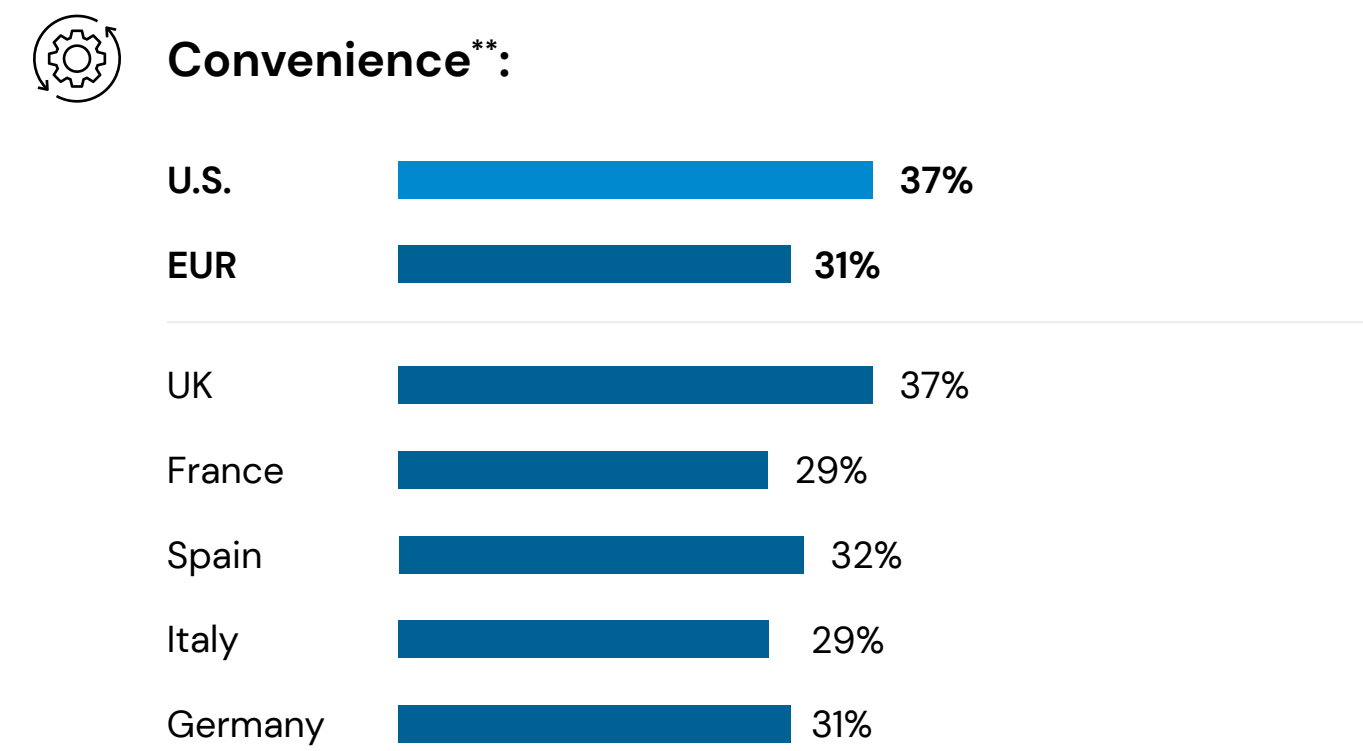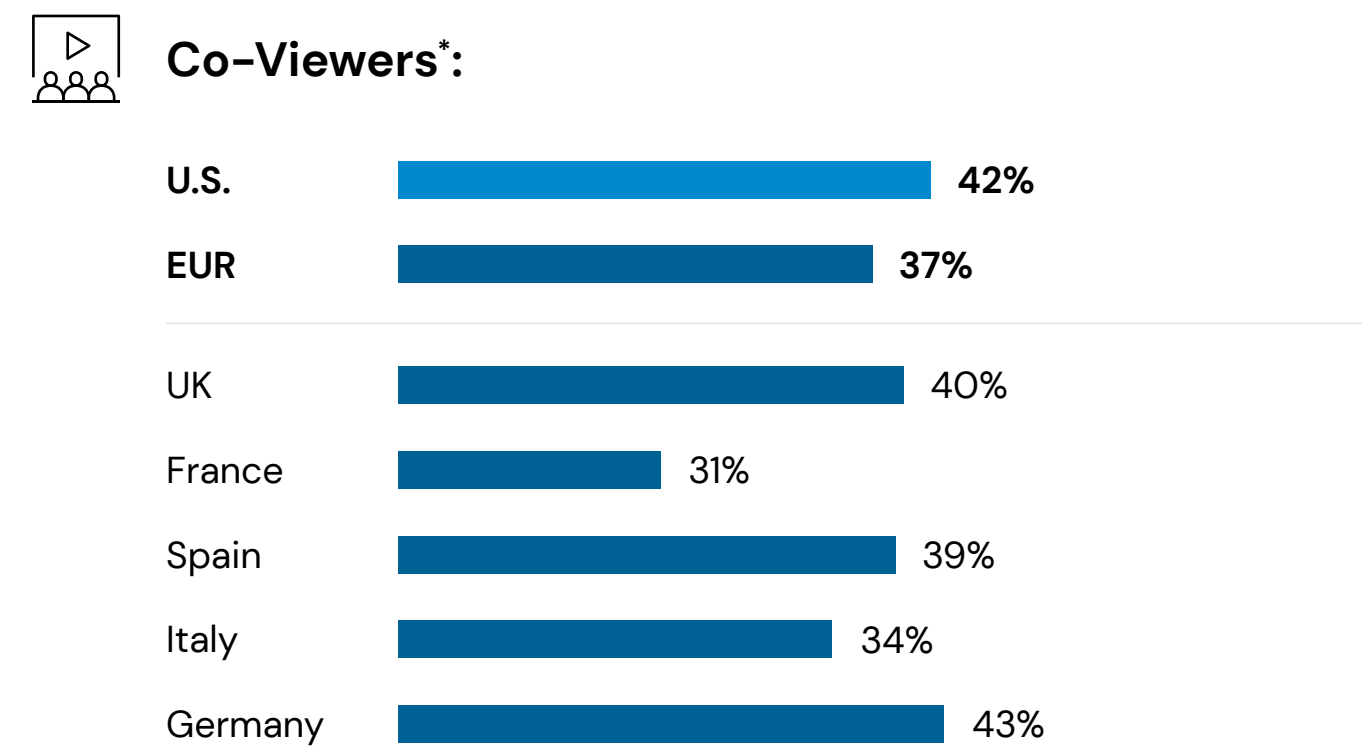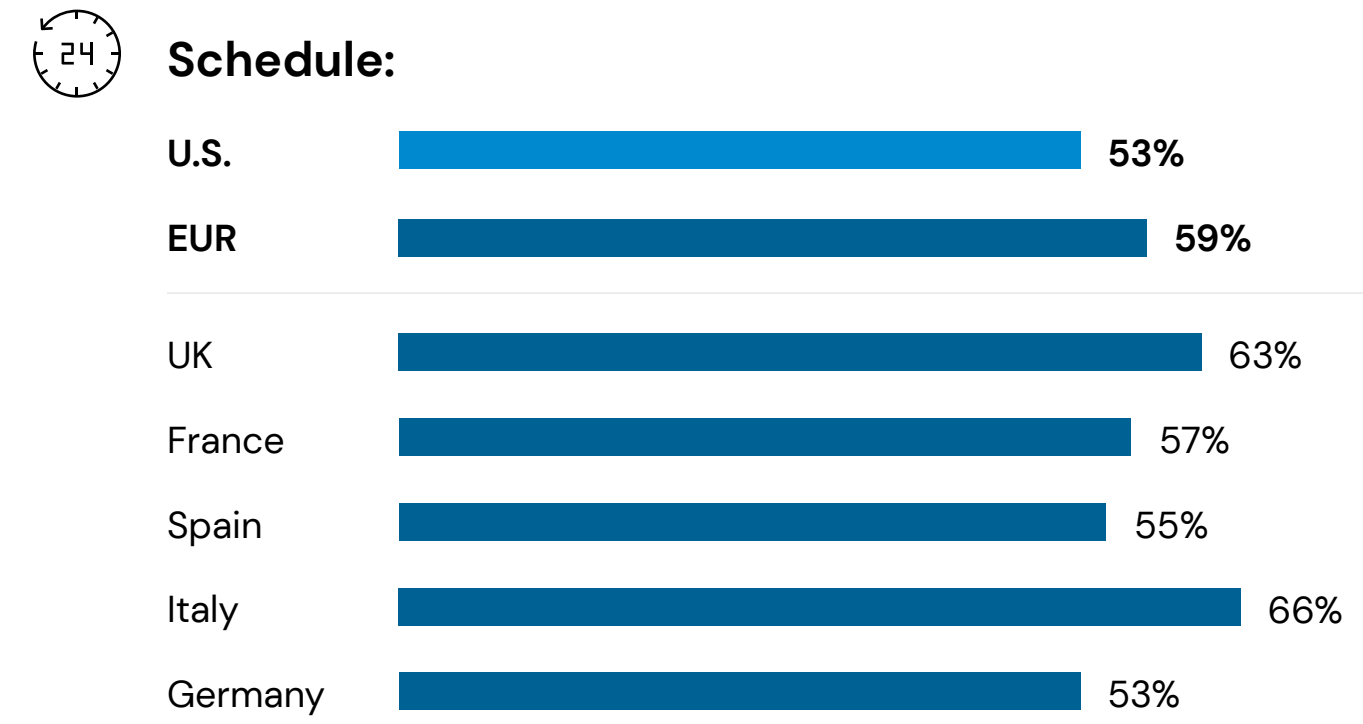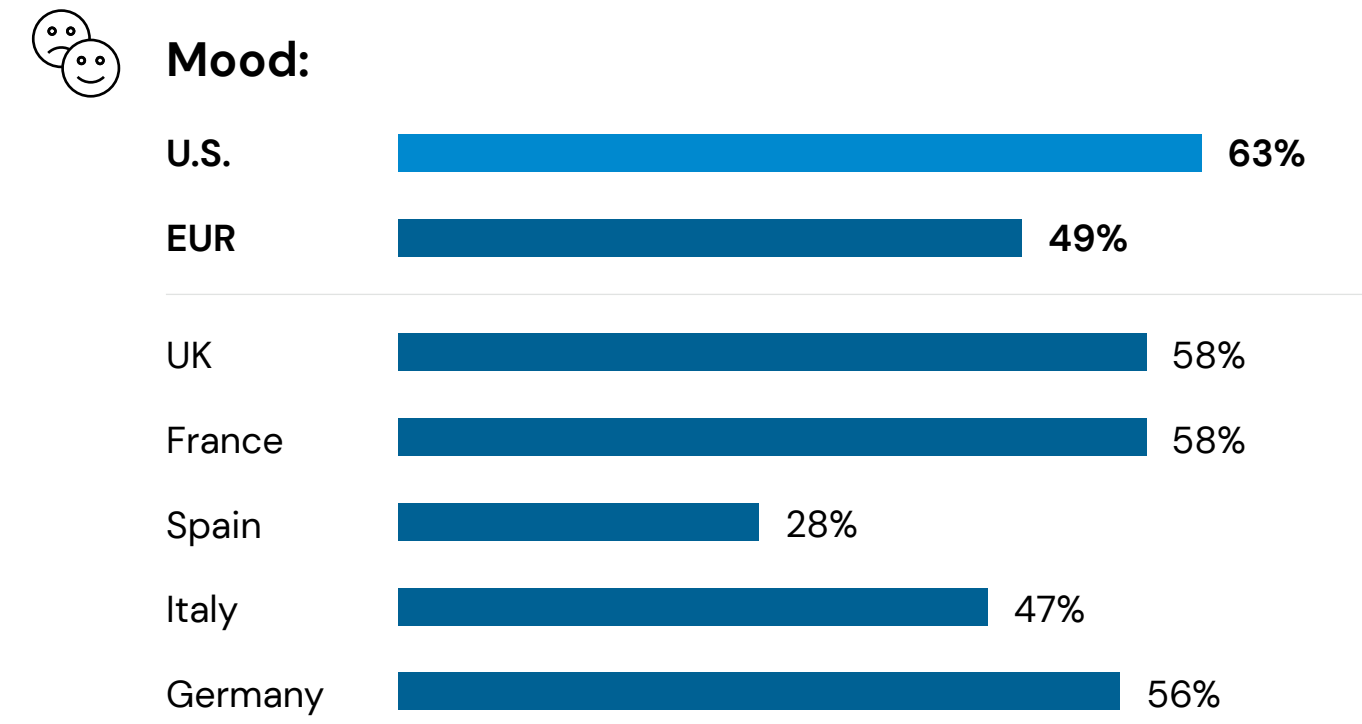**Where do you typically learn about new content to watch?[2]**

	U.S.	EUR	UK	France	Spain	Italy	Germany
Trailer or promotional ad	**37.6%**	**41.8%**	37%	40%	49%	48%	36%
Provider recommendations	**19.0%**	**19.5%**	15%	16%	17%	26%	24%
Scrolling through a guide/list	**32.4%**	**28.3%**	37%	21%	17%	31%	37%
Scrolling through the streaming platform home page	**40.3%**	**36.7%**	32%	41%	39%	44%	29%
From friends or family	**54.8%**	**51.3%**	60%	44%	55%	48%	51%
Online searches	**33.6%**	**42%**	35%	41%	49%	43%	43%
Social Media	**49.3%**	**45.5%**	44%	47%	54%	45%	39%
Through podcasts	**10.9%**	**9.9%**	8%	9%	11%	11%	12%
Influence or celebrity recommendations	**9.7%**	**11.5%**	9%37%	11%	18%	11%	10%

Genre is foundational to content choice but situational factors play a part

78% of Americans and 75% of Europeans say that genre will impact their decision to watch.

Factors impacting viewing choice:

Mood:

U.S.	**63%**
EUR	**49%**
UK	58%
France	58%
Spain	28%
Italy	47%
Germany	56%

Schedule:

U.S.	**53%**
EUR	**59%**
UK	63%
France	57%
Spain	55%
Italy	66%
Germany	53%

Co-Viewers*:

U.S.	**42%**
EUR	**37%**
UK	40%
France	31%
Spain	39%
Italy	34%
Germany	43%

Convenience**:

U.S.	**37%**
EUR	**31%**
UK	37%
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Germany	31%

*In this case, co-viewers refers to who the viewer is watching with. **In this case, convenience refers to how easy the content was to find.
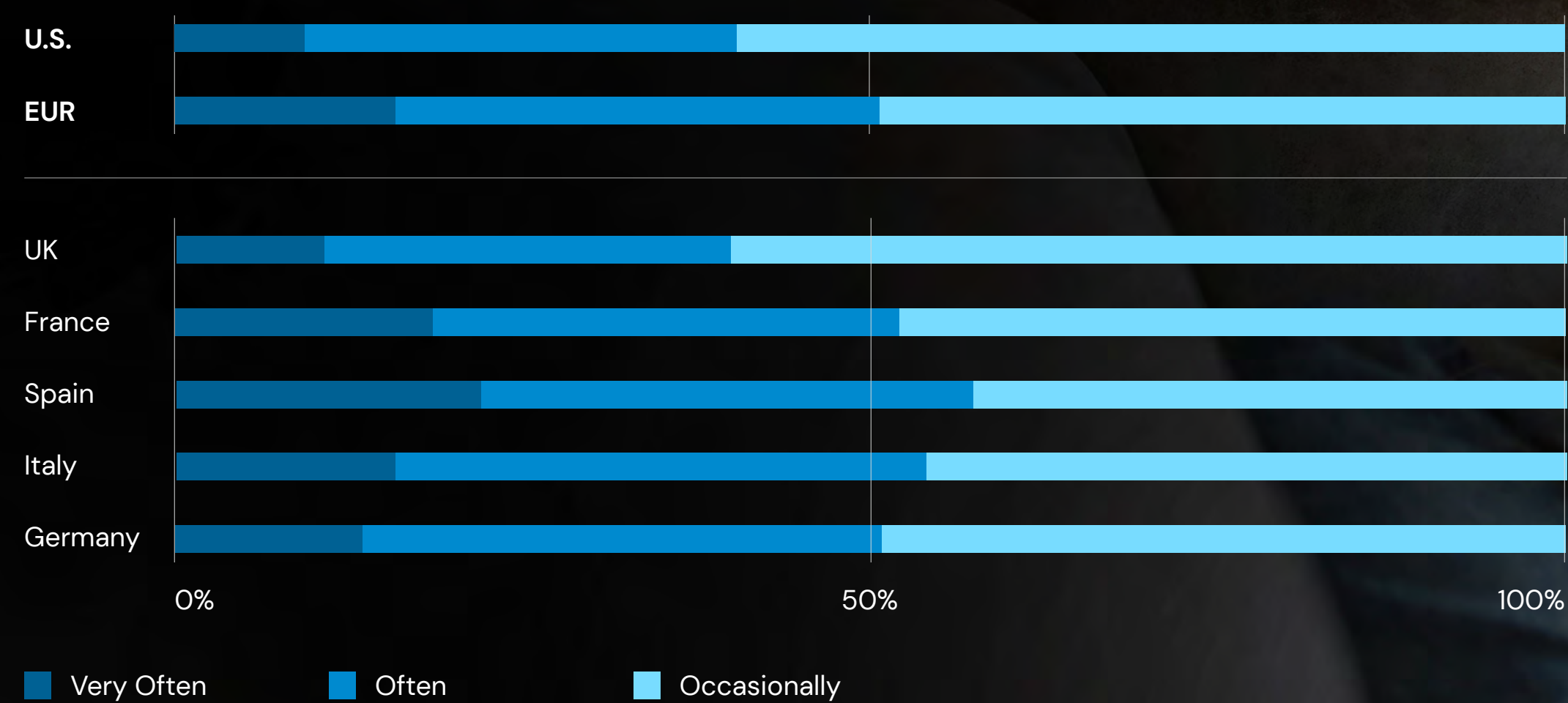
Source: Comcast Advertising survey conducted through Cint in December 2023. U.S. N=1500, EUR N=1000. Qualifying criteria: Adults 18+ who searched for or watched something new in the past three months.

Examining the Role of Recommendations and Promotion

Viewers are not reliant on platform recommendations so creating awareness helps

How often do you watch shows recommended to you by the provider?

Chart categories:
- **Very Often**
- **Often**
- **Occasionally**

Regions: U.S., EUR

Countries: UK, France, Spain, Italy, Germany

X-axis: 0% — 50% — 100%

Promo ads boost content consideration

How likely is the following to influence your decision to watch content recommended to you by the provider?

I have seen an ad or trailer for this content before

U.S.	**85%**
EUR	**84%**

UK	93%
France	71%
Spain	84%
Italy	84%
Germany	86%

Viewers are very receptive to provider recommendations, and previous exposure to a promo ad or trailer plays a pivotal role in influencing their decision to watch that recommended content. This means that both native ads and the 30-second spot have an important role to play when promoting content.

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