Your long tail is talking

Most buyer demand goes unworked. Here's where to find it.

Anonymised behavioural insight across 18 live TV distribution environments.

one

INTRODUCTION

After the meeting

Every distribution executive knows the feeling. The meeting went well. The buyer was engaged, the feedback was warm, the slate landed. You left the room confident. Weeks passed. Nothing happened.

This isn't because buyers are being dishonest. A market meeting is a particular kind of social exchange: relationship maintenance, professional courtesy, a chance to stay connected. What a buyer says across the table reflects all of that. It doesn't reliably reflect what they will do next.

The real signal comes later, back at their desk, with no obligation to perform enthusiasm. Whether they pressed play on the screener. Whether they came back to the title a fortnight later. Whether a colleague from the same company started looking at it too. That behaviour is the closest thing this industry has to knowing what a buyer is actually thinking.

The first edition of *The Next Move* showed that this behaviour exists and can be read. This edition goes further, and harder. Drawing on behaviour across eighteen distribution environments (a view no single distributor has of its own market), it asks the questions a distributor can't answer from inside its own four walls:

01 **Is the quiet majority of your buyer list really lost?**

02 **Does personalised curation change what buyers do, or only where they start?**

03 **How much of your catalogue is anyone actually watching, and what decides which titles get seen?**

04 **When a buyer goes silent, are they gone? And can you tell in advance who will come back?**

The answers are more specific, and more useful, than the industry's working assumptions.

Based on 2.8 million platform events across 18 live B2B TV distribution environments, of which around 650,000 were made by identified, logged-in buyers, over a 12-month window. Distributor staff and anonymous traffic are excluded from every buyer figure. All data is anonymised: no individual buyer, distributor, title or transaction is identified. The findings describe patterns of association, not cause and effect.

AT A GLANCE

Four numbers that change how you read your buyers

1.9%

of registered buyers account for 80% of all screener watch time

68%

of back-catalogue titles with a screener went a whole year unscreened

2.9×

the screening rate for a title once it's put in front of the right buyer

37%

of buyers who went silent for 90+ days came back

18 LIVE DISTRIBUTION ENVIRONMENTS 12-MONTH PRODUCTION WINDOW DATA ANONYMISED

PART

Your long tail is full of warm buyers

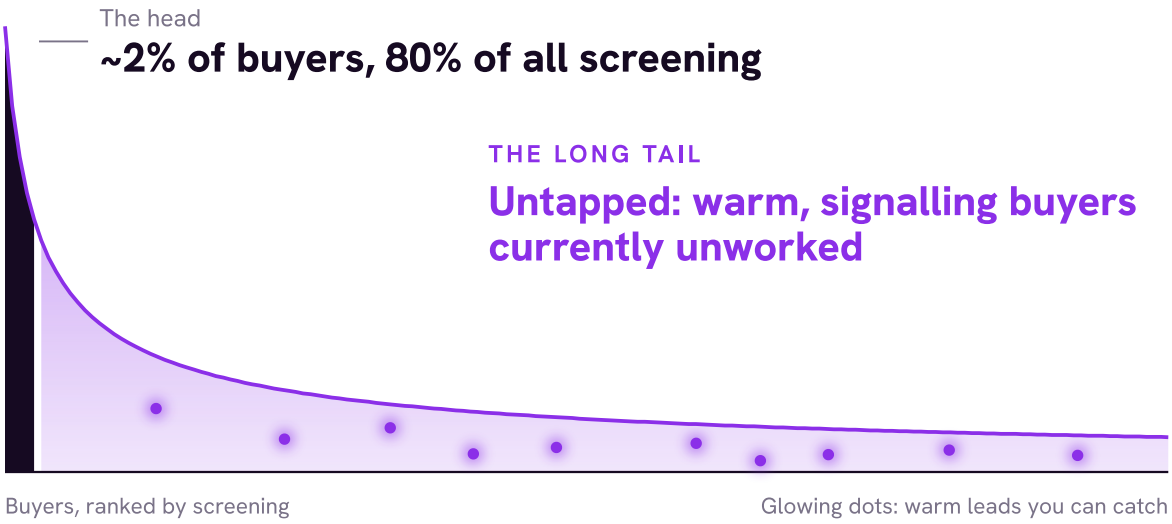
Concentration is a limit on sales hours, not on demand. The tail isn't dead. It's unattended, full of warm leads that surface on their own as signals.

Under 2% of your list does 80% of the watching

Start with the shape of the market. **Across the environments analysed, a median of 1.9% of registered buyers accounted for 80% of all screener watch time.** The top 1% alone accounted for 62%.

This is not a quirk of any one distributor, and it is not, in itself, a failure. It is what distribution looks like when reaching buyers depends on human bandwidth. A sales team has a finite number of hours, and it spends them, rightly, on the buyers it knows best and the relationships most likely to close. Everyone else gets less. Compounded over years, the result is concentration: a small core who do almost all of the serious evaluating, and a long tail served lightly or not at all. Every distributor's data has this shape, because every sales team runs into the same ceiling: you can only personally look after so many buyers.

THE SHAPE OF THE MARKET



Median across 17 environments with watch-time tracking; 67,789 registered buyers, 18,258 screener hours. Illustrative curve; head share from the data. 'Meaningful activity' = a screener play, 10+ seconds on a title page, a search, a download or a share.

Some of that tail is genuinely inactive. Only 11.5% of registered buyers did anything meaningful in the 12 months; the rest of the list is largely history, grown for years without cleaning. But concentration is not evidence that the tail is dead. It is evidence of what a human-paced sales operation can physically reach. The long tail isn't ignored because nobody wants those buyers. It's ignored because, buyer by buyer, serving them by hand was never possible. And that is the point: it never had to be. The tail is not silent. It is full of signals. Buyers who went quiet after watching seriously. A second colleague quietly opening the same title. A first session spent deep on a single programme. These are warm leads, and they surface on their own, in behaviour distributors already record. **The opportunity in the long tail is not more effort. It is reading the signals already there, and acting on the few hundred that matter instead of the tens of thousands that don't.**

3.4×

Buyers who registered during the window were active at 3.4 times the rate of older accounts, **31.8% vs 9.3%.**

4.5%

One registration year alone contributed nearly 21,000 accounts, 28% of the registry, of which only 4.5% were ever active. The profile is consistent with a bulk import.

THE DORMANT BASE

The quiet majority: mostly history, partly recoverable

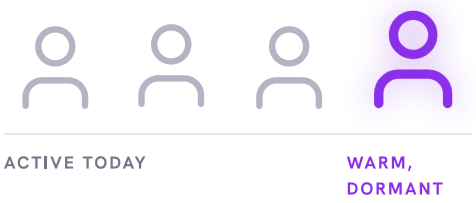
If 11.5% are active, the obvious question is whether the rest are worth anything. It is tempting to say the dormant majority is all hidden pipeline. The data doesn't support that. It supports something narrower, and more useful.

92% of registered buyers had no meaningful activity in the last six months of the window. Nearly three-quarters of them have no recorded login and no activity anywhere in the data. Most of the list is genuinely inert.

WARM LEADS HIDING IN THE TAIL

36%

The dormant buyers still showing signs of life equal more than a third of your entire active buyer base, roughly one more warm buyer for every three actively engaging today.



And some had already watched a screener to the halfway point before they went quiet.

Dormant buyers (no meaningful activity in the final 180 days) still showing a live signal (a recent login, a light touch, or earlier serious activity), expressed as a share of the active base. 18 environments. Proportions only.

These are not cold leads. They are buyers who were recently in your catalogue, evaluating, and nobody followed up. The recoverable share varies enormously: around 30% of the dormant base in smaller, recently built environments, under 1% in the largest legacy registries.

WHAT THIS MEANS FOR A HEAD OF SALES

Don't try to revive the whole registry. Find the 1-in-22 dormant buyers still showing a pulse, and start with the ones who had already watched seriously. That is a re-contact list you can build today. Part IV shows how to tell which of them will come back for real.

SPOTTING A GEM WITHOUT HUNTING

A warm lead announces itself in the first five minutes

Buyers who went on to take a high-intent action behaved distinctively in their very first session, and the distinction was **depth on a single title, not breadth across many.** Among buyers whose serious action came *later*, starting a screener and running a search both independently raised the odds. The number of titles viewed predicted nothing at all.

	SERIOUS BUYER	EVERYONE ELSE
Longest dwell on one title	6 min	2 min
Pressed play	54%	31%
Deep watch in session one	23%	7%
Titles viewed NO DIFFERENCE	1	1

63% 10+ minutes on a single title page in session one → take a high-intent action later, against 42% for those who glanced and moved on.

7,190 active buyers, 17 environments; leading-indicator figures from 5,864 buyers whose high-intent action came after the first session. Medians.

Breadth is browsing. Depth is intent. The tell is how a gem in the tail shows itself.

A CAVEAT

59%

The half you can't see

59% of all programme page views came from visitors who were not logged in: 645,000 of 1.09 million. This is real interest that can't be linked to any buyer. Every insight here is drawn from the 41% that can, and so describes the identifiable part of demand. Interest that can't be attributed can't be acted on, the gap is a lever in its own right.

PART

II

Matching beats sending

Curation changes whether a title gets screened. It doesn't change how long a buyer stays.

Most buyer engagement is self-directed. Across the eighteen environments, only a sliver of buyer title views arrived through a guided route: a link in a sent list or an email. The rest came from browsing, moving title to title, and search.

The easy story is that lists are under-used and distributors should send more. This edition asks a sharper question: when content reaches a buyer through curation, rather than the buyer having to find it, what actually changes?

The answer has two halves, and the second is the more important.

1.8%

of buyer title views arrived through a guided route. The other 98% came from browsing and search.

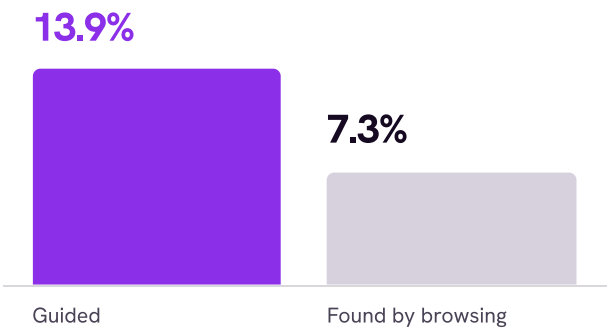
WHAT A CURATED LIST CHANGES

Curated titles get screened more. They don't get watched longer.

Getting to play

1.9×

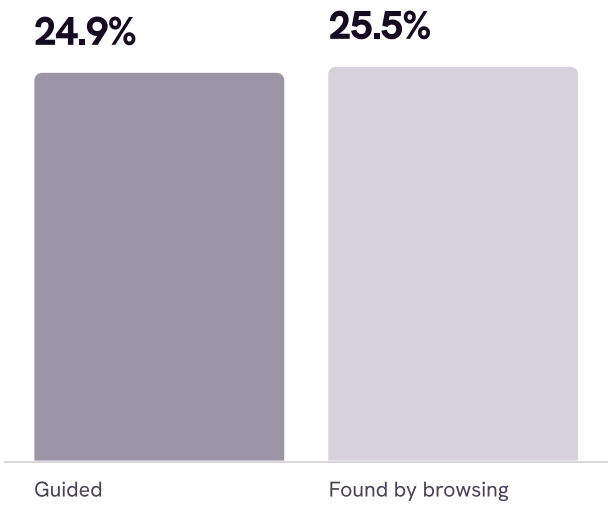
Share of buyer-titles reaching a deep screening within 30 days



Once it's playing

No gap

Share of screener starts watched to the halfway point



Left: 81,148 buyer-title pairs (1,469 guided), 17 environments, share reaching ≥50% screener depth within 30 days of first contact. Right: 83,323 screener starts (1,764 guided). Both panels on a 0 to 30% scale. Guided = arrived via a list or email link, or shared to the buyer in the previous 30 days.

Twice the rate of screening

When a buyer's first contact with a title came through a list or email, they went on to watch at least half its screener 13.9% of the time, against 7.3% when they found it themselves. It holds when the same buyers are compared with themselves (19.2% vs 12.4%), barely moves when the largest contributor of guided traffic is removed (12.6% vs 7.0%), and guided titles came out ahead in 6 of the 10 environments with enough traffic to compare.

No difference once it plays

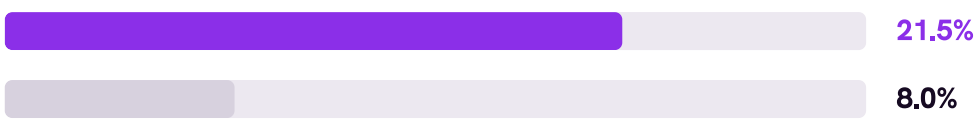
Of screeners started from a list, 24.9% were watched to the halfway point; for self-found screeners, 25.5%. Compared within the same buyer, guided screeners were watched slightly *less* deeply. Personalisation gets the right title into the screening queue. It cannot make the content hold a buyer once it starts.

The question isn't "was it opened?" but "did the titles on it get screened?" The lever isn't more volume; it's better matching.

WHERE CURATION PAYS MOST

The lift is concentrated in drama

2.7×



Factual showed a smaller lift: 1.3×.

Share of buyer-titles reaching a deep screening; largest multi-environment genre base in the data. Bars on a 0 to 30% scale.

Curation pays most where the buyer's commitment is highest and the decision is slowest. A drama needs to reach the right buyer; a quick-turnaround format is judged fast however it arrives.

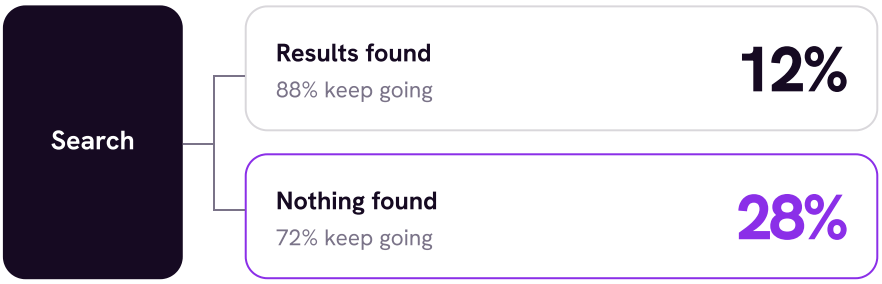
WHAT THIS MEANS FOR A CMO

Treat matching as a measurable discipline. Track screen-through per curated title, not opens per send. The titles a buyer screens from a list tell you whether your matching was right; the depth they reach tells you about the content, not the list.

SEARCH

Buyers telling you what they want

Across 92,568 logged-in searches by 6,099 buyers, only 1.2% returned nothing, but an empty search is the most specific demand signal on the platform. Often it is a title you *do* have but have left restricted, unpublished or mislabelled.



44%

of searchers watch a screener seriously, vs 28% of non-searchers. Search belongs in lead scoring.

Large figures: share abandoning the session within 30 minutes.

92,568 logged-in keyword searches, 6,099 buyers, 18 environments; 30-minute follow-on window measured in 17. No search terms are reported.

PART

III

Most of your catalogue is unmatched, not unwanted

Most of the library isn't unwanted. It is overlooked: carried, rather than sold.

Two-thirds of the back catalogue went unwatched

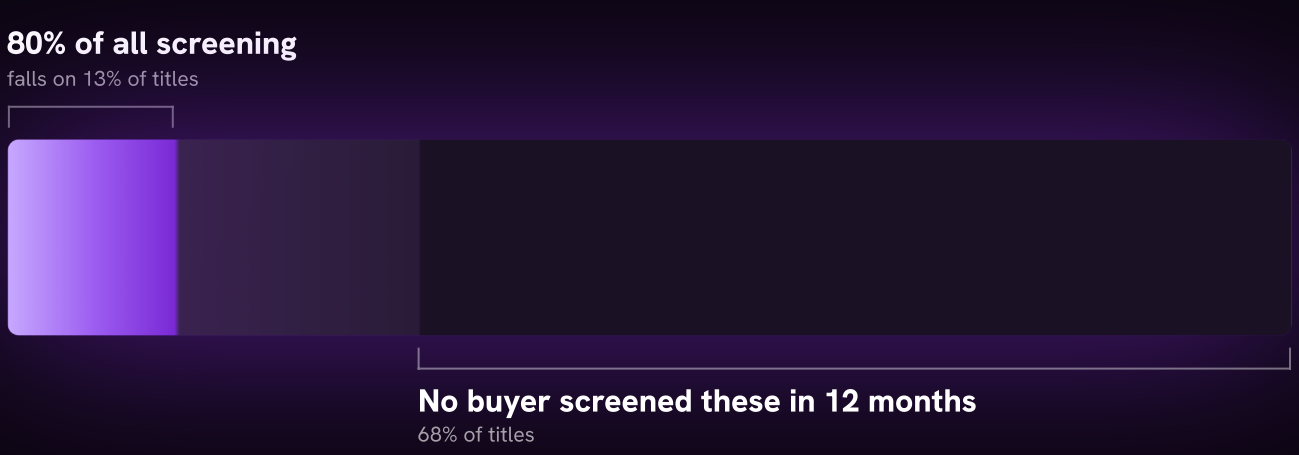
If the buyer base is concentrated, the catalogue is more so. **Of the active titles that pre-dated the window and had a screener ready, 68% were not meaningfully screened by a single buyer all year.** Ninety per cent were screened by two buyers or fewer. More than one in five weren't even opened by a logged-in buyer. At the other end, 80% of all screening fell on just 13% of titles.

The range between environments is wide, and that is itself the story. Catalogue size plays a part, but so, the data suggests, does what the distributor does with the catalogue.

THE OVERLOOKED CATALOGUE

68%

of back-catalogue titles with a screener were not meaningfully screened by a single buyer in 12 months.



Every title, sorted by screening volume, left to right.

10,419 active titles with a screener, created before the window; 16 environments. ‘Meaningful screening’ = ≥10% of runtime or ≥5 minutes watched by an external buyer.

BEST ENVIRONMENTS

12 to 22%

of back catalogue unscreened

WEAKEST

~90%

of back catalogue unscreened

NEWER TITLES

17% → 47%

Titles from the last two years: share of catalogue → share of screening

THE PROOF

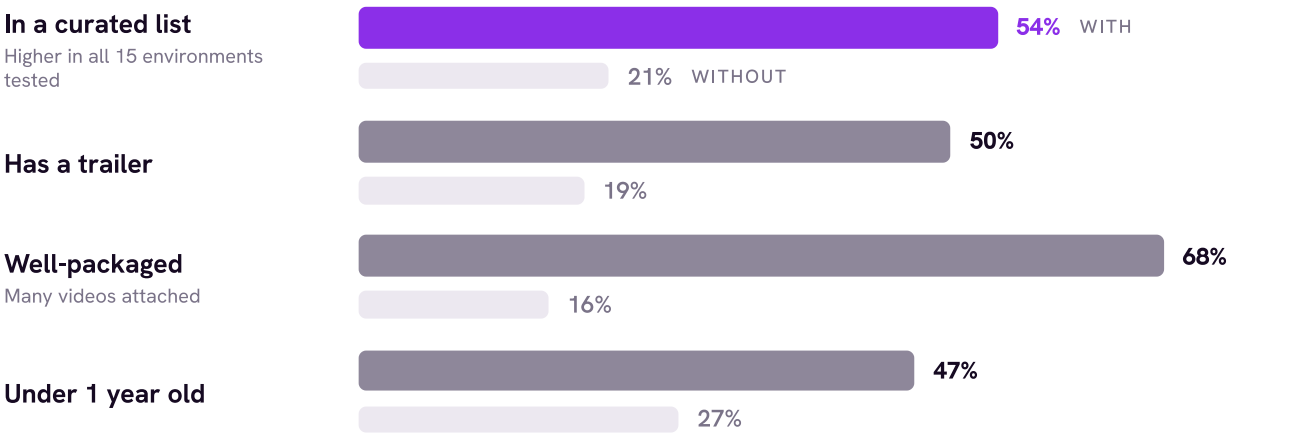
What actually decides whether a title gets watched

We compared, title by title, what separates the 32% that get watched from the 68% that are overlooked. The biggest factor is not the content. It is whether anyone put the title in front of a buyer.

2.9×

Among titles that had never been screened, **being listed made a first screening within 90 days 2.9 times more likely** (17.1% vs 5.8%). In 69% of cases, the first screening came *after* the listing. The list isn't picking titles already popular; it is surfacing titles that were overlooked.

WHAT SEPARATES A WATCHED TITLE FROM AN OVERLOOKED ONE



Share of titles meaningfully screened. 10,419 titles, 16 environments. Adjusted odds ratios: listing 3.2×, video count 2.05× per e-fold, trailer 1.36×, age 0.66× per e-fold. All correlational.

A title nobody screens is usually not one nobody wants. It's one nobody put in front of the right buyer.

Underneath all of these sits a simpler problem: whether a buyer can find the title at all. Buyers search by name, not by theme (only a fraction of searches use a genre label), so a library title a buyer has never heard of is effectively invisible, however well it would suit them. And genre labels themselves are applied thinly and inconsistently. A title isn't only overlooked because nobody put it in a list; it can be overlooked because nothing about the way it is catalogued lets the right buyer stumble into it. **Richer, behaviour-led metadata, matching on what a title actually is and who engages with similar content rather than on when it was made, is how a hidden tail becomes a discoverable one.**

EPISODE ONE

64%

of buyers who meaningfully watched episode one of a series didn't go on to episode two. In practice, episode one *is* the screener: tone, premise, cast and production values have to land there.

2,345 buyer-series, 2 environments; a narrow base, stated plainly.

PART

IV

Quiet buyers come back, and you can tell which

A quiet buyer is usually paused, not lost, and the ones who return seriously can be identified in advance.

More than a third come back, and you can tell which ones

One of the most common judgements in distribution is that a buyer who has gone quiet has gone. The data says otherwise. **Of buyers who went silent for 90 days or more, 37% came back within the window**, a typical absence of about four months. And they weren't returning for a glance: 30% of returns were followed by watching at least half of a screener within a month.

What brings them back is, honestly, not visible in the data: not a send, not a new title, not a colleague. Most returns show no trigger at all; buyers come back on their own, clustering in the spring. So the practical move isn't to chase the silence. It's to watch for the return, and to know in advance which returns will matter.

THE RETURN

37%

of buyers who go silent for 90+ days return.



6,277 buyers with a 90+ day silence; 2,321 returned; 1,791 returns with full follow-up measured for the predictor. 17 to 18 environments. Illustrative timeline; gap shown at median length.

The return that matters is predictable

A buyer who had watched a screener seriously before going quiet was about twice as likely to watch seriously again on their return. That is known before they come back, which makes it a ranking tool: of your dormant deep-watchers, these are the ones to prioritise the day they reappear.



Share of returning buyers who watched seriously again: 45.5% vs 24.1%. Bars on a 0 to 50% scale.

WHAT THIS MEANS FOR A HEAD OF SALES

Silence is a phase in the cycle, not the end of it. Rank your dormant list by whether each buyer ever watched seriously. When one of them returns and presses play and lingers on a title rather than skimming, that is the moment, and it is visible the day it happens.

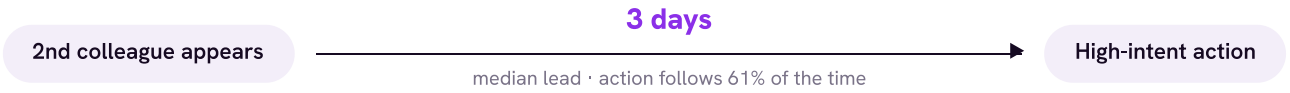
THE COMMITTEE SIGNAL

Two people from one company: the committee forms, and it forms early

In companies with more than one active buyer, 11.3% of title engagements drew two or more colleagues to the same title within 30 days. When a colleague was also looking, the same buyers were markedly more likely to act: a 1.5× lift that held in 13 of 16 environments. A third colleague adds nothing; the step change is from one person to two.

19.8%
take a high-intent action on a title they look at alone

29.7%
when a second colleague is looking at the same title



1,868 buyers compared with themselves; 32,285 company-title engagements, 1,224 multi-user companies, 16 environments.

Alert sales the day it happens. The window to support the internal conversation is days, not weeks. Don’t wait for a third.

FAST ISN’T THE SIGNAL

Deliberate is

Half of all serious screenings happened within an hour of the buyer first opening a title. But buyers who took longer, returning hours, days or weeks later to watch properly, came back to the title again far more often.



Share who came back to the title later. A buyer who screens a week later has, by definition, already returned once; the pattern still undercuts the instinct to prioritise the quickest responders.

53% vs 46%

Weekend screenings are rare, and more often finished

Only 6% of serious screening happens at weekends, but 53% of weekend screener starts reached halfway, against 46% in weekday office hours. Server time; weekday-versus-weekend is reliable, specific hours are not.

PART V · EIGHT SIGNALS WORTH ACTING ON

Eight signals worth acting on

01

10+ minutes on one title page in the first session

Depth, not breadth: the serious-buyer fingerprint

→ **Flag them. Over 60% take a high-intent action later**

02

A dormant buyer who once watched seriously presses play again

The predictable return, on the day it shows

→ **Act that week. They're twice as likely to go deep again**

03

A title reached a buyer through a list and they pressed play

The match was right

→ **Follow up on fit and depth, not with another send**

04

A curated title went unscreened

The match was probably wrong

→ **Re-match the title rather than re-sending it**

05

A back-catalogue title nobody has screened all year

Likely unmatched, not unwanted

→ **List it, give it a trailer, aim it at buyers whose behaviour fits**

06

A buyer searched by name and found nothing

A specific, unmet request

→ **Check whether you hold it, have hidden it, or mislabelled it**

07

A second colleague from the same company opens a title

An internal conversation has started

→ **Support the committee within days. Don't wait for a third**

08

A buyer returns to a title and then watches it properly

Deliberation: the pattern that goes with sustained interest

→ **A specific follow-up about that title**

Over the page: what it takes to see these signals, and where they appear in ONE.

READING THE SIGNALS

A signal nobody sees is not a signal

Every one of the eight signals shares one requirement. Each depends on behaviour that happens after the meeting, in sessions no one attends, measured at the level of a single buyer and a single title.

A CRM records what a salesperson writes down. A generic video host records plays. A spreadsheet records what someone remembered to enter. None of them knows that the buyer who stayed ten minutes on one title is the same buyer who went quiet in October and pressed play again this morning, or that a colleague from the same company opened that title yesterday.

Reading the signals takes four things, held together in one place.

A **Identified buyers**

Every view tied to a logged-in buyer and their company, so behaviour has a name and a relationship attached.

SIGNALS
01 · 02 · 07

B **Title-level depth**

Dwell, share watched and episode reached for each title, not a count of plays.

SIGNALS
01 · 03 · 08

C **Memory across silence**

A buyer's full history held through months of inactivity, so a return is recognised for what it is.

SIGNALS
02 · 08

D **Catalogue and list context**

Which titles were listed, sent, requested, restricted or never screened, connected to who saw them.

SIGNALS
03 · 04 · 05 · 06

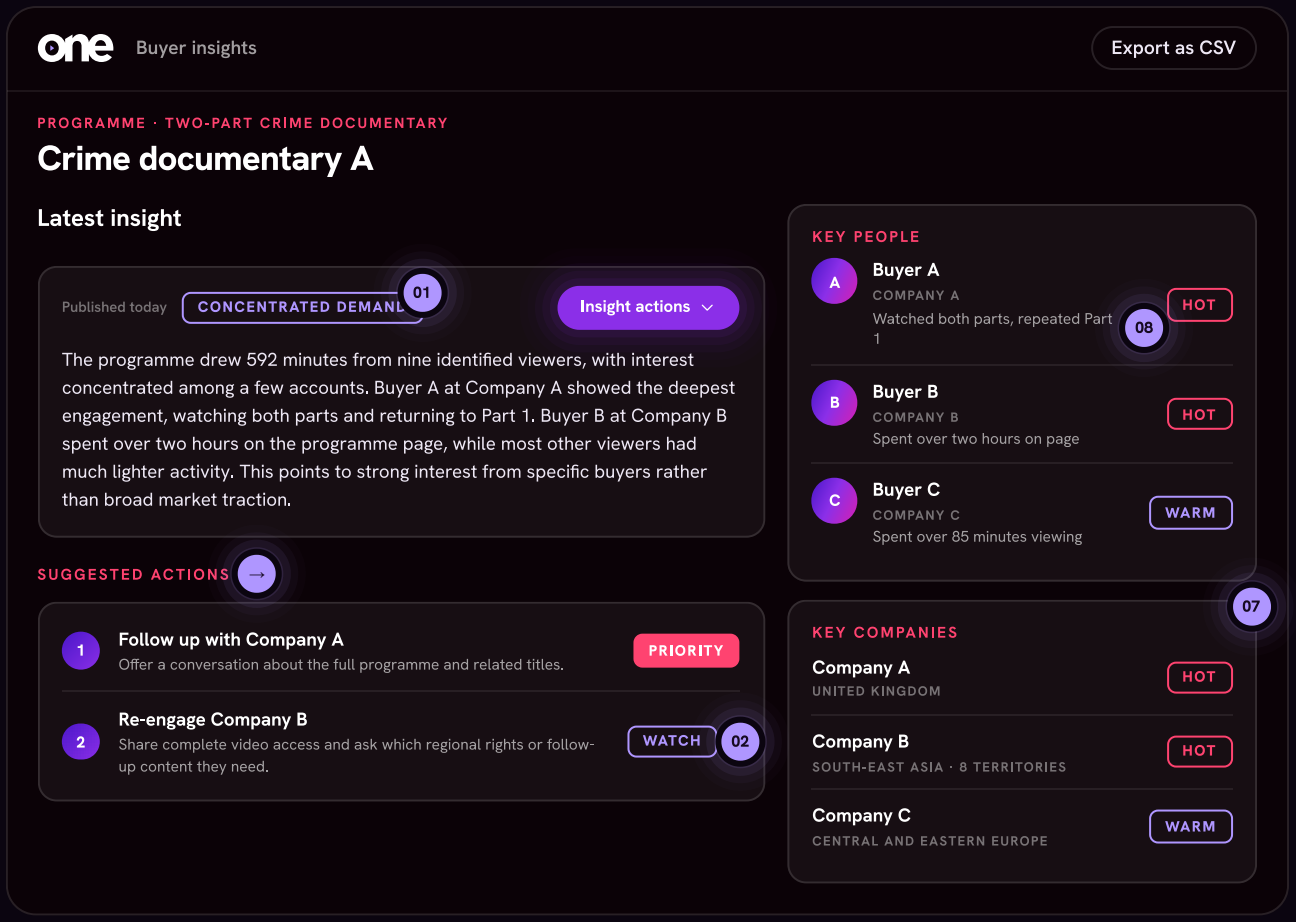
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18 Every figure in this report was read from behaviour ONE already records, across 18 live distribution environments. The question is whether your team is reading it too.

ONE BUYER INTELLIGENCE

From reporting to the next move

ONE doesn't stop at what happened. For every title, it reads the behaviour behind it, names the pattern, ranks the buyers and companies by intent, and recommends what to do next. The markers show where the signals from this report appear.



01 **The pattern, named.** Concentrated demand: depth from a few buyers, not breadth.

02 **The return.** Buyers to re-engage, flagged while it still matters.

08 **Deliberation.** Returning to Part 1 is read as intent, not noise.

→ **The next move.** Every insight ends in ranked, specific actions for sales.

07 **Companies, not contacts.** When colleagues converge, the company heats up.

\+ **The reports underneath.** Buyer profiles, watch trends and CSV export remain one click away.

Illustrative insight; buyers, companies and programme anonymised.

THE BENCHMARK

How do you compare?

METRIC	FIGURE	WHAT TO ASK YOURSELF
Meaningfully active buyers (12 months)	**11.5%** of registered	*How many of our "relationships" actually engage?*
Concentration of screener watch time	**1.9%** of buyers = 80%	*Do we know these people by name?*
Dormant buyers with a live signal	**4.5%** = 36% of active base	*Is anyone working the dormant buyers still signalling?*
New vs older registrant activity	**31.8% vs 9.3%**	*When did we last clean our registry?*
Serious-buyer first-session tell	**10+ min → 63%** later act	*Do we flag depth, or just count clicks?*
Personalisation dividend: screen-through	**13.9% vs 7.3%** 1.9×	*Do we measure curated titles screened, or emails opened?*
Personalisation dividend: depth once playing	**24.9% vs 25.5%** no gap	*Are our screeners strong enough to hold a buyer?*
Curation lift, drama	**2.7×**	*Are we curating hardest where commitment is highest?*
Back-catalogue titles with no screening	**68%**	*Which titles are unwanted, and which just unmatched?*
Listing's effect on an overlooked title	**2.9×** more likely screened	*Are our best titles actually in front of buyers?*
Searchers vs non-searchers, serious screening	**44% vs 28%**	*Is search in our lead scoring?*
Return after 90+ days of silence	**37%**	*Do we write off quiet buyers too soon?*
Committee signal: high-intent with vs without a colleague	**29.7% vs 19.8%** 3-day lead	*Can we see when a buyer company is discussing a title?*
Episode-one-only screenings	**64%** stop before ep. 2	*Is our first episode doing the job of a screener?*
Anonymous share of title page views	**59%**	*How much buyer interest can't we attribute?*
Buyer local-time viewing	Not measurable	
Lists opened	Not measurable	
Download-to-title	Not measurable	

Figures are medians or pooled rates across the environments where each can be measured; see How this was measured. Grey rows are not measurable from platform data alone.

FINAL REFLECTION

Distribution will always depend on relationships, judgement, taste and timing. Nothing here diminishes that. What this adds is a view of the parts of the relationship that happen when nobody is in the room.

That view is more nuanced than the usual story, and more actionable. The quiet majority is mostly history, but the recoverable part can be found and ranked. Curated titles aren't watched for longer, but they are screened twice as often, and an overlooked title put in front of the right buyer is screened three times as often as one left to be found. Most of the catalogue goes unwatched, largely because it is never matched to anyone, not because nobody wants it. The committee that decides a deal forms visibly, and early. And silence, more often than the industry assumes, is a pause, with the buyers who will return seriously identifiable before they come back.

None of these patterns proves what causes what. All of them are visible, today, in data most distributors already collect but few read. The question the best distributors are now asking isn't whether they got their content in front of buyers. It's what the buyers did next, and whether anyone was watching closely enough to make the next move.

The ceiling on distribution has never been how many buyers want your content; it has been how many a team can personally understand and serve. **That ceiling is the one thing technology can lift**, letting the same team read, match and act on the behaviour of the whole buyer base, not just the few it has the hours for.

Do you know what to do next?

The answer is in your buyers' behaviour. ONE helps you read it.

METHODOLOGY

How this was measured

18
live distribution environments

2.8M
platform events

~650K
by identified, logged-in buyers

12
months of behaviour

DATA

Production exports from 18 live distribution environments over a 12-month window. Demo, test and empty environments excluded.

WHO COUNTS

Only external buyers with an identifiable, logged-in account. Distributor staff and anonymous traffic are excluded from every buyer figure. No distributor, buyer or title is named anywhere in this report.

KEY DEFINITIONS

Meaningful activity: a screener play with time watched, 10+ seconds on a title page, a search, a download or a share.

Active: at least one meaningful activity in the window.

Dormant: none in the final 180 days.

Screener vs trailer: videos over five minutes are screeners (lengths split cleanly at that point).

Serious (“deep”) screening: at least 50% of runtime, or 20+ minutes where runtime isn’t recorded.

Guided route: arrived via a list or email link, or shared to the buyer in the previous 30 days.

BASES

Some environments don’t record watch time or video length; each figure is reported on the environments where it can be measured, and every caption states its basis.

INTERPRETATION

All findings are observational associations. Where a comparison could reflect who the buyers are rather than what they experienced, a within-buyer comparison (the same people under both conditions) is reported alongside.

The specialist platform behind modern B2B TV distribution teams

ONE is a single environment for presenting, managing and screening complex catalogues for global buyers. Alongside a buyer-first catalogue experience and secure, frictionless screening, ONE turns real buyer behaviour into clear, actionable sales intelligence: what buyers watched, how deeply, what they searched for, what they downloaded, and when they returned, feeding directly into existing CRM and rights-management systems.

TRUSTED BY LEADING DISTRIBUTORS AND STUDIOS, INCLUDING

Fremantle Banijay AMC FOX Discovery A+E NETWORKS

This report draws on anonymised, aggregated behaviour across eighteen live distribution environments. No distributor's data is identified, and no finding is attributable to any single company.

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