

TV Attention in India Part 2

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Attention is gaining traction internationally



Ads only work if people are paying attention.

Understanding what content audiences actually engage with, not just what they had the opportunity to see, is necessary in order to create better, higher-value, media plans and smarter creative.

While the industry has previously focused on performance metrics like impressions or CPM, attention is gaining momentum throughout the industry. Advertisers are using attention data in new ways:

- Attention Guarantee - Attention metrics are gaining traction as a new form of ad currency, with innovative brands and networks transacting on Attention Guarantees to ensure that advertisements reach actual engaged audiences.
- Cross-platform measurement - the industry is increasingly considering the impact of attention measurement on cross-platform campaign effectiveness and performance. Industry visionaries, Ebiquity (UK) which measures advertising cost data and Lumen (UK), have joined with TVision (US) to create a new composite metric- **attentive seconds per thousand impressions**. This metric allows for comparisons across cost and impact of different media including TV, digital video, and display video.

Founded at MIT by advertising and technology entrepreneurs who sought to revolutionize TV measurement, TVision uses computer vision technology to understand how people really watch TV and CTV. Brands, networks and content creators use TVision's data to improve the engagement of their content and ads, making sure that content does not air to empty rooms. TVision's data is used by some of the largest advertisers in the world, including Pepsi, AB-inBev and Microsoft and by leading media companies like Roku, Hulu and Fox. This report is authored by TVision.



Incorporating Attention in the Advertising Workflow

Comprehensive Measurement at Each Step of the Funnel is Critical



METRICS

Impressions

Brand Impact

Low funnel Impact
(Visits/traffic/Sales)

OBJECTIVE

Following consumer
behavior across
platforms

Understand brand
impact at campaign
level

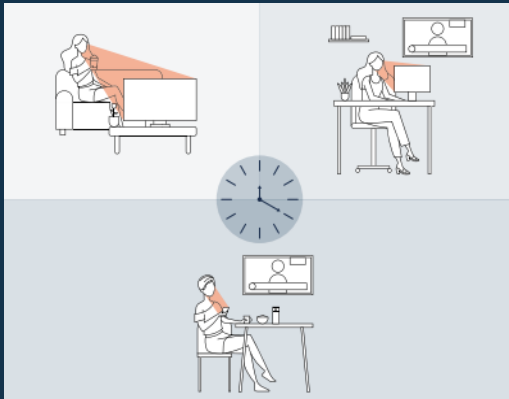
Understand the
impact on business
outcome

Multiple Factors Impact Ad Attention

Attention is required for ads to be effective, but there are multiple factors that impact a viewer's ability to pay attention to the ad. Advertisers looking to maximize their ad budgets should consider campaigns that factor in all of these components.

Environmental Distractions

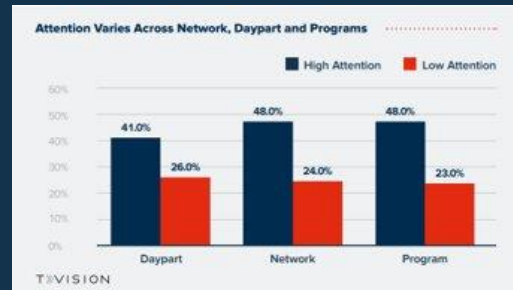
Just because ads are viewable does not mean they are being viewed. People may be in the room, but they may be checking their phone, reading the paper, talking to loved ones, or getting the kids ready for school.



Time of day and audience behavior also influence the viewer's ability to pay attention.

Network, Daypart and Program Differences

Viewer attention varies greatly even within dayparts, and networks. People pay different amounts of attention to different content.



There are dramatic differences in attention across dayparts, networks and programs

Creative Alignment

Ads are more effective when the quality of the creative is better, but also when it better aligns with the specific programming in which it airs.



There are several other factors to consider as well, when measuring attention such as pod duration, creative length, and genre.

Understanding TV Advertising Attention in India

In this report we dive into TV viewer attention and engagement with ads in India. TVision operates a viewer panel in India, from which we pulled data to examine Attention to Duration (ATDI) across various lenses - pod duration by genre, daypart, and creative length.

ATDI measures how effectively a specific Ad keeps a viewer's eyes on the TV relative to the duration of the commercial.

This report includes the following analysis of TV viewing in India:

- Attention Varies Across Genres
- Shorter Pod Durations Lead to High Attention for Cricket
- Pod Position Impacts Attention
- The IPL Captures Attention
- The Brands that Captured Attention Best in IPL
- Second-by-Second Analysis of Attention to Creative

The data in this report is based on aggregated performance from January 1st, 2021- June 30th, 2021, against viewers aged 18 and up in the India panel. In addition, the following data cuts are included:

- The IPL data is based on Adults 18+ for the first 29 games- April 9th, 2021- May 2nd, 2021.
- The World Test Championship data is based on aggregated performance for Adults 18+ from June 19th, 2021- June 23rd, 2021.



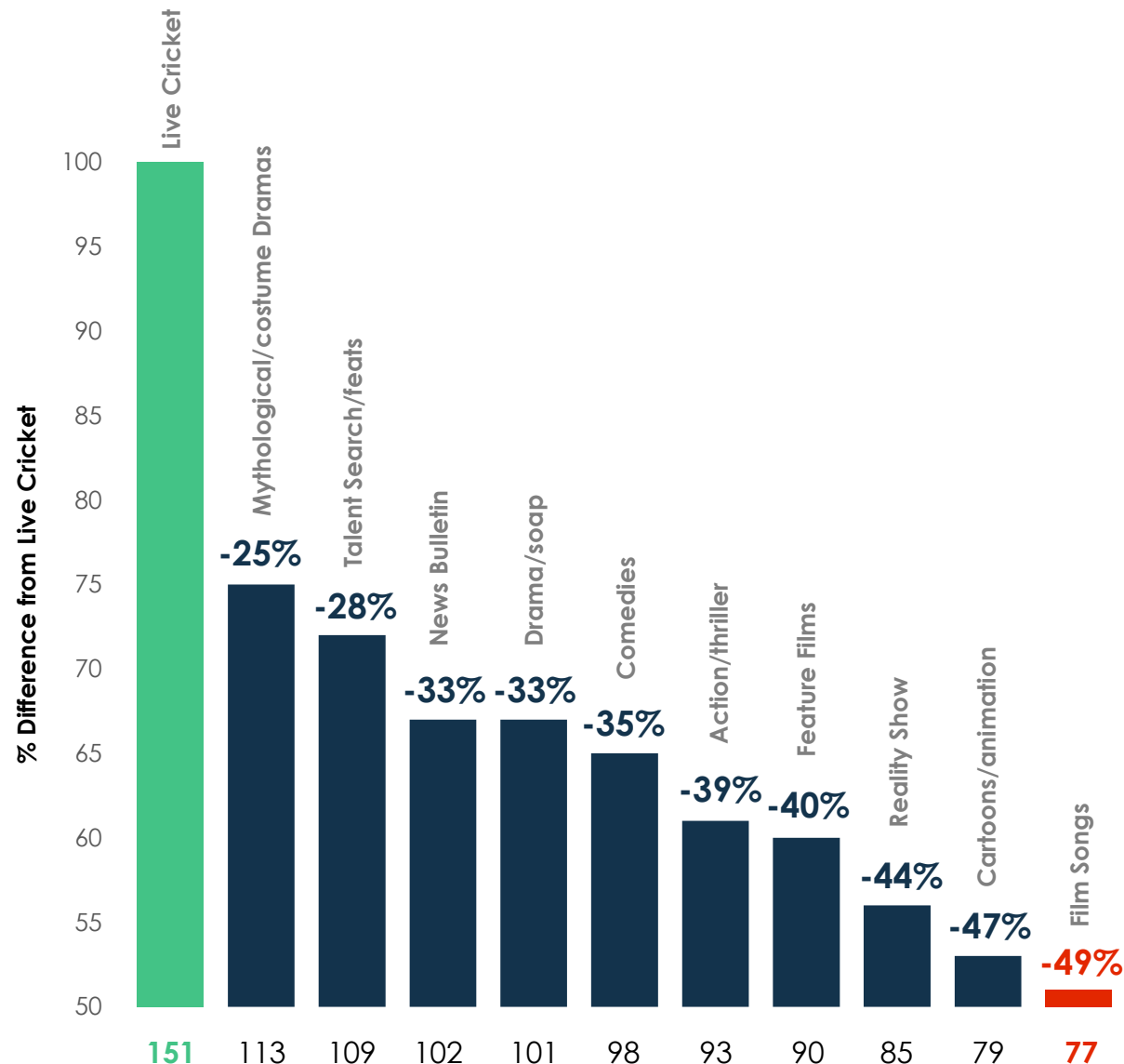
Cricket Delivers Highest Attention Among Genres

In the US, we see wide variation in genre performance for attention. Much of this is dictated by the type of performance and nature of the content. Sports in particular has high variation based on the nature of the game, the size of the audience and the length of the game.

We used the most recent data from the India panel to examine how exactly attention fluctuates by genre.

In the table below, Live Cricket had the highest attention, followed by Mythological/Costume/Dramas, and Talent Search/Feats. The range within the genres is as low as 77 and as high as 151, a 74% variance in attention.

In fact, Drama/Soap had 33% lower attention than Cricket, while Feature Films had 40% lower attention than Cricket:



Attention to Duration Index (ATDI)

This metric measures how effectively a specific Ad keeps a viewer's eyes on the TV relative to the duration of the commercial.

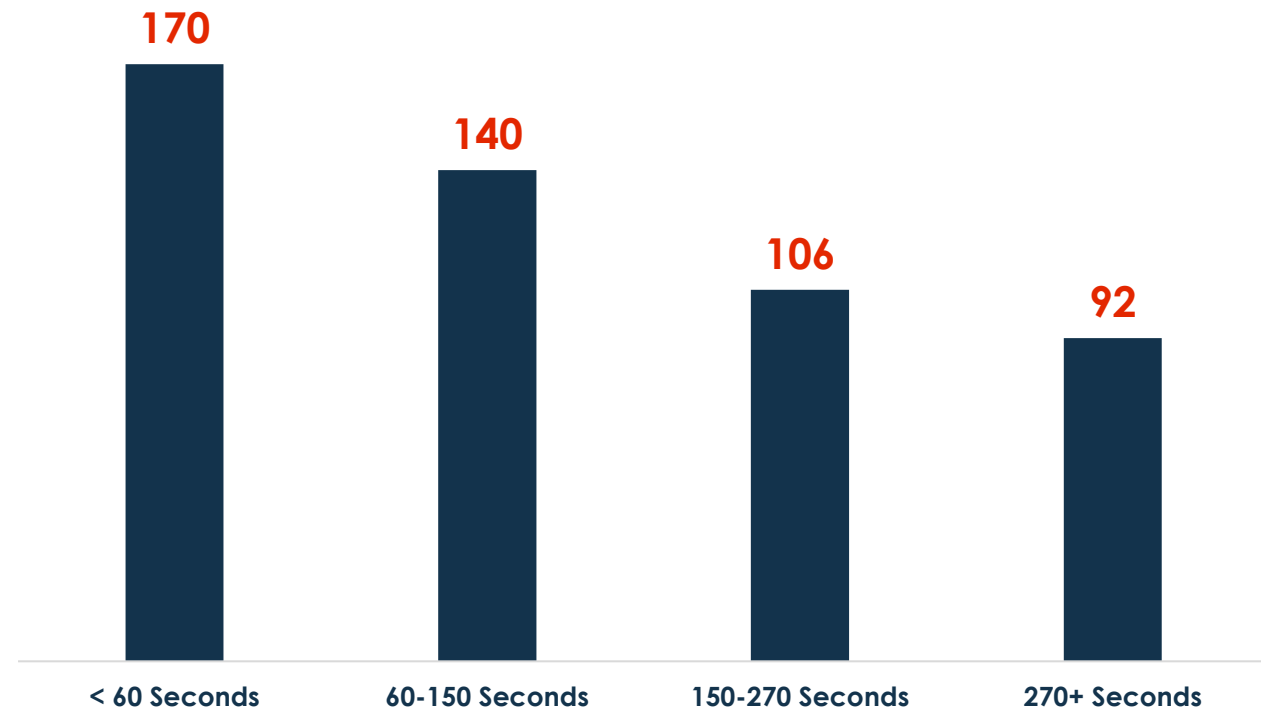
SHORTER POD DURATION ENABLES CRICKET TO HAVE HIGHER ATTENTION AS WELL AS LIMITED DROP IN ATTENTION ACROSS POD POSITION

The placement of ads within the commercial break, as well as the duration of the pod can also impact a viewer's attention.

We examined data from January 1st, 2021-June 30th, 2021, in India, from a variety of lenses including genre and pod duration to understand pod performance across genres.

Pods in live cricket are short compared to other genres. In fact, the majority of pods in cricket are in the < 60 seconds bucket, a factor in why they enjoy significantly higher attention than genres such as drama/soap, mythological shows, news, etc.

Shorter Pods Lead to Higher Attention



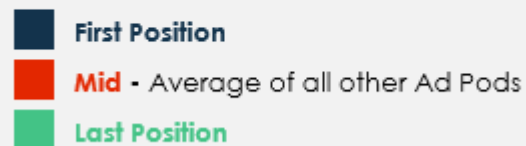
Pod Position Impacts Attention

Position in the ad break does not matter in the Cricket genre. Not only is attention highest in each position in Cricket compared to any other genre, it also sees minimal variation between positions.

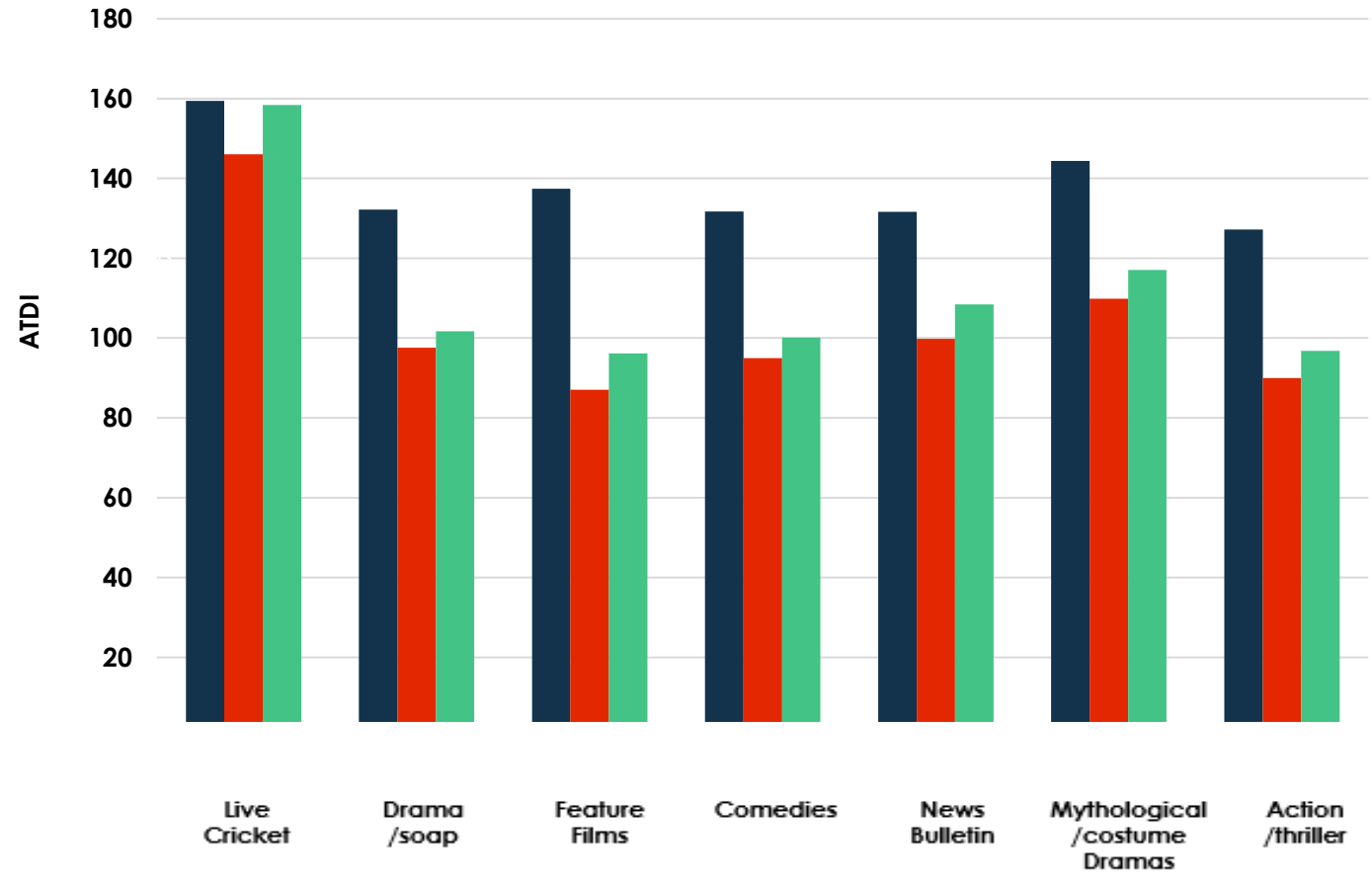
In Cricket, attention drops only 8% when one moves from first position to mid position and is the same between first and last, however, in Drama/Soap, attention is lower 25% in mid (compared to first) and lower 22% in last (compared to first)

Even the mid position in Cricket enjoys higher attention than the first position in any other genre

Position in POD



Position in Pod by Genre

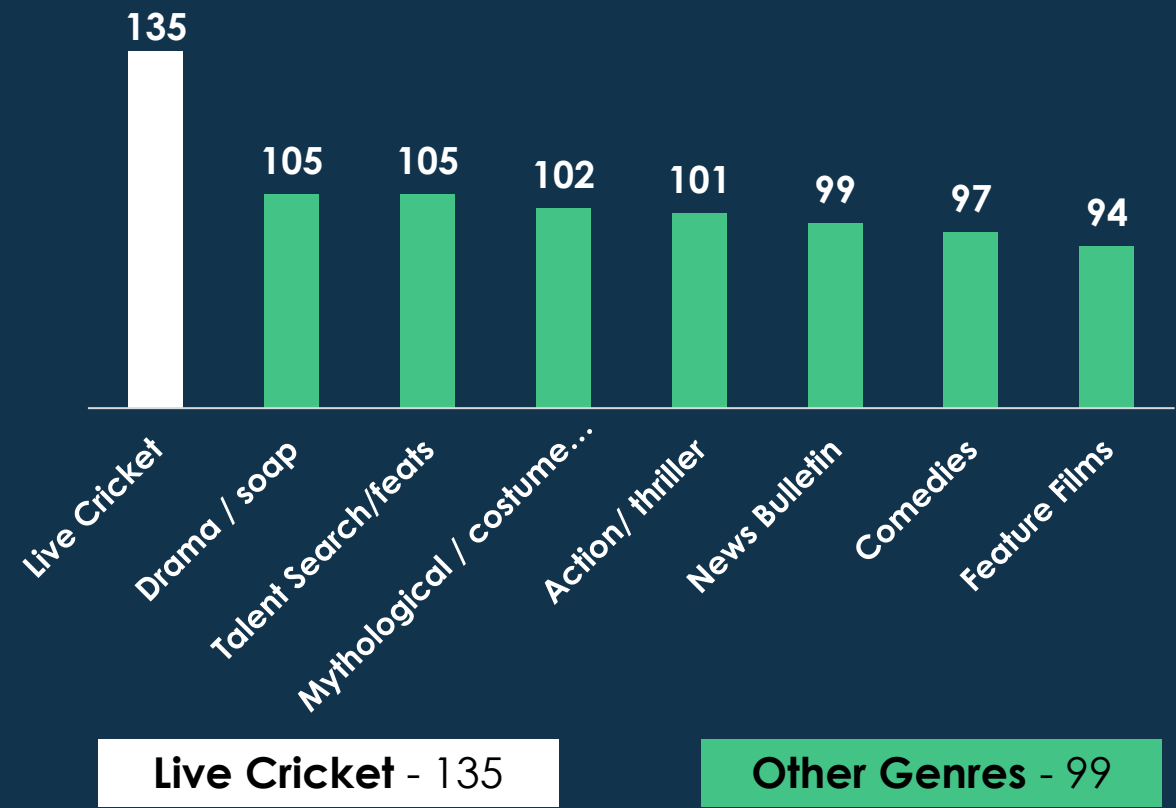


Big Name Events Deliver Higher Than Average Attention: World Test Championship 2021

We examined viewers' Attention during the 2021 World Test Championship. Tentpole events such as these present a massive opportunity for advertisers who are competing for viewers' attention. Since the WTC was the first time that Live Cricket returned to the screens after the paused IPL 2021, the pent-up demand for live sports was even greater.

During this year's WTC, rain impacted play-causing washouts on Days 1 and 4, and delays on days 2 and 3. In addition, the tournament was a test match- day long game over 4 days, quite different from the shorter T20 IPL Format. Despite these obstacles, the WTC successfully sustained higher attention compared to all the popular genres.

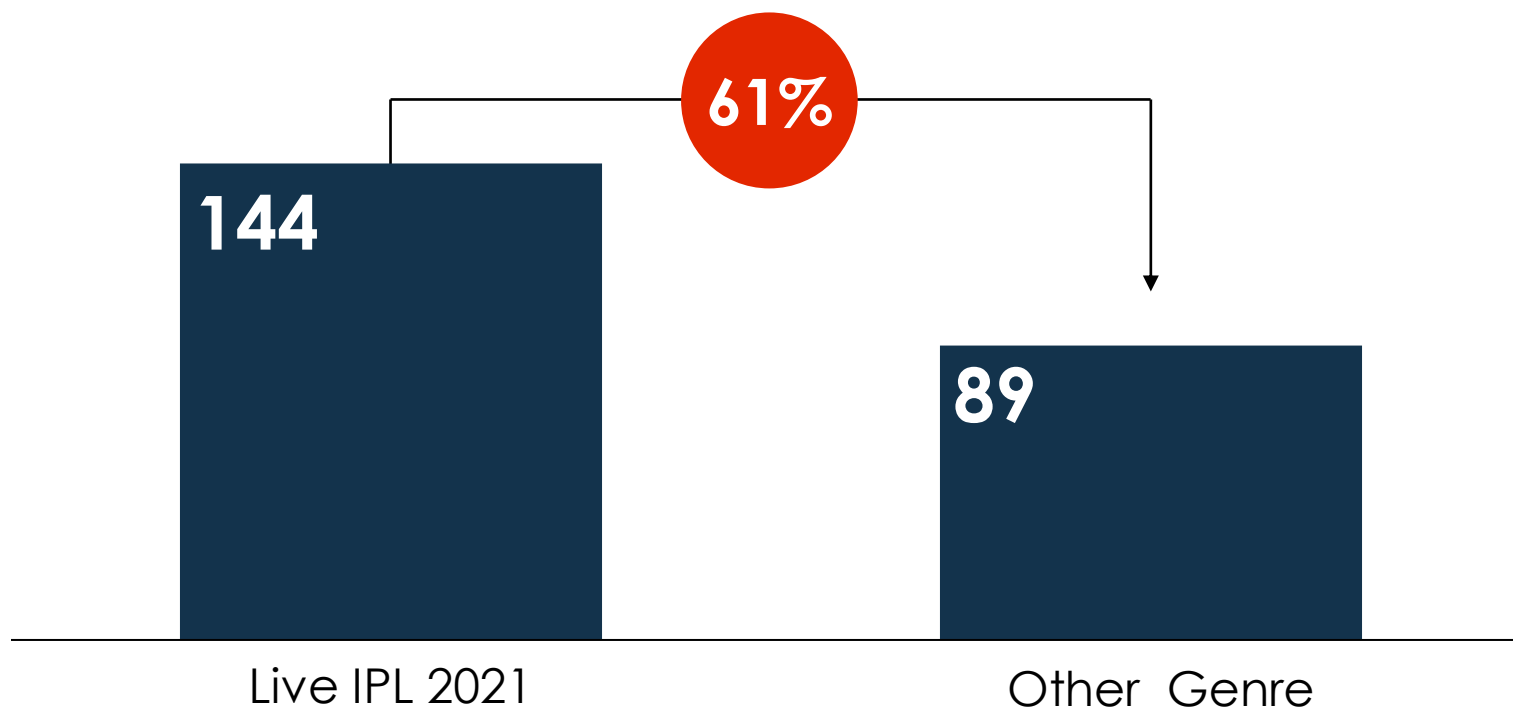
Attention To Duration Index: WTC vs. Key Genres



Indian Premiere League 2021 Captures Attention




The BCCI is India's biggest sports organization and hosts popular Cricket tournaments in India, including the Indian Premiere League. This year, due to Covid-19, the IPL was postponed and consisted of 29 games. Despite the abbreviated tournament, attention during the IPL 2021 was nearly 61% higher than other content that aired during the time-frame.




Tentpole events such as IPL and WTC are a great opportunity for brands to reach large audiences. Next, we delve into the specific creatives and ads that garnered the highest attention during IPL 2021.









High Performing Brands and Creative for IPL 2021

Attention to ads is influenced by strength of creative, appropriate audio cues, content relevance and more. We dissected the top 15 ads during the IPL to understand which factors were impacting attention.

Brand	Ad Title	Creative Length	Attention to Duration
 Livfast Solar	Dhoni Advice Masi-fastest Saving	10	181
 Jio Fiber	Song-jio Fiber/rr-ranveer/Most Reliable Broadband	10	179
 LG	Story Of Mogli	10	178

Brand	Ad Title	Creative Length	Attention to Duration
 Lenskart.com	Glasses For Rs 999-run Out-nazar Ghati Durghatna Ghati	15	171
 Tata Altroz	Man Drive Car/ipl Footage/corner Stability Control	15	170
 Jeevansathi.com	Cricket Match/umpire-match Fix	15	167

Brand		Ad Title	Creative Length	Attention to Duration
	Jsw Neosteel	Rishabh Pant Talking About His Cricket Experience	20	171
	Icici Pru Balanced Advantage Fund	Two Friends On Seesaw	20	162
	Cred	Jim Sarbh-cred Coins/jackie Loves Zumba	20	161
Brand		Ad Title	Creative Length	Attention to Duration
	Finolex Pipes	Sehwag As Umpire-ball	25	164
	Dream11.com	Hardik Pandya Passing Bricks To Friends	25	155
	Dream11.com	Shreyas Iyer With Friends Finding Lost Bat	25	155
Brand		Ad Title	Creative Length	Attention to Duration
	Reserve Bank Of India	Amitabh-banking Serv At Home For Over 70 Yrs/handicap People	30	167
	Apollo Tyres	Song-ganga/sachin Drive The Car	30	154
	Swiggy	Pp-old Man Known As Gulab Jamun Uncle	30	150

Second by Second Attention Analysis: Tata Altroz :15 second IPL Ad

Here we take a closer look at what is driving attention to Tata Altroz's successful :15 second IPL ad. The data below reflects the high points of attention of all viewers, aggregated over the duration of the creative. Each second of the creative was measured to understand when viewer attention peaked. This data allows us to understand which elements of the ad impacted viewers' attention. Based on this analysis we can see the critical role audio, such as IPL's signature tone, dialogue and voice over, plays in grabbing viewers' attention.



Attention of only completed views considered

Creative Assessment: Drive Greater Impact with Creative Optimization

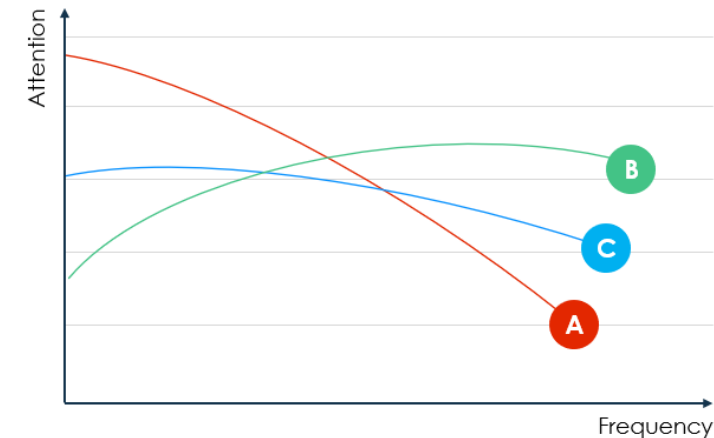
Tvision's attention data suggests that it is important to optimize creative allocation based on in-flight performance. Since each ad will perform different over time as viewer exposure to the ad increases, understanding at what frequency an ad has wear-out, can help determine the shelf life of each creative based on actual performance.

In order to maximize creative performance, it is necessary to understand attention drivers and identify best practices:

- **Creative Attention Score (CAS):** Ads ability to breakthrough (stand out) compared to other advertisers, capturing a greater proportion of attention
- **Ad Performance:** Does the Ad capture attention
- **Wear-out:** Ads will often decline in attention at a certain frequency
- **Optimization:** Knowing where ads are successfully capturing attention opens the opportunity to adjust creative rotation, introduce new creative, and adjust schedules

Questions to Consider When Creating Your Media Campaign

- When and where does your creative perform best ?
- How does your creative breakthrough week over week?
- How does reach and frequency impact creative performance?



Ad Performance Differs Across Creative, Understand Wear-Out

Media Planning: Maximize Audience Engagement with Attention

Attention data can be used to support media planning – throughout every stage of your campaign. Media buyers and sellers can work together to ensure that campaigns are optimized for attention, this helps the advertiser get more value for their budgets and allows the media seller to price premium content accordingly.

Questions to Consider:

- How do you maximize efficiency for viewability and attention
- How can historical performance inform buys?
- Which macro/micro TV trends can give you an edge?

Using attention as a currency enables

Optimal Campaign Performance

Work with your network partners to improve performance across specific elements.



Smarter Budget Allocation

Shift airings within the network towards high-viewability environments



Improved Investments:

For low performers with low strategic value, consider if they are driving the results you need.



Actionable Insights

Use learnings from historical performance to optimize current allocations, plan more effectively, and inform any media buying.



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