R K SWAMY
CENTRE FOR STUDY OF INDIAN MARKETS

RECALL OF ADVERTISING ON DIGITAL VIDEO PLATFORMS & CHANNELS

The multi-thousand crore question

(A whitepaper on the impact of advertising on Digital Video platforms based on an empirical study conducted by R K SWAMY Centre for Study of Indian Markets)

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hansa research

If you advertise on
Digital Video platforms and
channels, this White Paper will be
relevant for you.

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Executive Summary

The consumption of digital videos is nothing short of eye-popping.

The vast supply pipeline beyond TV and Movie production companies now also includes social platforms, millions of creators, you and me. Peer-to-peer sharing of videos happens every minute. No longer is viewing restricted to a location like home. Viewing is on the go, virtually anywhere. The mobile is the most watched screen.

Watching videos online has become the No. 1 pastime surpassing all other forms of entertainment. According to our study, 93% of respondents watch videos on their mobile. They spent 2.17 hours daily in this activity, on average.

Advertisers are pouring thousands of crores of rupees in advertising on digital video platforms and channels. The estimate of ad spends on digital videos ranges from Rs. 12,000 Cr to Rs. 22,000 Cr. The individual context of viewership of videos is as varied as there are viewers. The video platforms offer advertisers an array of formats, inventory, buy types and packages mapped on to audience profiles, interests, intent and geographic options. They hold out the promise of superior targeting. Delivery metrics, almost all supply-side in nature and self-certified, include Impressions, Views, View-through-rate (VTR), Click-through-rate (CTR), Cost-per-thousand views (CPM) or Cost-per-view (CPV). They are designed to give an idea of what is being bought.

Is the advertising effective?

Advertisers spend money to meet basic objectives – increase Brand Awareness and Recall, communicate content to persuade consumers, educate the audience on various offerings, and improve loyalty to their brands and offerings. All of this starts with Brand Awareness and Recall.

We set out to study Awareness and Recall of brands advertised on Digital Videos. The R K SWAMY Centre for Study of Indian Markets, under its AIM (Advertising Impact Measurement) series, launched a seminal study covering 3,000 respondents in a single month, between the ages of 18-50 years, split equally by gender and across income groups in 10 cities. One-on-one interviews were conducted with each of the respondents. Their viewing devices were checked to ensure veracity of screen-time use. We posed questions to understand digital video consumption. (Answers to the detailed questionnaire are provided in this paper.)

The Findings

The findings of this study are eye-opening, summarized as follows:

1. The recall of brands, across the board, was poor. More than 600 brands were recalled, but each brand was recalled by less than 1% of the respondents.
2. Only 11 brands have more than 3% recall. These were: Zepto, Zomato, Meesho, Nescafe, Flipkart, Amazon, Swiggy, Blinkit, Country Delight, Rummy Circle and Dream 11.
3. Respondents recalled only about 1.5 brands on an average – the average is more or less similar across platforms.
4. Respondents struggled to recall specific brand names, often referring to ads by generic terms like "mobile ad" / "clothes ad," highlighting the difficulty in remembering and accurately identifying the brands.
5. The most frequently recalled brands are associated with online shopping, online food ordering/delivery, groceries and coffee.
6. Most recalled attributes reflect the features/benefits of the online brand, like "fast delivery", potentially influenced by their past experience with the brand.
7. Very few were able to recall specific details of the creative content itself.
8. Nearly three out of five respondents found the ads served to them irrelevant.
9. Three out of four WhatsApp videos received are viewed and forwarded.
10. Three out of five viewers prefer to skip ads on Digital Videos, if they can.
11. YouTube was the highest used platform for watching videos, followed by Facebook and Instagram.

What can explain the findings?

Several hypothesis can be deliberated to understand the low recall of advertising on Digital Videos:

a) The Digital video landscape is vast and lacks a concentrated focal point.

b) The impressions served are unique to each viewer, based on the platform's appreciation of viewer preference. Frequency of views of a single message is unclear, as this is not measured.

c) The Digital Video viewing is not appointment viewing, as was/is the case with primetime viewing on Television. The viewing is very scattered, not accumulating a mass audience at any one time.

d) Advertising is easily skipped on Digital Videos.

e) The method of planning and buying impressions/time on digital videos may have to be reviewed from the point of adequacy and impact.

All of these merit deep introspection and investigation. This white paper for now provides a detailed insight into recall of brands advertised and how people consume Digital Videos and view advertising that appears on them.

The Study also assessed ad content recall, not covered in this paper. This can be discussed on request.

Detailed findings

Who did we meet?

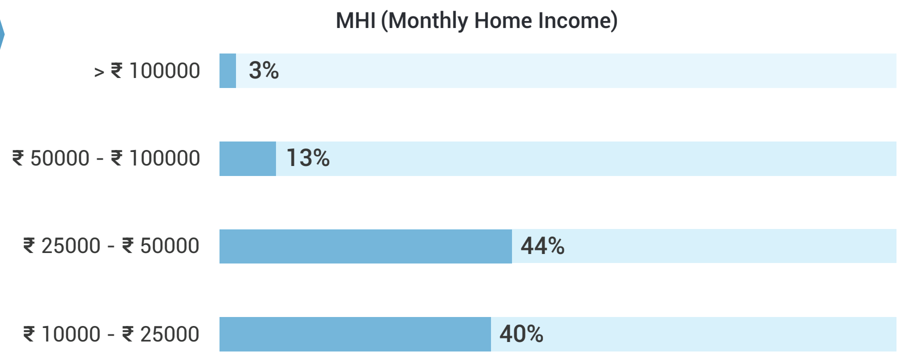
A robust sample of 3000 respondents were interviewed in person one-on-one by Hansa Research. A specific questionnaire was administered and the viewing devices of every respondent was checked to gauge the veracity of OTT apps subscribed to and viewed.

Age: 18 -56 yrs.

Male/ Female 50%:50%

Bengaluru, Chennai, Delhi, Hyderabad, Kochi

Kolkata, Ludhiana, Mumbai, Patna, Pune

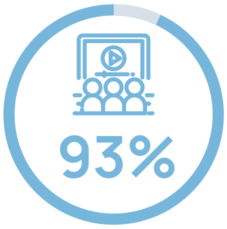


Sample

Location	Sample per day	Total Sample
Bengaluru	10	300
Chennai	10	300
Delhi	10	300
Hyderabad	10	300
Kochi	10	300
Kolkata	10	300
Ludhiana	10	300
Mumbai	10	300
Patna	10	300
Pune	10	300
	Total	**3000**

Video Watching Habits and Ad Viewing Preferences

Mobile phones are the dominant device of choice with an average viewing time of 2.17 hours per day. Most preferred viewing videos in their native languages. Incidence of ad skipping while viewing is high.

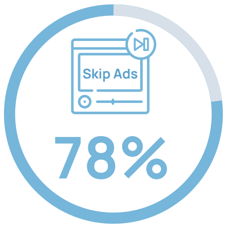


Video Watching Frequency

- 93% watch videos daily on their mobile phones.
- Average Daily Viewing Time: 2.17 hours

Language Preferences

- Regional languages rule the roost



Ad Viewing

- 78% of participants skip ads during video playback.

Language Preferences by Location

(Language preferences in %)

	All	Bengaluru	Chennai	Delhi	Hyderabad	Kochi	Kolkata	Ludhiana	Mumbai	Patna	Pune
Base	3041	300	303	306	301	309	300	312	307	302	301
Hindi	64	30	4	100	14	34	77	99	100	100	76
English	41	36	61	28	20	63	41	8	80	9	59
Tamil	15	25	99	-	-	23	1	-	0	-	-
Marathi	15	1	-	0	1	-	0	1	82	-	61
Telugu	12	21	5	-	98	1	1	-	0	-	0
Malayalam	10	1	2	-	-	99	-	-	-	-	-
Kannada	10	96	0	-	0	0	-	-	3	-	-
Bengali	9	0	-	0	-	-	88	0	-	-	1
Punjabi	8	-	-	6	-	-	1	69	-	-	-
Bhojpuri	2	-	-	7	-	-	2	1	2	4	-
Gujarati	1	-	-	1	0	-	-	-	5	-	0
Odia	0	-	-	-	-	-	0	-	0	-	-

Brand Recall Status

Average no. of brands recalled by one person	1.5

The most frequently recalled brands are associated with online groceries, online shopping, food delivery, and coffee.

Platform Usage Summary

A lion's share of ads were viewed on YouTube followed by META.

Other Platforms on Which Ads Were Seen	%
Don't Know/ Can't say	11
Hotstar	0.3
OTT app	0.3
Jio TV mobile	0.2
Cricbuzz	0.1
News18	0.1
Spotify	0.1
Jio Cinema	0.1
MX Player	0.1
Chrome	0.1
News app	0.1
Sony	0.1
ABP	0.1

While more than 600 Brands were recalled, only 11 had more than 3% of the audience recalling them.

Brand Recall by Platform Usage

A greater percentage of the respondents recall seeing a Brand on YouTube than on other platforms perhaps due to greater time spent on the platform.

(%)

Brands	Overall	Youtube	Instagram	Facebook
Zepto	13	19	6	9
Zomato	6	8	2	4
Meesho	5	5	6	5
Nescafe	5	7	1	2
Flipkart	4	3	8	8
Amazon	4	5	3	7
Swiggy	3	4	2	2
Blinkit	3	4	3	3
Country Delight	3	4	1	1
Rummy Circle	3	3	3	1
Dream 11	3	4	5	1
Zupee	2	3	4	0
Britannia	2	1	1	8
Surf excel	2	2	1	2
Samsung	2	2	3	1
Dove	2	2	1	3
Colgate	2	1	1	3

Most recall is happening on YouTube – in direct correlation to usage of platform

Brand Recall by Demographics

Q-Com brands have a greater skew towards a younger respondents when it comes to recall.

(%)

Top brands recalled	Overall	Male	Female	18-25 Years	26-29 Years	30-35 Years	36-45 Years	46-55 Years	56 Years Or Older
Zepto	13	13	12	20	12	11	9	9	7
Zomato	6	7	4	5	8	5	4	6	8
Meesho	5	3	6	5	3	5	4	6	4
Nescafe	5	4	5	7	4	3	4	3	4
Flipkart	4	4	4	4	4	5	4	4	5
Amazon	4	3	4	5	2	4	4	2	3
Swiggy	3	3	3	3	5	3	3	3	4
Blinkit	3	3	3	3	4	2	3	3	4
Country Delight	3	2	3	2	3	3	3	5	3
Rummy Circle	3	4	2	2	3	4	2	3	4
Dream 11	3	3	2	6	1	2	1	0	2
Zupee	2	3	2	5	1	1	2	0	1
Britannia	2	1	2	1	2	1	2	2	5
Surf excel	2	2	1	1	2	1	2	1	1
Samsung	2	2	1	1	2	1	2	2	2
Dove	2	1	2	2	2	1	2	1	1
Colgate	2	2	2	1	2	1	1	3	3

On META's platforms younger respondents seem to recall seeing more ads more than their older ones

(%)

Top brands recalled	Overall	Male	Female	18-25 Years	26-29 Years	30-35 Years	36-45 Years	46-55 Years	56 Years or Older
YouTube	64	64	65	72	61	62	61	62	62
Facebook	19	19	19	21	18	21	20	16	16
Instagram	17	18	17	23	18	17	15	12	13

Purchase/ Usage Intention

While recall may be low, percentage of respondents willing to buy the brands they recall is high/significant.

Top brands recalled	% respondent willing to use/ buy the product/ brand for which they saw the ad
Zepto	79
Zomato	66
Meesho	60
Nescafe	76
Flipkart	65
Amazon	60
Swiggy	63
Blinkit	66
Country delight	60
Rummy Circle	33
Dream 11	53
Zupee	45
Britania	66
Surf excel	85
Samsung	71
Dove	76
Colgate	78

The maximum viewing time of the leading platforms is in the range of 1.07 to 1.25 hours/day

Mobile Video Viewership for top Apps and the time spent on them is fairly accurate when compared with physically verified data.

Top 10 APPS used	Apps Used		Avg. time spent on apps in a day	
Base	Unaided response (%) 3041	Physically Verified (%) 2666	Unaided response (In Hrs.)	Physically verified (In Hrs.)
YouTube / YouTube shorts	89	90	1.14	1.19
Instagram	73	75	1.07	1.18
Facebook	63	65	0.49	0.53
WhatsApp	62	70	0.5	0.53
Disney + HotStar	19	24	1.19	1.11
Snapchat	17	22	0.41	0.44
Amazon Prime	11	14	1.17	1.22
Netflix	9	12	1.25	1.14
Respondent didn't allow physical verification		12		
Avg. time spend on apps in a day			3.2 hrs	3.0 hrs

Hours vs Number of Brands Recalled

Avg. time spent on apps in a day	Avg. No of Brands recalled
Overall	1.49
1 Hr	1.45
2 Hr	1.47
3 Hr	1.39
4 Hr	1.57
5 Hr	1.58
6 Hr	1.49
7 Hr	1.70
Above 7 Hr	1.63

R-squared value of 0.59 – so there is a good correlation between the time spent and brand recall

Ad viewing habits

Incidence of ad skipping and muting during playback is high. Majority felt that the ads streamed are irrelevant to them.

Ad Skipping

78%
Prefer to skip ads while watching

22%
Like to watch ads

Muting Ads

50%
Mute ads If they can't skip them

50%
Watch ads without muting

Ad Relevance

57%
Most ads are irrelevant to me

43%
Most ads are relevant to me

Repetition of Ads

69%
Dislike seeing the same ad again and again

31%
I don't mind watching the same ads

8% respondents said they love to watch ads but hate if its repeated

WhatsApp video behaviour

Videos received on WhatsApp generally get viewed and shared.

Video Viewing Habits on WhatsApp (%)	
I don't get videos on WhatsApp	12
I watch very few videos that I get on WhatsApp	14
I watch only some of the videos that I get on WhatsApp	36
I normally watch most of the videos that I get	38

Video Forwarding Habits on WhatsApp (%)	
I don't forward videos that get on WhatsApp	15
I normally forward very few videos that I get on WhatApp	14
I normally forward some of the videos that I get on WhatsApp	47
I normally forward share most of the videos that I get on WhatsApp	25

Base: people who watch video on WhatsApp: 2004

In conclusion

We hope this study gives Advertisers some vital insights that will help them understand and contend with the challenges of advertising on digital platforms.

The performance metrics provided by various Digital Video platforms do not really throw much light on the impact of advertising on critical outcomes that determine ROI. The fact this media is becoming only more cluttered, fragmented and expensive to advertise on, is certainly not making things easier forcing many spenders to question what they are really getting.

Our intent at R K SWAMY Centre for Study of Indian Markets is to continue to explore this issue from a variety of dimensions to help provide advertisers with answers.

We welcome feedback and suggestions which may make this Study more useful for advertisers. We also plan to offer advertisers who would like to assess their brand performance the opportunity to participate in the forthcoming phases with their specific requirements (brands, markets, audiences or any other variable).

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