



Let's Solve

Whitepaper

Advancing Analytics and Insights Maturity Level for TV Viewership

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Abstract

Though technology disruption in the media and entertainment industry have caused a strong shift towards digital businesses, linear TV broadcasting still holds a majority revenue share for broadcasters and that is not going to change anytime soon. Broadcasters can in fact leverage some of these disruptive technology advancements to know more about their ecosystem, especially their consumers, and leverage those deeper insights to deliver more value to their consumers and advertisers.

TV Broadcasting – The optimism is still there, and for a reason

As emerging technology disruptions propel rising consumer expectations in the media and entertainment (M&E) industry, enterprises are compelled to transform their business models to align with the new digital world. While it's true that all media companies are having a significant focus on their digital businesses, the traditional linear TV broadcasting still holds a major share of their revenue portfolio and that's something that's not going to change anytime soon. Though there's no doubt that the population of cord-cutters and cord-nevers has grown significantly over the past few years and it still continues to grow, the linear TV broadcasting subscription has not declined as badly as it was being feared, by many, couple of years ago.

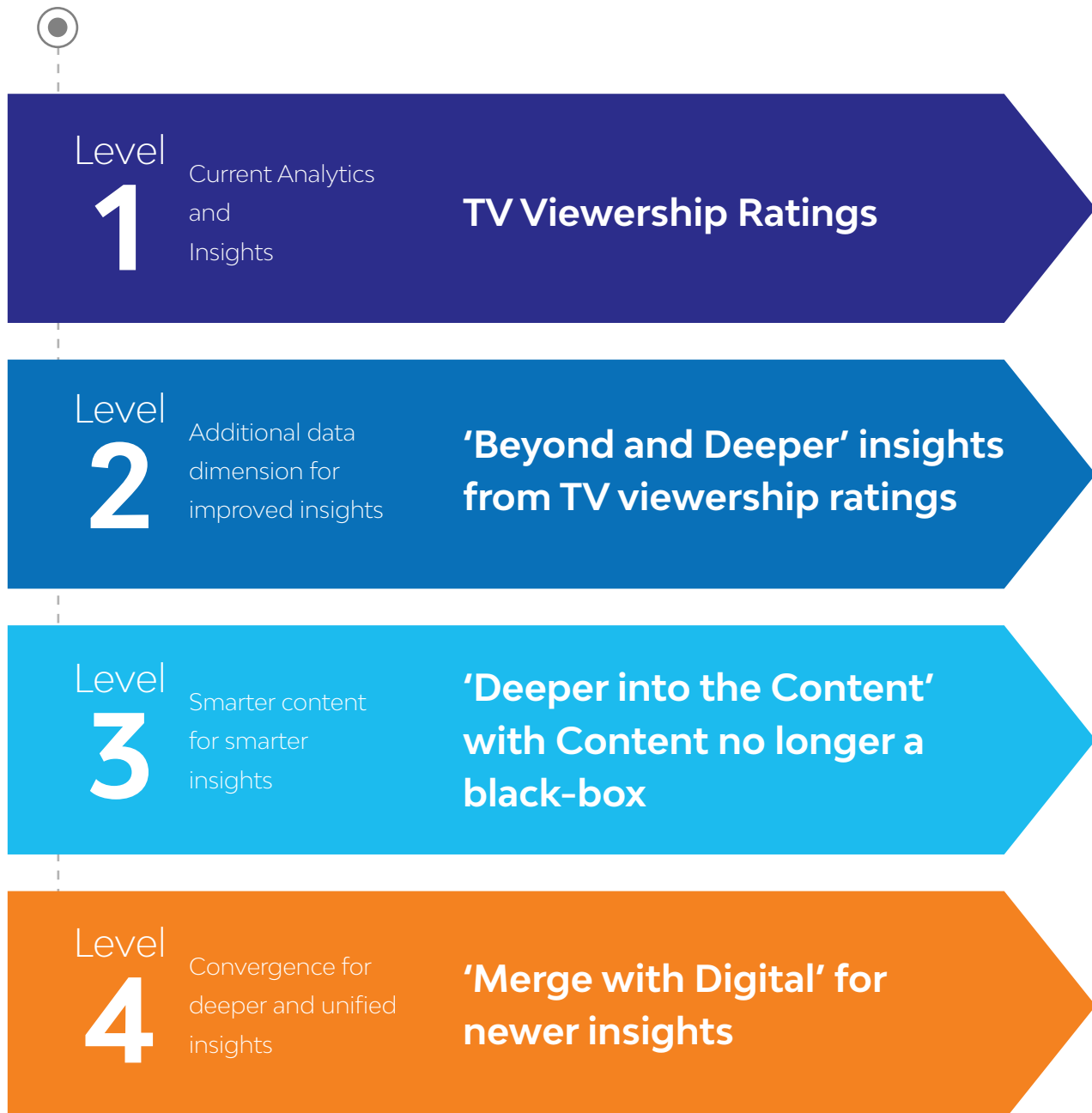
Realizing the potential risks and opportunities, media companies are making heavy investments towards enabling higher value for TV consumers and advertisers in an attempt to sustain, at minimum, their traditional TV broadcasting business. The first of the top three investments made by the media firms should be on data and analytics to understand more about TV consumers' content preferences and viewing patterns.

The Three Building Blocks for Advanced Analytics and Deeper Insights

In addition to indicating a shift towards digital business models, the technology disruptions also open up opportunities to innovate in traditional TV business with more insights into the ecosystem of consumers, advertisers and competitors. Building on this, TV broadcasters should focus on the following three incremental building blocks to achieve that much needed and much Beyond and Deeper insights to drive business growth.

- 'Beyond & Deeper' insights from TV viewership ratings
- 'Deeper into the Content' with Content no longer a blackbox
- 'Merge with Digital' for newer insights

Figure 1 : Building Blocks for Advancing Analytics and Insights Maturity for TV Viewership



Let's look at each of these building blocks for how they help with more advanced analytics and deeper insights.

1. 'Beyond and Deeper' insights from TV viewership ratings

Broadcasters leverage data provided by viewership rating agencies to learn about performance of their channels and content. Common dashboards employed by broadcasters provide 'insights' about viewership trends, performance vis-à-vis competition channels and shows, ad viewership and its correlation to ad sales rates charged by broadcast. Though these dashboards are surely helpful and informative, they are only reporting and representing already available data in a more consumable format. Are they really delivering 'insights' that can significantly help with business decisions and growth?

When we look at TV viewership ratings, it usually covers the viewership for channels in given genres such as English GEC, Kids, Sports etc., and for shows, promos and commercials. Broadcaster leverage the available data well, but need an additional data-point to proceed to the next level of analytics. This additional data point is the genre of the show/content within a given channel type. Few broadcasters already use this dimension in either manual analysis or in broad genre categories. This data point has to be at the right level, and will henceforth be referred to as sub-genre in this whitepaper.

- The word genre may be confusing as it can be used both for channel genre (such as English GEC or Kids) and for show genre (such as Fiction-Thriller or Reality-Singing) based on the region one is looking at
- For the sake of clarity, we will use two terms and here they are with examples
 - i) **Channel type** – This indicates the channel genre or category such as English GEC, Sports, Kids, News etc.
 - ii) **Subgenre** – This indicates the one level drilldown of the show genre or category such as Fiction-Thriller, Non-Fiction Crime, Reality-Singing, Fiction – Family Drama, Fiction – Comedy, and Mythological etc.

Broadcasters can define their own subgenres based on their programming strategy and their content portfolio. Assigning subgenre to the shows, whether owned by broadcasters themselves or by competition, is not a time consuming activity. Broadcasters can have subgenres assigned once to their own running shows and the shows from competition. Subgenres can be assigned to new shows when they are launched. It's not a cumbersome activity as new shows are not launched every other day or week. Subgenres can even be formed leveraging public data sources (IMDB, EPGs etc.) and validated by channel teams. Once the broadcasters have this additional data dimension, they can get the next level of insights by tying this data to TV viewership data.

The following are a few types of analyses and examples of meaningful insights that can be derived from TV viewership ratings data analytics:

1.1 In-Subgenre Analysis: All Shows within the Subgenre

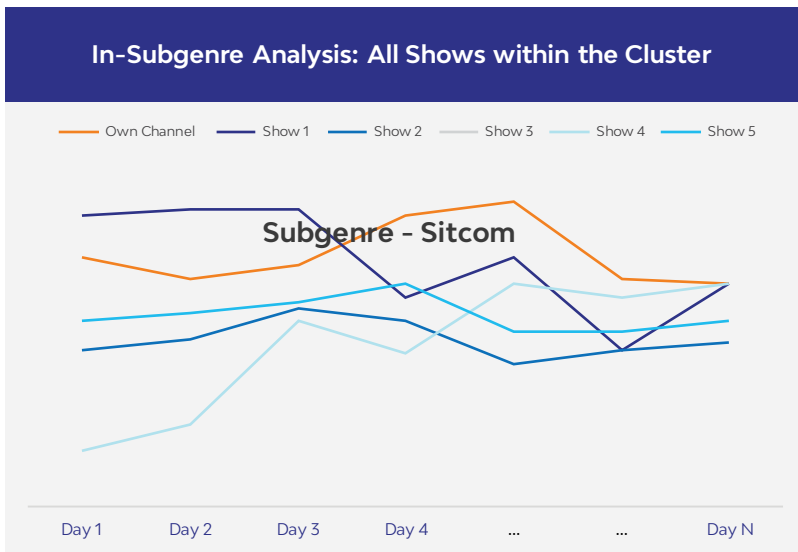


Figure 2: In-Subgenre Analysis: All Shows within the subgenre

Insights for Broadcaster

- How are channel's own shows doing as compared to similar (same sub-genre) shows on own and competing channels?
- Does channel rating depend considerably on shows within this subgenre?

1.2 In-Subgenre Analysis: Correlating Promos to Shows' GVM

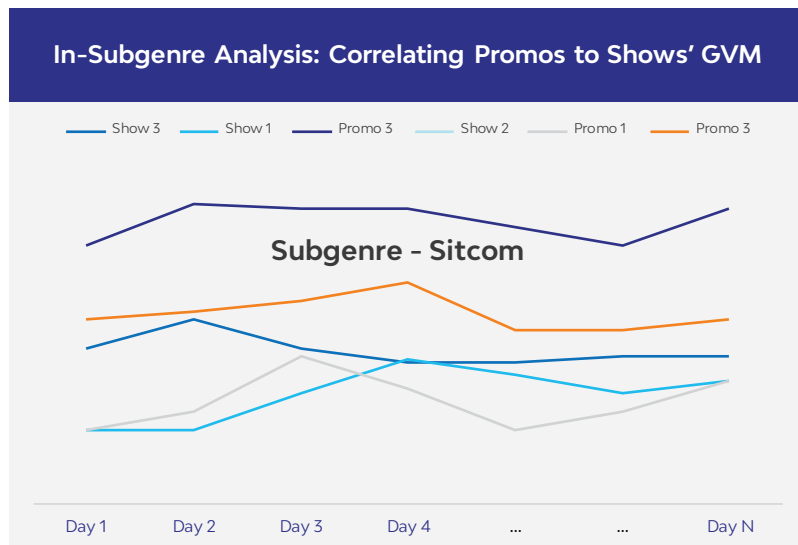
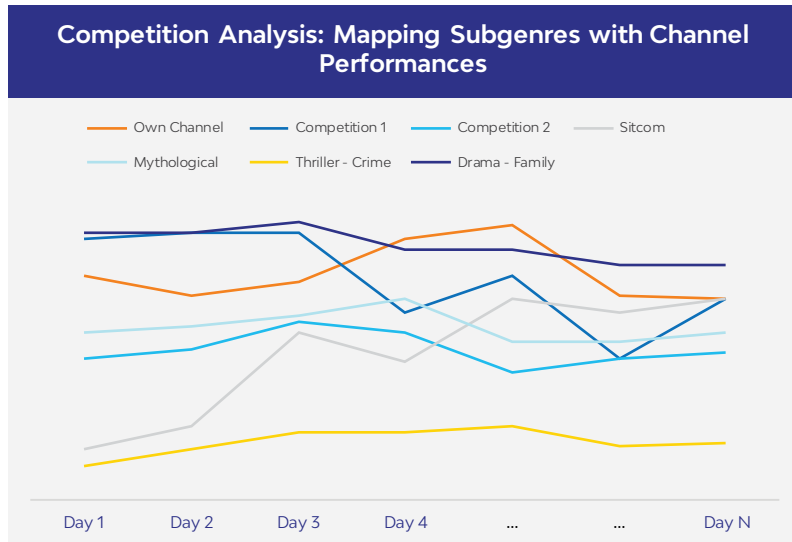


Figure 3: In-Subgenre Analysis: Correlating Promos to Shows' GVM

Insights for Broadcaster

- How are promos impacting the viewership of a channel's shows
- What is the competition's promo strategy with promos (focus subgenres and shows) and how is it impacting viewership of their shows
- Which promos can be stopped (not impacting show viewership)
- Which shows need to be promoted more (viewership declining)
- Which shows are responding well to promos

1.3 Competition Analysis: Mapping Subgenre with Channel Performances

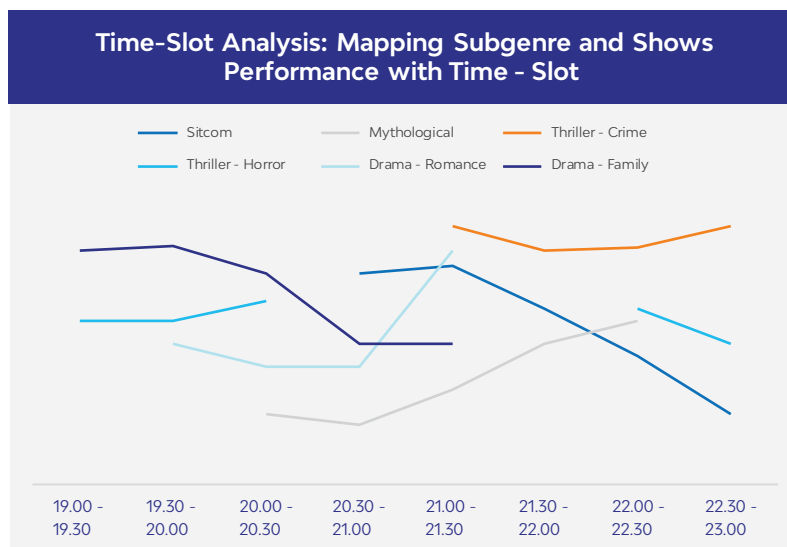


Insights for Broadcaster

- Which subgenres impact channel viewership and what's the degree of impact for each subgenre?
- Is channel viewership closely related to any subgenre?
- Is any competitor gaining significant viewership because of a particular subgenre?

Figure 4: Competition Analysis: Mapping Subgenre with Channel Performances

1.4 Time-Slot Analysis: Mapping Subgenres and Shows Performance with Time-Slot



Insights for Broadcaster

- What impact does time-slot have on a show for a given subgenre?
- Does a given subgenre perform better in a specific time-slot?
- How is the channel viewership related to own shows and slots they run in?
- Can viewership be improved by moving slots?
- Is the channel running the best show of one subgenre against an average show by a competition in a more preferred/popular subgenre?

Figure 5: Time-Slot Analysis

1.5 Channel Type Performance: Identifying Pattern with Viewership Dips

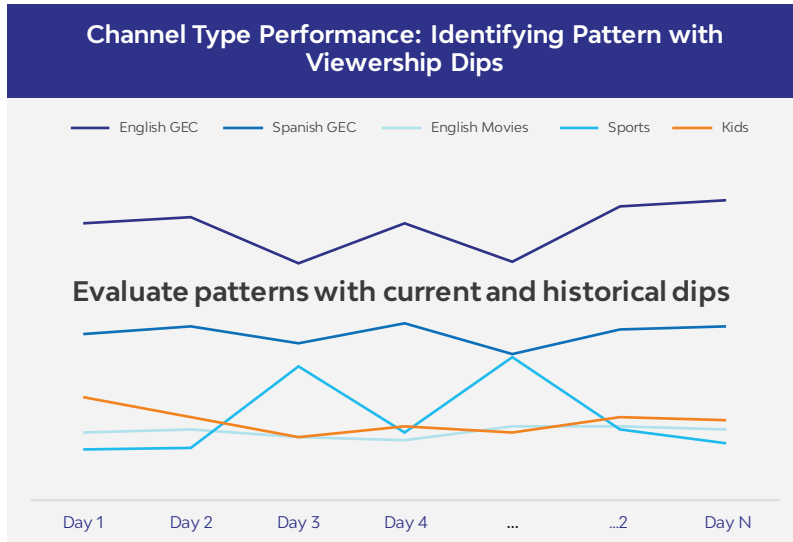


Figure 6: Channel Type Performance

Broadcast media firms can capitalize on these type of insights to augment TV viewership and ad sales pricing, by using these inferences to drive informed decision making about content strategy, airing time slots, promos planning and ad sales.

2. 2. 'Deeper into the Content' with Content no longer a black-box

The next level of insights are uncovered when we dig deeper into the content and relate that with the performance of the content as indicated by viewership rating. It is all about reading into what happened within the content that affected viewership in a positive or negative way.

Programming teams at broadcasters try to

Insights for Broadcaster

- How are Channel Genres performing as compared to each other?
- How is my channel performing as compared to performance of the overall genre
- What kind of viewership raise and dips are happening within and across genres?
- Is there a pattern that I can determine by looking at historical rises or dips?
- Which events (major award show, sports, news, spring break etc.) impacts viewership with a pattern?

correlate the performance of the show with what's happening within the show. While they are able to get a broad correlation on what works and what doesn't, the process of deriving such correlation is not very scientific and may miss many more insights that can be leveraged for better business outcomes. Adding temporal metadata to the content is the key to transforming the 'black-box' content into smart content that provides data required to understand and unclear about the idea trying to be conveyed by author.

Nonetheless, it is imperative for broadcasters to always consider content and viewership data in tandem with other influential factors such as content on competing channels, holiday seasons, sport events, or any national or global events that primarily drive higher viewership for specific channel clusters.

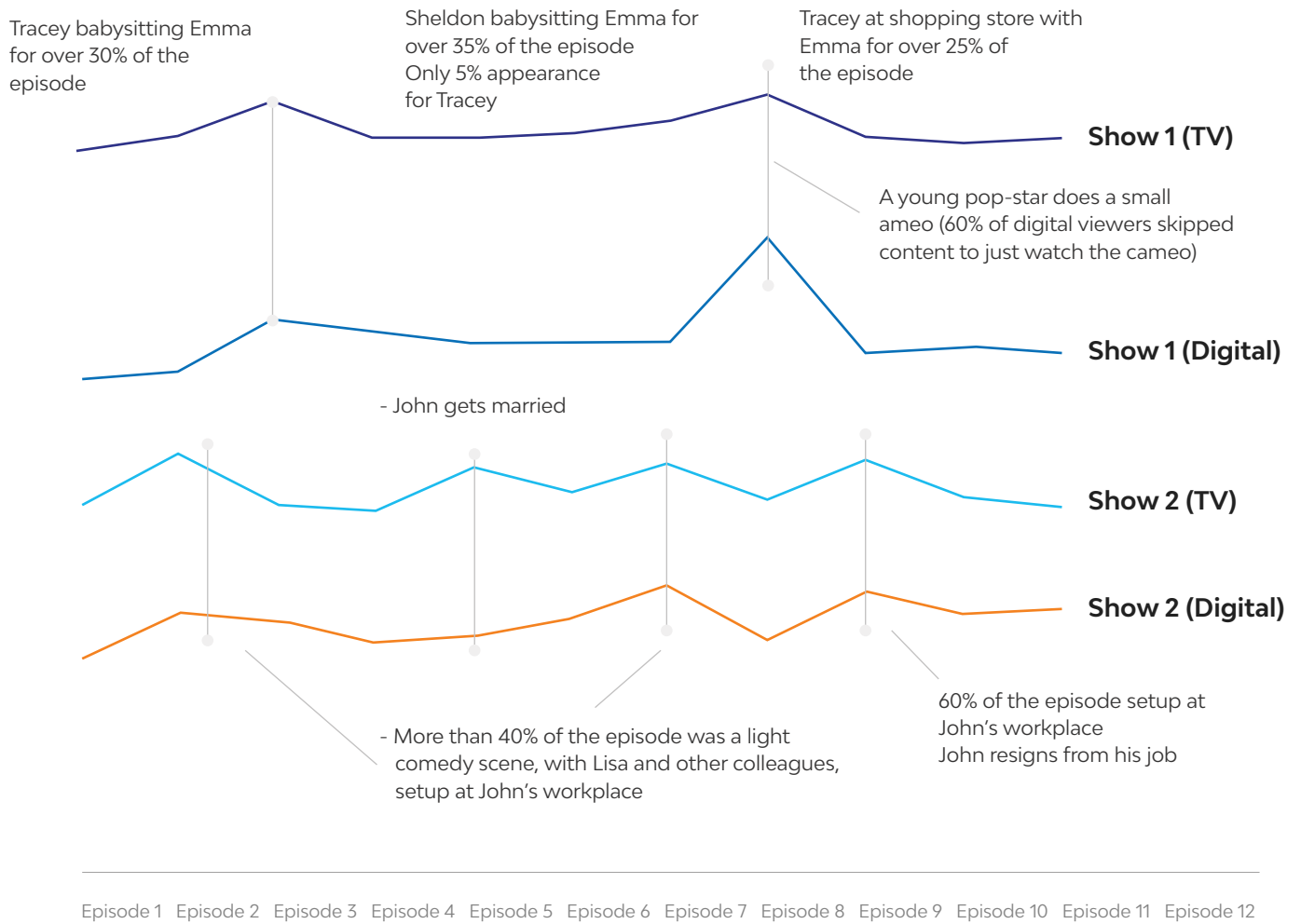
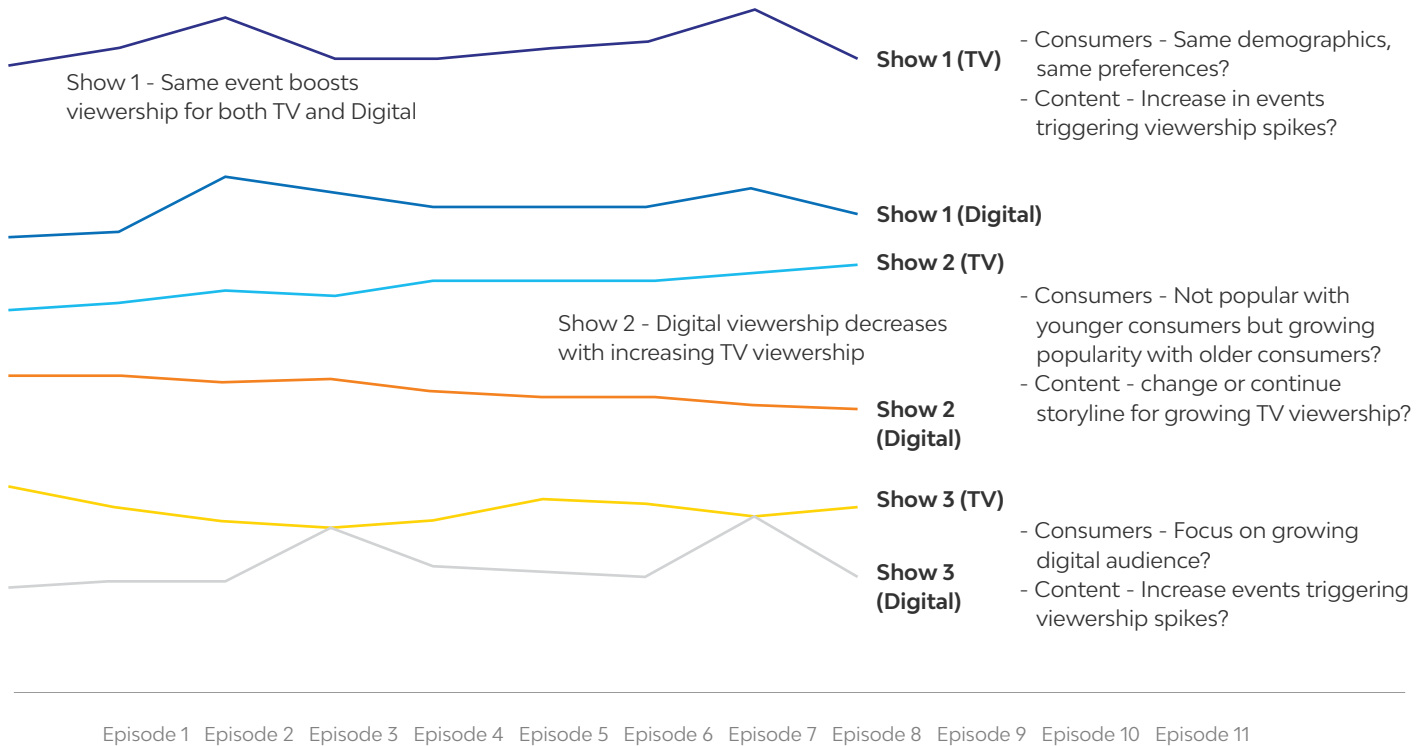


Figure 7: Moving 'Deeper into the Content'

With artificial intelligence capitalizing on image processing, NLP and face detection, the addition of temporal data has become economically viable and is garnering popularity. Though the addition of AI enabled automated metadata may not be in the 90% accuracy range yet, the available solutions can provide the the required accuracy for developing a simple data model that enables the aforementioned correlation and insights. Moreover, broadcasters can implement similar analyses for competing shows and channels to gain a comprehensive understanding of viewership trends and consumer expectation in terms of content.

3. 3. 'Merge with Digital' for newer insights

As going direct-to-consumers has become both an imperative and a norm, broadcast companies around the world have easy access to vast data on consumer interaction with content. As a result they can gain deeper understanding of viewer preferences and consumption behavior, which can be selectively converged with the data available for linear TV broadcasting.



*The above viewership data is meant for the purpose of gaining clarity only

Figure 8: 'Merge with Digital' for newer insights

Broadcasters can analyze the first party data to gain deep understanding of the consumer along the following lines:

- Digital consumer content preferences and behavior that extends beyond genre
- Differences between performance of the same content across digital and traditional TV broadcast
- Insights from digital that can be fed to TV broadcasting firms for improved decisions regarding content strategy and time-slot planning
- Comprehensive content strategy that aligns with the demands of both TV and digital consumers

Conclusion

Advancing data analytics and reporting along the three building blocks discussed above, can really help TV broadcasters with their content and consumer decisions enabling more viewership more channel viewership and higher ROI on their content and marketing investments. The data and insights discussed above can also be leveraged in digital business by broadcasters for improved business outcomes. An integrated view of success for a show across linear (traditional TV) and non-linear (digital) channels can help broadcaster plan for content that delivers business value that's more than sum total of value brought individually by the same content on linear and non-linear channels.

About the Author



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Manish is the Head of Business Development for Media, Entertainment and Information Services for Americas at LTI. He brings in a strong Strategy and Operations Consulting background with deep industry knowledge. Manish focuses on enabling business transformation for global customers by bringing-in the right set of industry insights and the latest technology solutions and platforms for helping them achieve desired business outcomes.

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