# THE CONTENT INDEX

# 2026

**11,000 CREATIVES WATCHED 1,957 READ 228 PUBLIC SOURCES**

Position. Produce. Distribute. Learn.

Less guesswork. More evidence.

YOSOmedia

# 1 in 20.

Of every twenty creatives an Indian D2C brand ships, one earns its budget. This report is about what that one has in common, and how to get to one in fourteen.

Built from two scored panels of shipped work (834 creatives watched frame by frame, 1,957 read from the account) and 228 public sources, April to September 2026.

SCORE WHAT YOU SHIP ✳ EDITION 1 ✳ INDIA D2C ✳ 1 IN 20 ✳

# HOW TO READ THE NUMBERS

# 02

**Every return is spend-weighted ROAS**, so a ₹10 lakh creative counts more than a ₹10K test.

**ROAS is indexed.** Each panel's average is set to 2.0x and everything scales with it. Ratios are exact; no client's real numbers appear.

**Two panels, scored separately and never added together.** Lens A: 834 creatives, a vision model tagged what is in each ad (the first three seconds, who carries it, sound, length, shape). Lens B: 1,957 creatives, tags read from the ad names the teams already use (concept, producer, language, copies).

**Sale-event campaigns return 3.0x to 3.3x** because the price is the creative. Content cuts exclude them.

**ROAS is platform-reported**, before returns and cash-on-delivery rejections. It ranks creatives and nothing more.

**This is a slice of one agency's production.** Rates travel between brands better than absolute numbers do.

## THE TWO LENSES

| | Lens A | Lens B |
|---|---|---|
| What it tags | What is in the frame | How the ad was made |
| How | Vision model, 20+ attributes | Ad-name conventions |
| Creatives | **834** | **1,957** |
| Window | Apr to Jun 2026 | To 24 Sep 2026 |
| Answers | **What a winning ad looks like** | **How often one happens, and who made it** |

# SIX THINGS THE DATA SAYS. ONE RULE.

03

## ONE CREATIVE IN TWENTY CARRIES THE ACCOUNT

The top 5% of creatives took 64% of spend. Half never passed ₹900.

## THE CHEAPEST FORMATS RETURNED THE MOST

Stills 2.4x against 1.8x for video. 64 of the 95 winners were stills.

## EARLY CLARITY PAYS

Brand in the first three seconds, +14%. Text in the opening frame, +15%. The slow reveal won attention and lost money.

## CLICK-THROUGH PREDICTS RETURN. HOOK RATE BARELY DOES

ROAS steps from 1.7x to 2.4x once CTR passes 0.8%.

## VERNACULAR PAYS WHEN THE WHOLE FUNNEL IS LOCALISED

Regional-language creative returned 1.9x against 2.0x.

## TWO POINTS ON THE HIT RATE IS WORTH OVER 40% MORE WINNERS

On the same spend. Seven percent is inside the observed range.

**THE RULE TO CARRY: STILLS FOR SALES AND RETARGETING, 9:16 VIDEO FOR COLD AUDIENCES. SCALE ON CTR ABOVE 0.8%. COUNT WINNERS PER MONTH.**

# WHY THE CREATIVE IS THE LEVER NOW 04

**57%**

of India's digital ad spend is social plus online video, where the platform picks the audience and the ad picks the result

**62%**

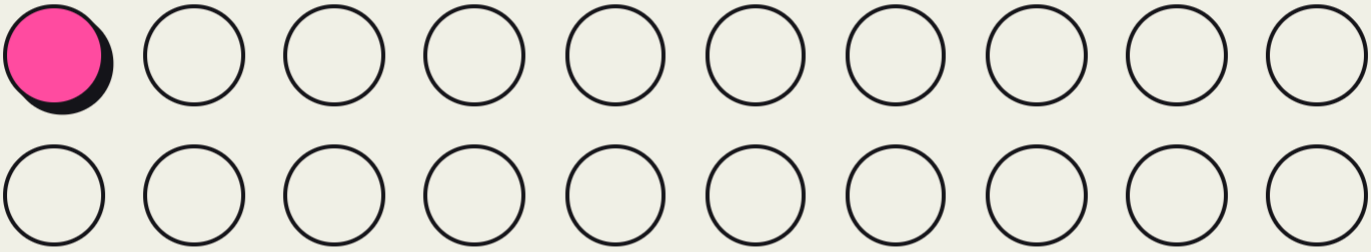
of 100+ Indian D2C founders surveyed call creative fatigue their biggest bottleneck

**30 to 45 days**

before an ad tires, as reported by Indian brands

Meta now collapses near-identical ads into one and asks for 20+ distinct ads per scaling campaign. Indian CPMs are a tenth of the global median and swing month to month, so the auction rewards more distinct concepts, not smarter bidding. The brief is the targeting.

# 1 IN 20 CREATIVES WINS, AND THAT IS THE GLOBAL RATE TOO 05



Of 1,957 shipped creatives, 95 cleared the winner bar: **4.9%**. Among those funded past ₹10K, one in four did. Motion's global base rate across 578,750 creatives is about 5%, from 3.7% for small accounts to 8.2% at $1M a month. The sample sits on the global line.

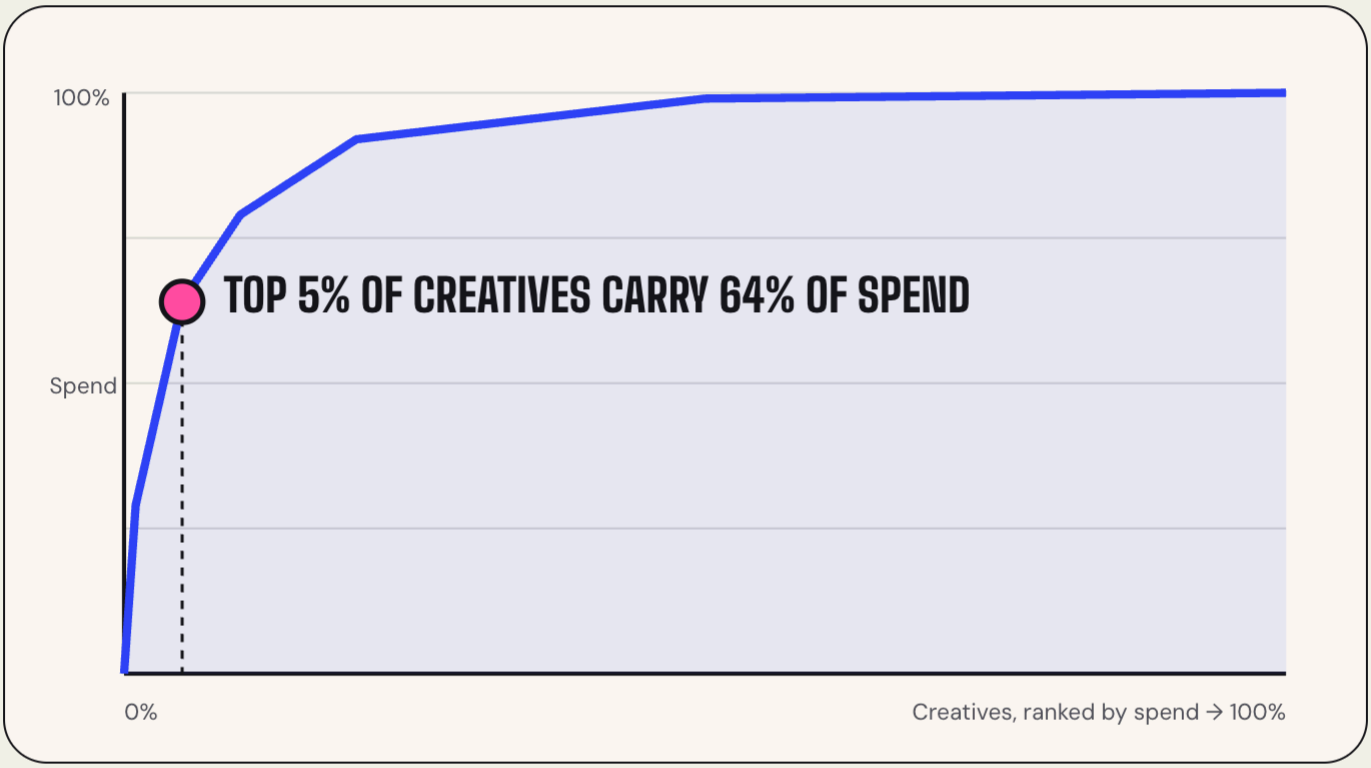
The winners carried 25% of funded spend and 36% of revenue, at 2.9x.

## THE WINNER RULE

ROAS at or above 1.9x indexed and CTR at or above 0.8%, on spend of ₹10K or more. Video also needs hook rate above 10% and hold above 20%.

# 1 IN 20 CREATIVES CARRIED 64% OF THE SPEND

06




| Creatives, ranked by spend | Share of spend |
|---|---|
| Top 1% | 29% |
| **Top 5%** | **64%** |
| Top 10% | 79% |
| Top 20% | 92% |
| Top 50% | 99% |

The median creative spent under ₹900. Only 413 of 1,957 passed ₹10K, and they carry 92% of spend. Most creatives are tests the algorithm rejected within days. That is normal. The job is to make the rejects cheap.

# WHAT A WINNER LOOKS LIKE

# 07

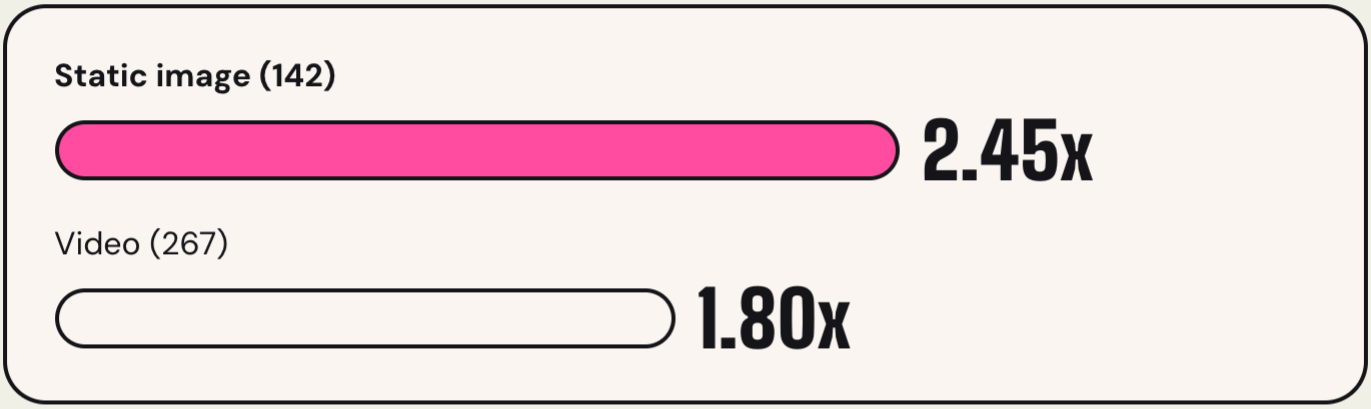
| Attribute | Winners (n = 95) | The rest (n = 318) | Gap |
|---|---|---|---|
| Spend-weighted ROAS | 2.86x | 1.71x | +1.15x |
| Share that are stills | 67% | 25% | +43 pts |
| Spend-weighted CTR | 1.52% | 0.82% | +0.70 pts |
| Hook rate, video | 22.2% | 14.7% | +7.5 pts |
| Offer-led concept | 36% | 14% | +22 pts |
| Running 2+ copies | 55% | 44% | +10 pts |
| Regional language | 5% | 12% | -7 pts |
| Median spend | ₹38K | ₹27K | |

**The attributes the rule does not test are the brief: a still or a sub-10-second cut, the offer in frame one, copies running once it works.**

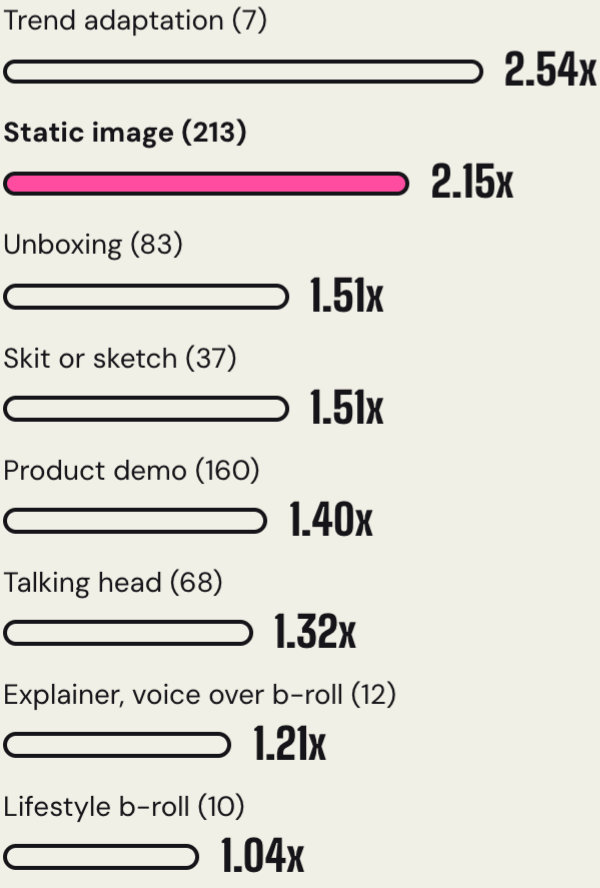
The CTR and hook rows are partly built into the rule itself, so read them as magnitudes.

# STILLS RETURNED 2.4X AGAINST VIDEO'S 1.8X, ON A THIRD OF THE SPEND

08




Lens A, by format, content only



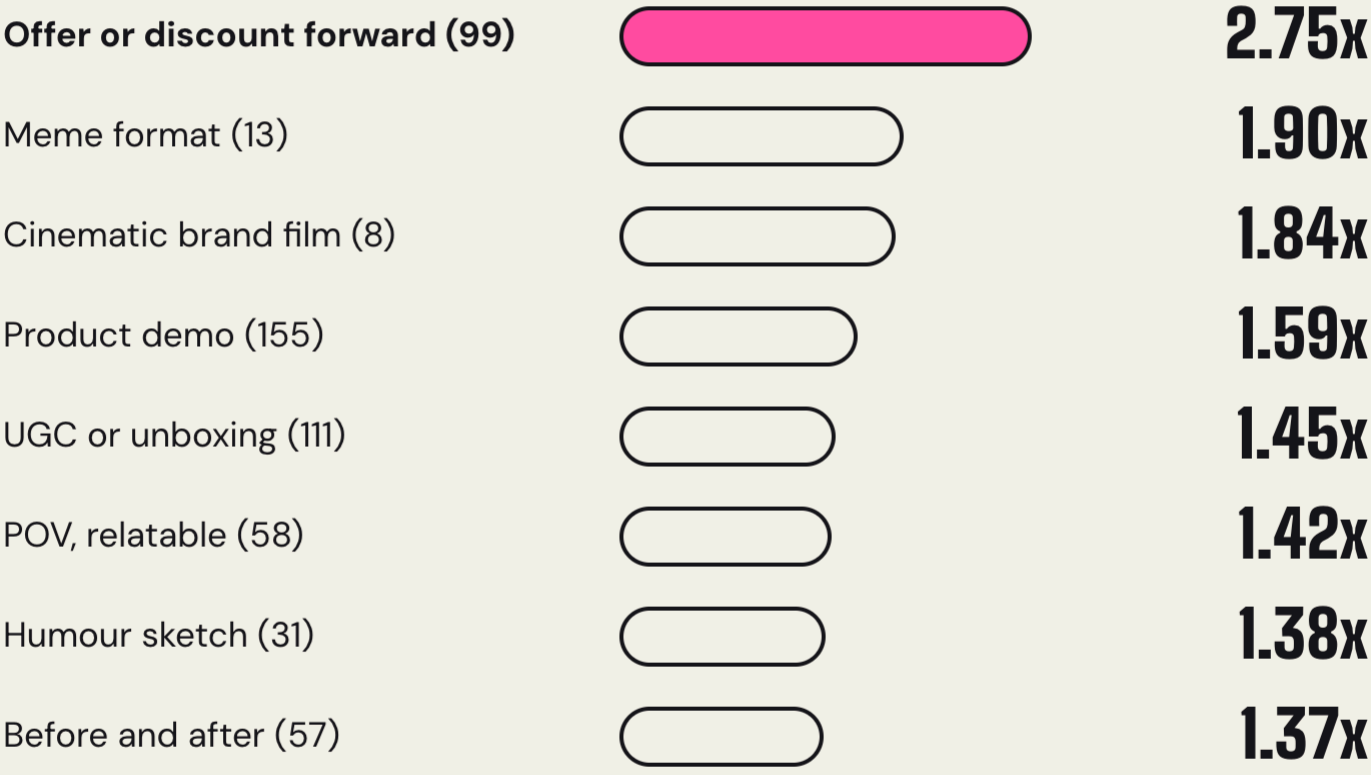

Stills took 32% of funded spend and produced 67% of winners. CTR follows the same order: 1.25% for stills against 0.88% for video.

**Run an offer layer in stills and a persuasion layer in 9:16 video**, and do not let video's hook rate win a budget it will not convert.

Trend adaptation leads the ladder on seven creatives. Treat it as a lead, not a rule.

# AN OFFER IN THE OPENING FRAME RETURNED 2.75X, TWICE THE BEFORE-AND-AFTER

09




Lens B agrees: offer-led concepts returned 2.87x on 79 creatives against 1.46x for product demos.

Globally, newness and price-anchor openers win spend about twice as often as question hooks. **Lead with the reason to buy.**

Meme and brand film clear the average on small samples. Leads, not rules.

# SHOW THE BRAND IN THE FIRST THREE SECONDS AND EARN 14% MORE

10

**+14%**

early brand

**+15%**

early text

Brand or product visible in the first 3 seconds · all Lens A

**Yes (626)** 2.05x

No (208) 1.79x

On-screen text in the opening frame · content only

**Yes (501)** 1.65x

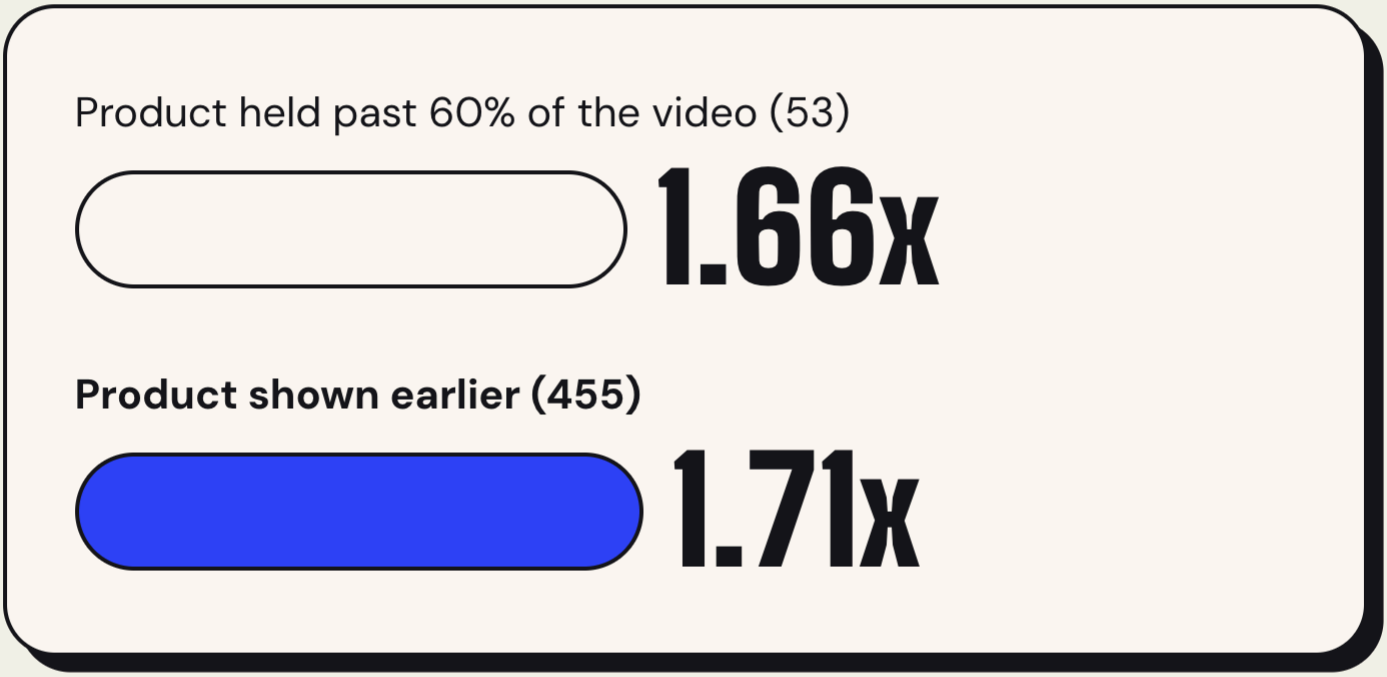
No (92) 1.44x

Brand in the first three seconds beat no-brand on all eight product lines, by 4% to 43%. Most Indians aged 16 to 35 look at an ad for under two seconds. A viewer who cannot tell what is for sale by then is gone.

## FRAME ONE CARRIES THE PRODUCT, A FACE OR THE OFFER, AND A LINE OF TEXT.

# THE SLOW REVEAL WINS ATTENTION AND LOSES MONEY

11




The slow reveal lost on six of eight product lines, including the two largest and all three sale events. It won on two, both within noise.

What it does win is hook rate: slow-reveal creatives post the highest three-second view rates in the sample.

**SO FUND IT AS REACH**, with its own budget, judged on hook, hold and assisted conversions, never on last-click ROAS.

# CLICK-THROUGH PREDICTS RETURN. HOOK RATE BARELY DOES. 12

Under 0.4% (58)

1.64x

0.4 to 0.8% (148)

1.71x

**0.8 to 1.2% (83)**

2.39x

**1.2 to 2% (72)**

2.28x

**2% and above (52)**

2.50x

| Signal | Correlation with ROAS | Variance explained |
|---|---|---|
| **CTR** | **r = 0.31** | about 10% |
| Hook rate | r = 0.17 | about 3% |
| Hold rate | r = 0.08 | under 1% |

Below 0.8% CTR, 206 creatives and 54% of funded spend returned under 1.7x. Above it, 207 creatives returned 2.3x to 2.5x.

Hold above 35% returned less than 15 to 35%: the videos people finish are not the videos people buy from.

**Make CTR the signal to scale on.** Hook and hold diagnose why; they do not decide what.

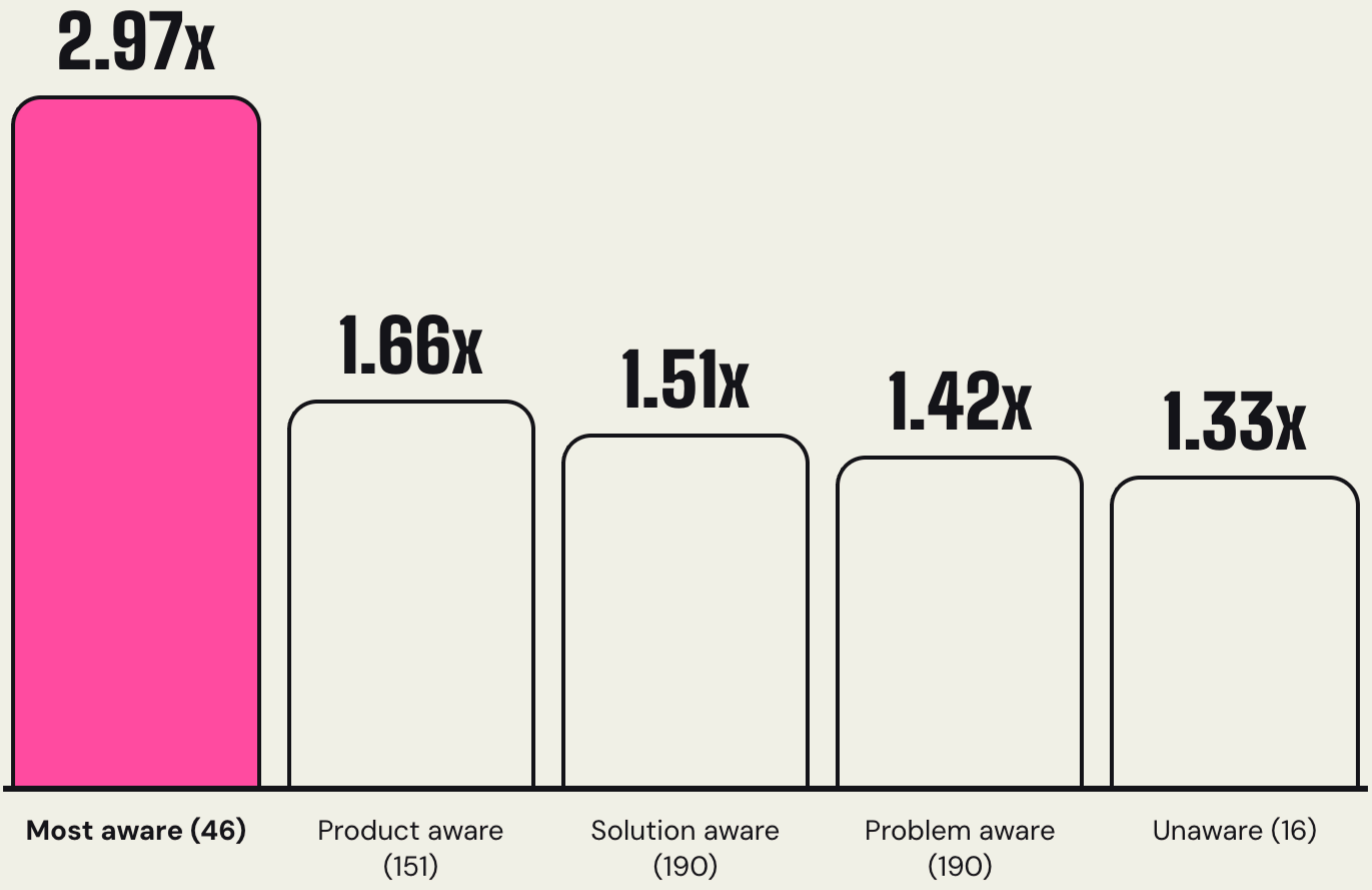
The gate

**0.8%**

**NOTHING SCALES BELOW IT.**

# CREATIVE FOR THE READY-TO-BUY RETURNED 2.2X THE CREATIVE FOR THE UNAWARE

13



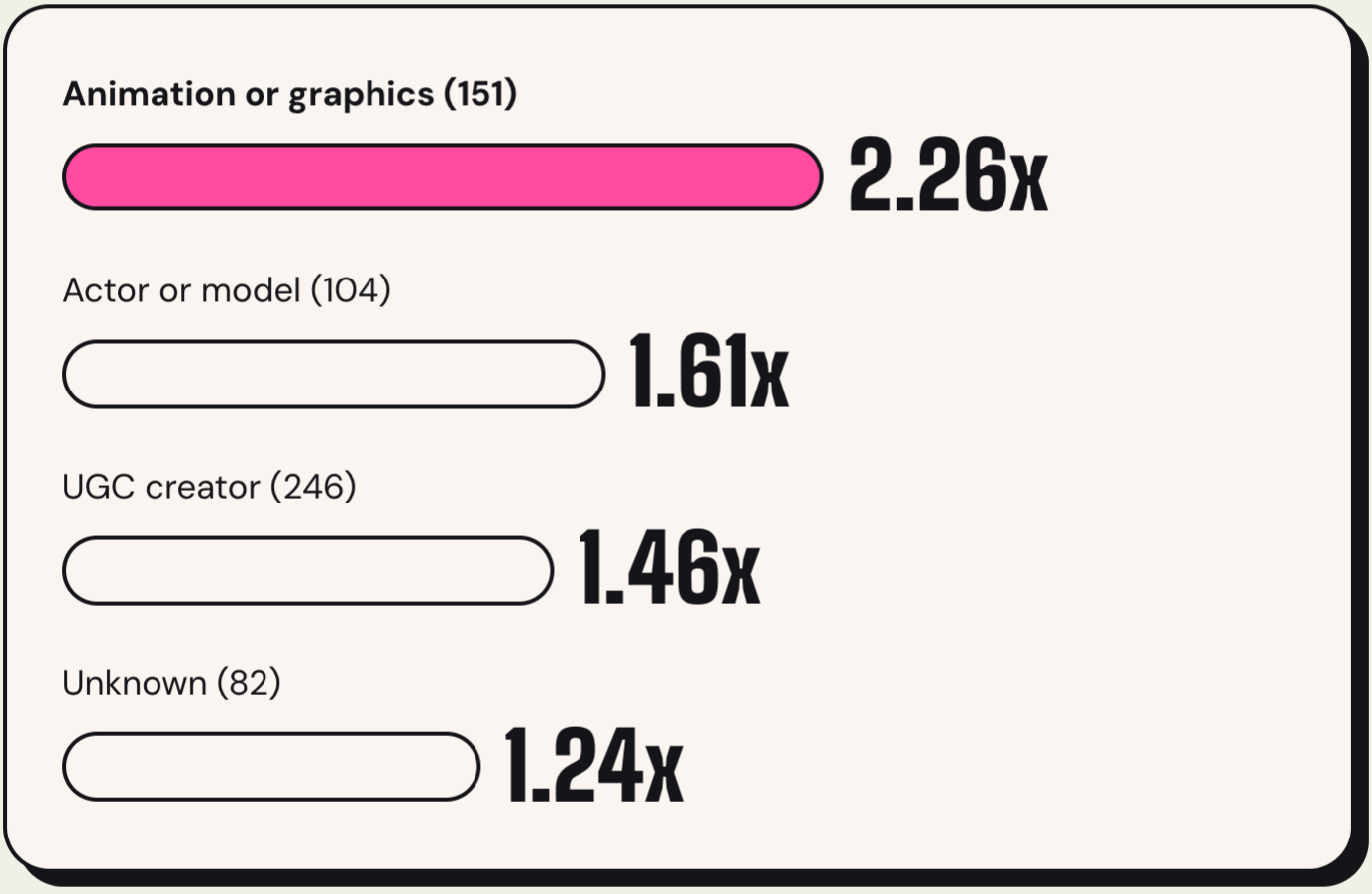

Returns rise at every one of the five stages, and the pattern holds inside every product line.

Last-click ROAS rewards the bottom of the funnel by construction, and most-aware creative is retargeting-shaped.

**Judge unaware and problem-aware creative on hook, hold and new-customer share**, and give it a separate budget line.

# GRAPHICS OUT-EARNED CREATORS BY THE WIDEST MARGIN IN THE SAMPLE

14



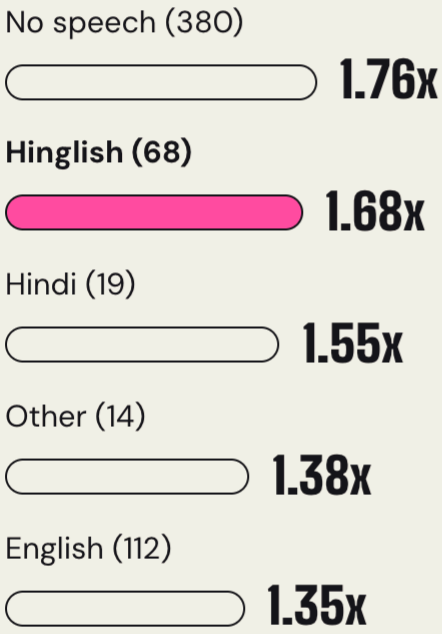

Graphics led on all five product lines. In Lens B, creator assets returned 1.67x against 2.04x for serialised studio assets. Globally, UGC's hit rate is 7.6% against 11.6% for text-only stills.

**UGC earns its place on volume and hook rate**, to find angles fast. Then rebuild the winning angle as a still and a short cut.

*Founder-led (n = 5) and voiceover-only (n = 5) are too small to read.*

# HINGLISH BEAT ENGLISH. REGIONAL LANGUAGES TRAILED BOTH.

15




| Lens B, ≥ ₹10K | Regional (43) | Default (370) |
|---|---|---|
| ROAS | 1.86x | 2.02x |
| CTR | 0.66% | 1.05% |
| Hook rate, video | 11.8% | 16.3% |

Regional-language creative took 15% of funded spend and trailed on all three signals. It won on one sale event and lost on the two largest content lines.

The public record has no clean Indian D2C vernacular ROAS win either; the old wins localised the whole funnel. **Vernacular is a landing-page, checkout and WhatsApp job before it is a creative job**, judged on delivered-order CAC by state.

Single-language samples are small: Hindi 1.99x (19), Marathi 1.47x (11), Malayalam 1.55x (5), Tamil 1.39x (4).

# THREE SMALL LEVERS: SOUND, LENGTH, COPIES

16

## OPENING AUDIO

Silent (217)
1.93x

Music only (160)
1.54x

On-camera dialogue (136)
1.46x

**Trending audio (18)**
1.41x

Voiceover (47)
1.41x

Mixed (15)
1.26x

Trending audio was the worst sound choice in the sample. Silent leads because most silent creatives are stills. Match the audio to the product, not to the trend.

## VIDEO DURATION

**Under 10s (45)**
2.05x

20 to 30s (130)
1.60x

30 to 45s (68)
1.46x

10 to 20s (106)
1.33x

45s and over (47)
1.28x

The best-returning video behaves most like a still: one idea, the product, the offer, out. Cut every winner twice, under 10s and 20 to 30s. Retire anything past 45.

## COPIES RUNNING

Single ad (220)
1.93x

2 copies (106)
1.98x

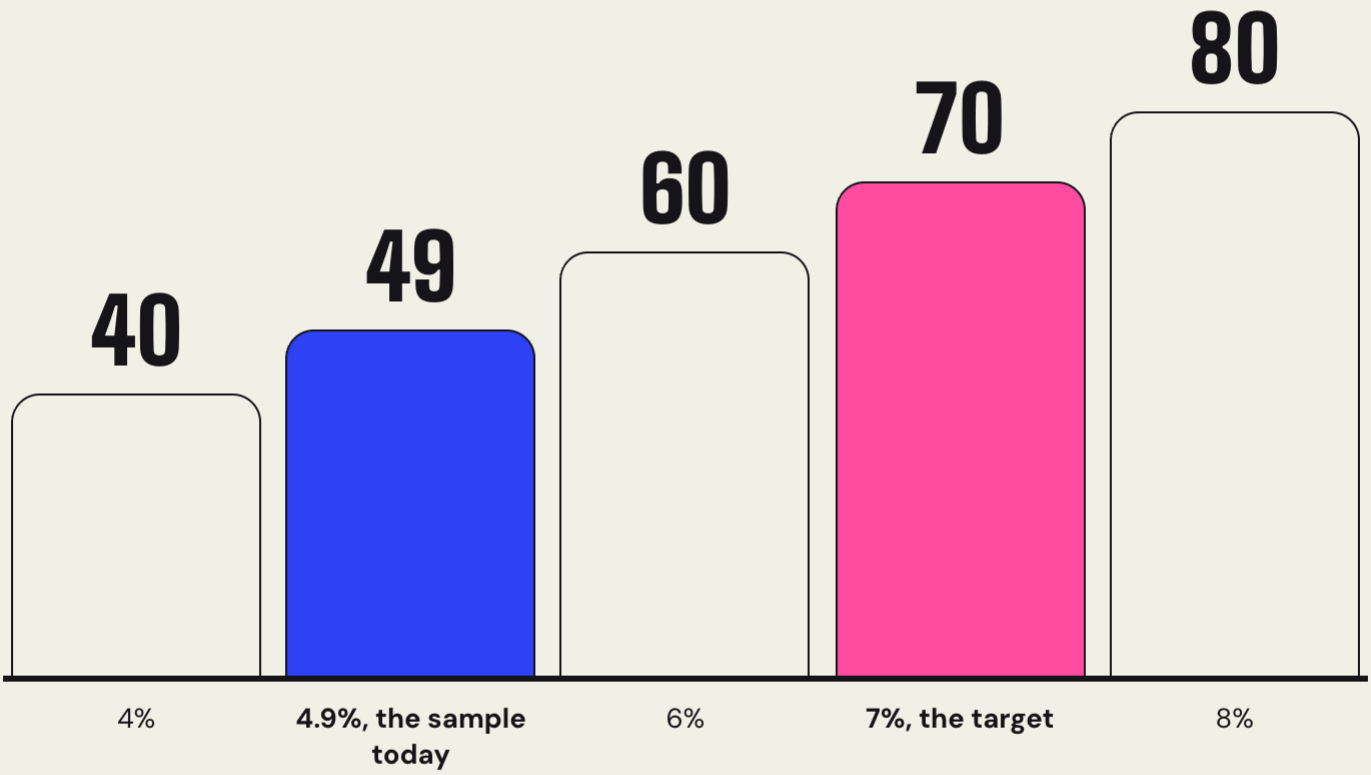
**3 copies (40)**
2.12x

4 or more (47)
2.11x

Three or more copies add about 10%. Meta pools learning across look-alike ads, so copies extend a winner's life; only a new concept creates one.

# TWO POINTS ON THE HIT RATE IS WORTH 40% MORE WINNERS ON THE SAME SPEND

17




Winners per 1,000 creatives shipped. Seven percent is inside the observed range: accounts spending $1M a month hit 8.2% globally.

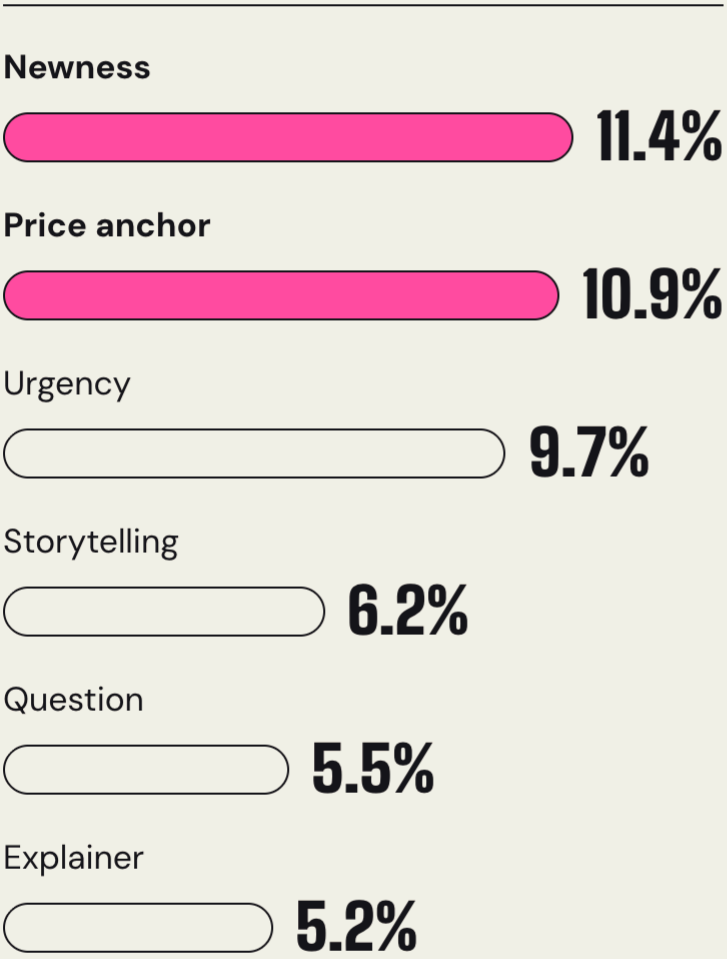
**Where the two points come from**, in the data: stills convert to winners at 45% of funded creatives against 12% for video; offer-forward openers return twice the before-and-after; early brand and text add 14 to 15%.

**Where the money is wasted:** creatives below 0.8% CTR, slow-reveal video judged on ROAS, and length past 45 seconds.

*The levers overlap, so they do not add. Each extra winner is worth the sample's winner economics, 2.9x on a median ₹38K, before returns. A model, not a measurement.*

# YOU GET TWO SECONDS, AND CLEVER OPENERS WASTE THEM

18




**≤2 sec**

of eyes-on attention is what most Indians aged 16 to 35 give a digital ad. Recall starts below one second.

**The sample's offer-forward result (2.75x) is the same finding measured in rupees. No Indian hook-rate benchmark exists; the global bar is 25% to pass and 35% to be strong.**

# CREATORS MOVE PURCHASES. THEIR HANDLE IS WORTH FAR LESS.

19

**≥30%**

of Indian purchase decisions are influenced by 2 to 2.5 million monetised creators. A modelled estimate, not attributed sales.

**−5% CPA**

when the same creative runs from the creator's handle instead of the brand's. CTR +19%, CPM +19%. Meta's own claim is −19%.

**76%**

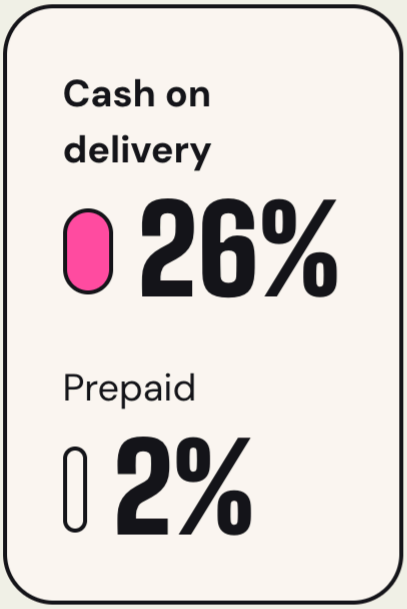
of India's top 100 digital stars broke disclosure norms in 2025, up from 69%.

In the sample, creator UGC returned 1.5x to 1.7x against 2.0x to 2.3x for studio and graphic assets, in both lenses. **Buy rights, not posts:** whitelisting bought later adds 60 to 120% to a creator fee, and the media runs at two to four times the fee.

Paid creator content made for ads is now 25 to 40% of creator spend at performance-led D2C brands, up from 5 to 10% two years ago. On AI: the four AI-generated stills in the sample returned 1.92x on 1.5% of spend, a lead only. From January 2027 ASCI bans AI-fabricated testimonials even with a label.

# A QUARTER OF CASH-ON-DELIVERY ORDERS COME BACK, AND THE PIXEL COUNTS THEM ALL

20




**2.0x → 1.4x**

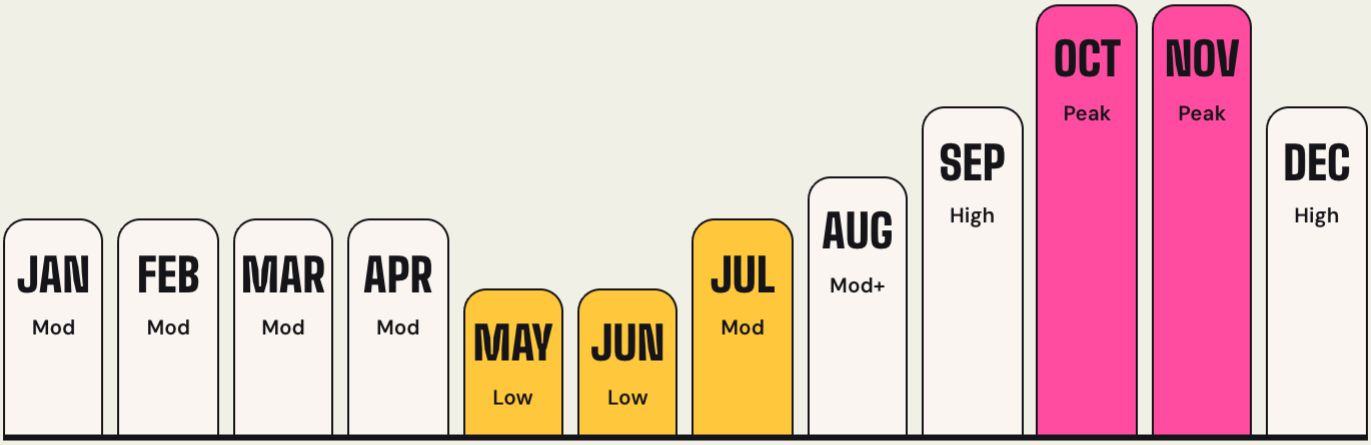
a reported ROAS of 2.0x at 30% RTO, measured on delivered orders, before cost of goods

Every ROAS in this report is platform-reported. Meta stopped returning 7-day and 28-day view windows on 12 January 2026, so video and awareness creative lose the most view-through credit. US vendor studies find platform reporting wrong both ways: $115 of incremental revenue per $100 click-attributed, and 37.7% of view-attributed purchases not incremental.

**Send RTO-adjusted purchase events back through the Conversions API**, report MER and new-customer CAC net of returns, and buy one geo or conversion-lift test a quarter.

# DIWALI AND BLACK FRIDAY ARE 19 DAYS APART, SO NOVEMBER IS ONE LONG PEAK

21




**TEST** · May to Jul · quietest auction, stock the festive concept library

**BUILD** · Aug to mid-Sep · consideration, gift guides, creator seeding

**ACQUIRE** · Navratri 11 to 20 Oct · the best-converting cohorts arrive early

**HARVEST** · 6 to 30 Nov · proven offer, urgency, delivery promise, Black Friday as tier one

Diwali falls on 8 November and Black Friday on 27 November, 19 days apart against 39 last year. Black Friday 2025 was the single biggest D2C order day of the year on one checkout network, ahead of Diwali.

Brand websites grew 33% at Diwali 2025 against 8% for marketplaces. **Push festive orders to prepaid:** cash-on-delivery apparel returns run 25 to 35% against 2 to 5%. Demand levels are an agency's qualitative calendar; no platform publishes an India festive CPM.

# THE INDIA D2C CREATIVE SCORE 22

| 40 | 30 | 30 |
|---|---|---|
| Pre-flight · before launch | Leading signal · 3 to 7 days in | Outcome · 14 to 28 days in |

| Layer | What it scores |
|---|---|
| **1 · 40 pts** | Five pillars of four criteria: attention, brand, connection, direction, compliance. The evidence now backs it: offer or product in frame one (+14%), opening text (+15%), early product over slow reveal. Any zero in compliance blocks launch. |
| **2 · 30 pts** | CTR at or above 0.8% is the gate, 10 points at 1.2% and above. Hook and hold are diagnostics scored against the account's own baseline. |
| **3 · 30 pts** | Delivered-revenue CPA net of returns against target, and contribution per order or incremental ROAS where a holdout exists. |

| Score | Decision |
|---|---|
| **80 to 100** | Scale. Move to the scaling ad set; brief iterations and copies. |
| **60 to 79** | Iterate. Keep the concept; rework the weakest pillar. |
| **Below 60** | Retire. Log the learning; do not re-cut with a new headline. |

## DIAGNOSE BEFORE YOU KILL

Low hook: rework the first two seconds. Hook strong but CTR weak: fix the offer and the text. CTR strong but delivered CPA weak: fix cash-on-delivery and the landing page, not the creative.

# SEVEN MOVES, EACH WITH AN OWNER

23

## 01 SET THE RATIO BEFORE THE BRIEF

Budget holder

Offer stills for sales and retargeting, persuasion video for cold reach. Budget them separately and never let hook rate move money between them.

## 02 MAKE CREATIVE SUPPLY A FIXED COST LINE

Budget holder

A weekly launch quota by spend tier, 20+ distinct concepts live per scaling campaign, and a concept library that outlives the quarter.

## 03 REPORT WINNERS PER MONTH, NOT ROAS PER AD

Budget holder

The hit rate is the KPI. Today it is 5%. The target is 7%. Every creative review starts with that count.

## 04 MEASURE ON DELIVERED REVENUE

Budget holder

RTO-adjusted purchase events through the Conversions API, MER and new-customer CAC net of returns, one lift test a quarter.

## 05 OPEN ON THE REASON TO BUY

Creative team

Offer, price anchor or product in frame one, a line of text, a voice by second one. Storytelling and question openers belong in the reach layer.

## 06 CUT EVERY WINNER TWICE

Creative team

Under 10 seconds and 20 to 30 seconds. Retire anything past 45 unless the reach budget owns it.

## 07 SCALE ON CTR, DIAGNOSE ON HOOK AND HOLD

Creative team

Nothing scales below 0.8%. Hook under 25%: rework the opening. Strong hold but weak CTR: fix the offer and the text.

# WHAT WE WILL GRADE IN OCTOBER 2027

24

| Edition 1 says | The number | How Edition 2 will check it | Edition 2 result |
|---|---|---|---|
| **Stills out-return video** | **2.4x vs 1.8x** | The same cut on a multi-brand panel | |
| **Nothing scales below 0.8% CTR** | **1.7x below · 2.3x to 2.5x above** | CTR bands against delivered CPA, net of returns | |
| **The two-layer ratio moves the hit rate from 1 in 20 towards 1 in 14** | **4.9% today** | Winners per month on accounts that adopted the ratio against those that did not | |
| **Trending audio trails every other sound choice** | **1.41x on 18** | The same cut at n above 50 | |
| **Regional-language creative trails until the funnel is localised** | **1.86x vs 2.02x** | The Hinglish-versus-native geo split, same offer, with a holdout | |

Edition 2 adds what nobody in India publishes yet: hook, hold, CTR and delivered CPA by category and language, scored across consenting brands rather than one agency's work. If a claim above does not hold on the wider panel, that page says so.

# THIS EDITION SCORES SHIPPED WORK. THE NEXT ONE HAS A WIDER PANEL

25

**Lens A.** 834 creatives with verified spend at or above ₹10K, April to June 2026, tagged by a vision model on 20+ attributes and checked. Content cuts exclude offer campaigns (n = 593).

**Lens B.** 1,957 creatives in the September 2026 account snapshot, bulk May to August, attributes read from ad-name conventions. Cuts use the 413 creatives at or above ₹10K, which carry 92% of spend. Untagged is left as untagged.

**Definitions.** Hook rate is three-second plays over impressions, video only. Hold is 15-second over three-second plays. CTR is link clicks over impressions. ROAS is platform-reported, indexed so each lens's average reads 2.0x.

**Limits.** The two windows overlap in May and June and are not de-duplicated; sample sizes are never summed. Classes under three are hidden, under 15 flagged, nothing under six is a recommendation. Every cut is univariate and the attributes are correlated with one another, so the lifts cannot be added. Spend-weighted and correlational, not causal. Public sources: 228, 2024 to 2026, India first; the full list is in the research annex.

## DISCLOSURE

One cut in Lens B compares production sources, and the serialised studio assets in it are YOSO's own work. They returned 2.04x against 1.67x for creator UGC and 1.46x for brand in-house builds. The highest-returning bucket of all was old offer stills nobody had tagged, at 2.29x.

Read narrowly, the finding is that a repeatable process beat one-off builds on video. We do not use it to sell, and it is not in the findings above.

# SCORE WHAT YOU SHIP.

The Index is published once a year, in October. The one-page version is free at yosomedia.in. Clients receive the full report, the research annex with all 228 sources, and the Creative Score ready to run on their own account.

## EDITION 2, OCTOBER 2027, RE-GRADES EVERY CLAIM ON PAGE 24. IN PUBLIC.