



Streaming Originals in India

The 2023 Story

An Ormax Media Report

Background



- Since 2018-19, Ormax Media has been extensively working to build industry data in the fast-growing streaming category in India. Through our various products and tracks, we now have sufficient data points to monitor the evolution of the streaming category, especially since the onset of the pandemic in 2020
- This report looks at the top original shows and films released in 2023, in Hindi & International languages, on three parameters: Viewership, Marketing Buzz & Content Strength
- This report focuses only on original content, and does not cover other ‘non-original’ content on streaming, such as theatrical films, catch-up television, sports, etc.

Viewership

Most-watched shows & films in India in 2023,
based on Ormax Media's research estimates

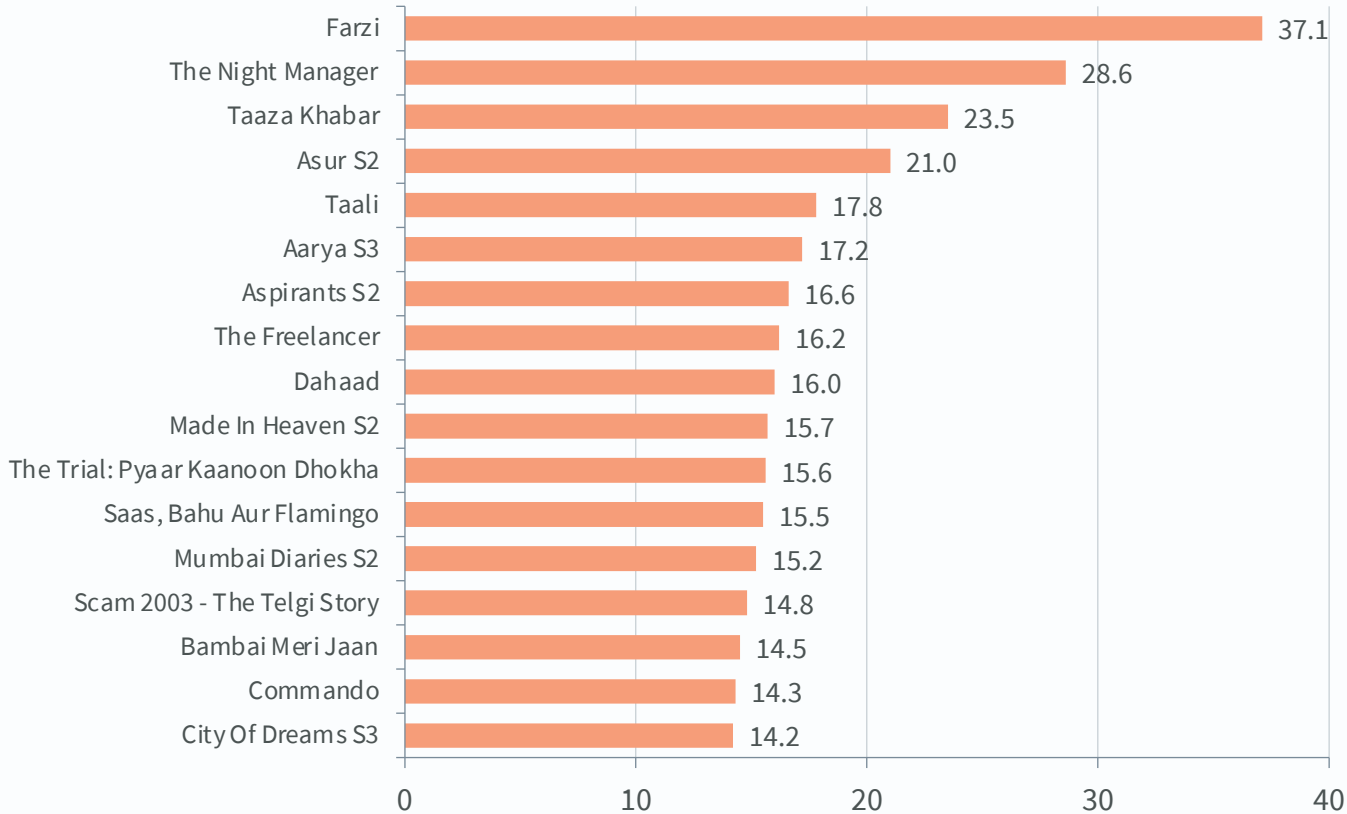
Viewership Estimates: Methodology



- Viewership is estimated using primary research conducted among audience across India at a weekly level, projected to the OTT universe in India. We do not use any secondary data, including that put out by platforms in the public domain, for this estimation. Our viewership estimates (reported in Millions) represent:
 1. Number of people who watched the show (at least one full episode) or film (at least 30 mins.). It does not represent the number of accounts used for watching the show/ film, e.g., three members of a family, or two friends, watching on the same account are considered as unique audience (3 & 2 respectively, in these examples)
 2. Only the India market (overseas viewership is not estimated)
 3. Unduplicated audience, i.e., even if an audience member watches episodes spread over multiple weeks, they are still counted only once

Most-Watched Hindi Web-series

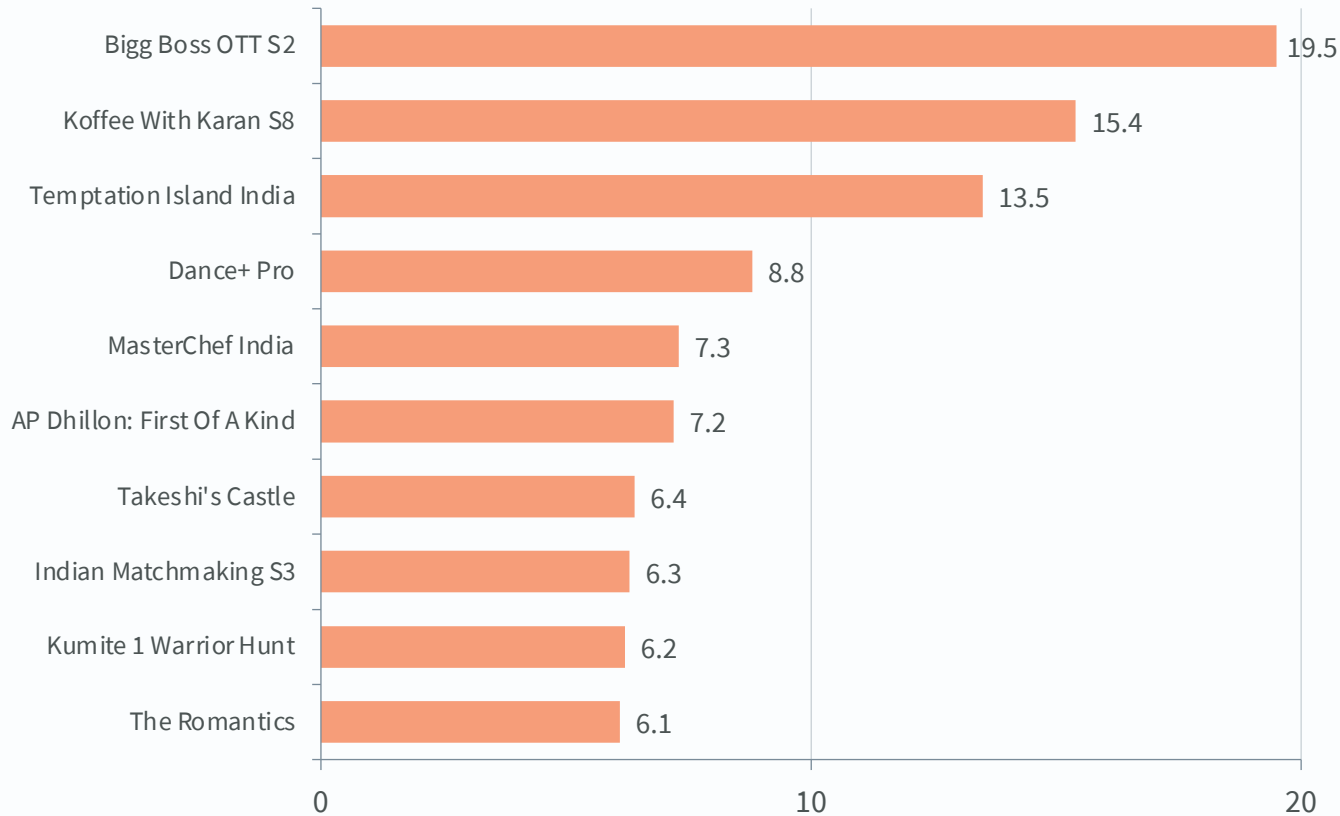
Viewership estimates in Mn



Farzi is the only show to cross the 30 Mn viewership mark in 2023, and is now the most-watched SVOD series in India of all time. Both Prime Video and Disney+ Hotstar have 6 shows in the top 15 list. Two AVOD shows from JioCinema, i.e., Asur 2 & Taali, feature in the top 5 most-watched shows of the year.

Most-Watched Indian* Unscripted Shows

Viewership estimates in Mn

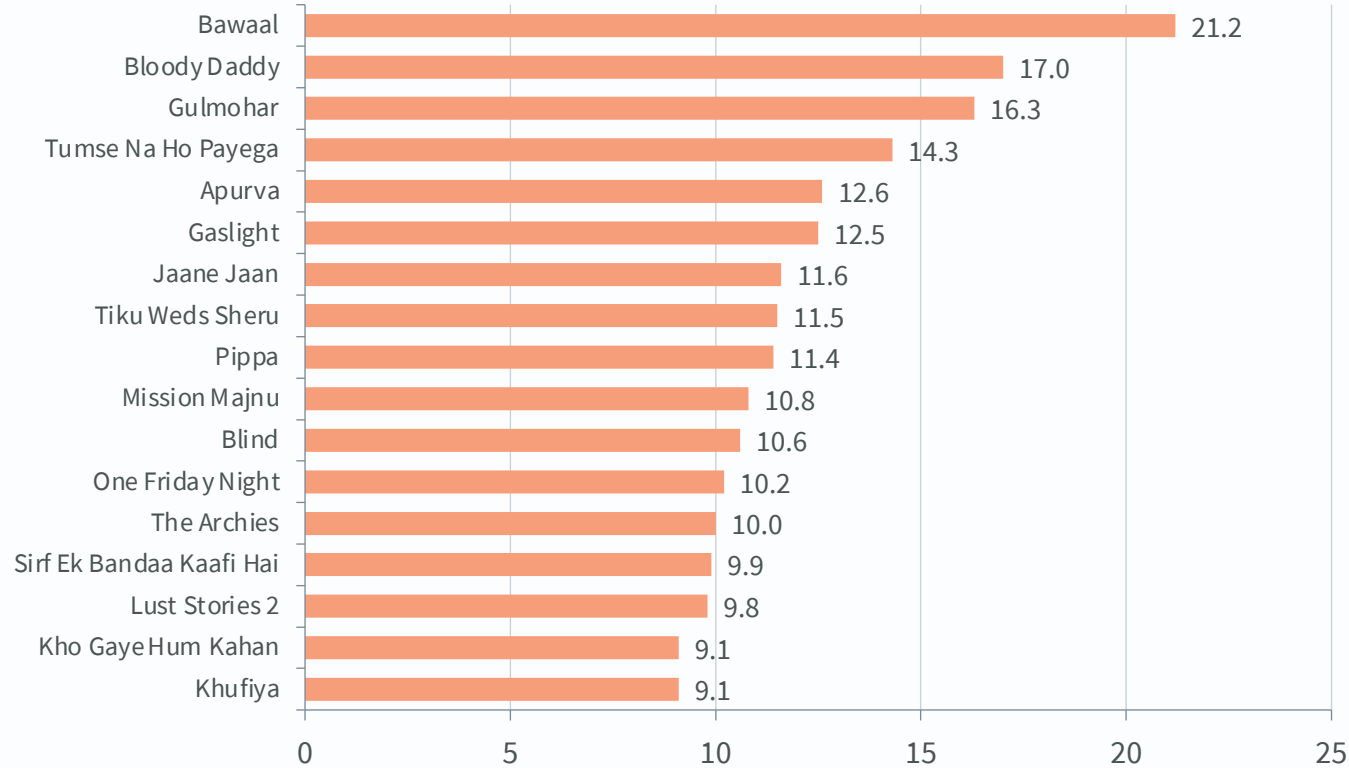


**Hindi/English language shows with a national marketing release*

The top 10 list has a healthy mix of sub-genres (TV show extensions, documentaries, task-based reality competitions, etc.), indicating that the non-fiction category now has significantly more width on OTT than a year or two ago.

Most-Watched Hindi Films

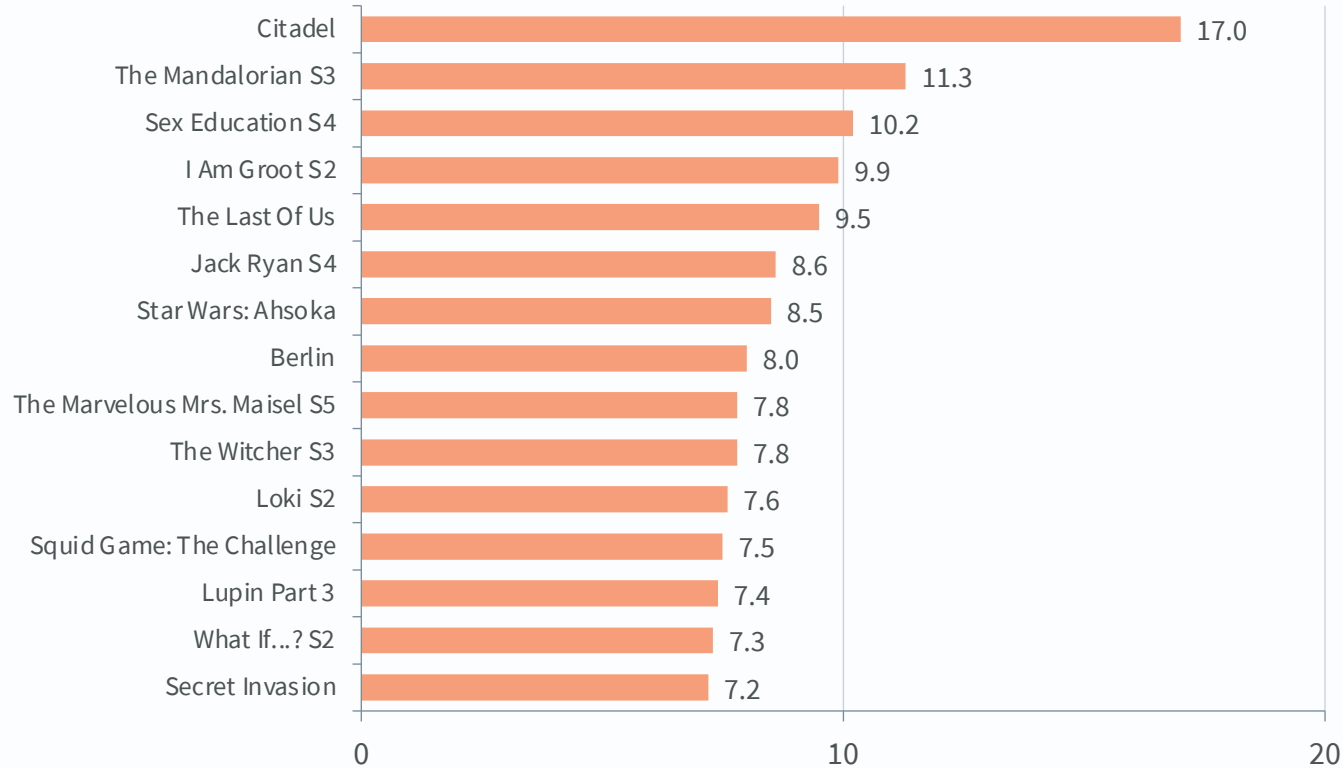
Viewership estimates in Mn



Prime Video's Bawaal is the most-watched direct-to-OTT Hindi film of 2023, followed by JioCinema's Bloody Daddy. Netflix features strongly on this list, with six films on the platform crossing the 9 Mn viewership mark.

Most-Watched International Shows

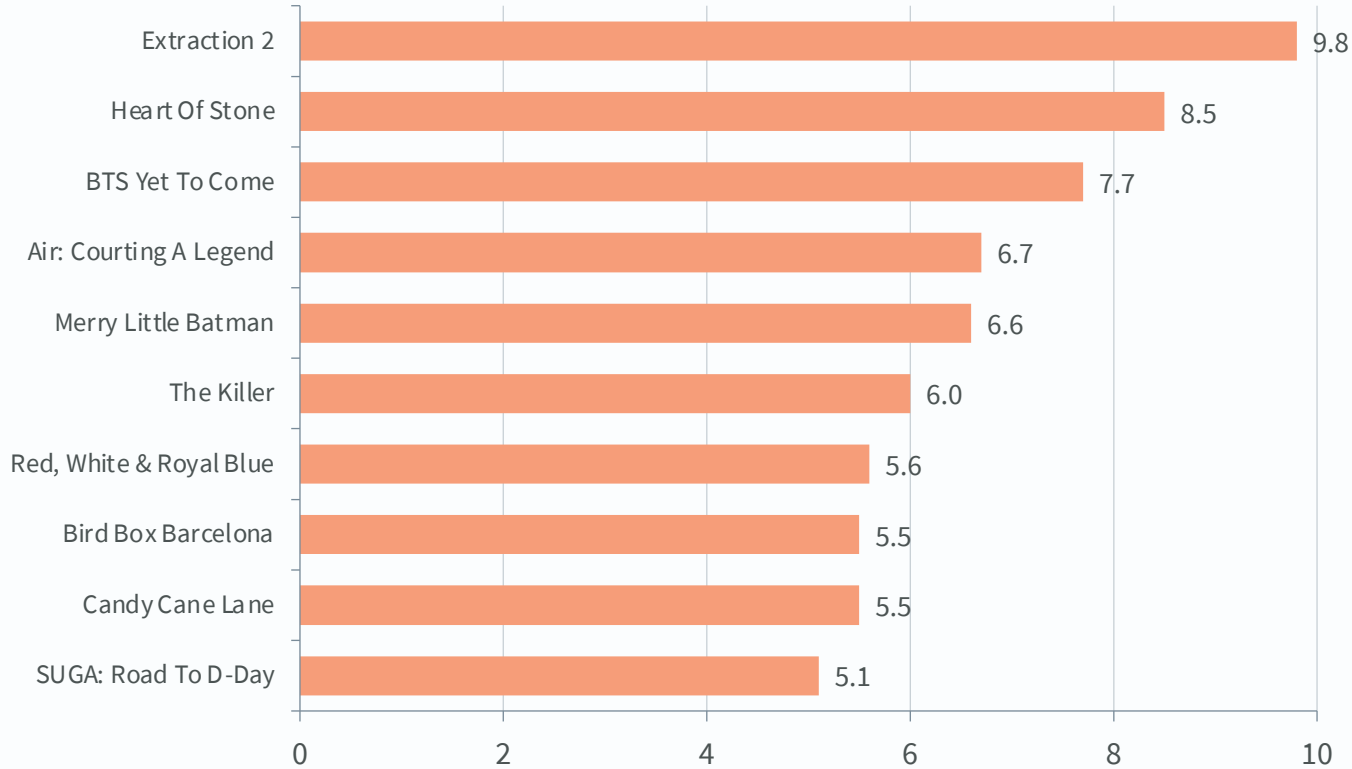
Viewership estimates in Mn



Citadel, aided by Priyanka Chopra's presence, is the most-watched International show of 2023, ahead of the rest of the pack by more than 50%. Every other entry in this list, except Citadel, is a franchise show or brand extension.

Most-Watched International Films

Viewership estimates in Mn



Extraction 2 and Heart Of Stone, both on Netflix, are the only two International films to cross the 8 Mn viewership mark. Two documentary films feature in the top 10 most-watched International films of 2023, both based on the Korean band BTS.

Marketing Buzz

Most-Buzzing shows & films in India in
2023, based on Ormax Stream Track

What is 'Buzz'?



DEFINITION

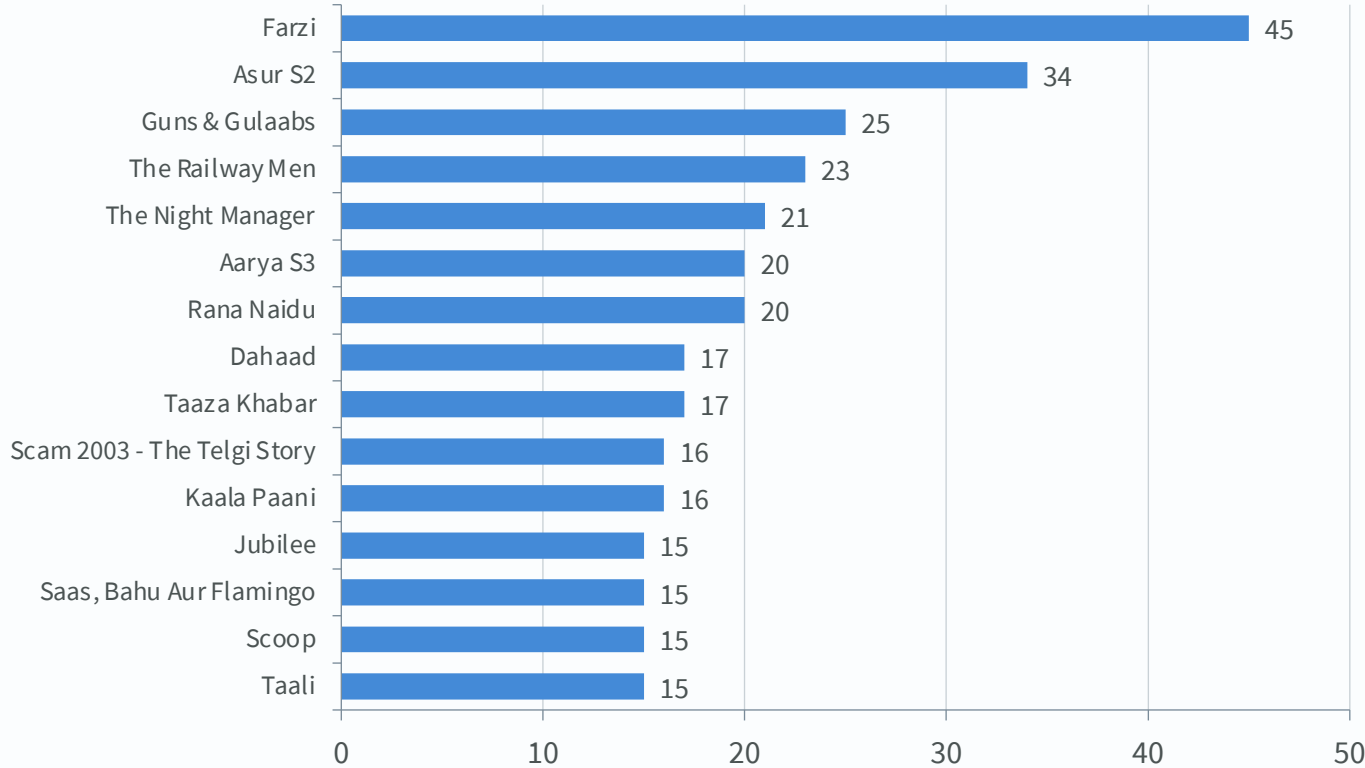
A score on a 0-100 scale that measures % audience who recalled the show or film unaided, when asked to recall upcoming or recently-launched streaming shows or films

IMPLICATION

Buzz is a strong indicator of the talk value of the property, i.e., the degree and effectiveness of conversations around it among regular OTT audiences

Most-Buzzing Hindi Shows

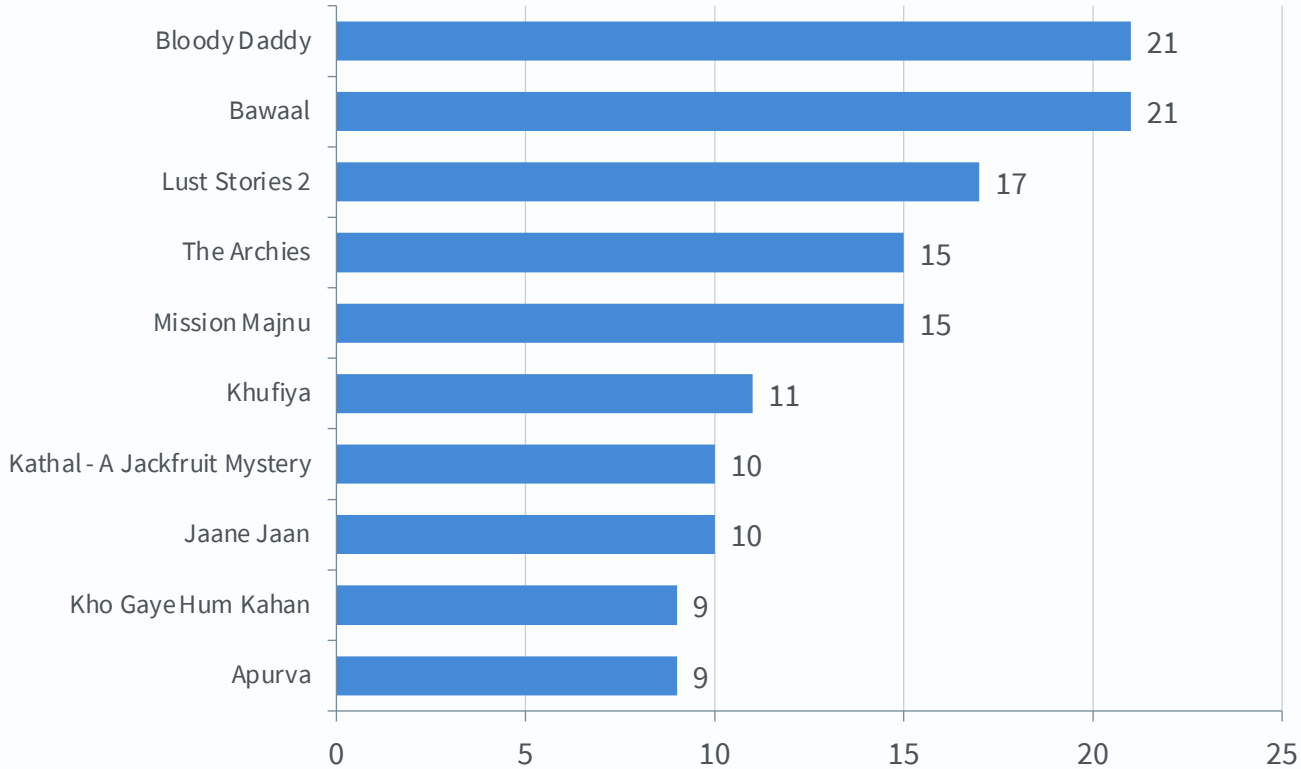
Source: Peak Buzz on Ormax Stream Track



Farzi (Prime Video) generated the maximum Buzz, followed by S2 of Asur (JioCinema). Only 3 out of the top 15 'buzzing' shows are franchise shows in 2023 (unlike 9 shows in 2022).

Most-Buzzing Hindi Films

Source: Peak Buzz on Ormax Stream Track

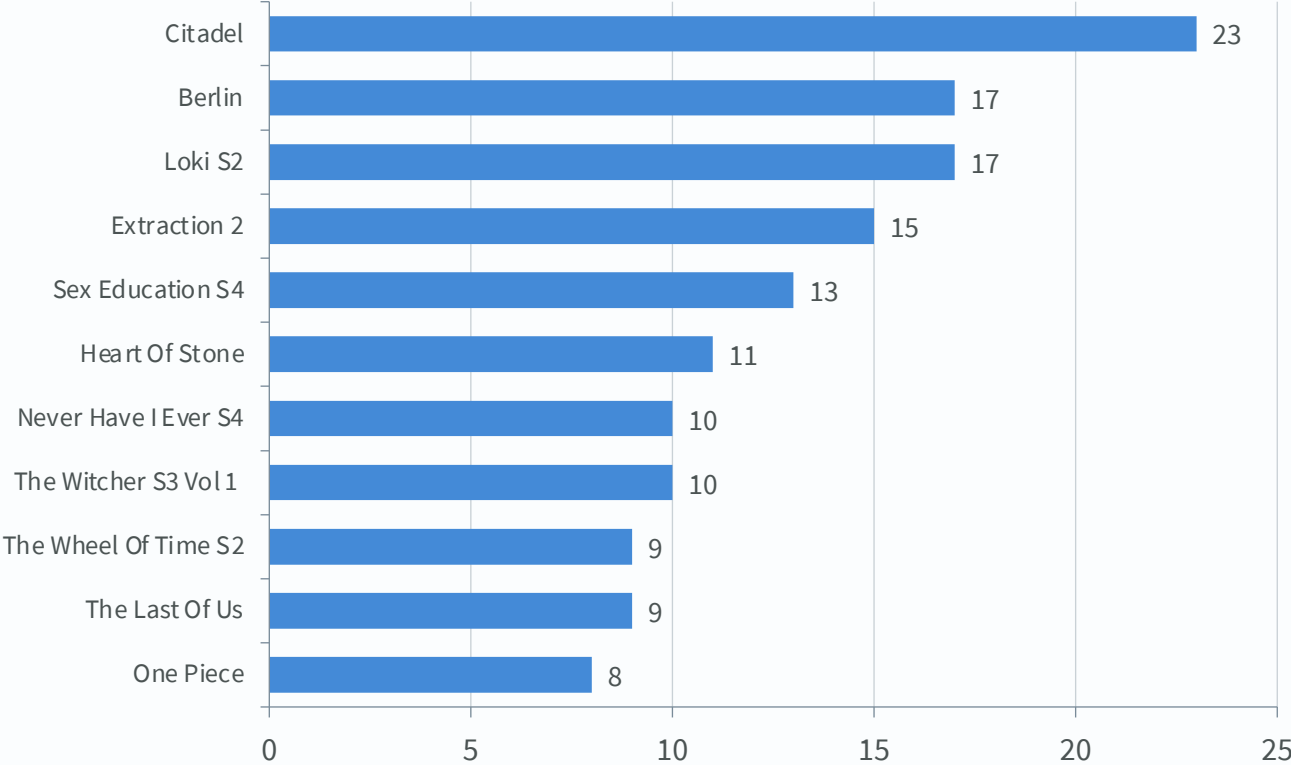


Films featuring theatrical stars dominate the list.

7 out the top 10 films of 2023 on Buzz are from Netflix.

Most-Buzzing International Shows/Films

Source: Peak Buzz on Ormax Stream Track



Only four International properties managed to touch the 15% mark on Buzz in 2023. 7 properties on this list are from Netflix, indicating the strength of their international slate compared to other platforms.

Content Strength

Most-liked shows & films in India in 2023,
based on Ormax Power Rating

What is 'Ormax Power Rating (OPR)'?



DEFINITION

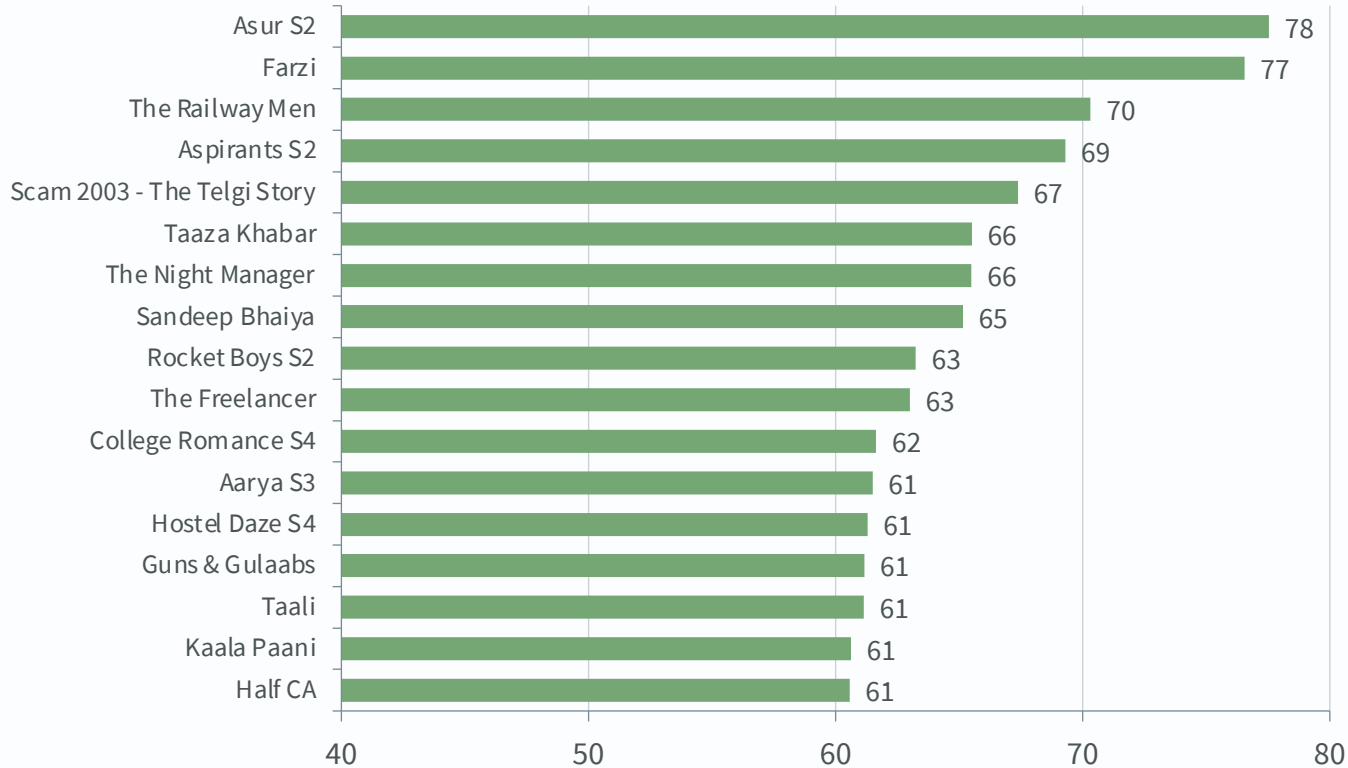
A score on a 0-100 scale that represents how much a show or a film is liked by its viewers

IMPLICATION

Higher OPR leads to higher conversion of initial sampling to total sampling, as well as higher completion rates

Most-Liked Hindi Shows

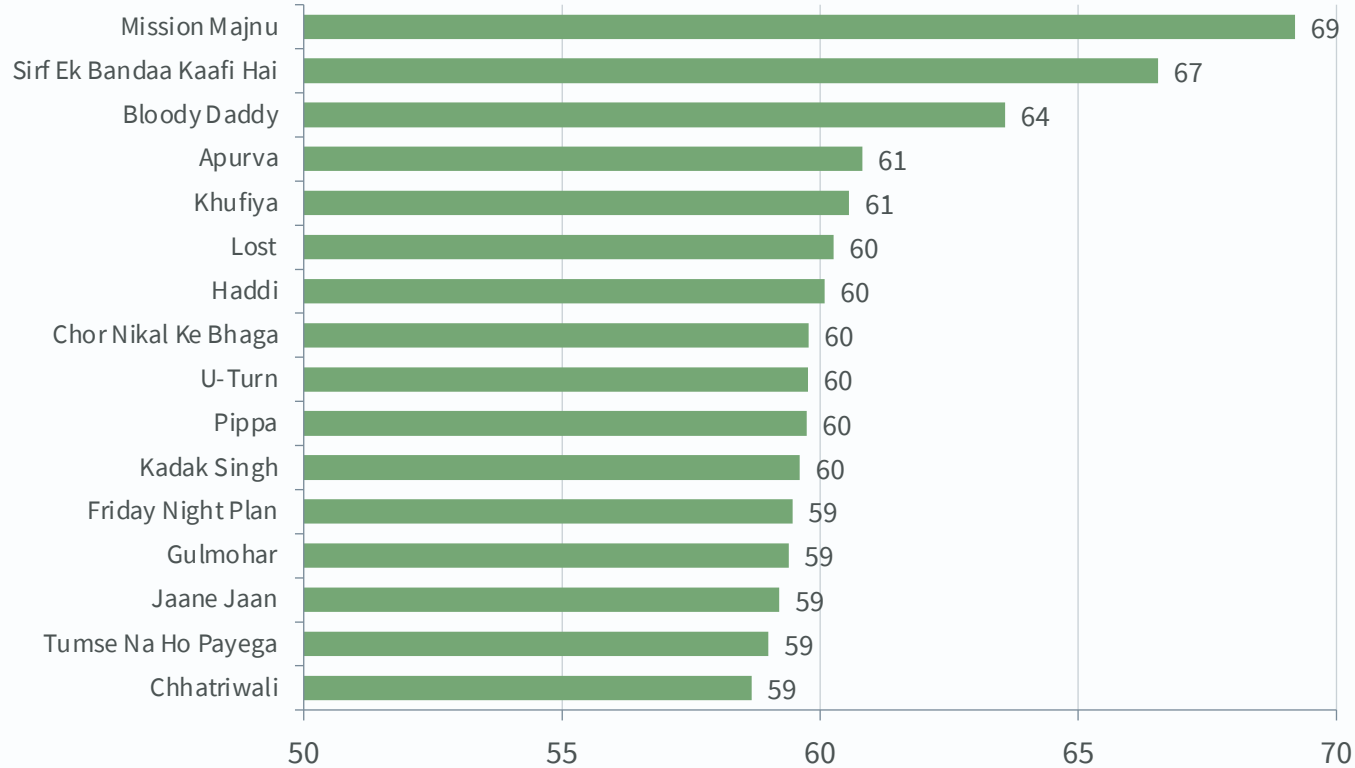
Ormax Power Rating (OPR)



Asur 2 (JioCinema) is the most-liked Hindi series of 2023. Farzi (Prime Video) and the The Railway Men (Netflix) are the only other shows to cross the 70-mark on OPR in 2023.

Most-Liked Hindi Films

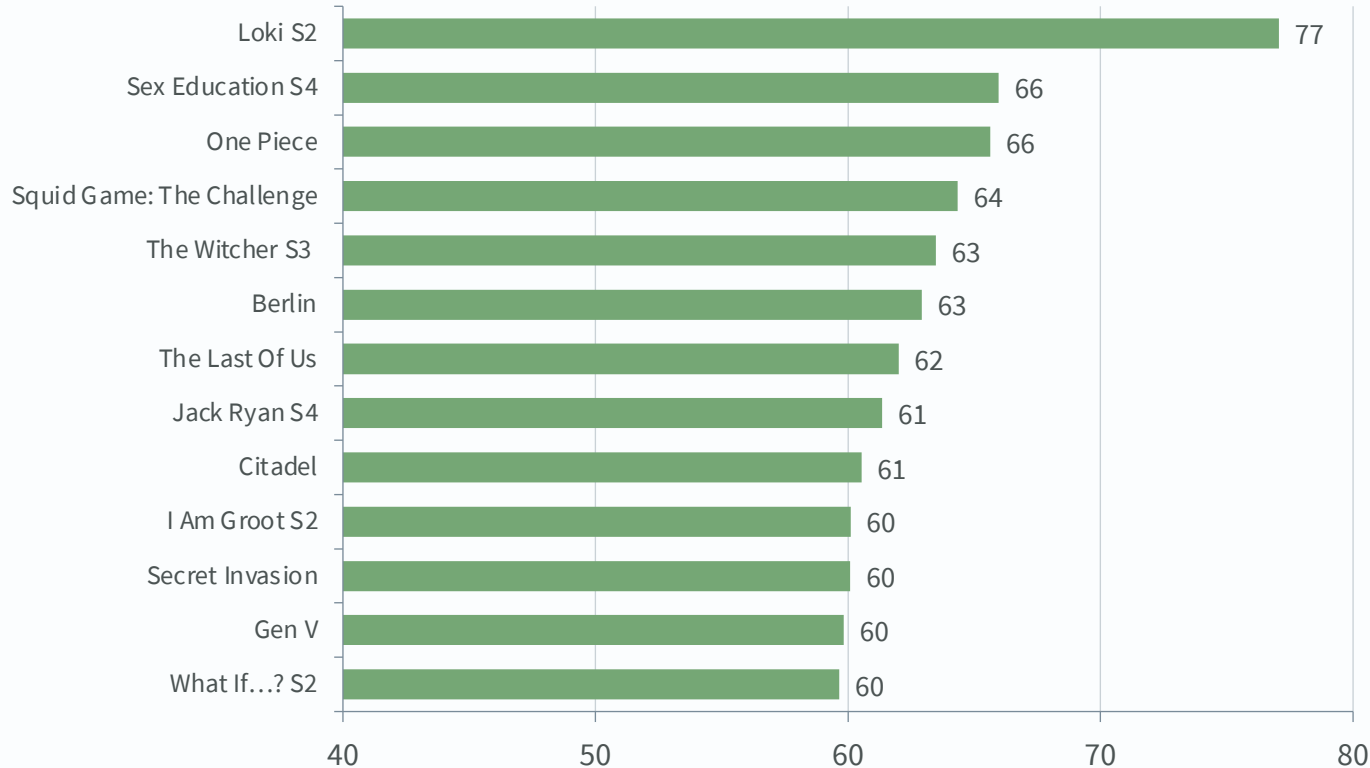
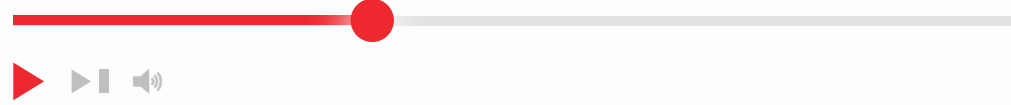
Ormax Power Rating (OPR)



Mission Majnu (Netflix), followed closely by Sirf Ek Bandaa Kaafi Hai (ZEE5), is the most-liked direct-to-OTT film of 2023.

Most-Liked International Shows

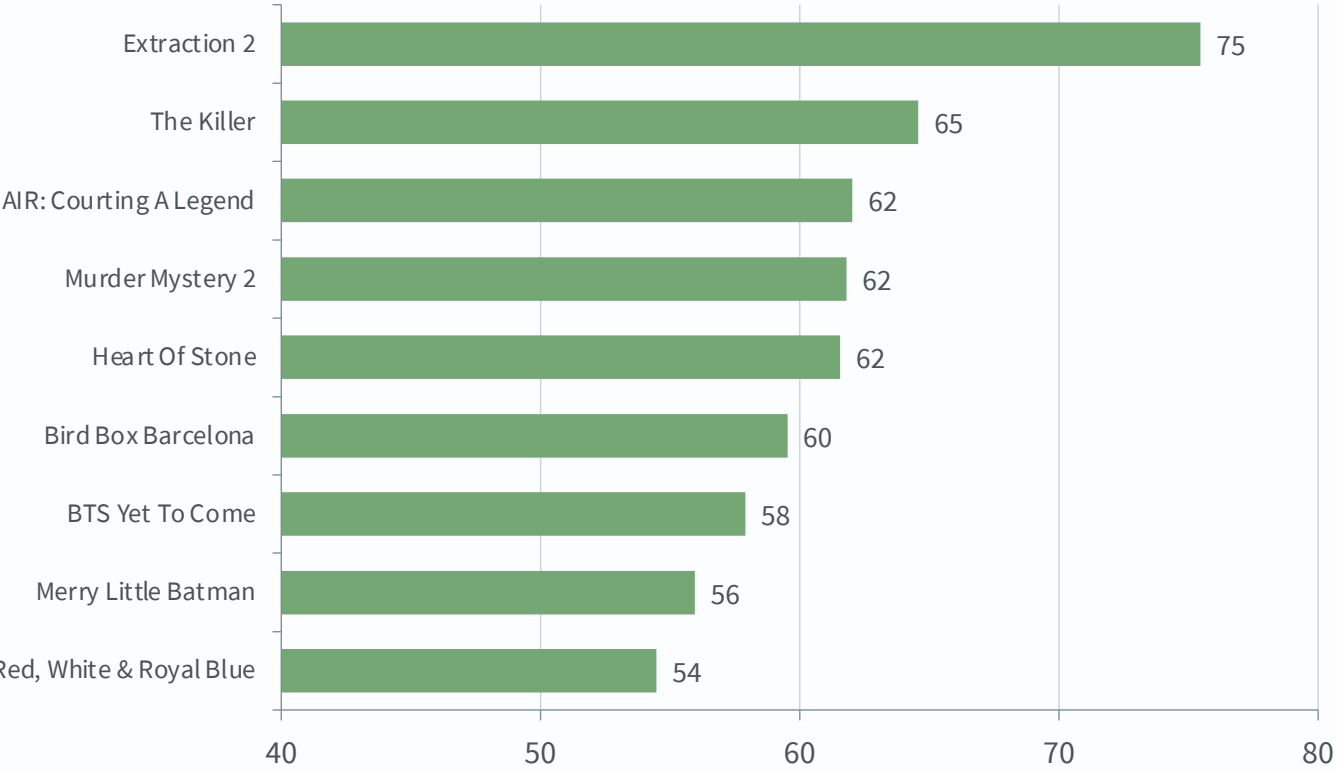
Ormax Power Rating (OPR)



With the exception of Money Heist (S4 & S5), Loki S2 is the second most-liked International show till date (since the start of tracking in 2020). The top 10 list features shows from a variety of genres and languages.

Most-Liked International Films

Ormax Power Rating (OPR)



Extraction 2 emerged as a break-out success in terms of its audience likeability, being the only International direct-to-OTT film to cross the 75-mark, 10 points higher than the 2nd position on the list.



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