



Streaming Originals in India

Mid-year Review

An Ormax Media Report | Jan-Jun 2022

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 the first six months (Jan-Jun) of 2022, 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.

Special Mention



- We are currently working on expanding our data to cover content in various Indian languages beyond Hindi. To this effect, we have started building sizeable data in 2022. However, we would like to wait for another few months before covering content made in Tamil, Telugu, Kannada, Malayalam, Bengali and other languages, in reports of this nature
- A special mention, meanwhile, is in order for two non-Hindi properties that stood out in Jan-Jun 2022



Viewership

Most-watched shows & films in India in Jan-Jun
2022, based on Ormax Media's research estimates

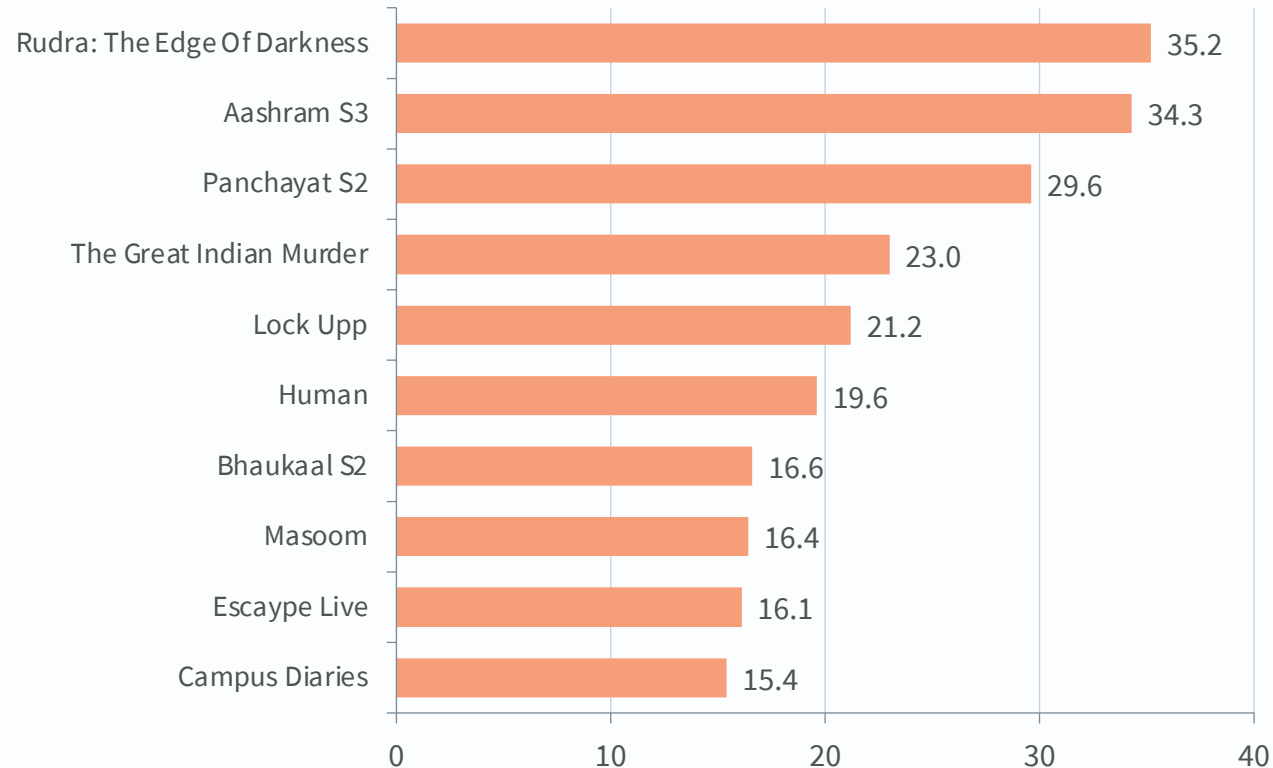
Viewership Estimates: Methodology



- 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 Shows

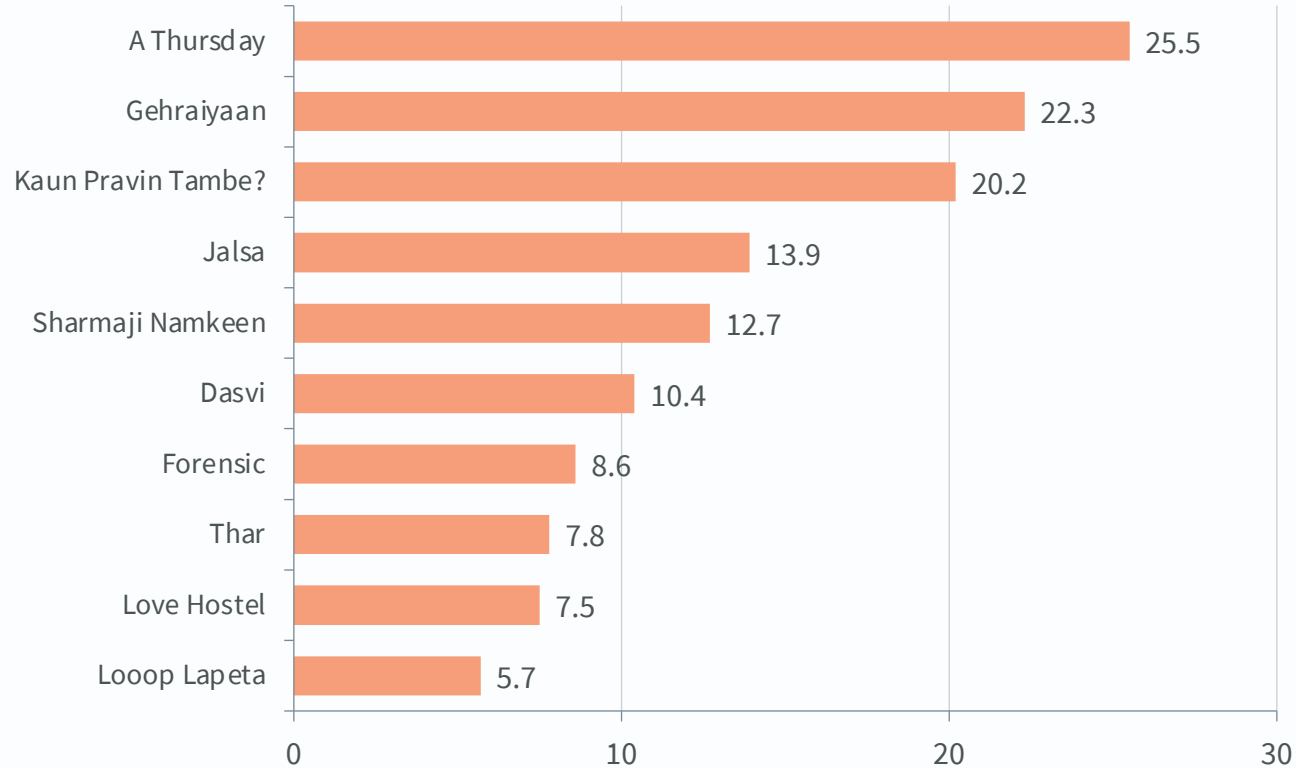
Viewership estimates in Mn



Led by Rudra: The Edge Of Darkness, Disney+ Hotstar takes 5 positions in the top 10 list, followed by MX Player with 4 shows.

Most-Watched Hindi Films

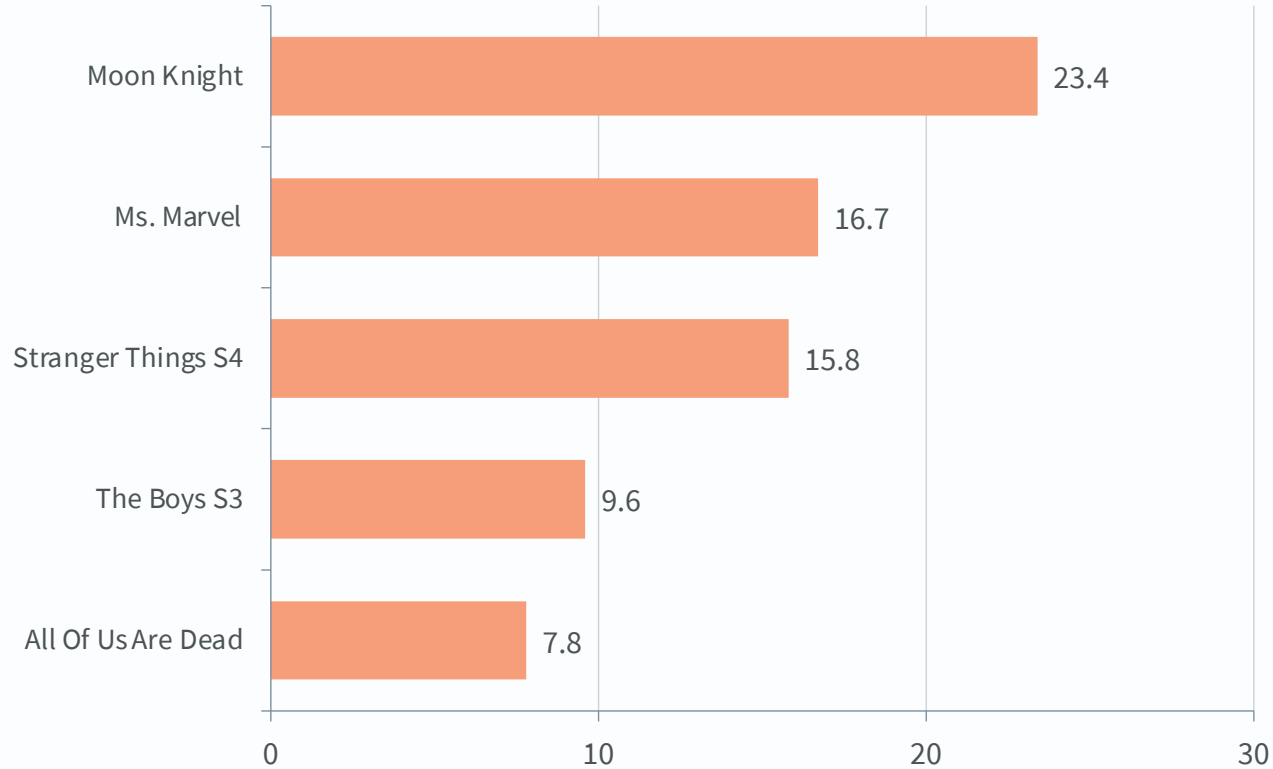
Viewership estimates in Mn



A Thursday was the most-watched direct-to-OTT Hindi film released in Jan-Jun 2022, with an estimated viewership of 25+ Mn.

Most-Watched International Shows

Viewership estimates in Mn



Marvel Cinematic Universe properties take the top 2 positions on the most-watched International shows list.

Marketing Buzz

Most-Buzzing shows & films in India in Jan-
Jun 2022, based on Ormax Stream Track

What is 'Buzz'?



DEFINITION

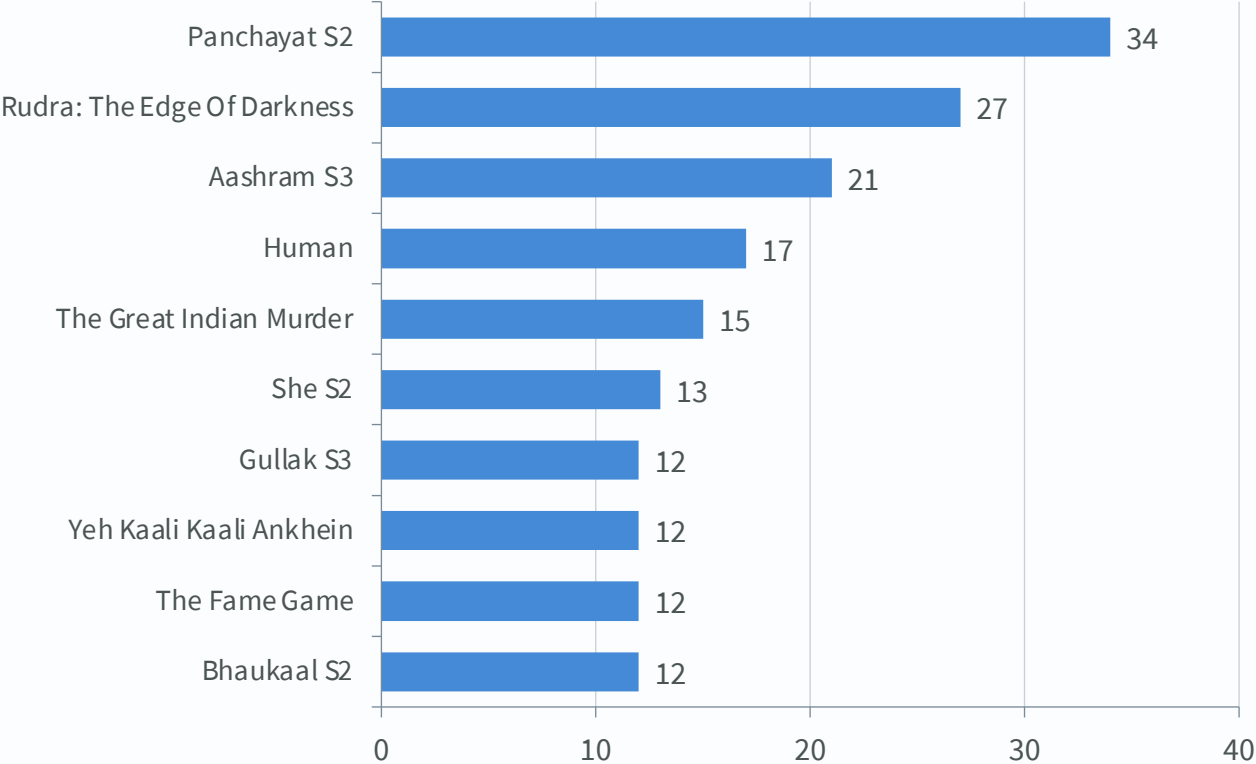
A score on a 0-100 scale that measures % audience who recalled the show or film unaided, when asked to recall upcoming or recently-launched streaming shows or films

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

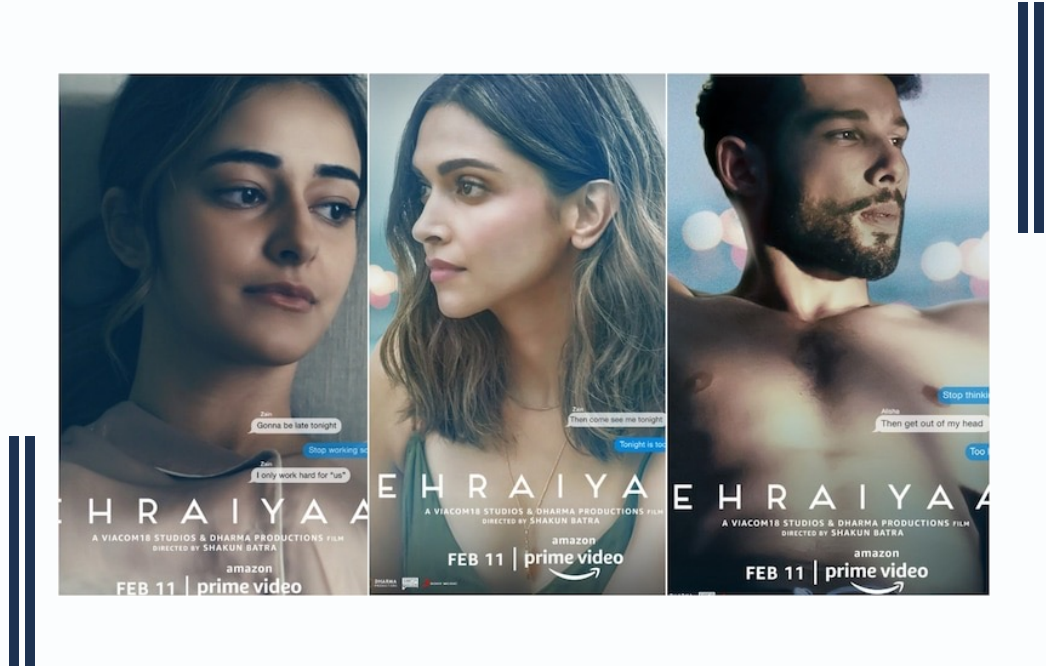
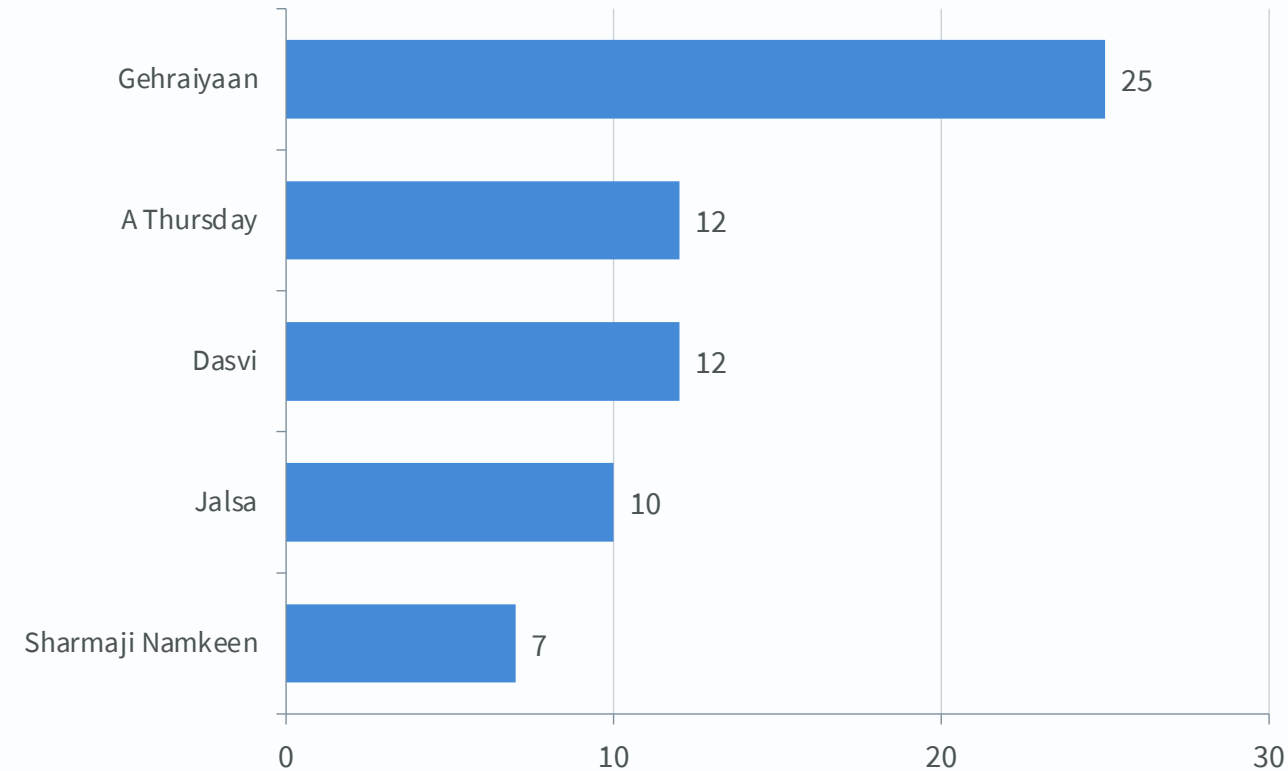


Franchise shows take 5 positions in the top 10.

Disney+ Hotstar takes 3 of the top 5 spots, while Netflix has three shows in the second half of the list.

Most-Buzzing Hindi Films

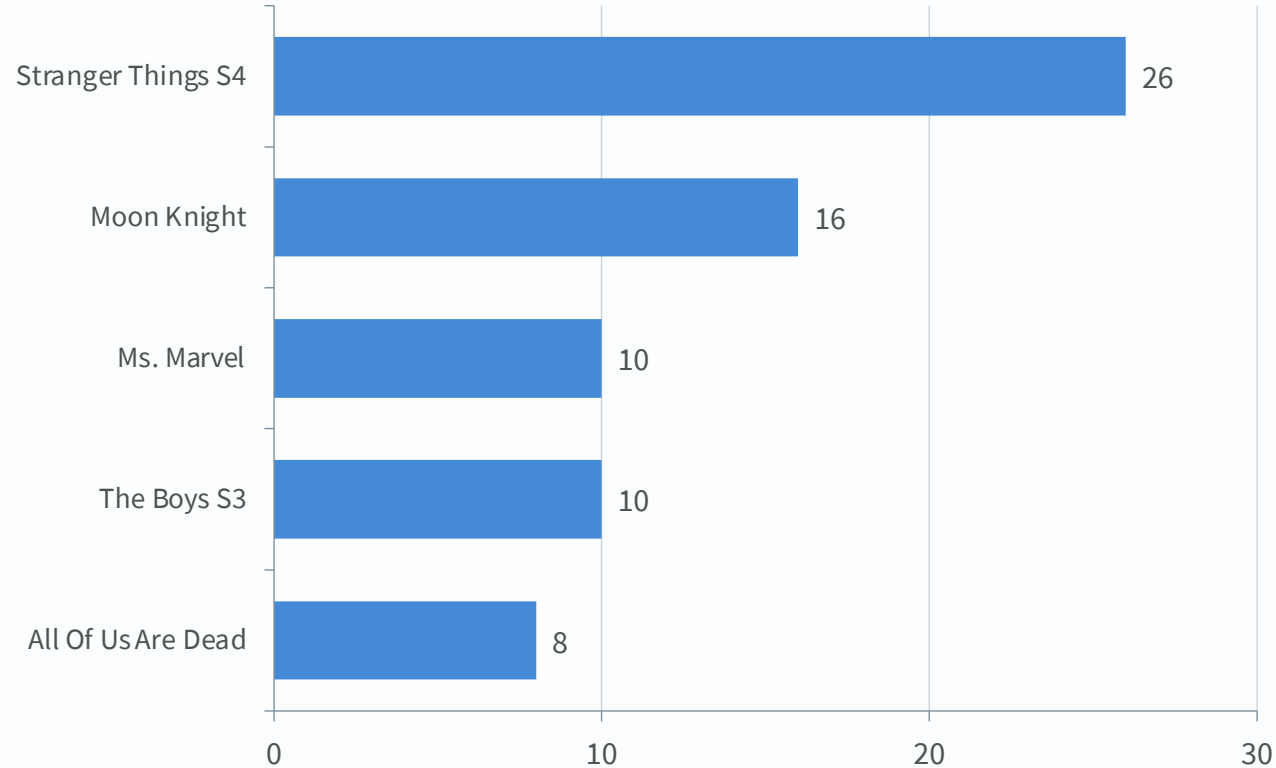
Source: Peak Buzz on Ormax Stream Track



Gehraiyaan was the most-buzzing direct-to-OTT Hindi film of the first half of the year, with more than twice the Buzz compared to any other film.

Most-Buzzing International Shows

Source: Peak Buzz on Ormax Stream Track



Stranger Things leads the list, recording higher Buzz (26%) than all Hindi series except Panchayat S2 and Rudra.

Content Strength

Most-liked shows & films in India in Jan-Jun 2022, based on Ormax Power Rating

What is 'Ormax Power Rating (OPR)'?



DEFINITION

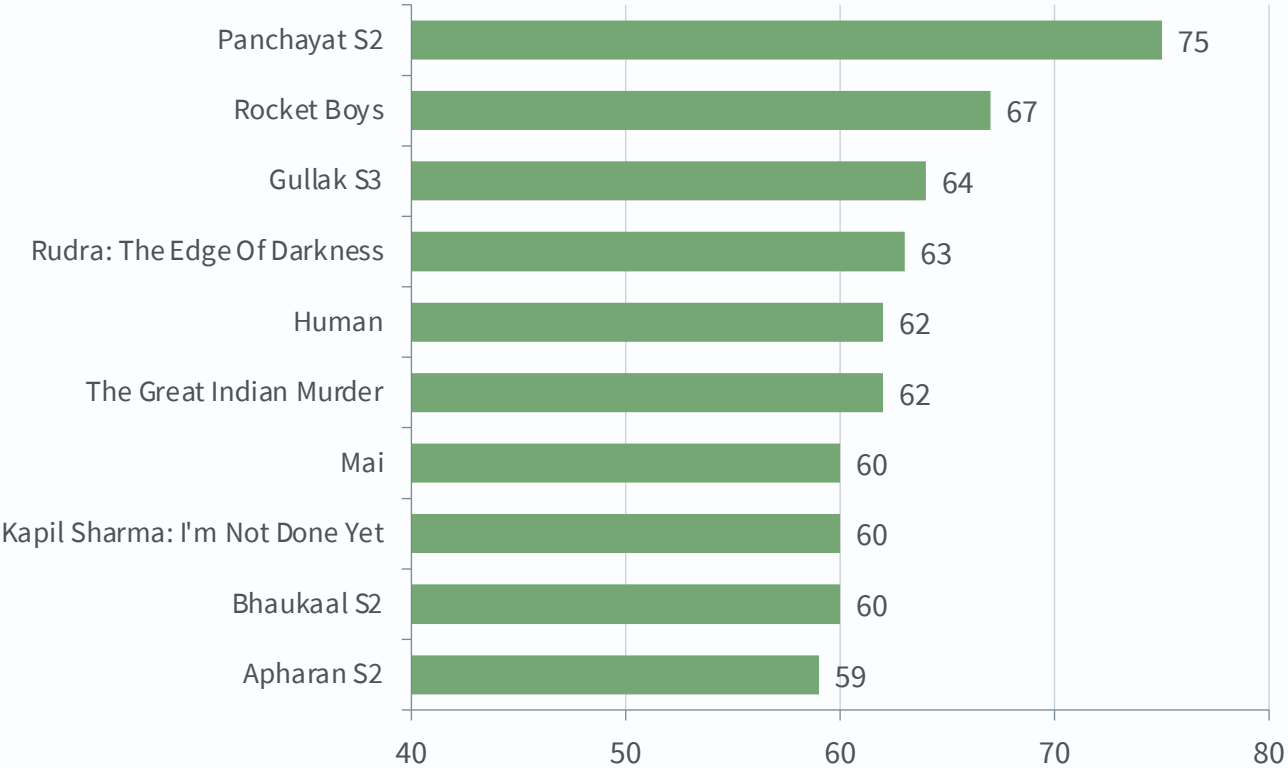
A score on a 0-100 scale that represents how much a show or a film is liked by its viewers

IMPLICATION

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

Most-Liked Hindi Shows

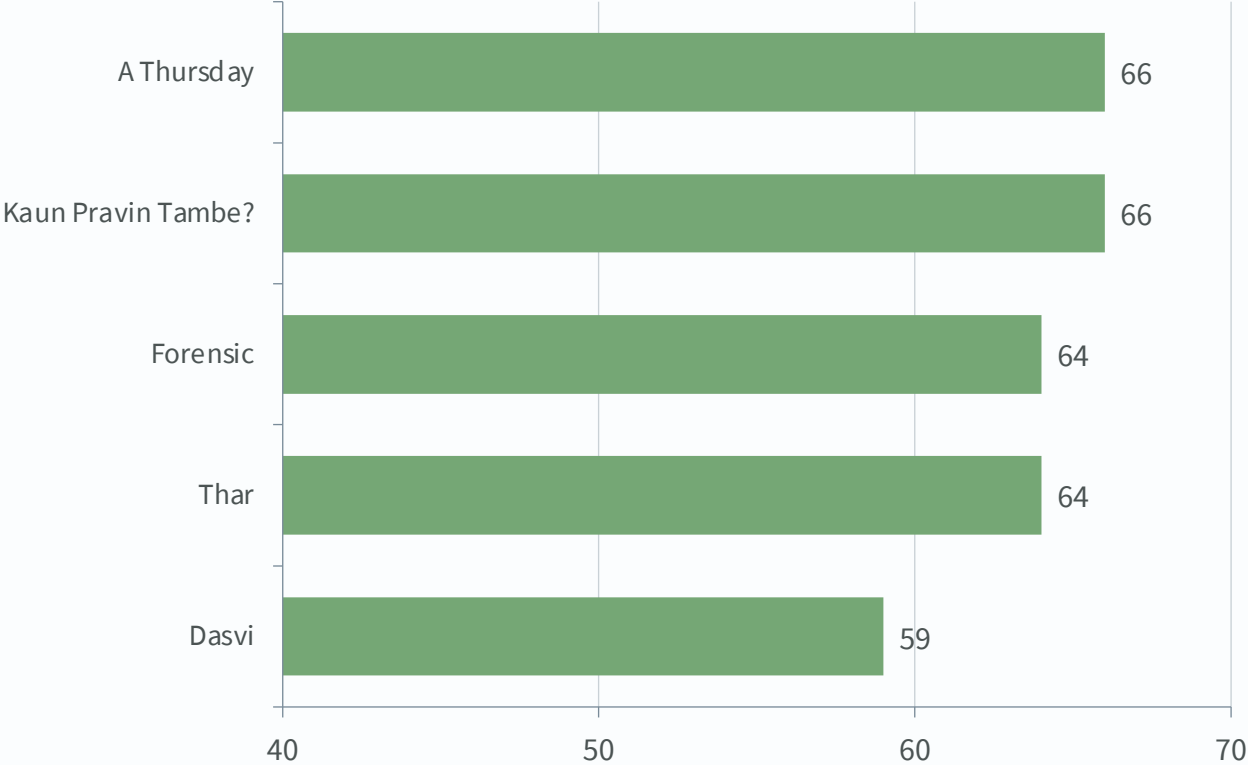
Ormax Power Rating (OPR)



Panchayat S2 was adored by the audience, with its high OPR of 75 placing it no. 6 on the all-time list, on which The Family Man S2, another Prime Video show, holds the top spot (OPR 85). Sony LIV’s Rocket Boys and Gullak S3 take the next two spots on the list.

Most-Liked Hindi Films

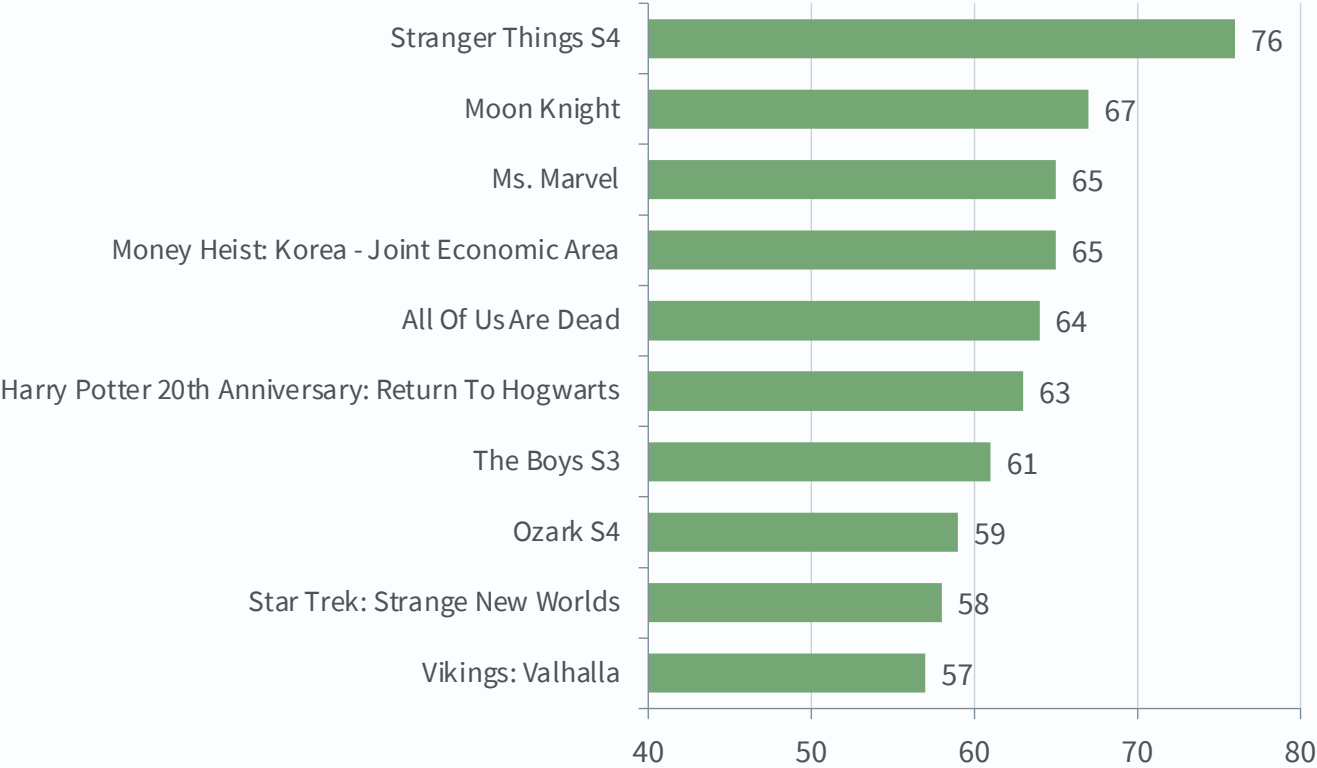
Ormax Power Rating (OPR)



Disney+ Hotstar and Netflix take two spots each in the list of Top 5 most-liked direct-to-OTT Hindi films of Jan-Jun 2022.

Most-Liked International Shows

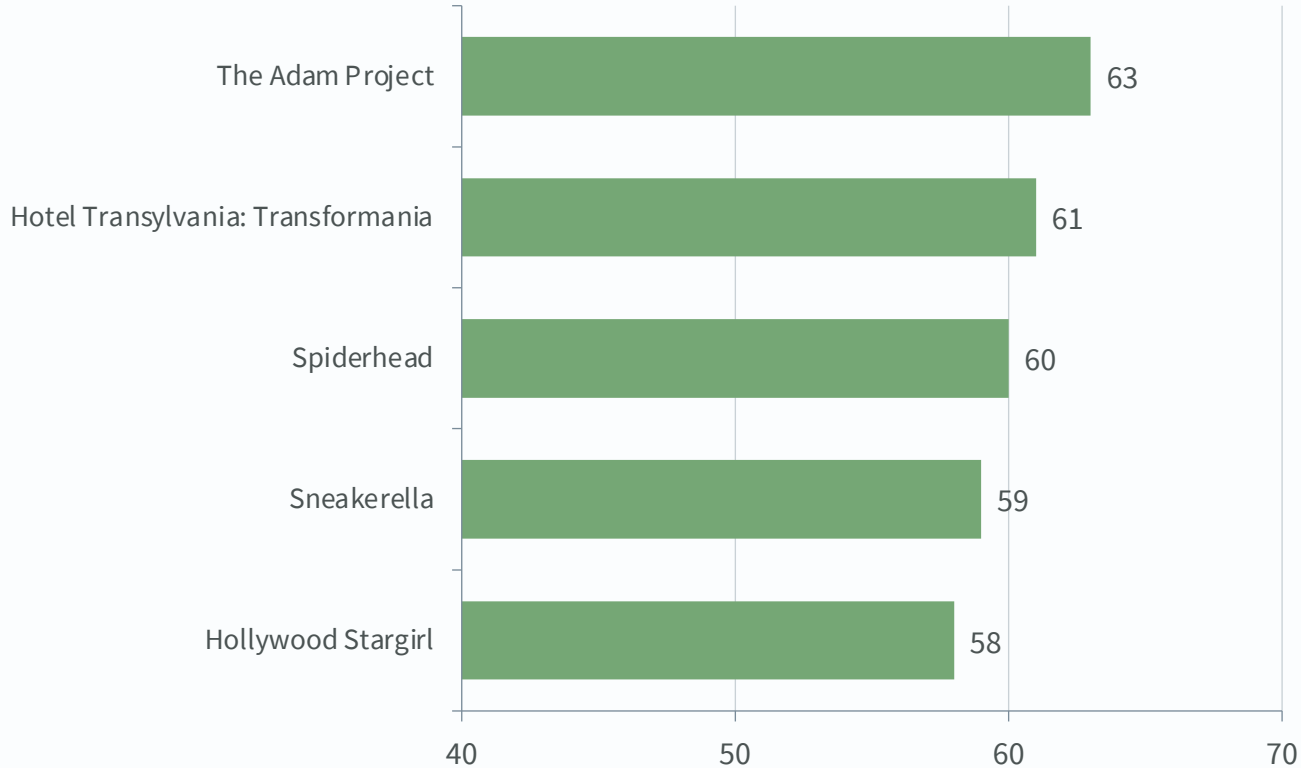
Ormax Power Rating (OPR)



Stranger Things S4 is the second most-liked International show till date (since the start of tracking in 2020) after Money Heist (S4 & S5).
Marvel properties take the next two positions, followed by two Korean shows.

Most-Liked International Films

Ormax Power Rating (OPR)



The first half of 2022 did not see too many major direct-to-OTT International film releases. Ryan Reynolds' The Adam Project emerges as the most-liked International film of the year thus far.



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