



Streaming Originals in India

Mid-year Review

An Ormax Media Report | Jan-Jun 2023

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 half of 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 Jan-Jun 2023,
based on Ormax Media's research estimates

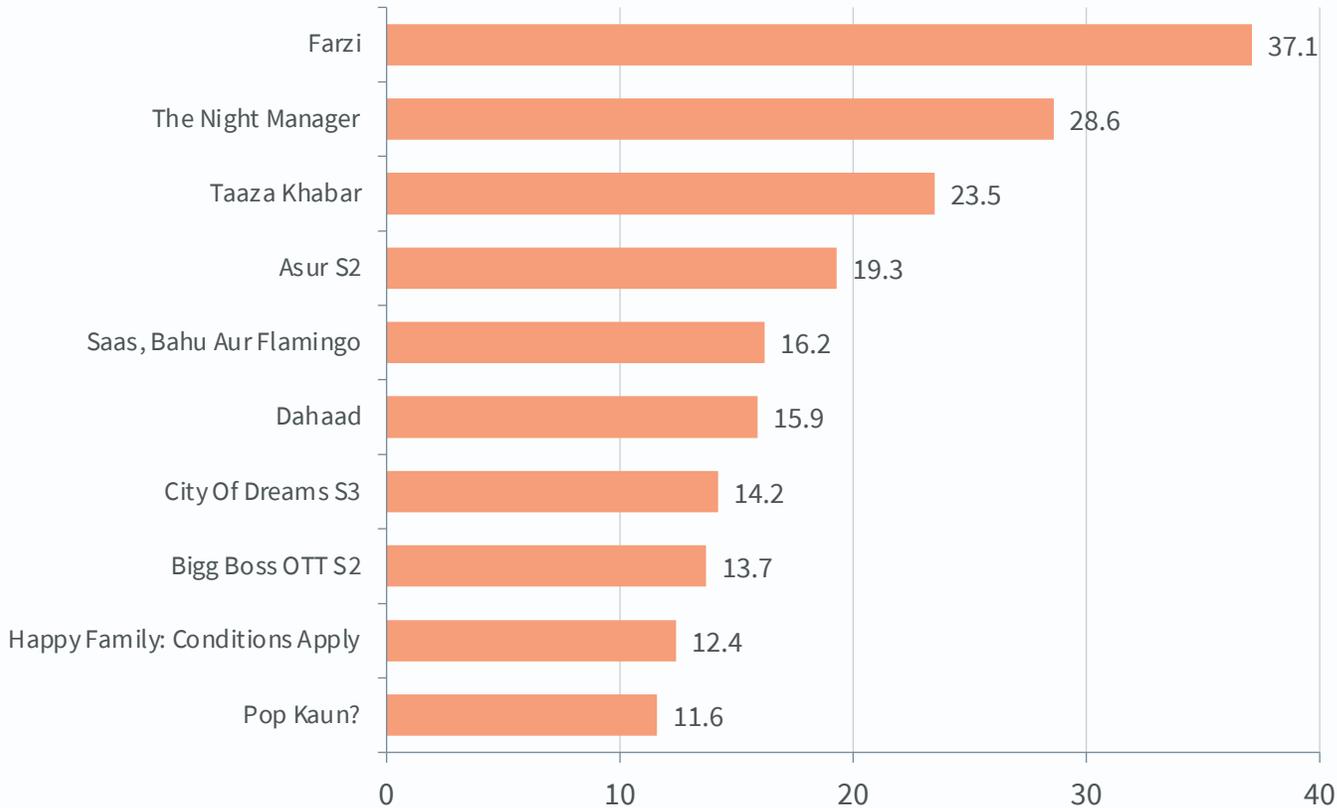
Viewership Estimates: Methodology



- 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 Shows

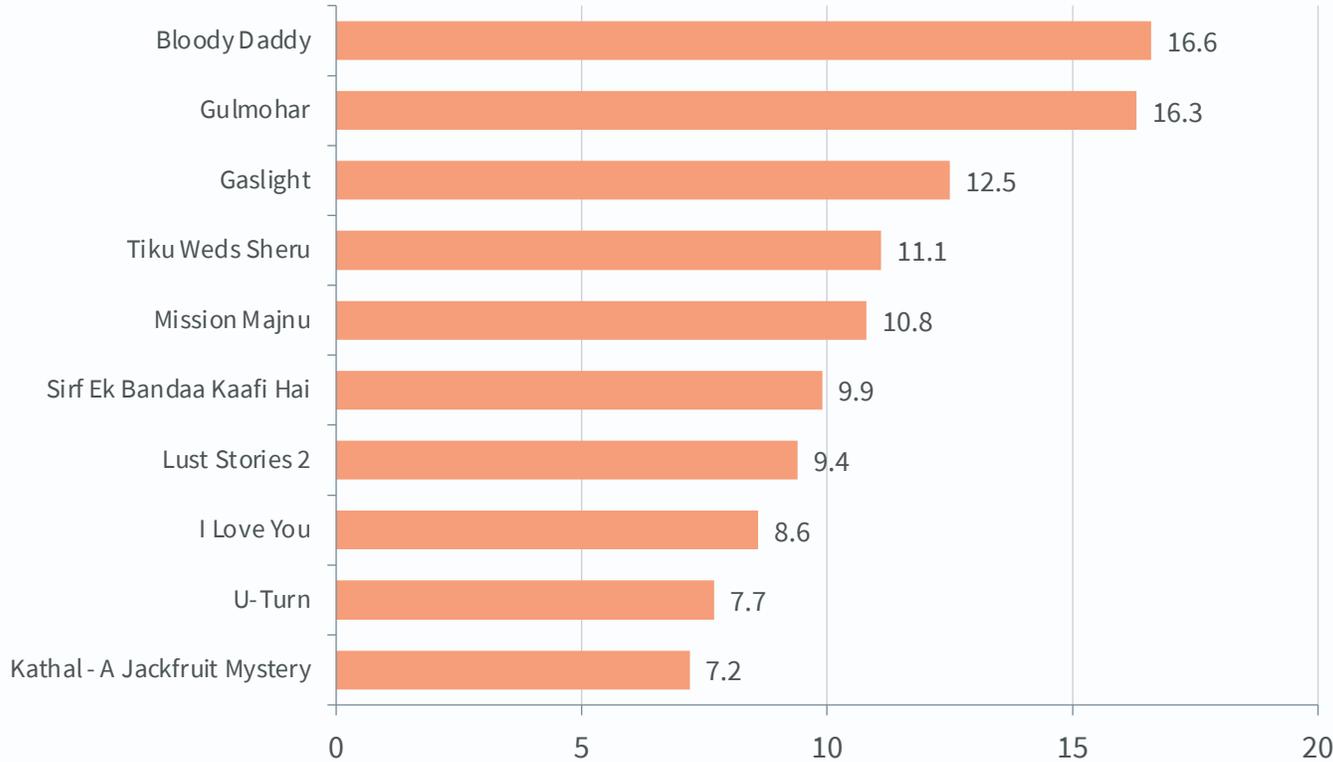
Viewership estimates in Mn



Prime Video's Farzi takes the top spot, not just as the most-watched Hindi series of 2023 so far, but also as the most-watched Hindi SVOD series of all time. Led by The Night Manager, shows from Disney+ Hotstar take 5 out of the top 10 positions.

Most-Watched Hindi Films

Viewership estimates in Mn

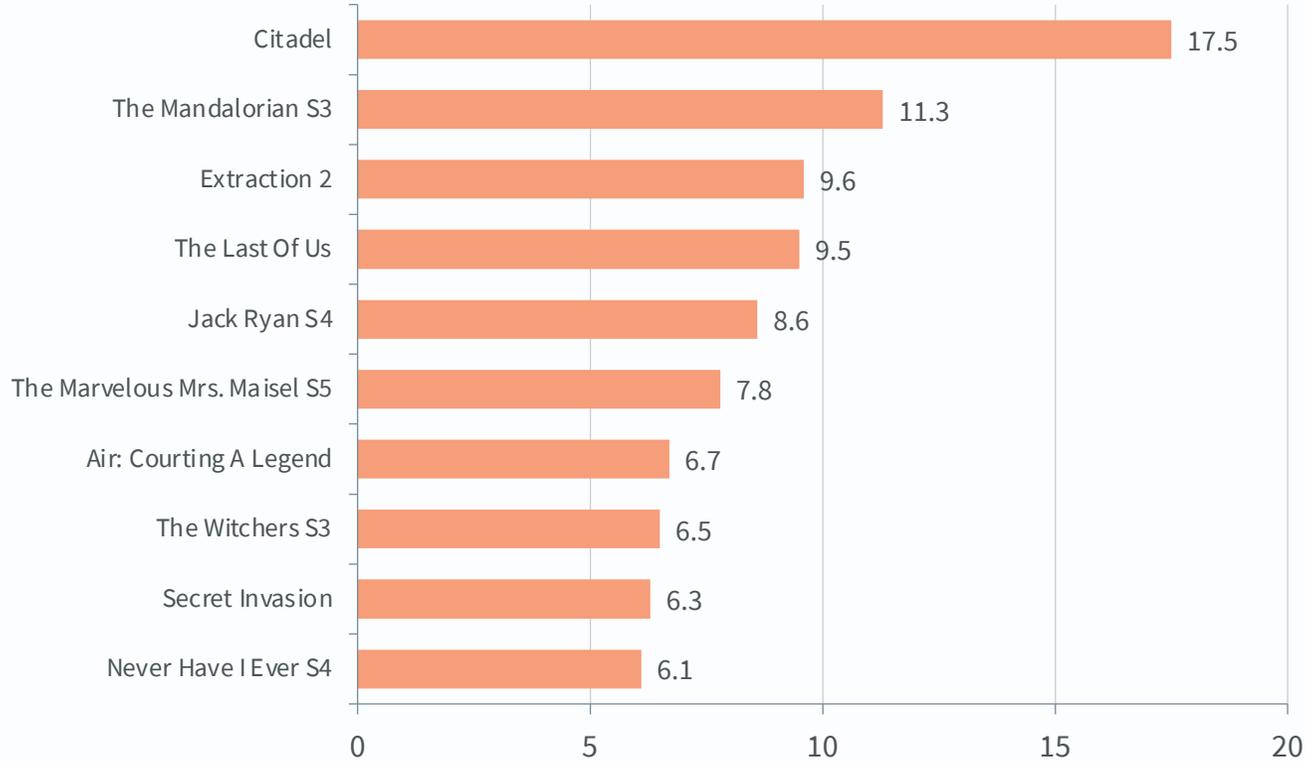


JioCinema's Bloody Daddy, also starring Shahid Kapoor like Farzi, is the most-watched direct-to-OTT Hindi film from the first half of 2023.

The top list is split across five platforms, with Netflix leading with three entries.

Most-Watched International Shows/Films

Viewership estimates in Mn



Citadel, aided by Priyanka Chopra's presence, is the most-watched International original in the first half of 2023, being ahead of the rest of the pack by more than 50%.

Marketing Buzz

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

What is 'Buzz'?



DEFINITION

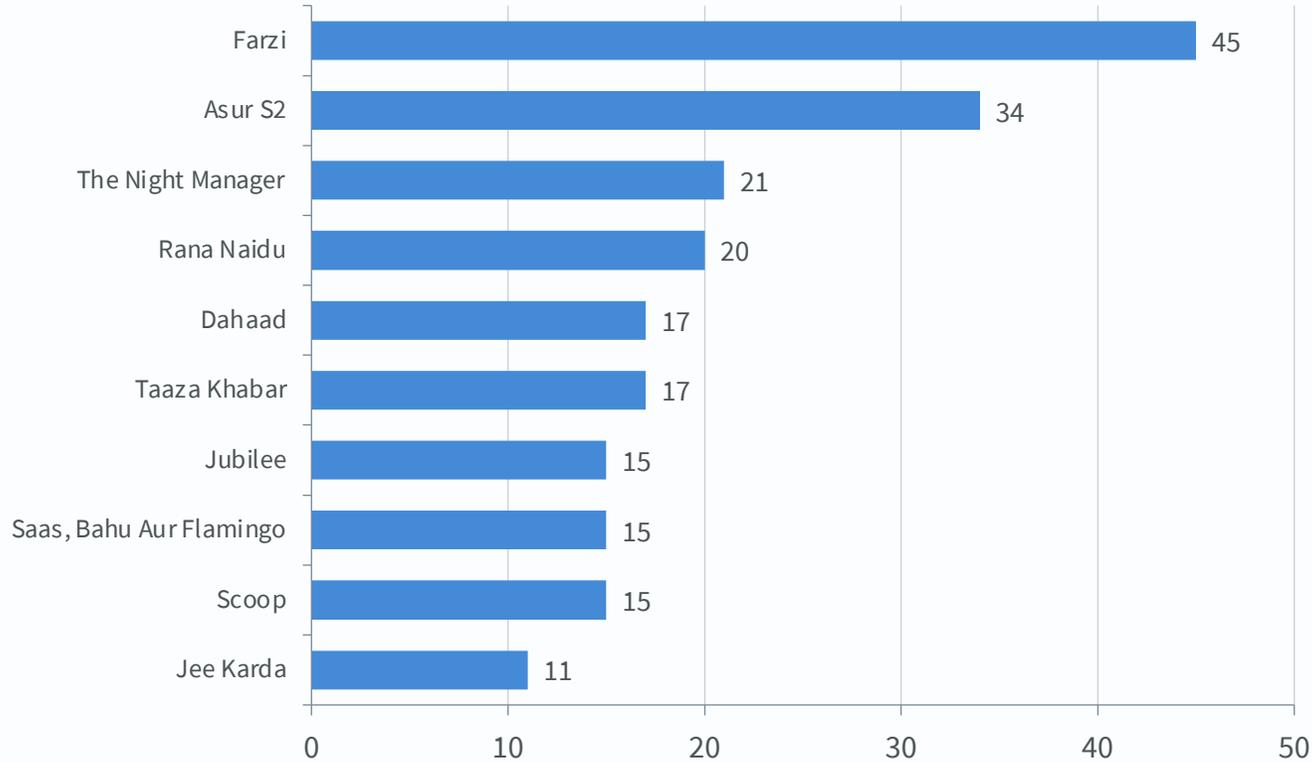
A score on a 0-100 scale that measures % audience who recalled the show or film unaided, when asked to recall upcoming or recently-launched streaming shows or films

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

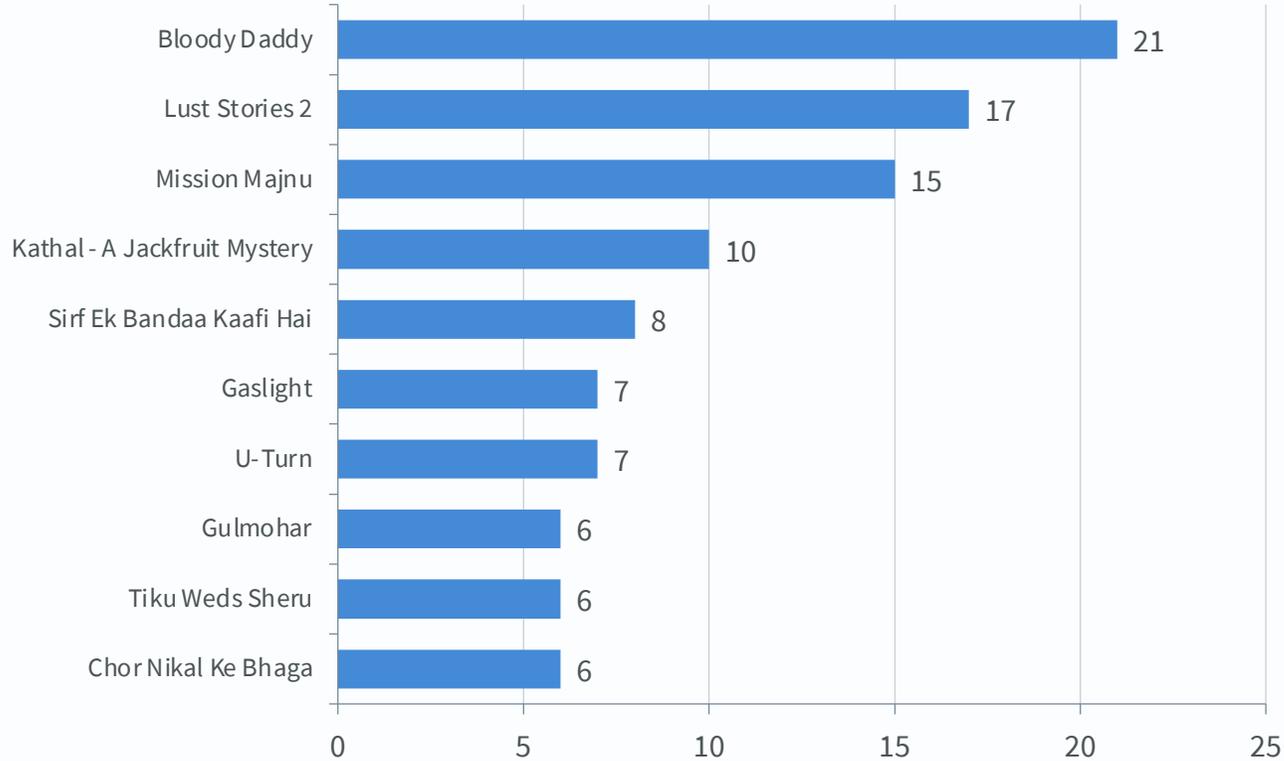
Source: Peak Buzz on Ormax Stream Track



Farzi almost dominated on Buzz, followed by Asur 2, which were the only two shows that crossed a peak Buzz of 25% in a cluttered category.

Most-Buzzing Hindi Films

Source: Peak Buzz on Ormax Stream Track

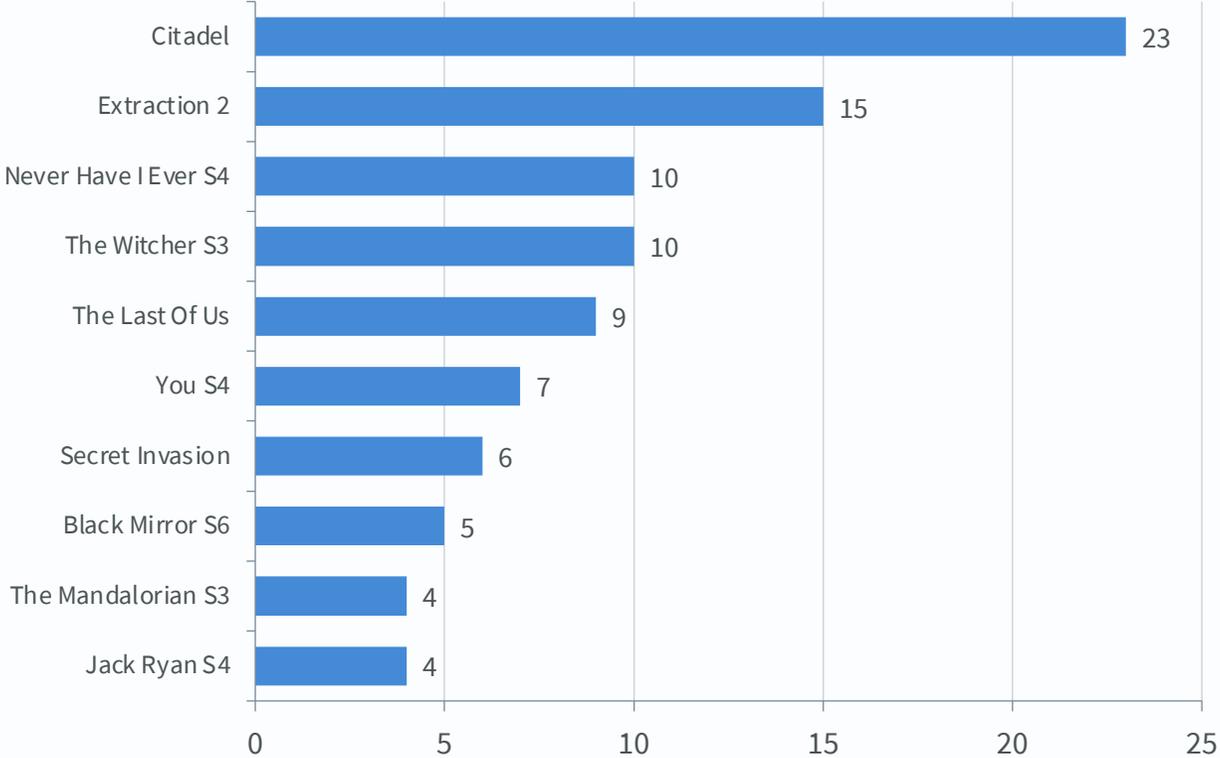


Bloody Daddy is the only direct-to-OTT film in the first half of 2023 with 20%+ peak Buzz.

Netflix takes the next three positions, and has a total of four entries in the top 10.

Most-Buzzing International Shows/Films

Source: Peak Buzz on Ormax Stream Track



Citadel scored well on Buzz, being more than 50% higher than Extraction 2.

Only four International properties managed the 10% mark on Buzz.

Content Strength

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

What is 'Ormax Power Rating (OPR)'?



DEFINITION

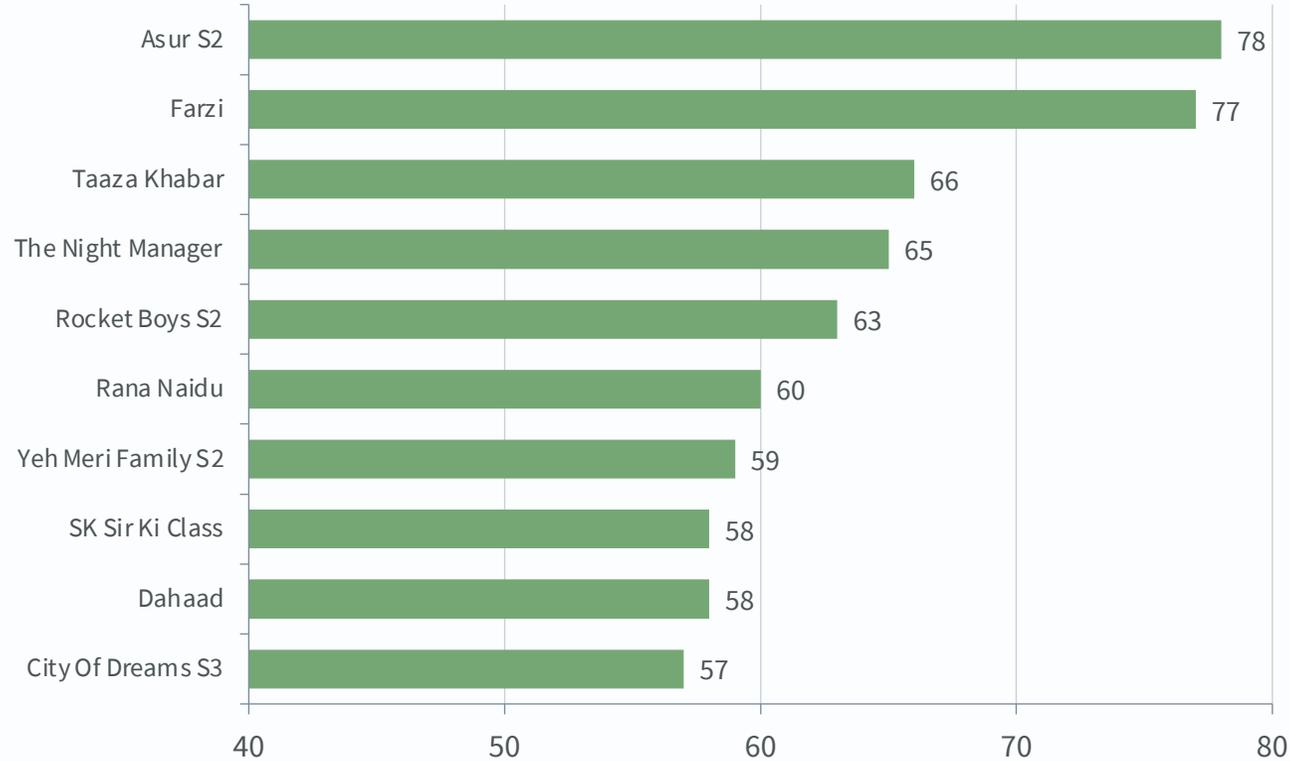
A score on a 0-100 scale that represents how much a show or a film is liked by its viewers

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)

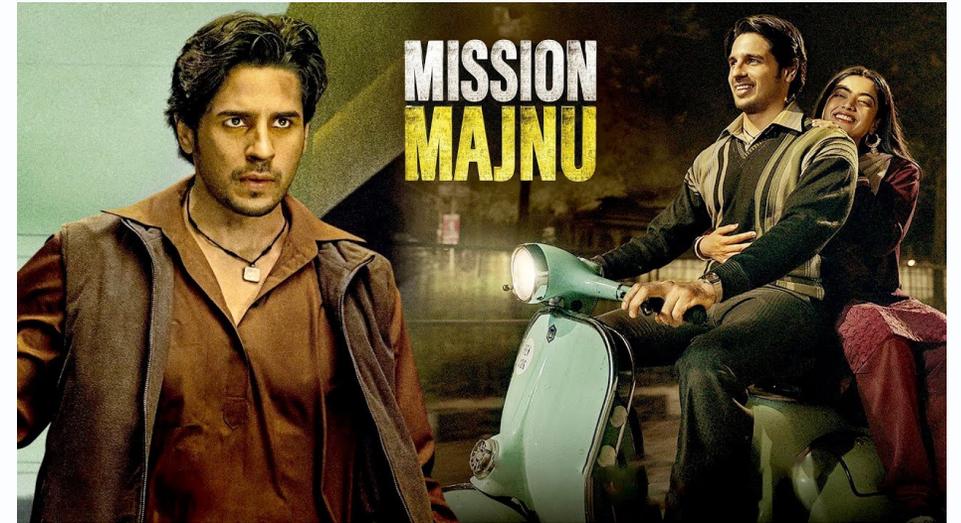
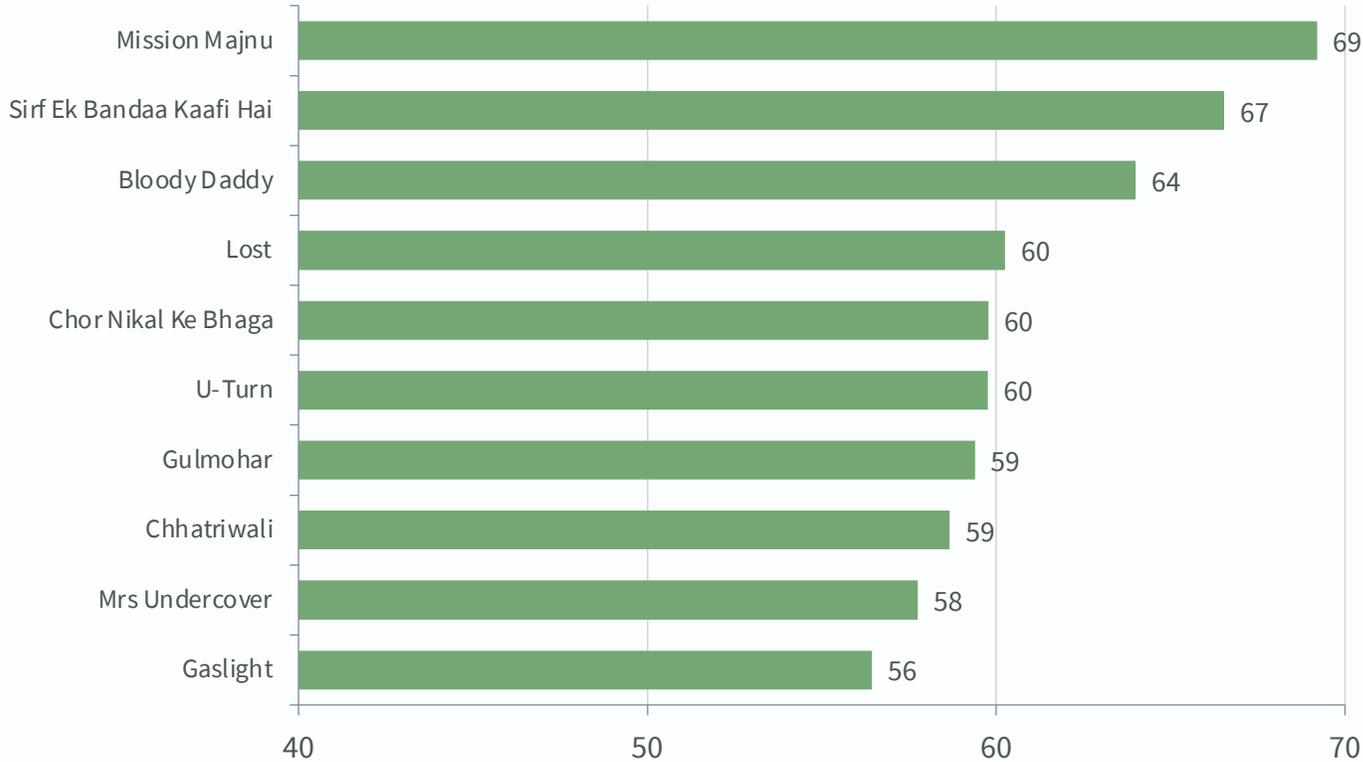


Asur S2 becomes the most-liked Hindi series of 2023 so far, with an OPR that's 1-point higher than Farzi.

No other Hindi series crossed the 70-mark.

Most-Liked Hindi Films

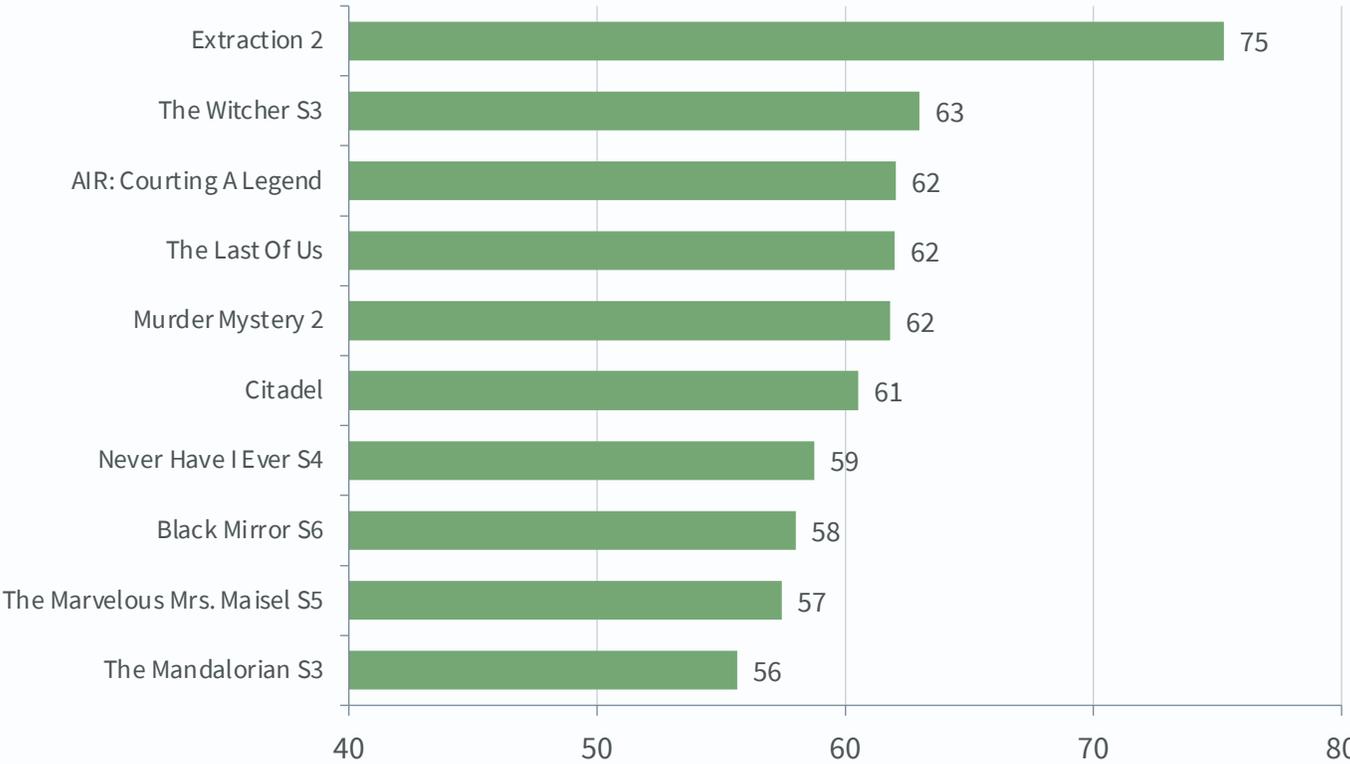
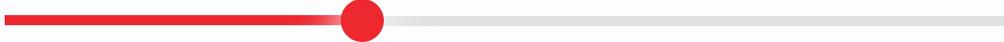
Ormax Power Rating (OPR)



Mission Majnu, closely followed by Sirf Ek Bandaa Kaafi Hai, is the most-liked direct-to-OTT Hindi film of the first half of 2023.

Most-Liked International Shows/Films

Ormax Power Rating (OPR)



Extraction 2 has enjoyed exceptional likeability among its audience base, with a breakout OPR of 75, more than 10 points higher than any International property launched in Jan-Jun 2023.



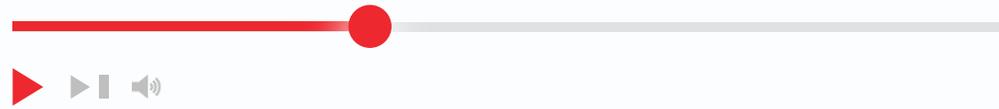
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