



Streaming Originals in India

The 2022 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 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 Mentions



While we currently don't track series in other Indian languages, the performance of Suzhal (Prime Video) came up strongly in our work in the category, and deserves a special mention



With 21.3 Mn unique viewers, S7 of English show Koffee With Karan competed with the best content in the year, and was in the elite list of less than 20 properties (across formats & languages) that crossed the 20 Mn mark in 2022

Viewership

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

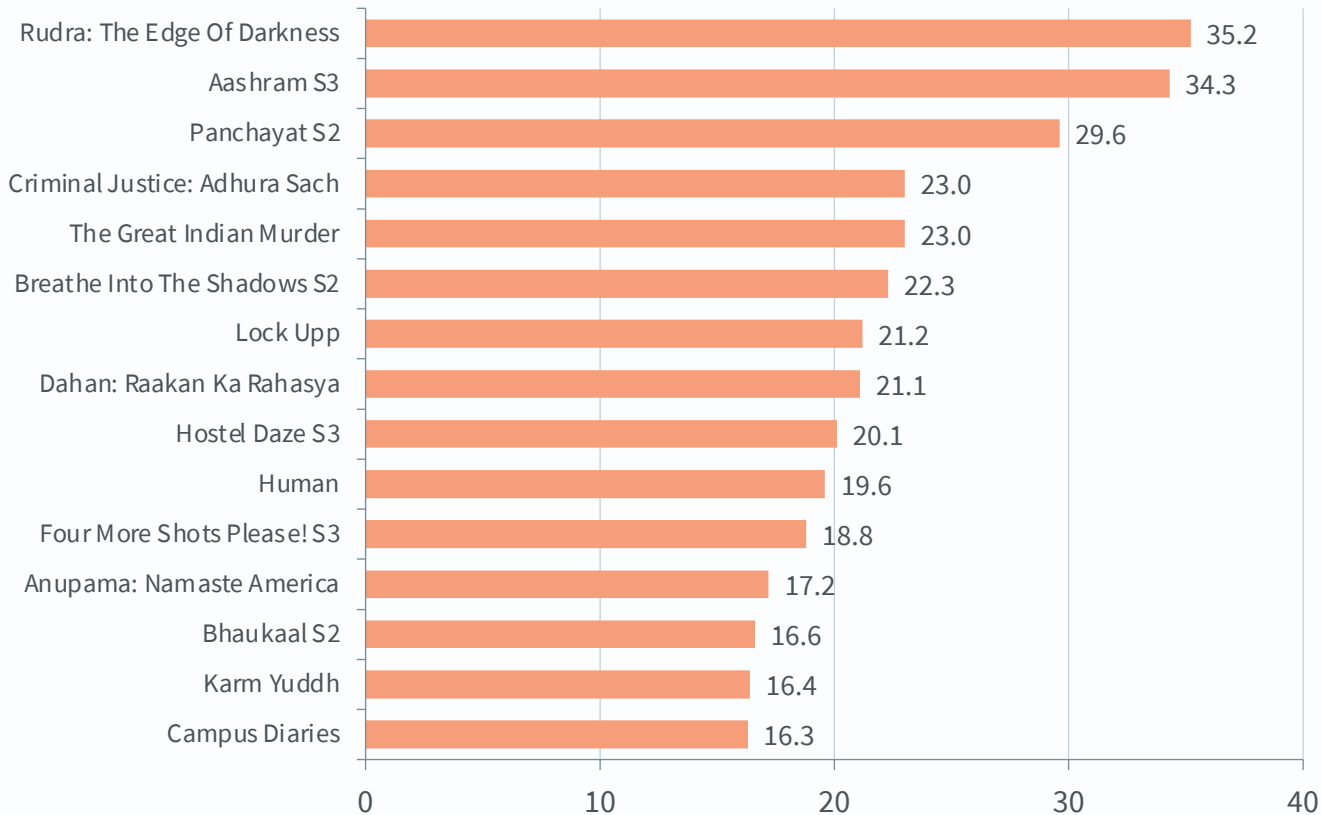
Viewership Estimates: Methodology



- 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

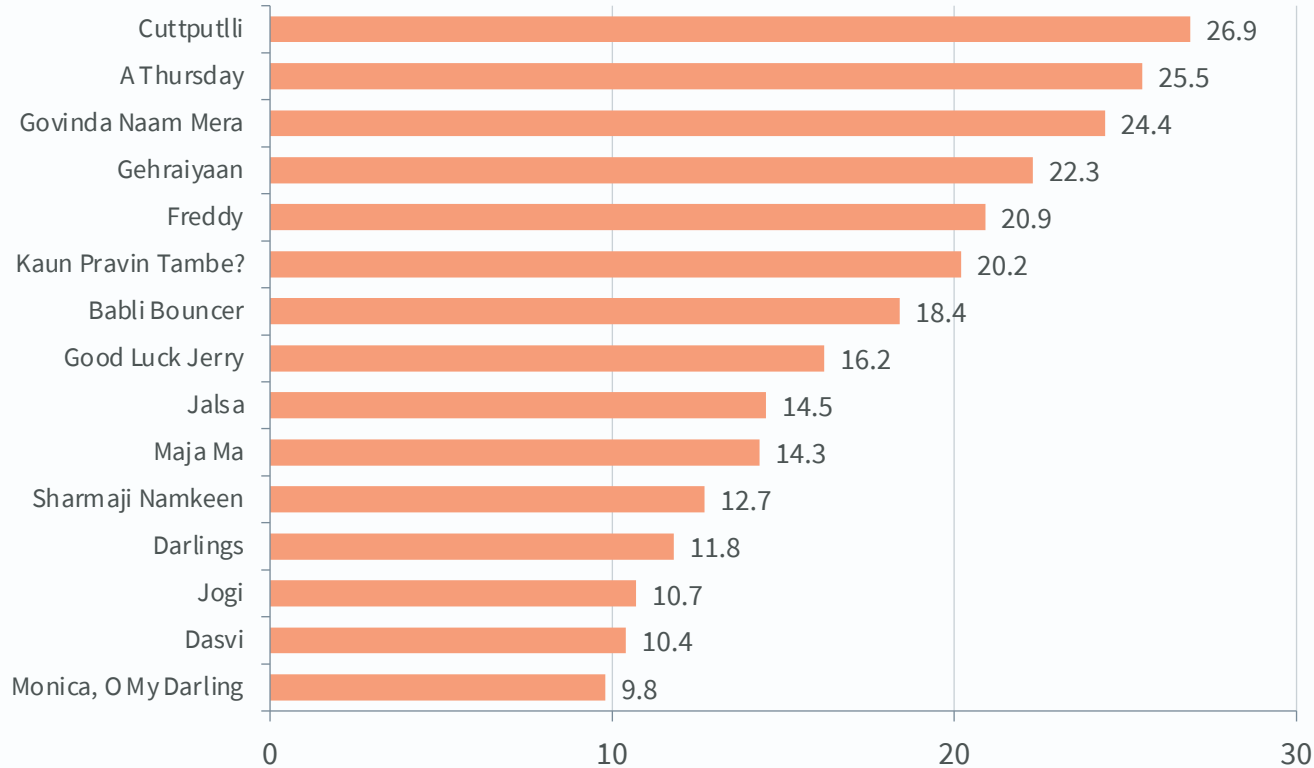
Viewership estimates in Mn



Led by Rudra: The Edge Of Darkness, Disney+ Hotstar takes 7 positions in the top 15 list, followed by Prime Video and MX Player (4 shows each).

Most-Watched Hindi Films

Viewership estimates in Mn

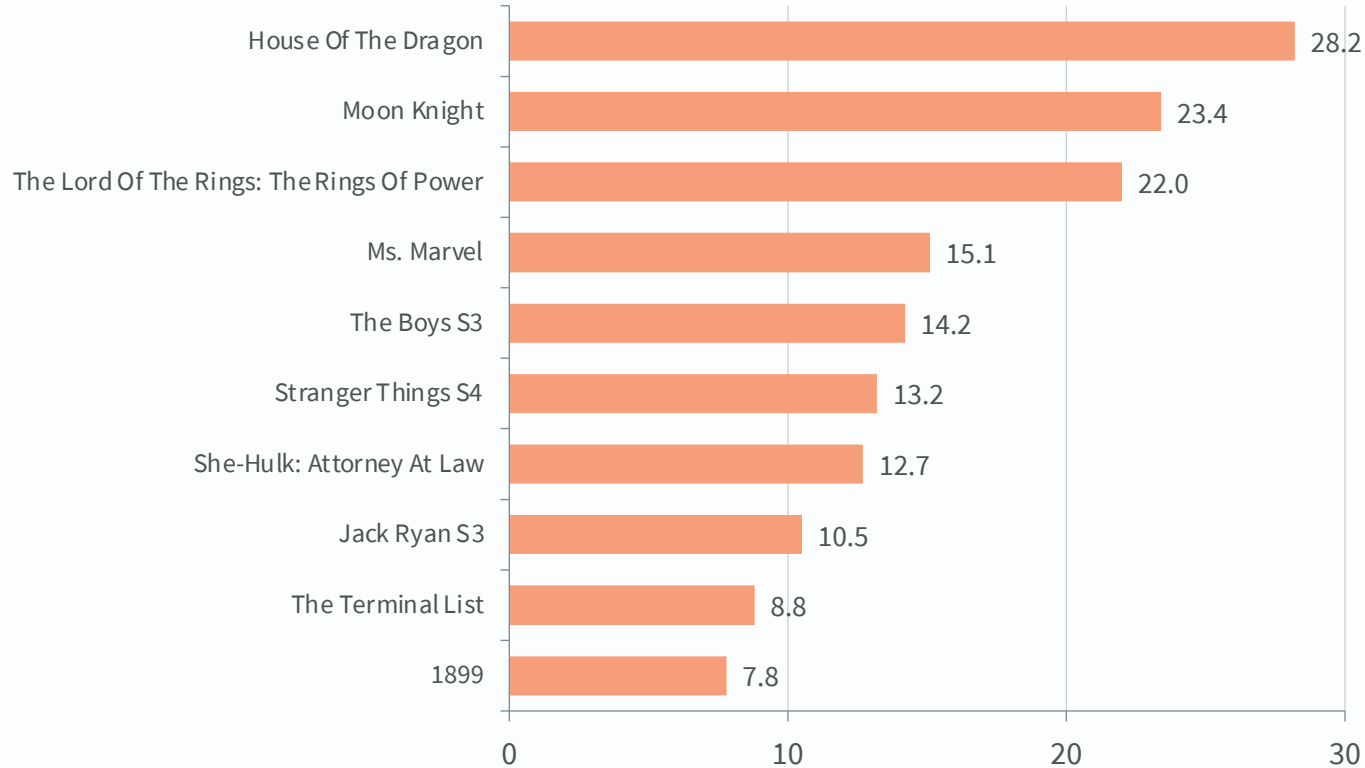


Three films, all on Disney+ Hotstar, crossed the 24 Mn Indian viewership mark in 2022.

Disney+ Hotstar (7 films), Prime Video & Netflix (4 films each) share the top 15 spots between them.

Most-Watched International Shows

Viewership estimates in Mn



Franchise shows, including those from the Marvel Cinematic Universe, dominate the International list, taking each of the top 8 positions.

Marketing Buzz

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

What is 'Buzz'?



DEFINITION

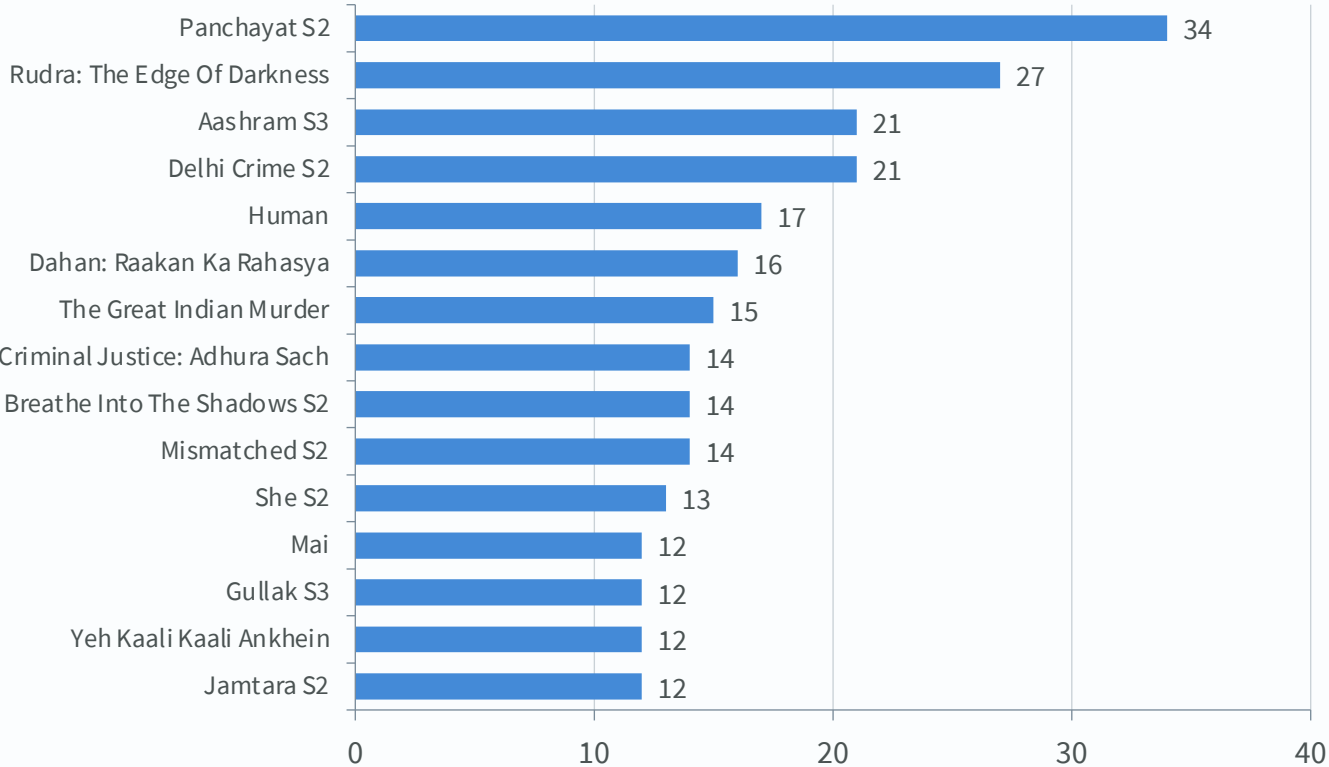
A score on a 0-100 scale that measures % audience who recalled the show or film unaided, when asked to recall upcoming or recently-launched streaming shows or films

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

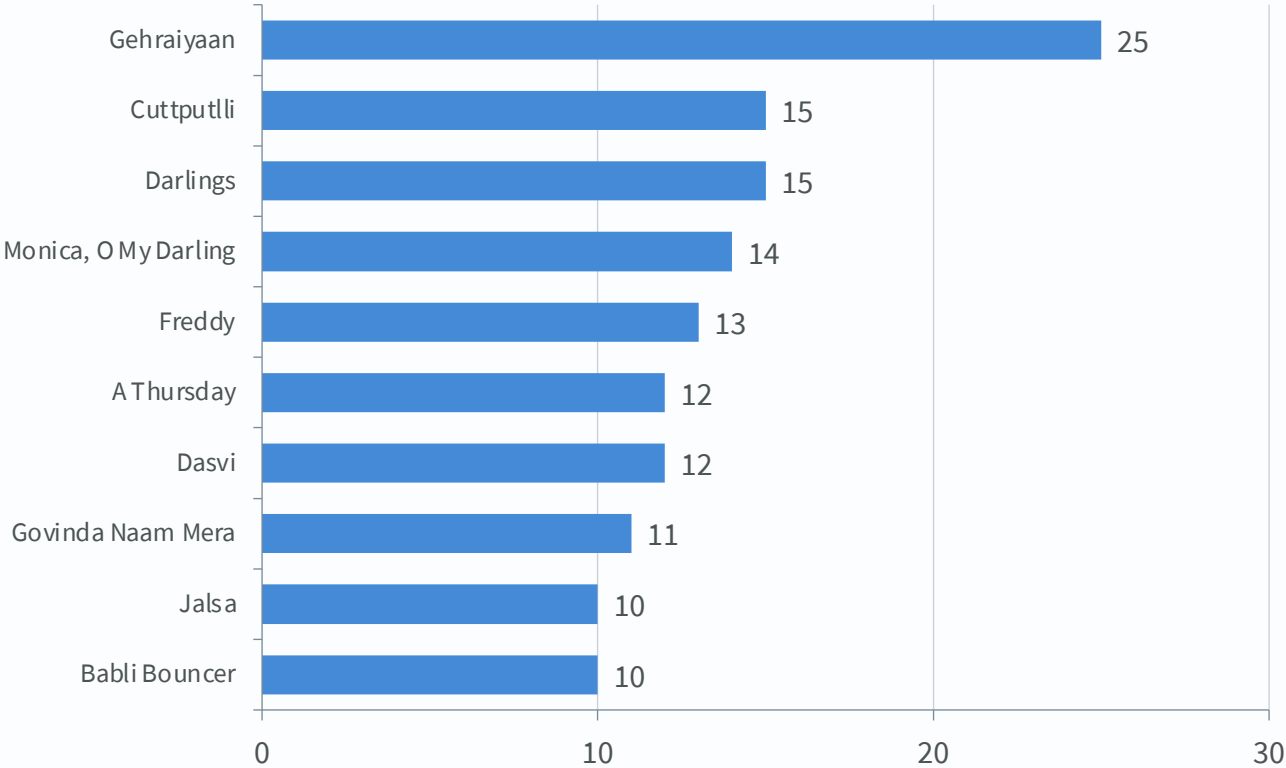
Source: Peak Buzz on Ormax Stream Track



S2 of Panchayat (Prime Video) generated the maximum Buzz, followed by Rudra (Disney+ Hotstar).
Franchise shows take 9 out of the top 15 positions on the list.

Most-Buzzing Hindi Films

Source: Peak Buzz on Ormax Stream Track

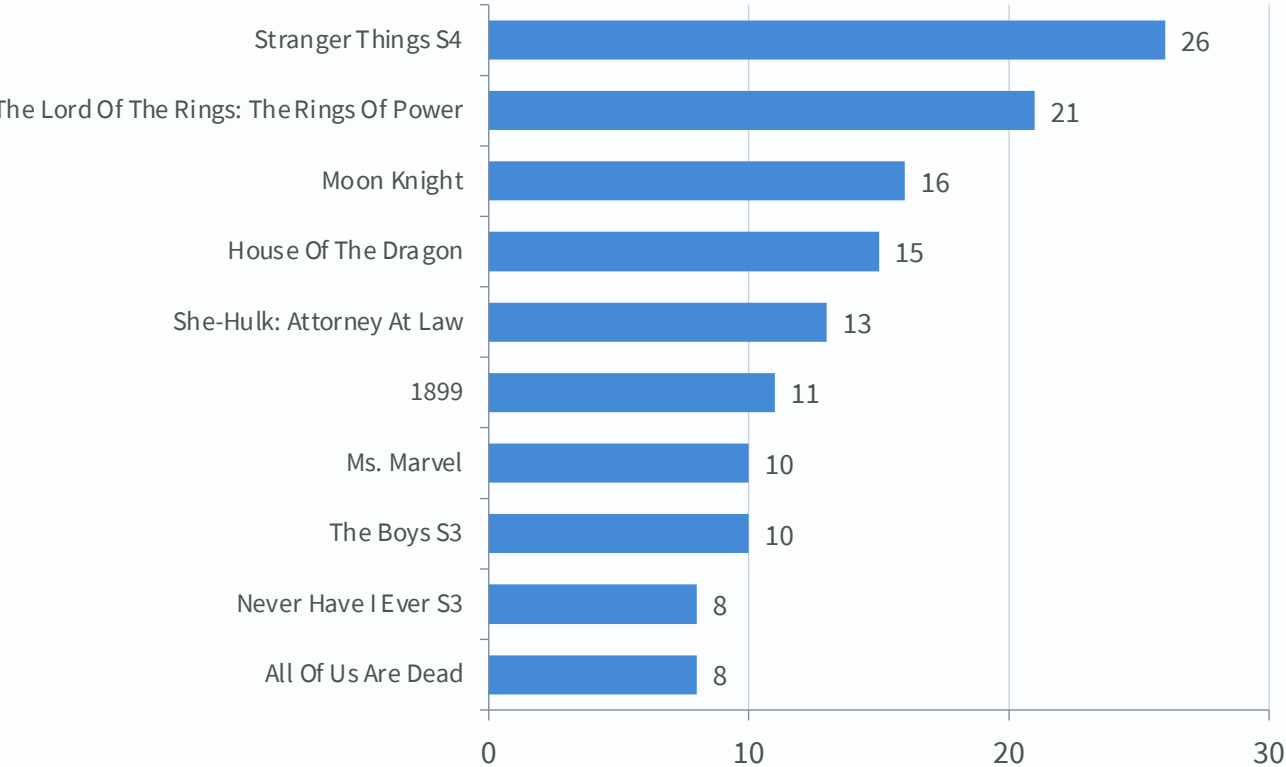


Films featuring theatrical stars dominate the list.

Geheraiyaan was the most-buzzing direct-to-OTT Hindi film of 2022, by a wide margin.

Most-Buzzing International Shows

Source: Peak Buzz on Ormax Stream Track



Stranger Things S4 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 2022,
based on Ormax Power Rating

What is 'Ormax Power Rating (OPR)'?



DEFINITION

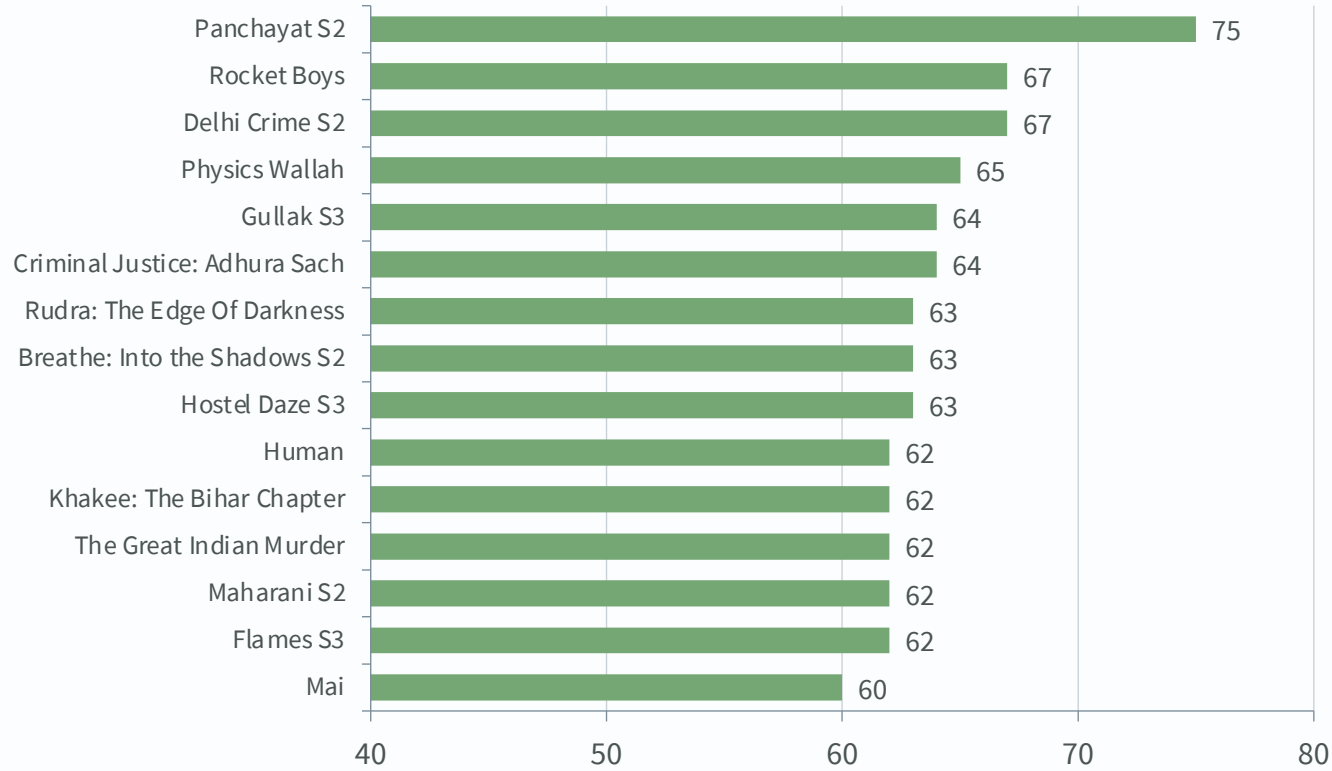
A score on a 0-100 scale that represents how much a show or a film is liked by its viewers

IMPLICATION

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

Most-Liked Hindi Shows

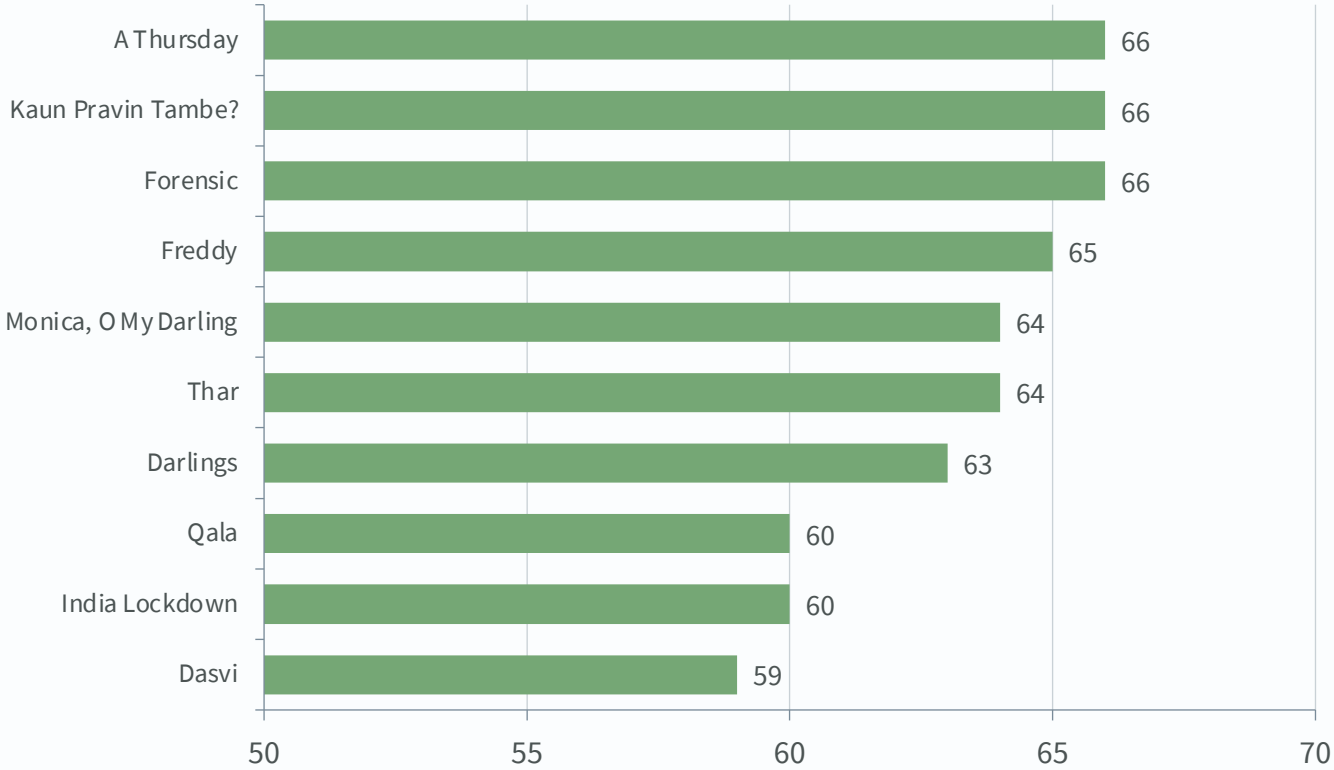
Ormax Power Rating (OPR)



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 Netflix’s Delhi Crime S2 take the next two spots.

Most-Liked Hindi Films

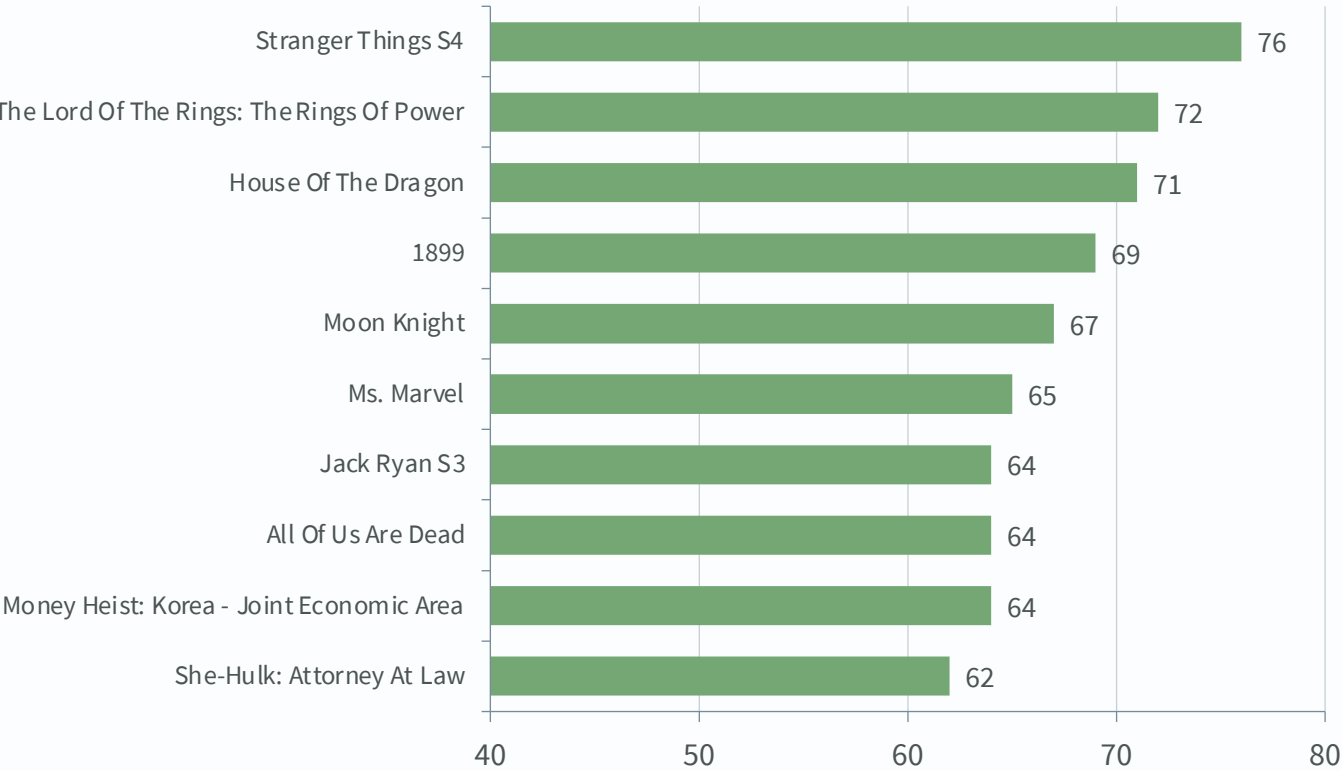
Ormax Power Rating (OPR)



While Disney+ Hotstar takes 3 of the top 4 spots, Netflix dominates the top 10 list, with five out of the six positions from no. 5 to no. 10.

Most-Liked International Shows

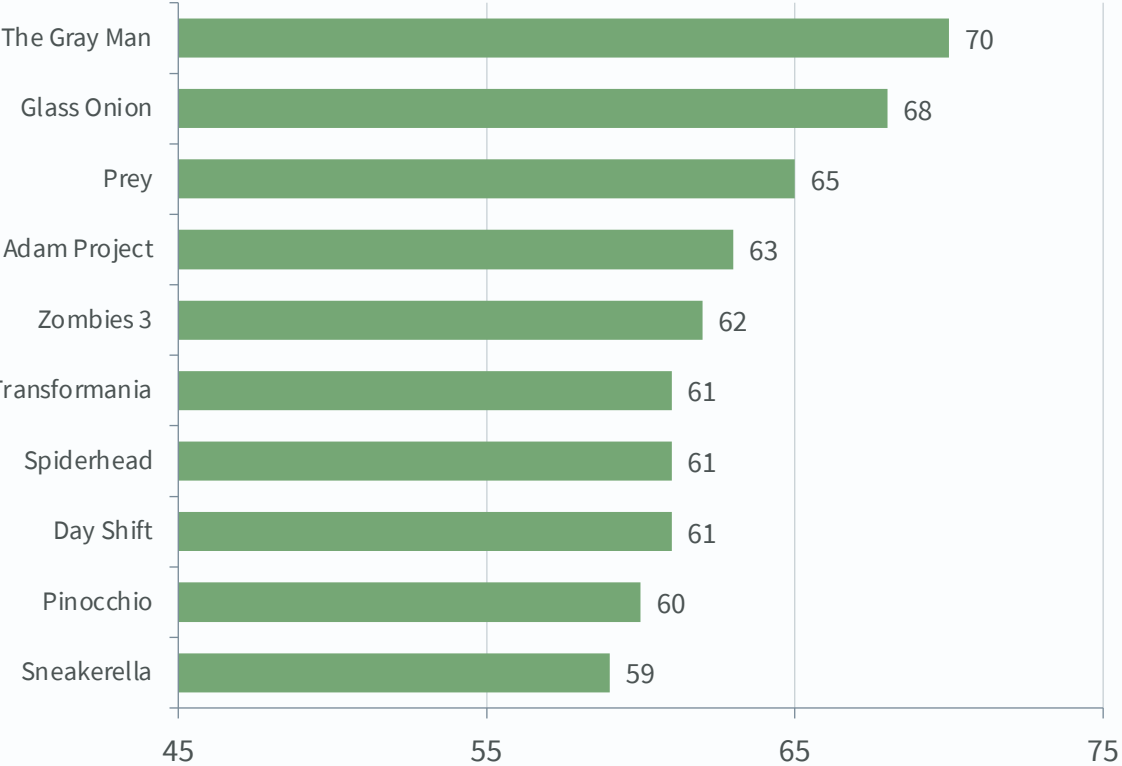
Ormax Power Rating (OPR)



Stranger Things S4 is the second most-liked International show till date (since the start of tracking in 2020) after Money Heist (S4 & S5).
The top 10 list features shows from a variety of genres and languages, but is primarily franchise-led.

Most-Liked International Films

Ormax Power Rating (OPR)



The Gray Man, featuring Dhanush in a key role, is the only International direct-to-OTT film to touch the 70-OPR mark in 2022.



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