



Streaming Originals in India

Mid-year Review

An Ormax Media Report | Jan-Jun 2024

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 of 2024 (i.e., Jan-Jun), in Hindi, Telugu, Tamil & 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 2024,
based on Ormax Media's research estimates

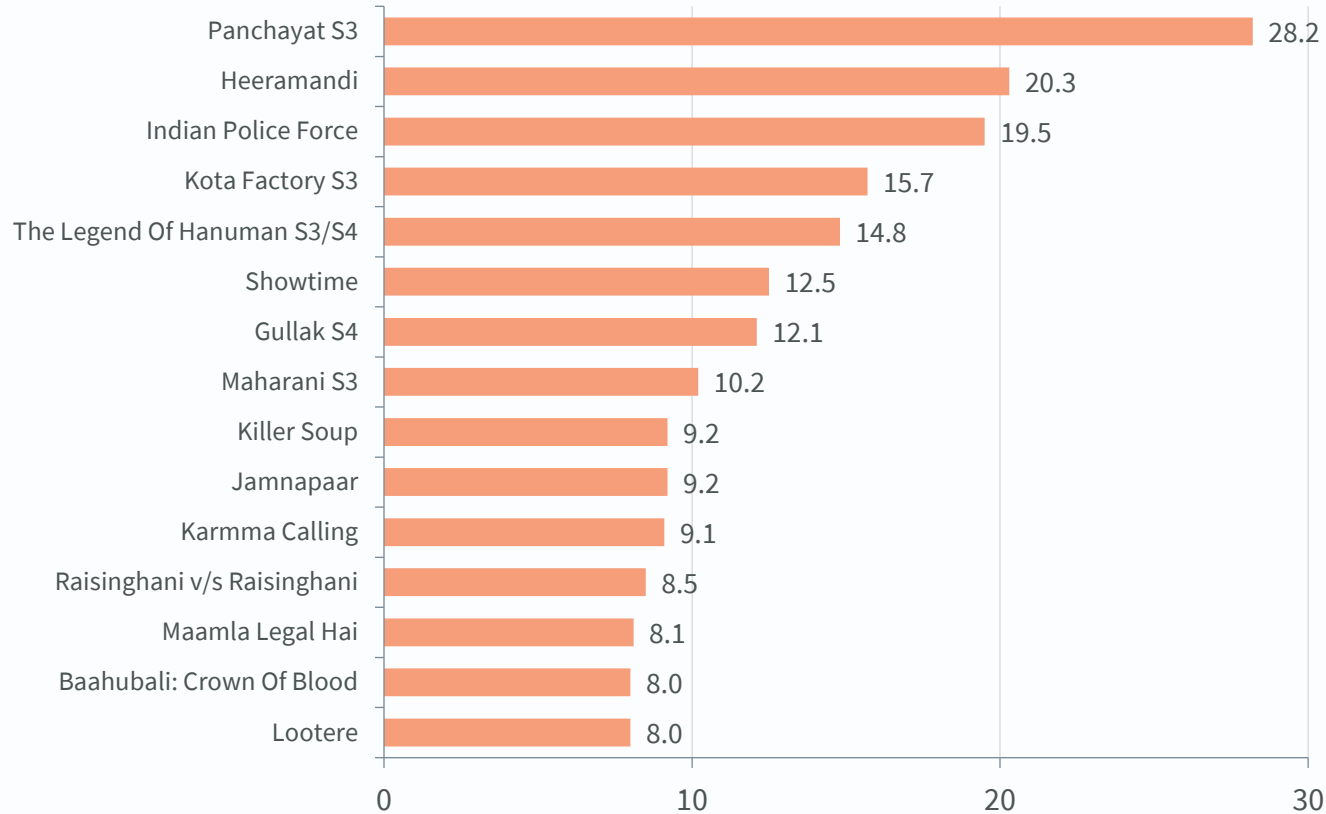
Viewership Estimates: Methodology



- 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 the 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

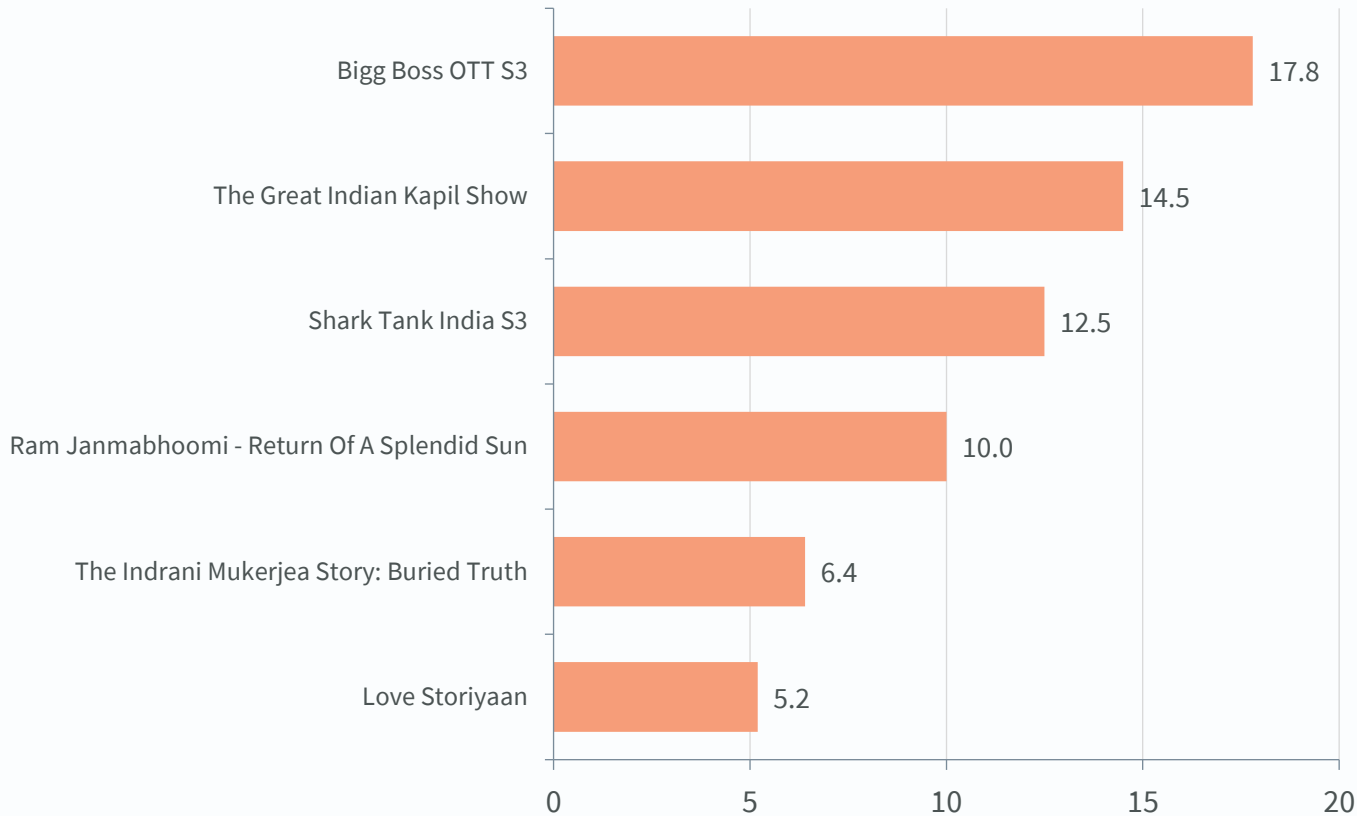
Viewership estimates in Mn



Prime Video's Panchayat S3 takes the top spot, just short of the 30 Mn viewership mark. Five platforms feature on the list, with Disney+ Hotstar leading with five entries. The only AVOD series to feature on the list is Jamnapaar (Amazon miniTV).

Most-Watched Hindi Unscripted Shows

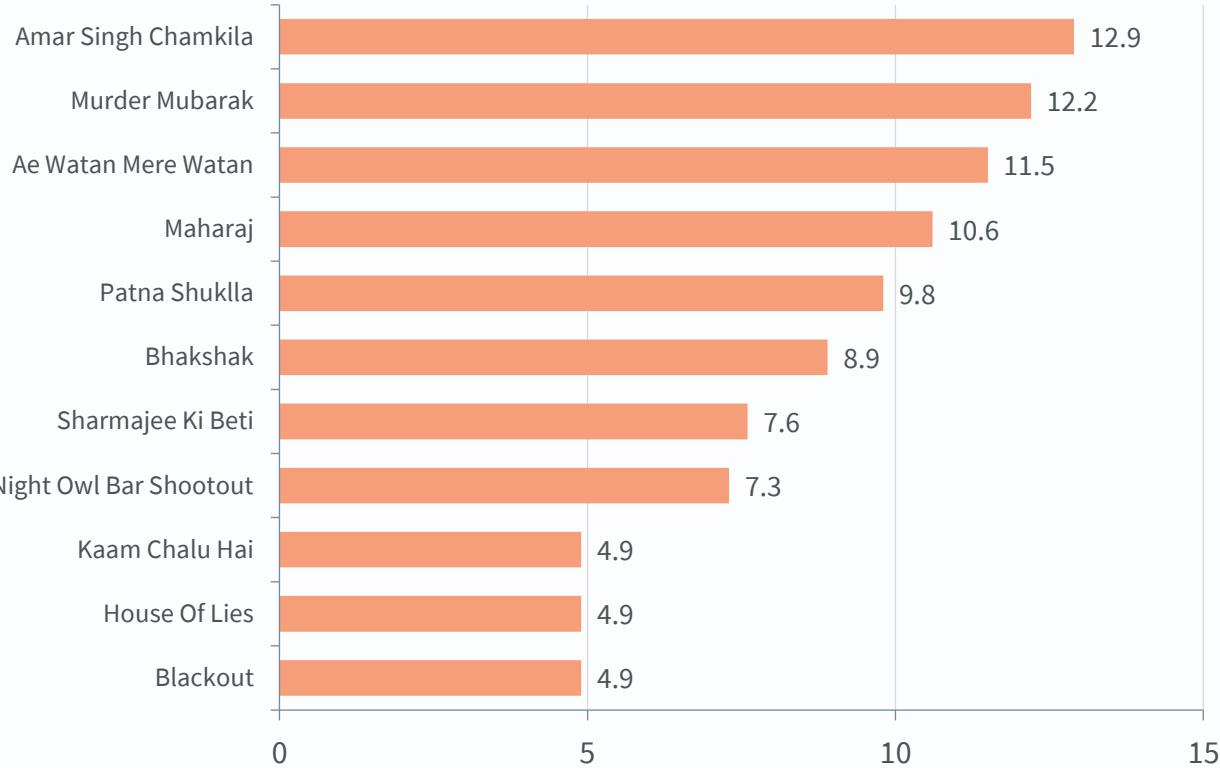
Viewership estimates in Mn



JioCinema's Bigg Boss OTT S3 tops this list as the most-watched Indian unscripted show in the first half of 2024. The four properties with >10 Mn viewership belong to different genres, indicating the potential for diversity of formats in non-fiction on OTT.

Most-Watched Hindi Films

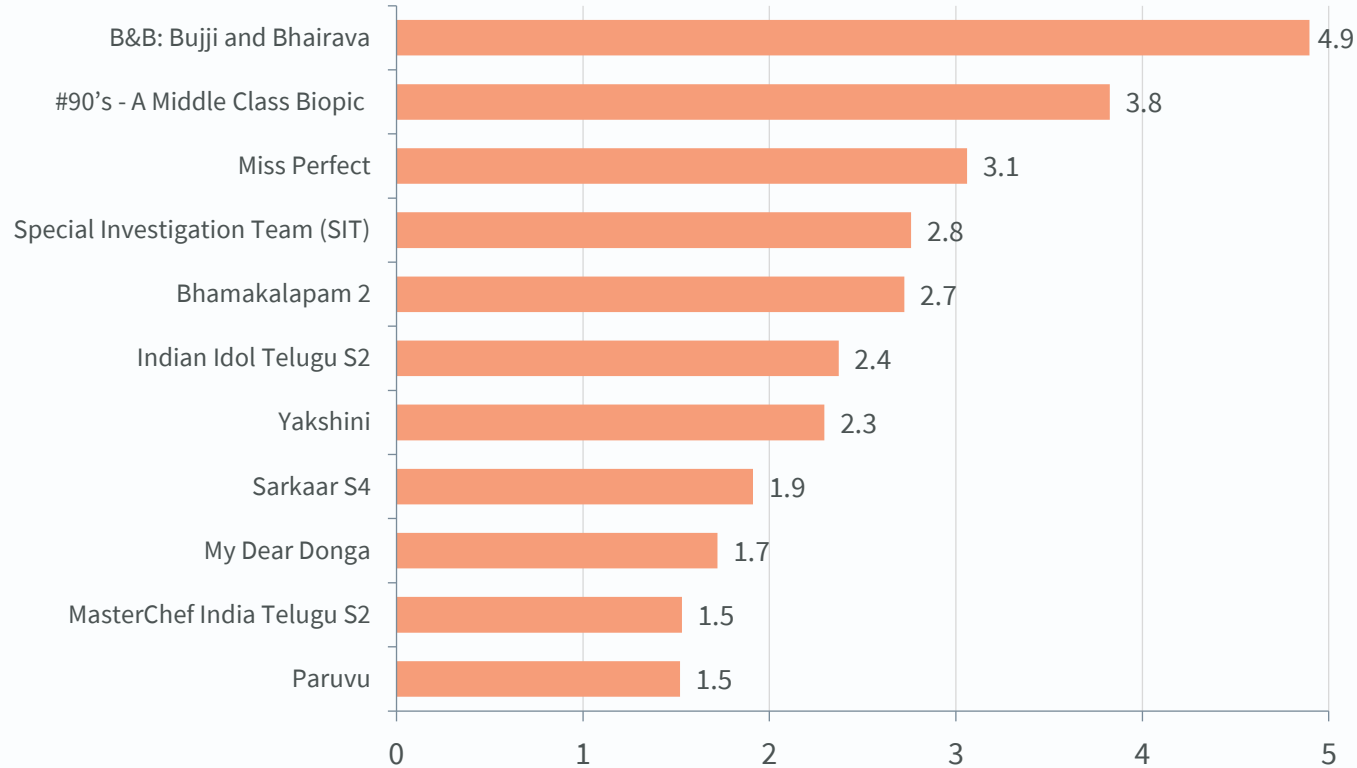
Viewership estimates in Mn



Netflix dominates the Hindi direct-to-OTT films category, with four films featuring on the list. Amar Singh Chamkila is the most-watched film in the first half of 2024, followed by Murder Mubarak.

Most-Watched Telugu Shows/Films

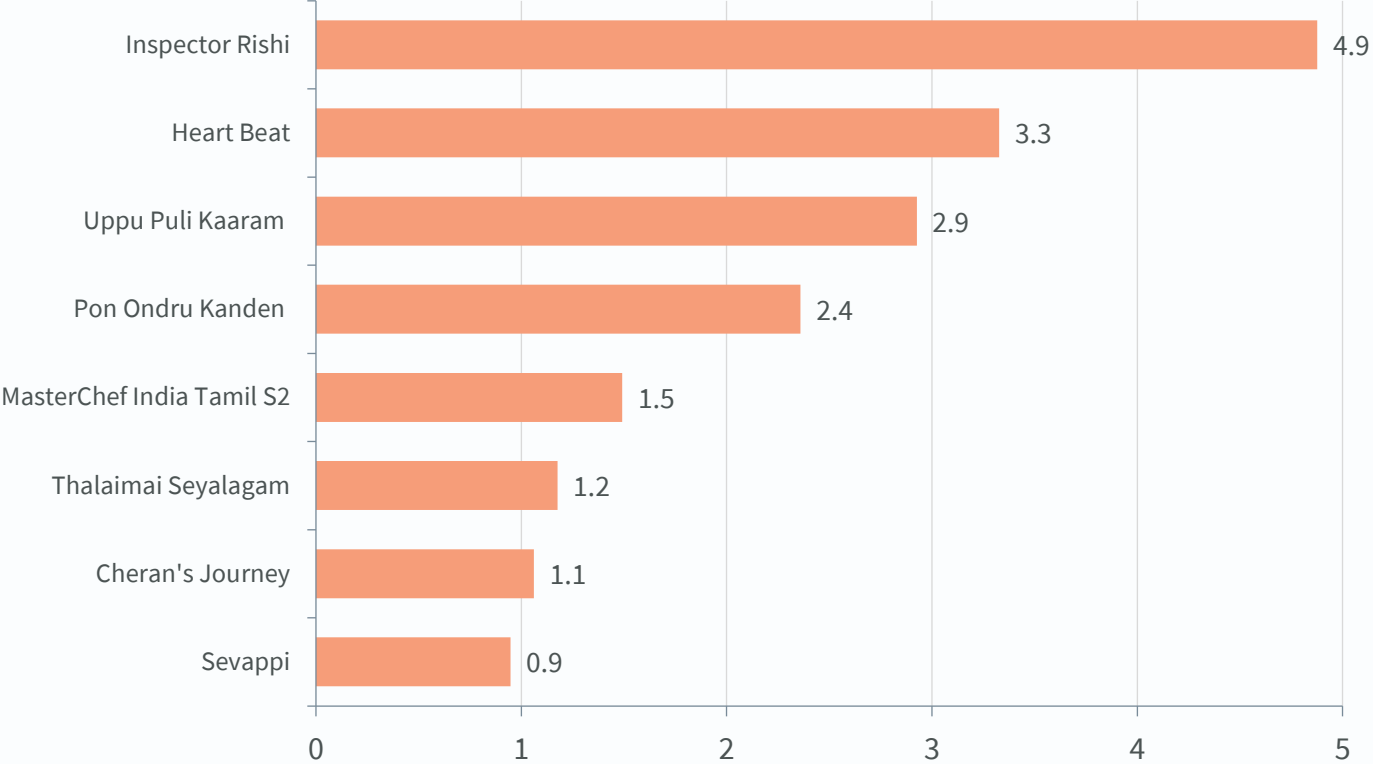
Viewership estimates in Mn



B&B: Bujji and Bhairava, the animated prelude to the theatrical film Kalki 2898 AD, is the most-watched Telugu property at the halfway mark of the year, followed by ETV Win's #90's – A Middle Class Biopic. The list has properties from six different platforms.

Most-Watched Tamil Shows/Films

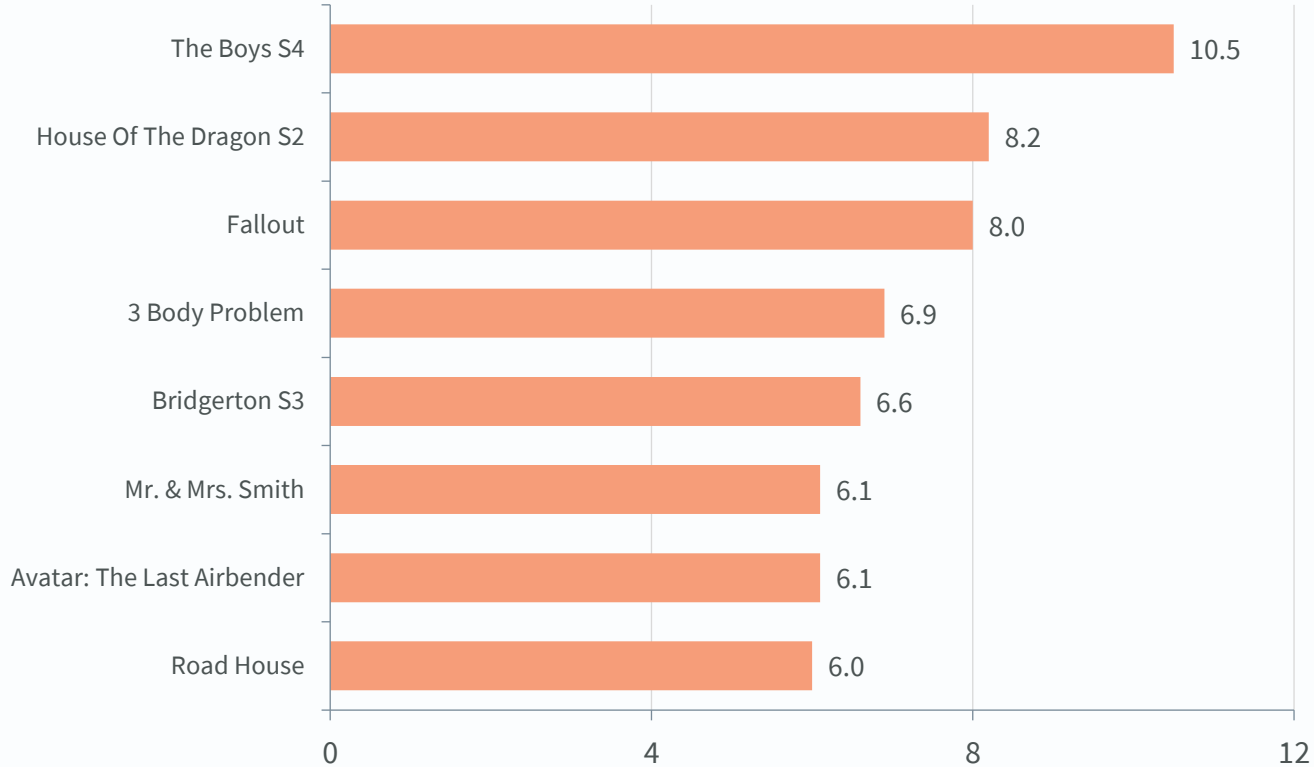
Viewership estimates in Mn



Inspector Rishi (Prime Video) tops the list of the most-watched OTT Tamil property thus far this year, by a significant margin.

Most-Watched International Shows/Films

Viewership estimates in Mn



International originals centered around a sci-fi and/or fantasy premise perform well, with The Boys S4 being the most-watched international show in India this year. Prime Video leads this list with four entries.

Marketing Buzz

Most-Buzzing shows & films in India in Jan-Jun 2024,
based on Ormax Stream Track

What is 'Buzz'?



DEFINITION

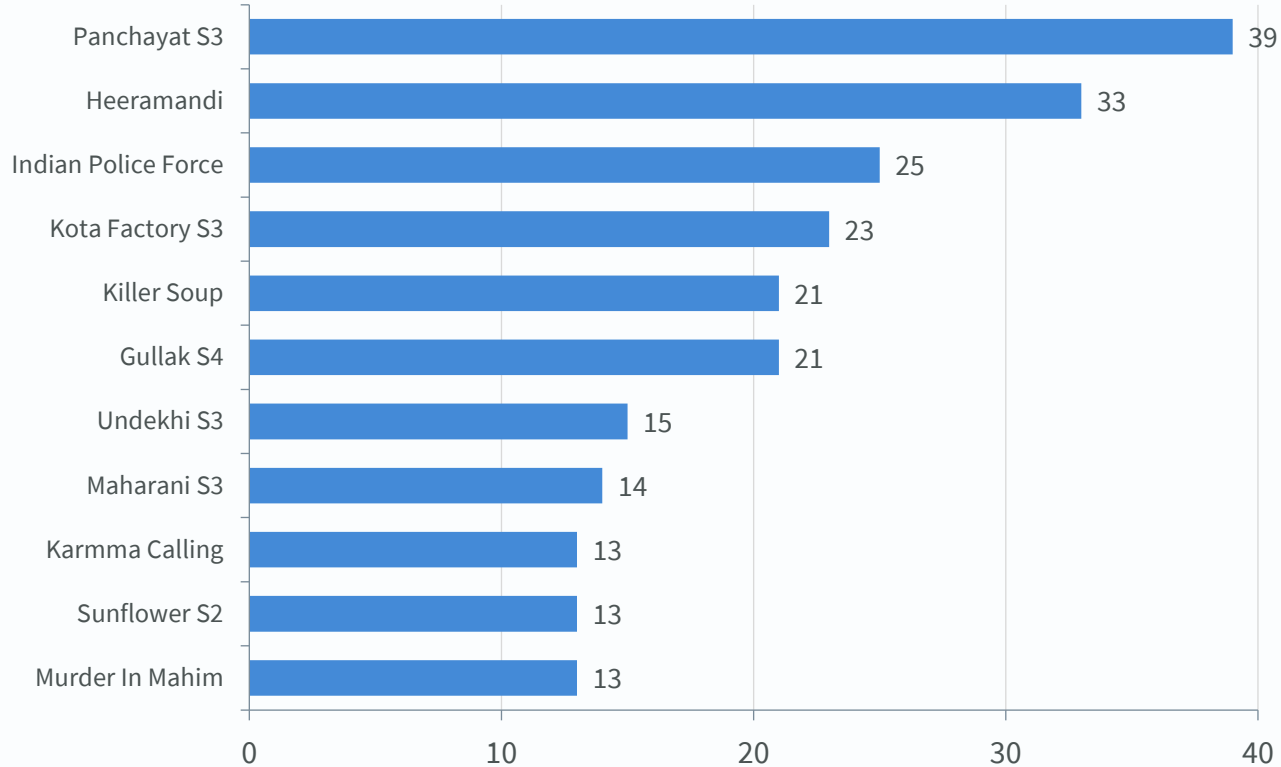
A score on a 0-100 scale that measures % audience who recalled the show or film unaided, when asked to recall upcoming or recently-launched streaming shows or films

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 audience

Most-Buzzing Hindi Shows

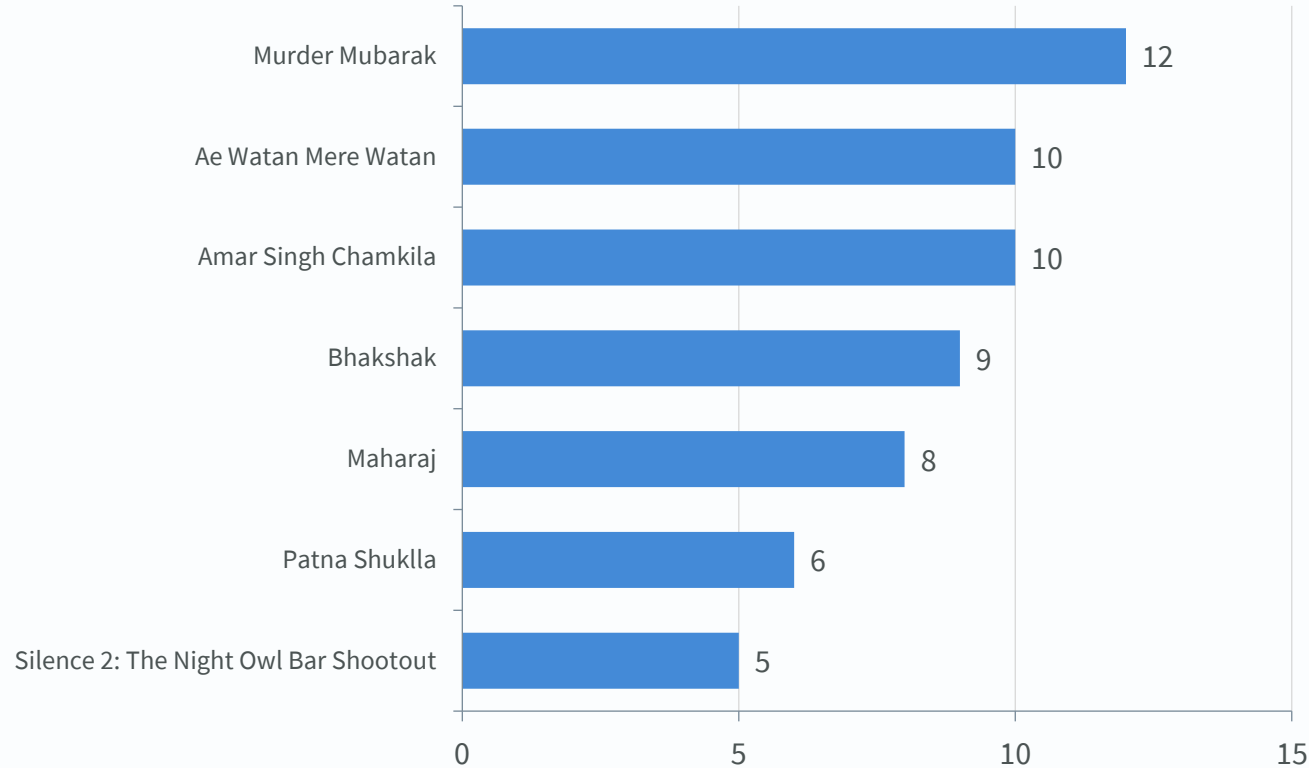
Source: Peak Buzz on Ormax Stream Track



Panchayat S3 (Prime Video) enjoyed the maximum Buzz, followed by Heeramandi (Netflix). These were the only two shows that managed to cross a peak Buzz of 30% in the first half of the year. Six of these most 'buzzing' shows belong to franchises.

Most-Buzzing Hindi Films

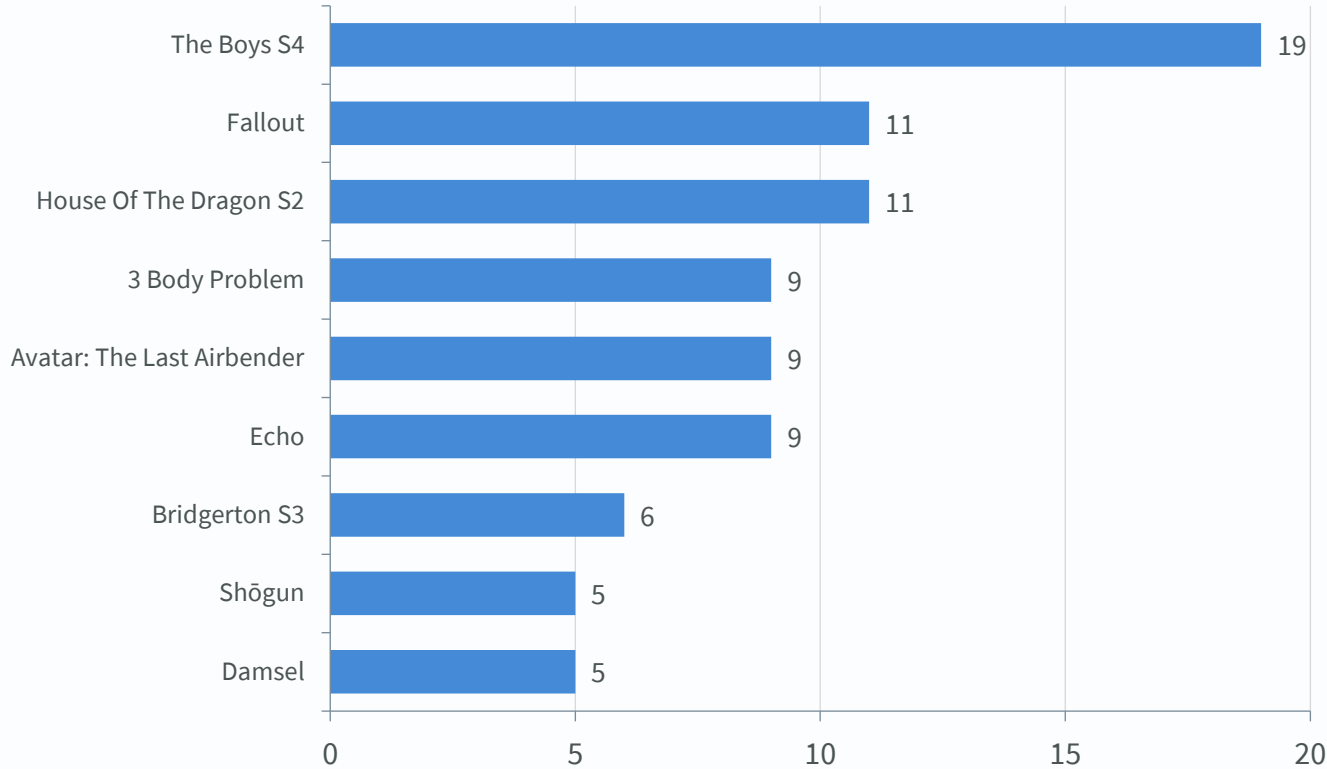
Source: Peak Buzz on Ormax Stream Track



Direct-to-OTT films struggled to stay relevant in 2024, with only three films managing double-digit Buzz. Similar to the viewership estimates for OTT films, Netflix dominates this list too, with 4 entries.

Most-Buzzing International Shows/Films

Source: Peak Buzz on Ormax Stream Track



Prime Video tops this list in the first part of 2024 with The Boys S4 and Fallout emerging as the top 2 shows, followed by JioCinema's House Of The Dragon S2. Only three International properties managed to cross the 10% mark on Buzz.

Content Strength

Most-liked shows & films in India in Jan-Jun 2024,
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

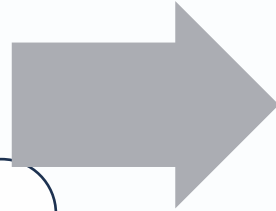
Higher OPR leads to higher conversion of initial sampling to total sampling, as well as higher completion rates

Test OPR vs. Actual OPR



Actual OPR

- Measured for all major shows/films, using data collected after the release, among actual viewers of the property, over a period of 4-8 weeks, with a minimum sample size of 1,200 for Hindi properties and 500 for other Indian languages



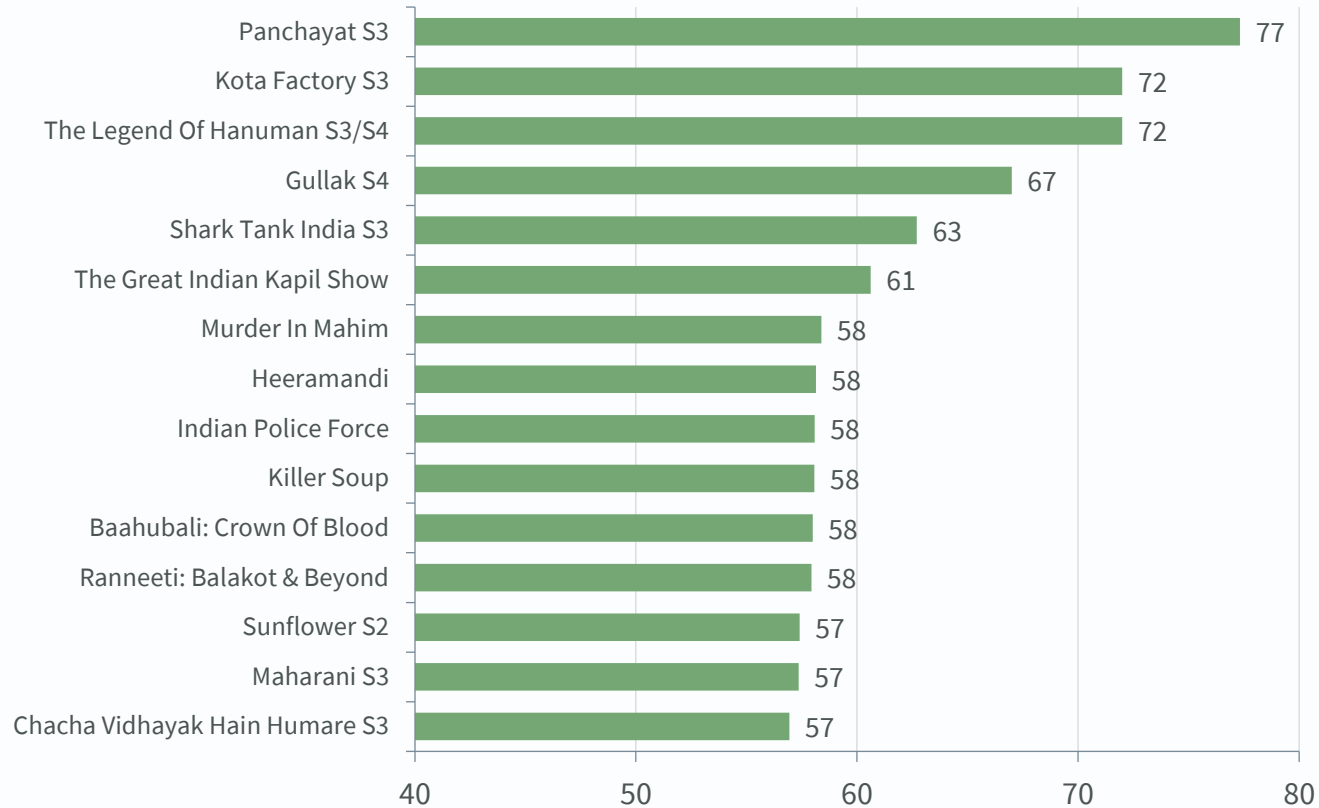
Test OPR

- Measured using data collected in the Ormax Stream Test research

OPRs reported in this section as actual post-release OPRs, which can be estimated at a pre-release stage using Ormax Stream Test, our content testing tool for streaming originals.

Most-Liked Hindi Shows

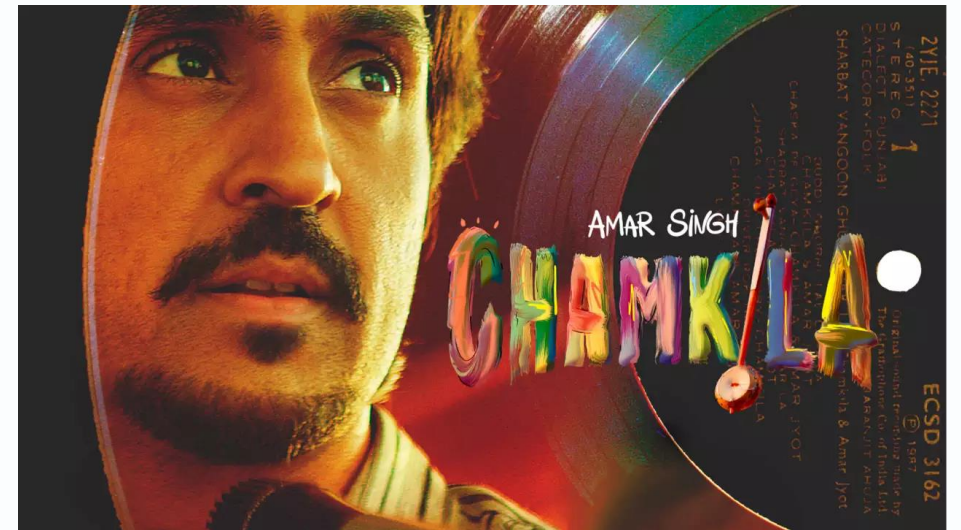
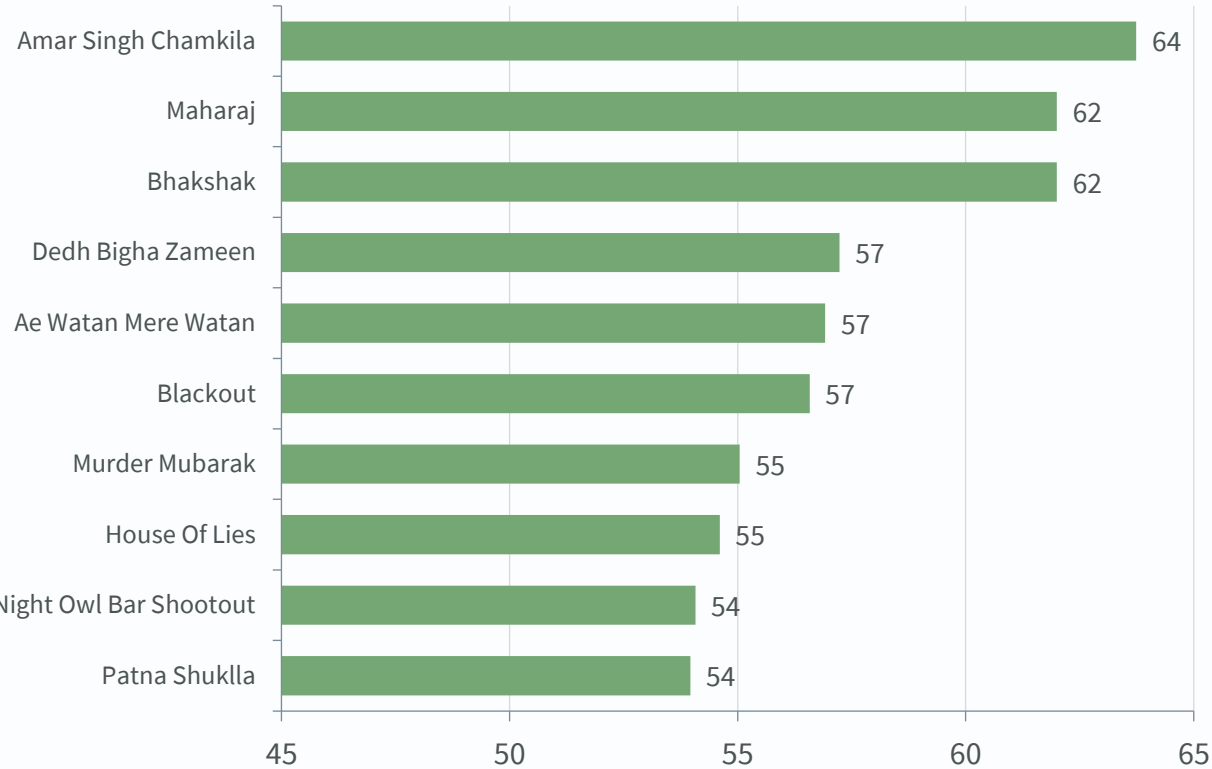
Ormax Power Rating (OPR)



TVF's Panchayat S3 (Prime Video) is the most-liked Hindi series at the mid-year point, followed by TVF's Kota Factory S3 (Netflix). Along with the two, only Disney+ Hotstar's The Legend Of Hanuman crossed the 70-mark.

Most-Liked Hindi Films

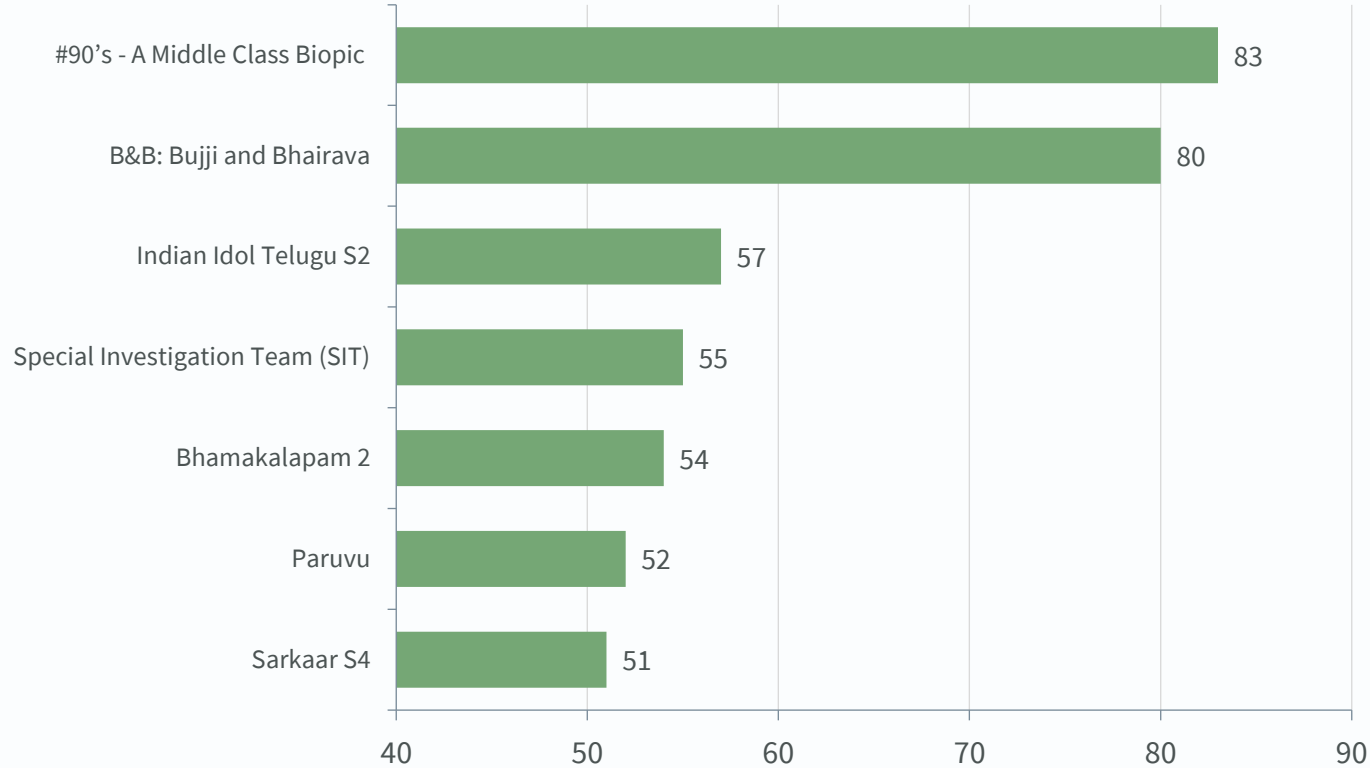
Ormax Power Rating (OPR)



Amar Singh Chamkila (Netflix) is the most-liked direct-to-OTT film in the first six months of 2024. Only three films cross the 60-mark, all of which are Netflix properties.

Most-Liked Telugu Shows/Films

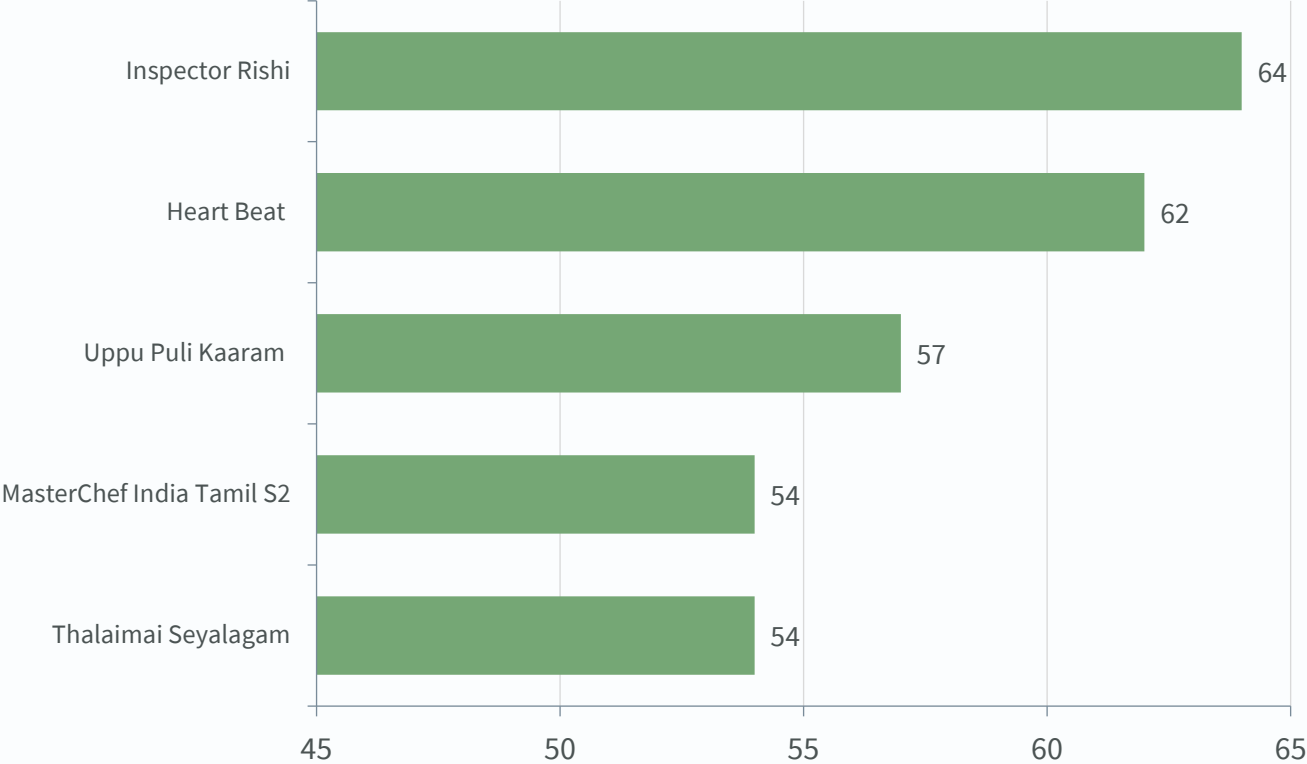
Ormax Power Rating (OPR)



The only two Telugu OTT originals that managed to breakout in terms of their content strength are ETV Win's #90's – A Middle Class Biopic & Prime Video's B&B: Bujji and Bhairava, with significantly higher OPR than other properties that launched in the first half of the year.

Most-Liked Tamil Shows/Films

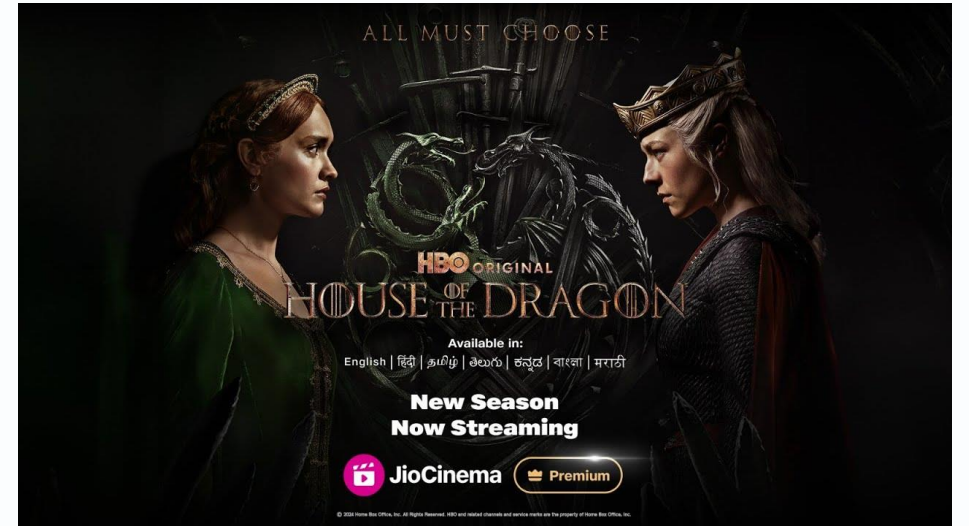
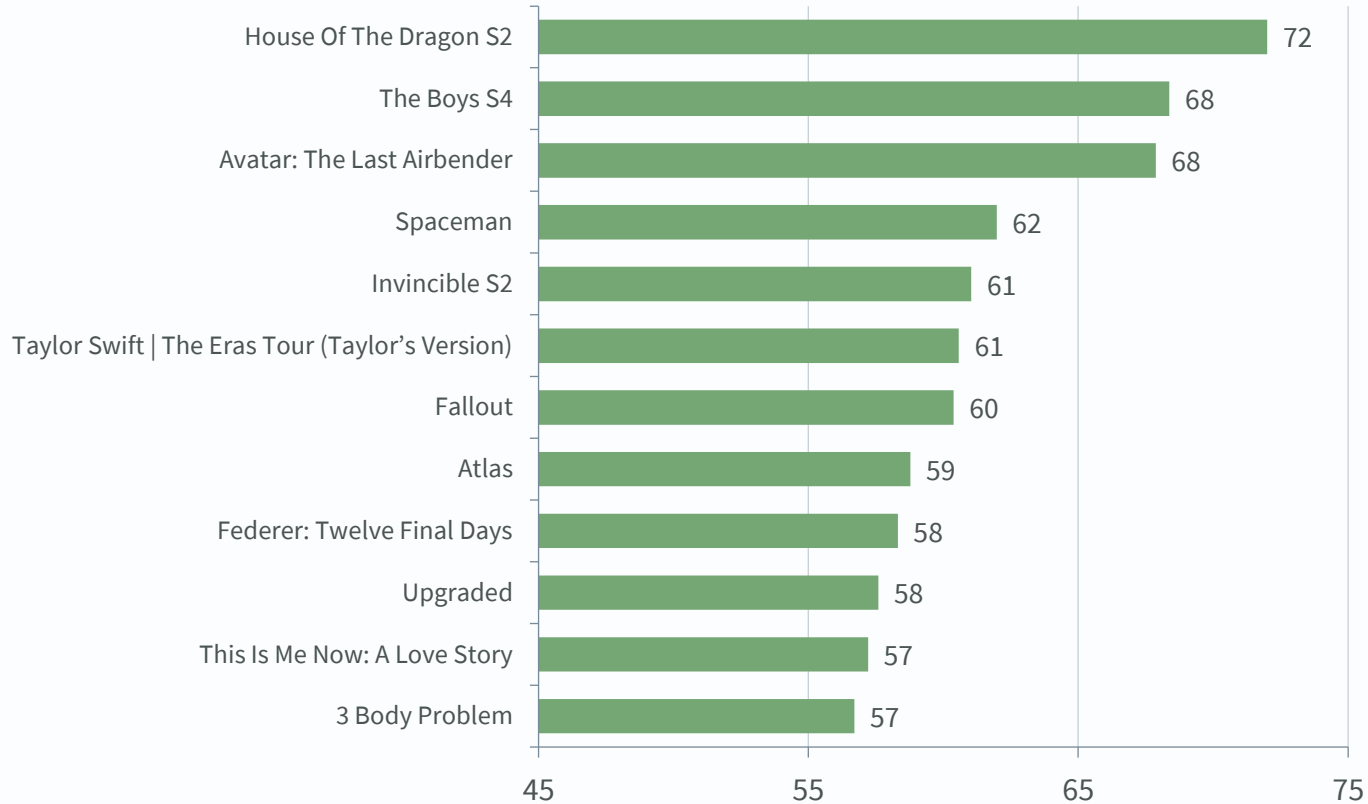
Ormax Power Rating (OPR)



Inspector Rishi (Prime Video) is the most-liked Tamil property launched in the first half of 2024, followed by Heart Beat (Disney+ Hotstar).

Most-Liked International Shows/Films

Ormax Power Rating (OPR)



House Of The Dragon S2 tops the list, being the only property that crosses the 70-mark. Prime Video's The Boys S4 is tied with Netflix's Avatar: The Last Airbender at the second spot. Prime Video leads the mid-year list, with 50% properties on the list belonging to their slate.



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