



Streaming Originals in India

The 2024 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 2024, in Hindi, International, Telugu & Tamil 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



- This report covers streaming originals on all major platforms except YouTube
- In this context, we extend a special mention to India's Got Latent on the YouTube channel Samay Raina. The show would have comfortably made it to the top 3 list of originals in our report, if YouTube originals were considered



Viewership

Most-watched shows & films in India in 2024,
based on Ormax Media's research estimates

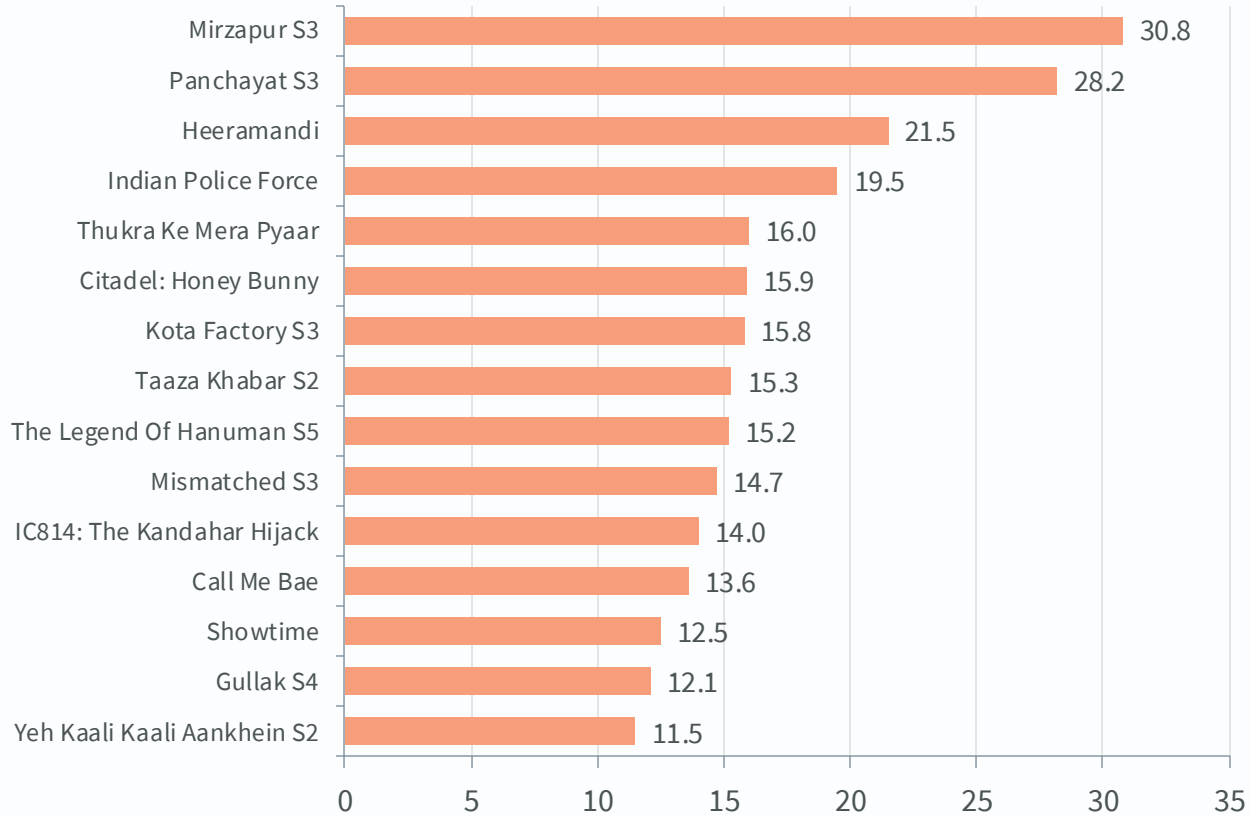
Viewership Estimates: Methodology



- 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
- Note: ‘Hinglish’ content, as well as Indian English content where Hindi is the primary Indian language of consumption, has been reported under Hindi language in this report

Most-Watched Hindi Web-series

Viewership estimates in Mn

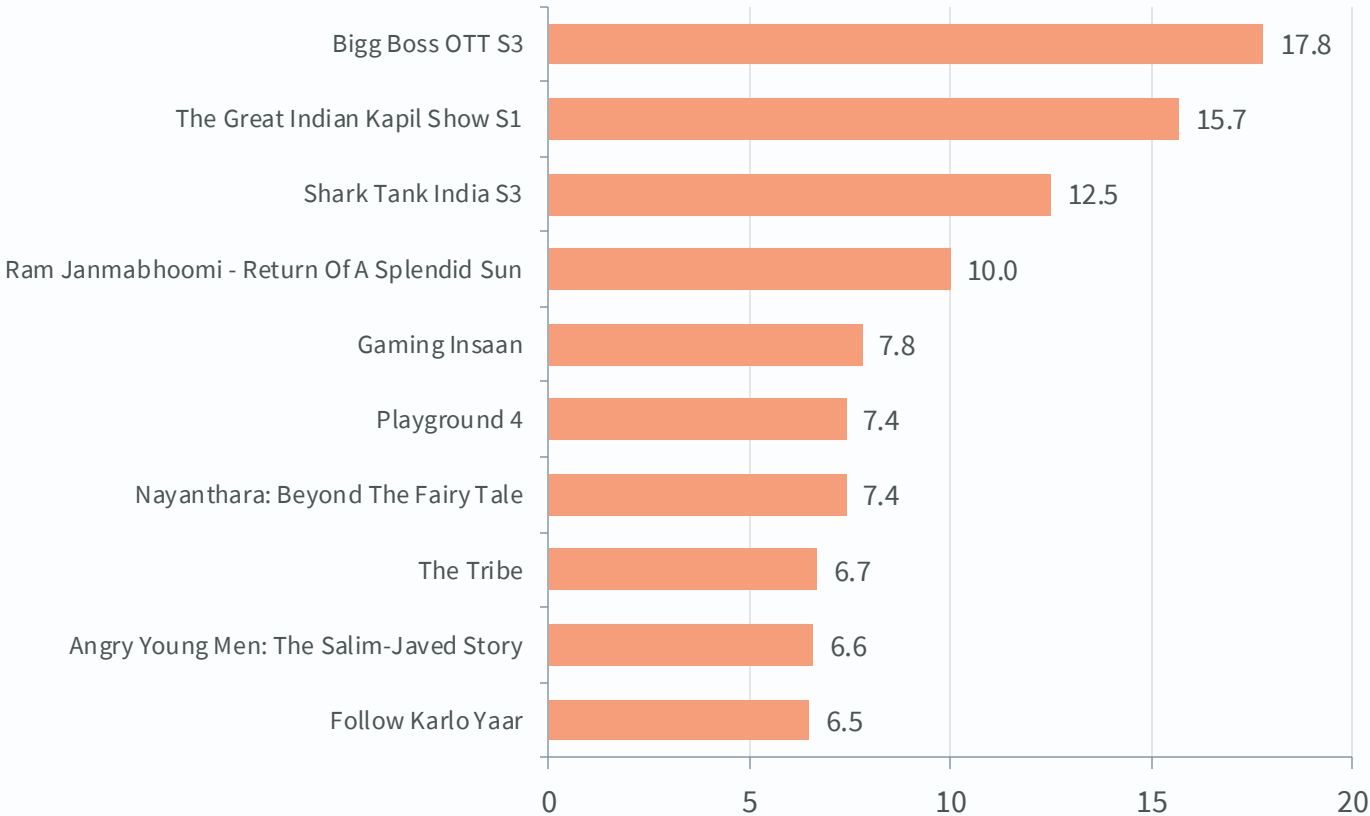


For shows with multiple seasons released in 2024, the season with the highest viewership has been reported

Prime Video's Mirzapur S3 takes the top spot in 2024, crossing the 30 Mn viewership mark.
Prime Video and Netflix dominate the Top 15 list, with five entries each.

Most-Watched Indian Unscripted Content*

Viewership estimates in Mn



*Includes reality shows and documentaries

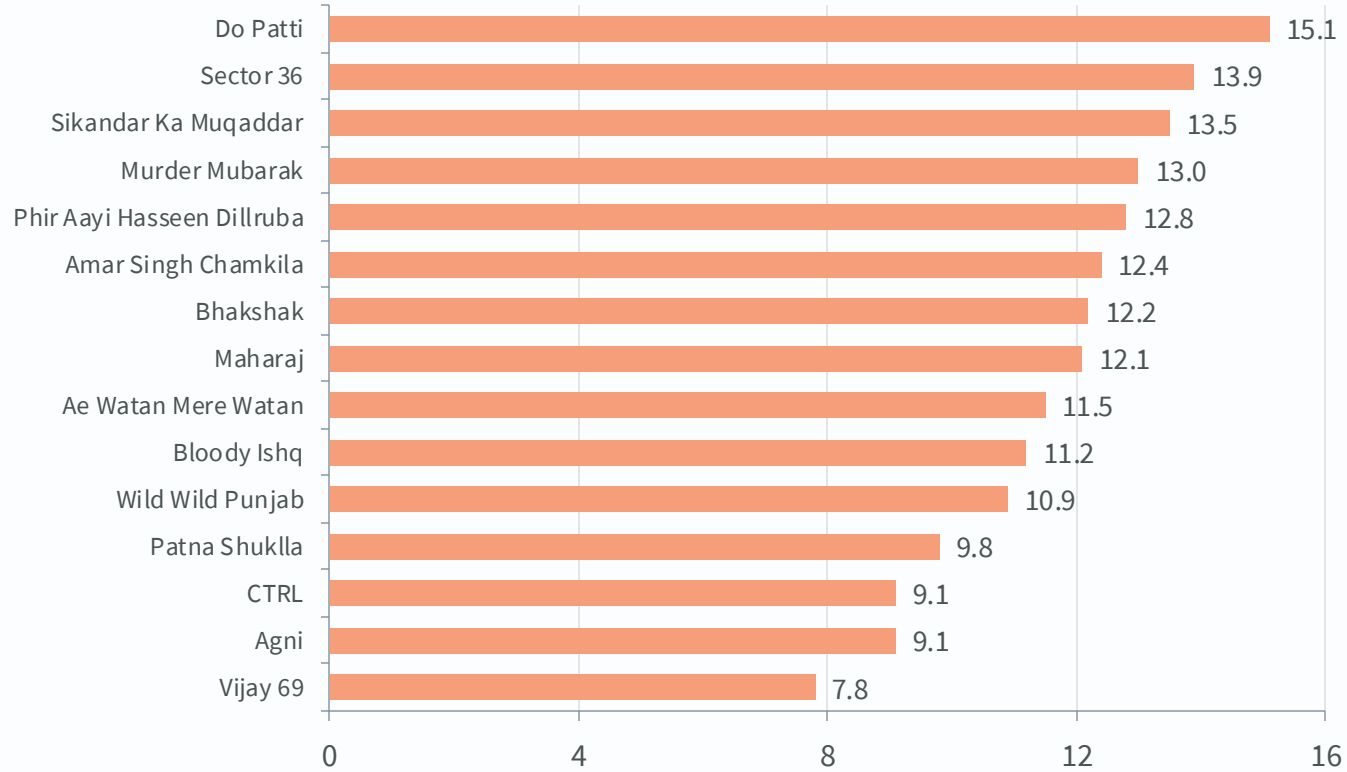
For shows with multiple seasons released in 2024, the season with the highest viewership has been reported

Includes 'Hinglish' or Indian English content

While JioCinema's Bigg Boss OTT S3 tops the unscripted category, the list showcases a diverse range of non-fiction genres, spanning TV extensions, documentaries, game shows, and influencer-driven reality formats.

Most-Watched Hindi Films

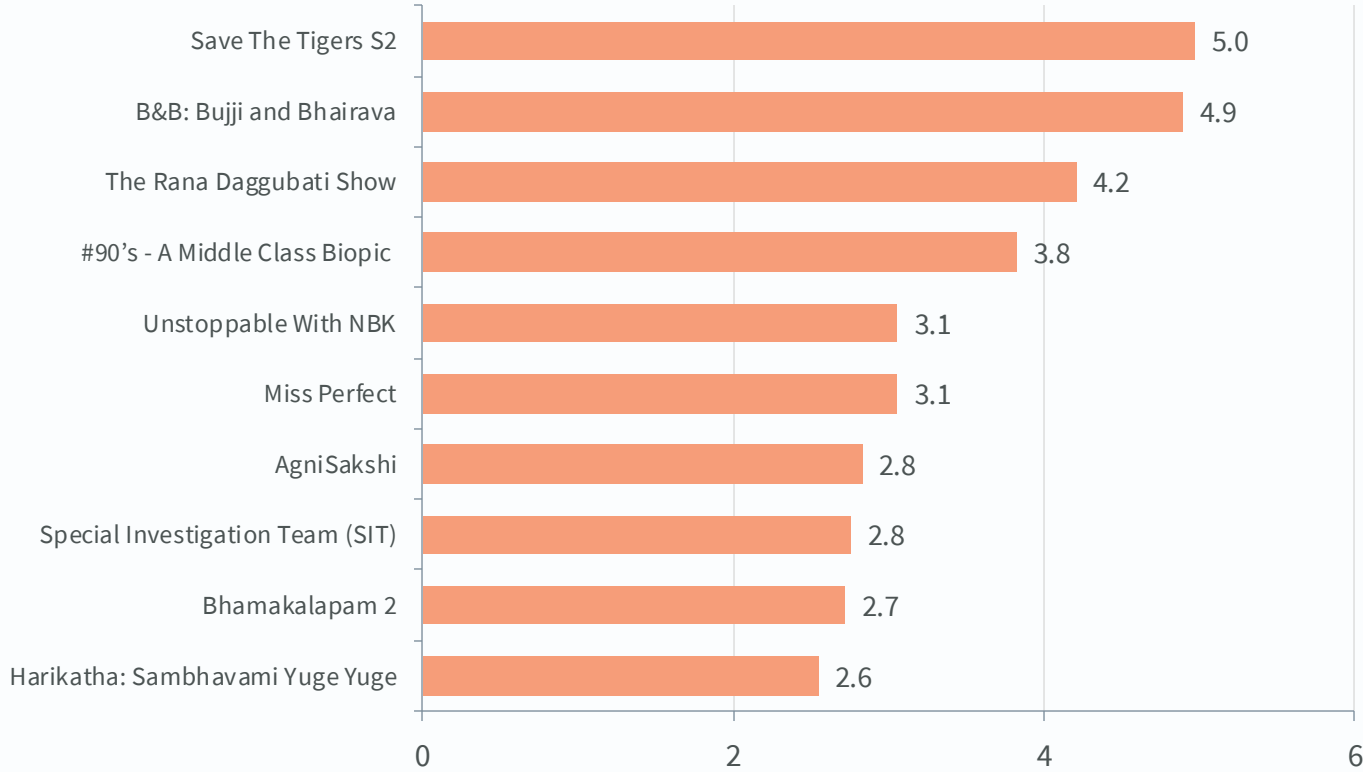
Viewership estimates in Mn



Netflix dominates the Hindi direct-to-OTT films category, claiming an impressive 11 of the top 15 spots, including the top 8.

Most-Watched Telugu Shows/Films

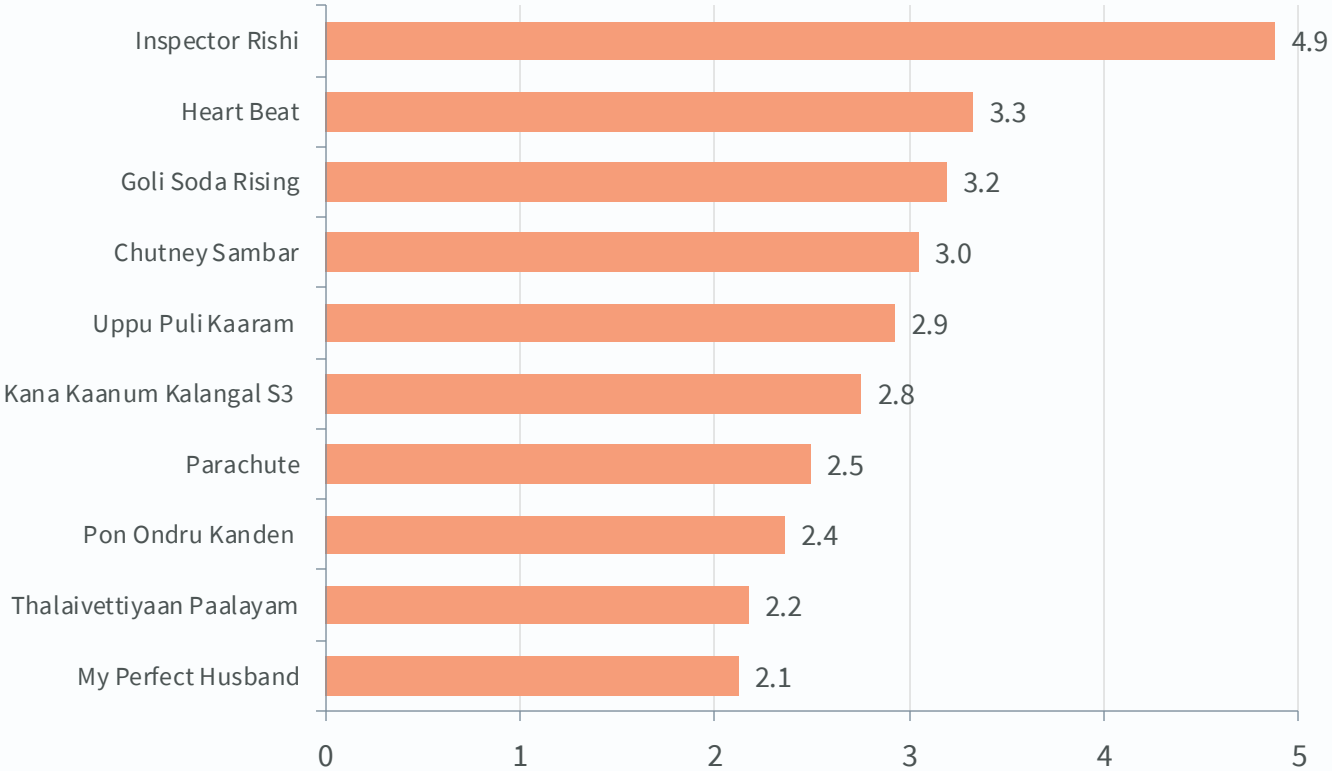
Viewership estimates in Mn



Save The Tigers S2 emerges as the most-watched Telugu original of 2024, followed by Kalki 2898 AD's animated prequel, B&B: Bujji & Bhairava. Disney+ Hotstar leads the Top 10 list with four entries.

Most-Watched Tamil Shows/Films

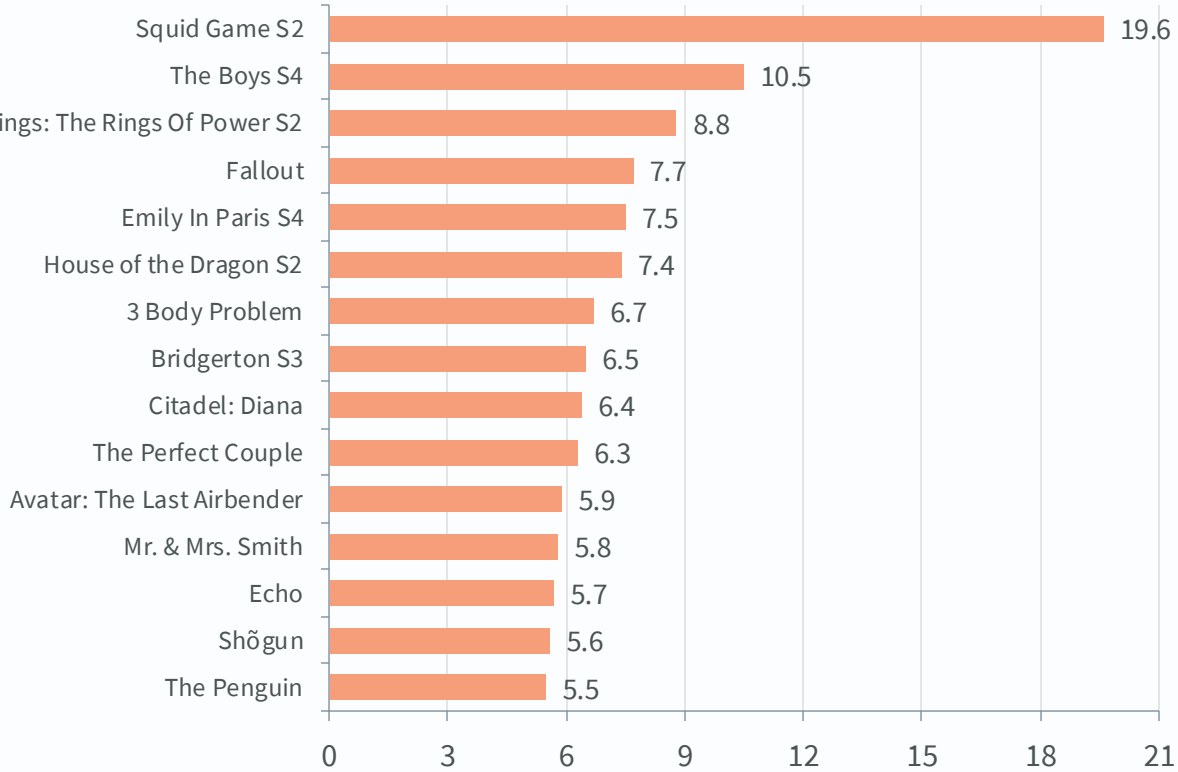
Viewership estimates in Mn



Inspector Rishi (Prime Video) tops the list as the most-watched Tamil OTT original of 2024 by a significant margin. However, Disney+ Hotstar dominates the list, with 7 entries in the Top 10.

Most-Watched International Shows

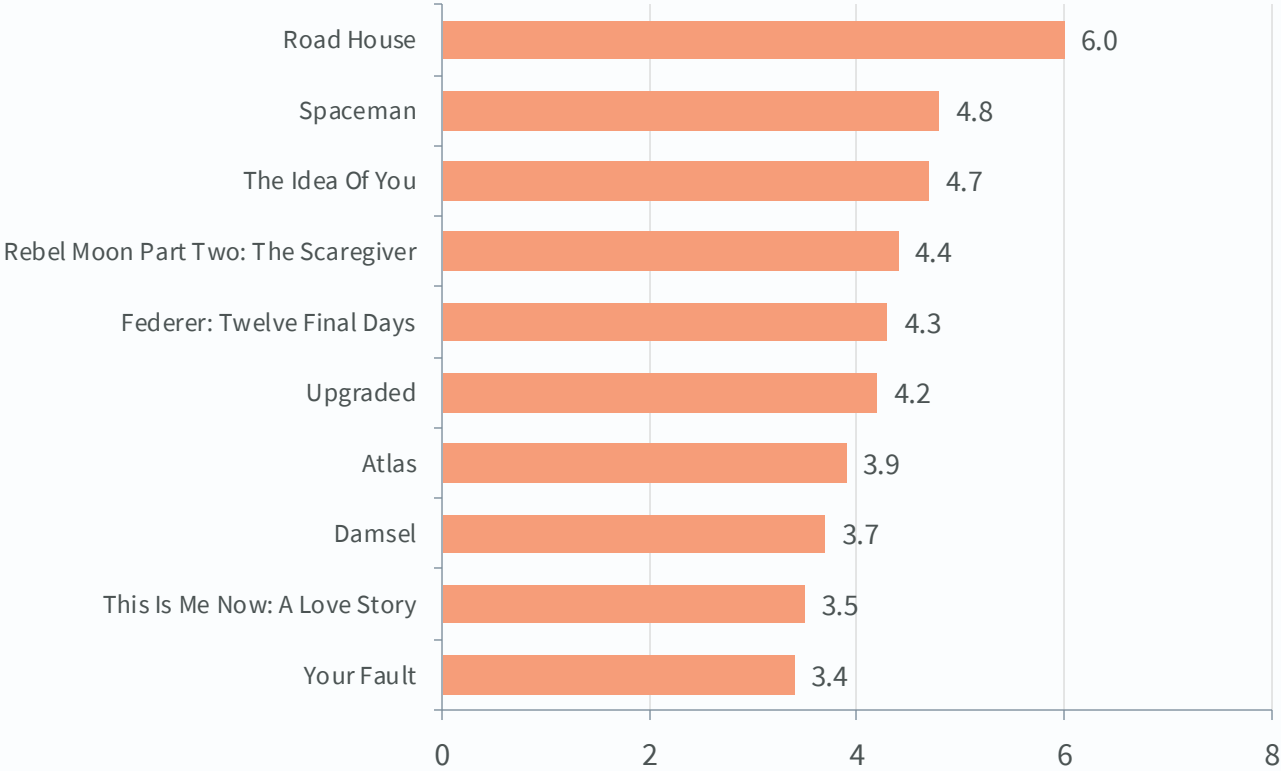
Viewership estimates in Mn



Squid Game S2 is not only the most-watched International original in India in 2024, but of all-time. Established franchises dominate, with 7 entries in the Top 10.

Most-Watched International Films

Viewership estimates in Mn



There were no breakout International films in 2024, with Prime Video’s Road House being the only one to cross the 5 Mn mark. Prime Video leads the Top 10 list with six entries, followed by Netflix with four entries.

Marketing Buzz

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

What is 'Buzz'?



DEFINITION

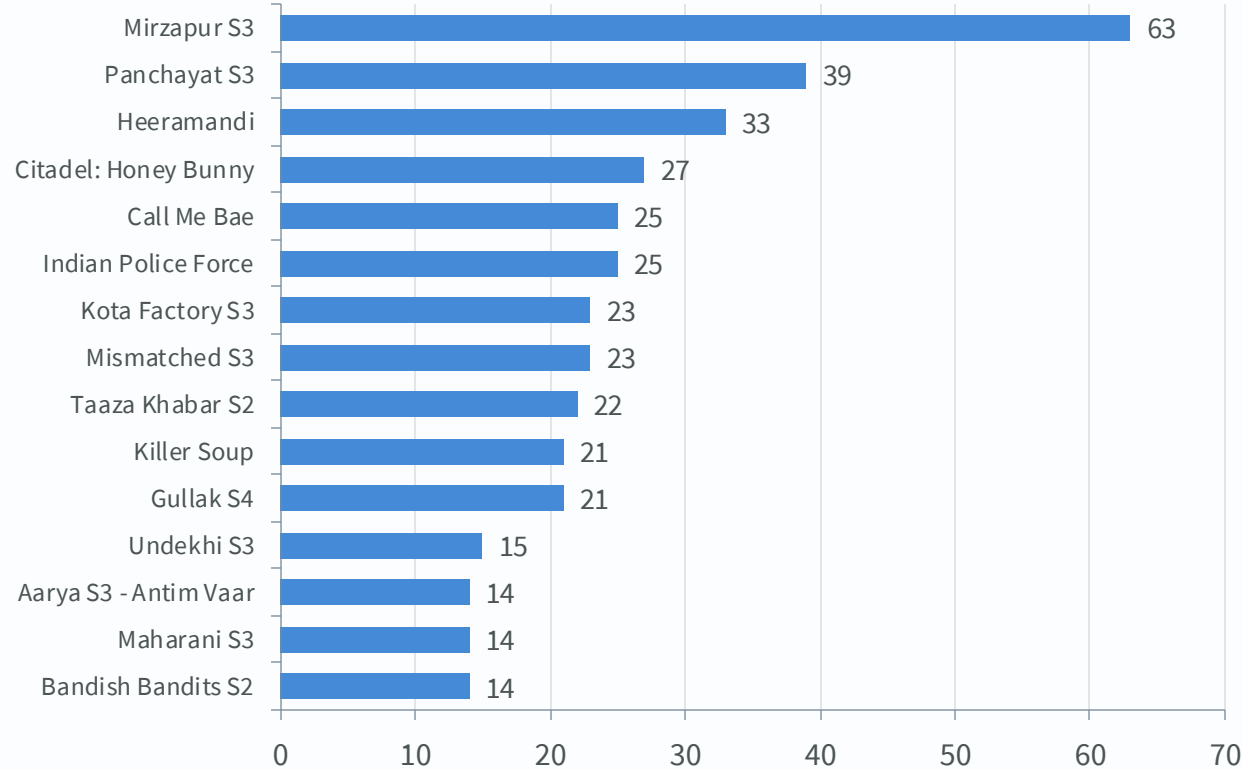
A score on a 0-100 scale that measures % audience who recalled the show or film unaided, when asked to recall upcoming or recently-launched streaming shows or films

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

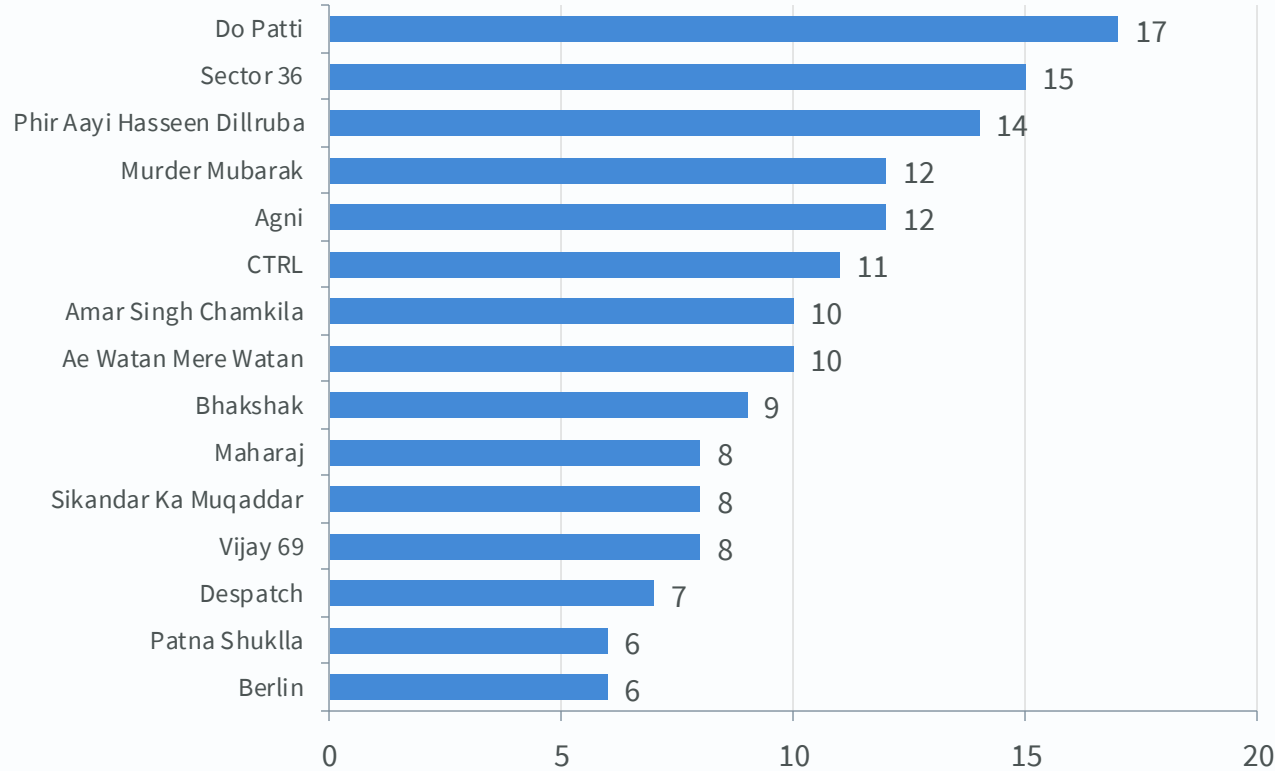
Source: Peak Buzz on Ormax Stream Track



Mirzapur S3 (Prime Video) crossed a peak Buzz of 60%, significantly higher than any other property in 2024, and no. 3 on the all-time list, behind Mirzapur S2 and The Family Man S2.

Most-Buzzing Hindi Films

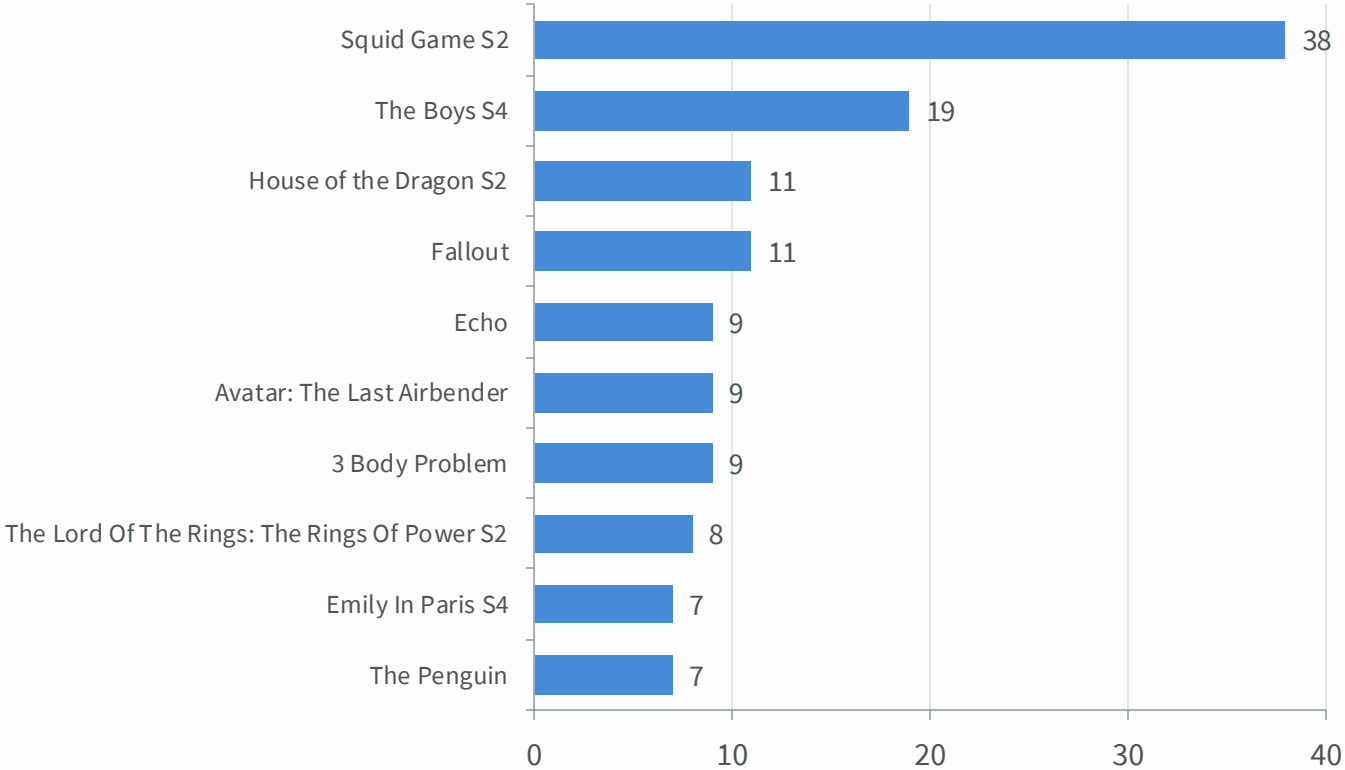
Source: Peak Buzz on Ormax Stream Track



Compared to shows, direct-to-OTT films do not manage to garner high Buzz, with only 8 films achieving Peak Buzz of 10%, compared to 28 series in 2024.

Most-Buzzing International Shows/Films

Source: Peak Buzz on Ormax Stream Track



Squid Game S2 is the second-most 'buzzing' international property till date, only behind Money Heist S5. Only four international properties managed to cross the 10% mark on Buzz in 2024.

Content Strength

Most-liked shows & films in India in 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

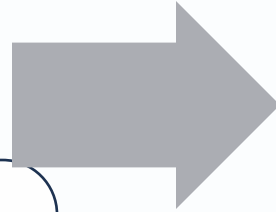
Higher OPR leads to higher conversion of initial sampling to total sampling, as well as higher completion rates

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



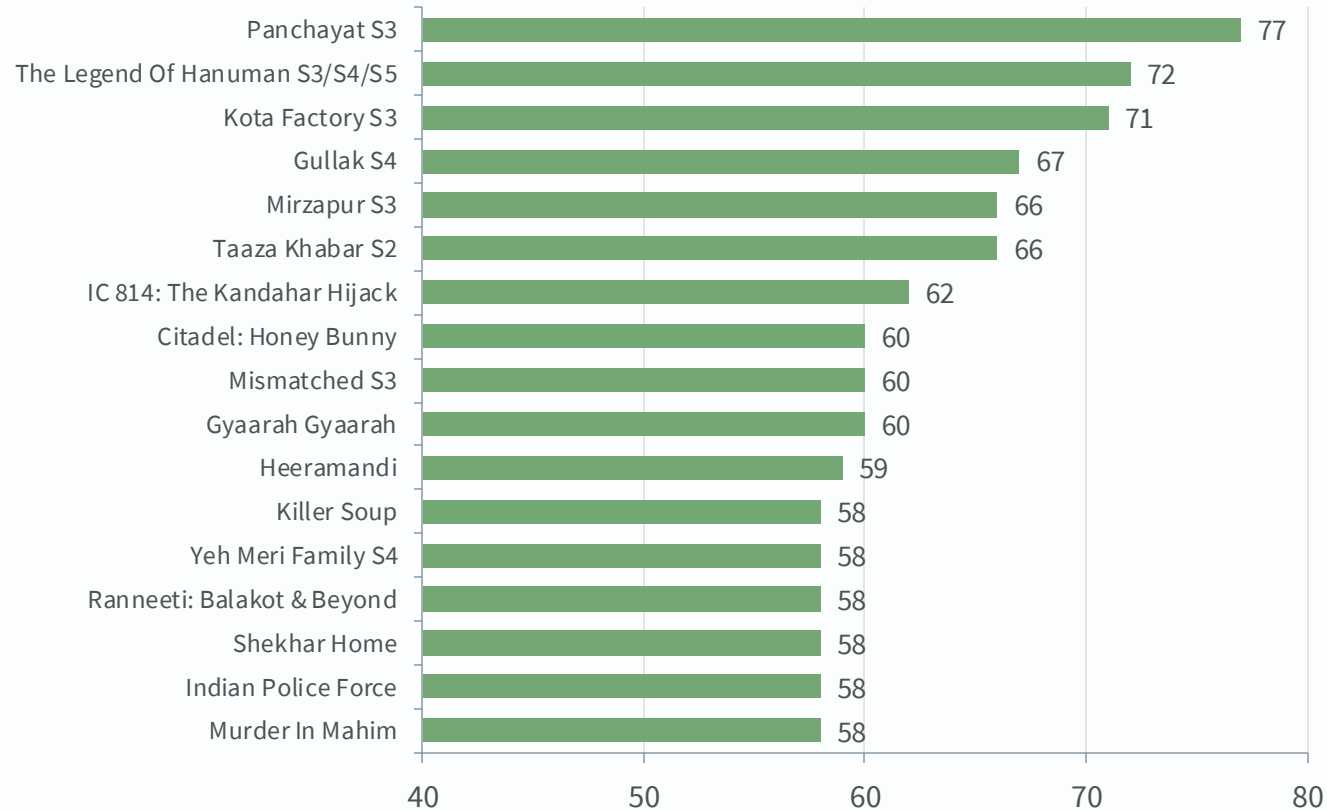
Test OPR

- 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 Web-series

Ormax Power Rating (OPR)

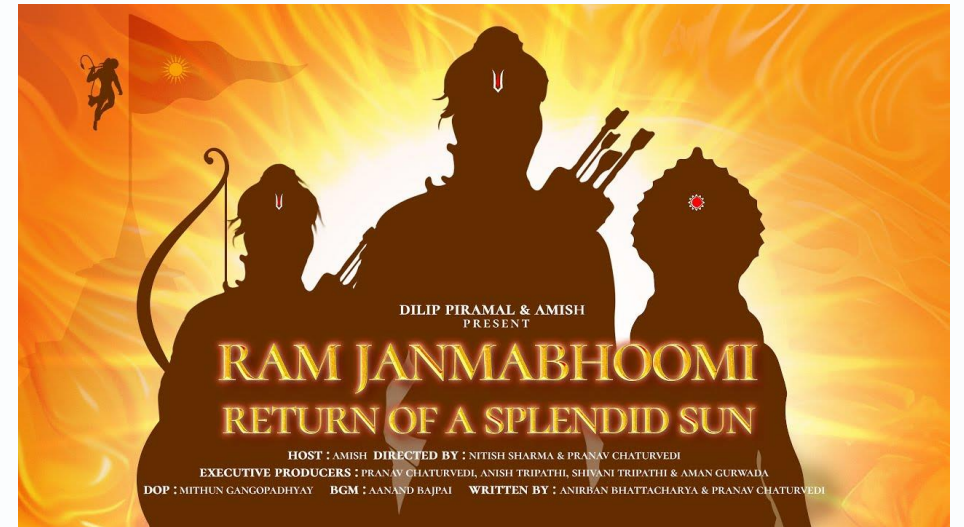
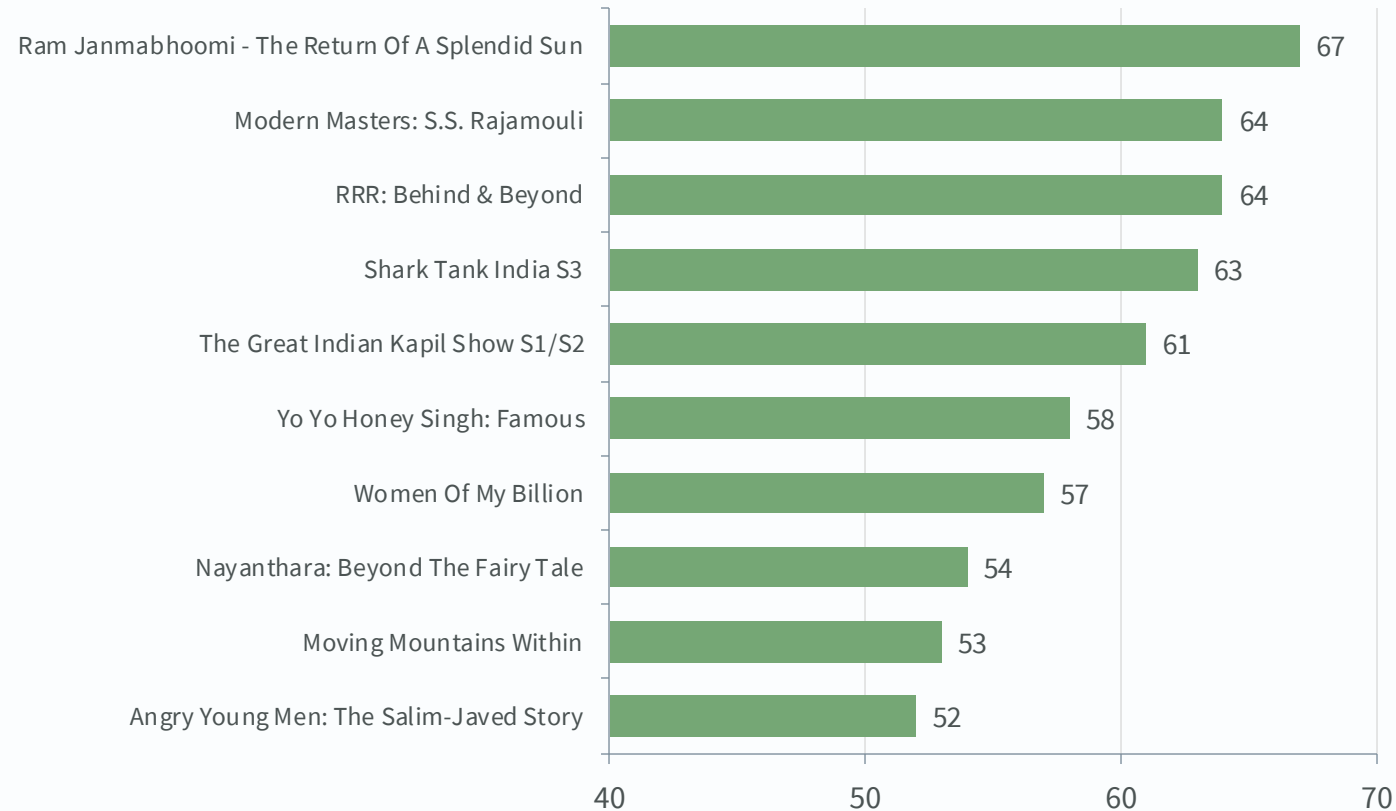


For shows with multiple seasons released in 2024, average OPR across seasons has been reported

Prime Video's Panchayat S3 is the most-liked Hindi series of 2024, followed by Disney+ Hotstar's The Legend of Hanuman. Shows produced by TVF take 3 of the top 4 spots on this list.

Most-Liked Indian Unscripted Content*

Ormax Power Rating (OPR)

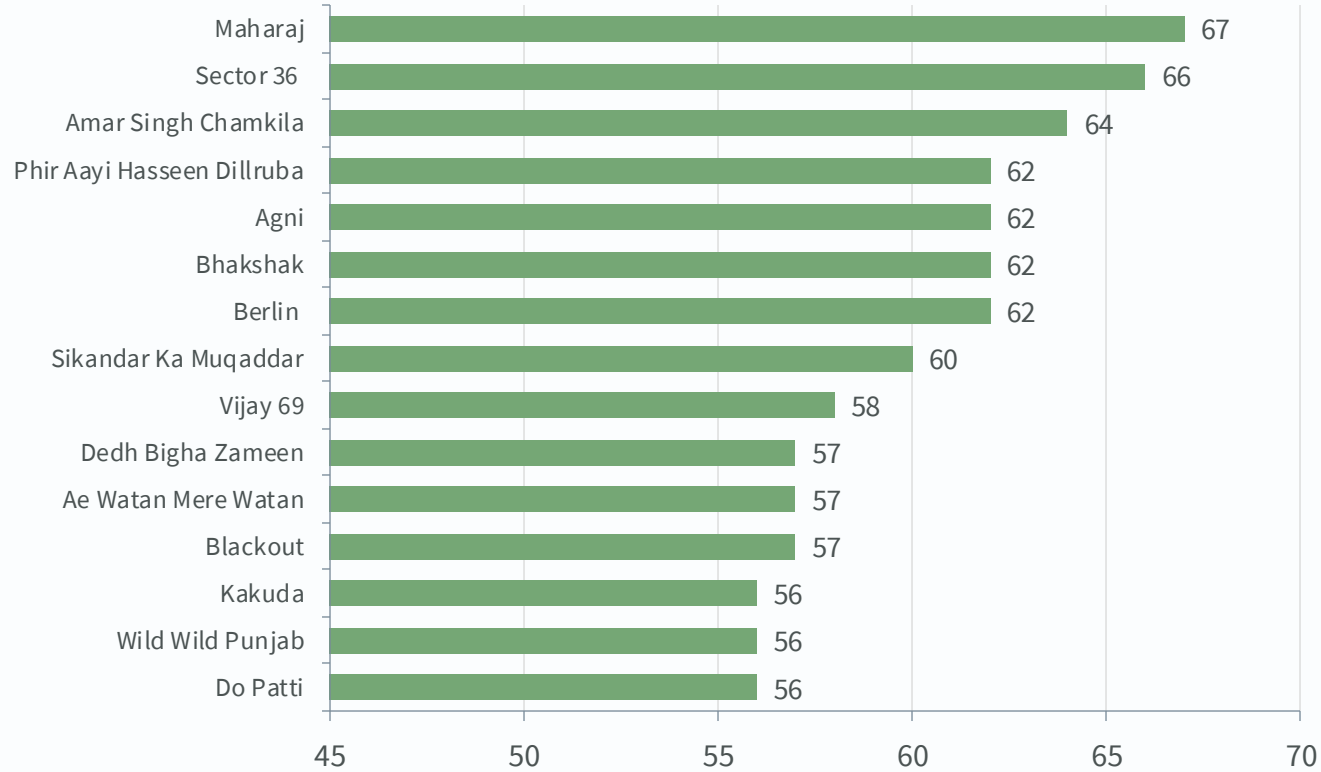


**Includes reality shows and documentaries
For shows with multiple seasons released in 2024,
average OPR across seasons has been reported
Includes 'Hinglish' or Indian English content*

8 out of the Top 10 entries in this list are documentaries belonging to a variety of sub-genres.

Most-Liked Hindi Films

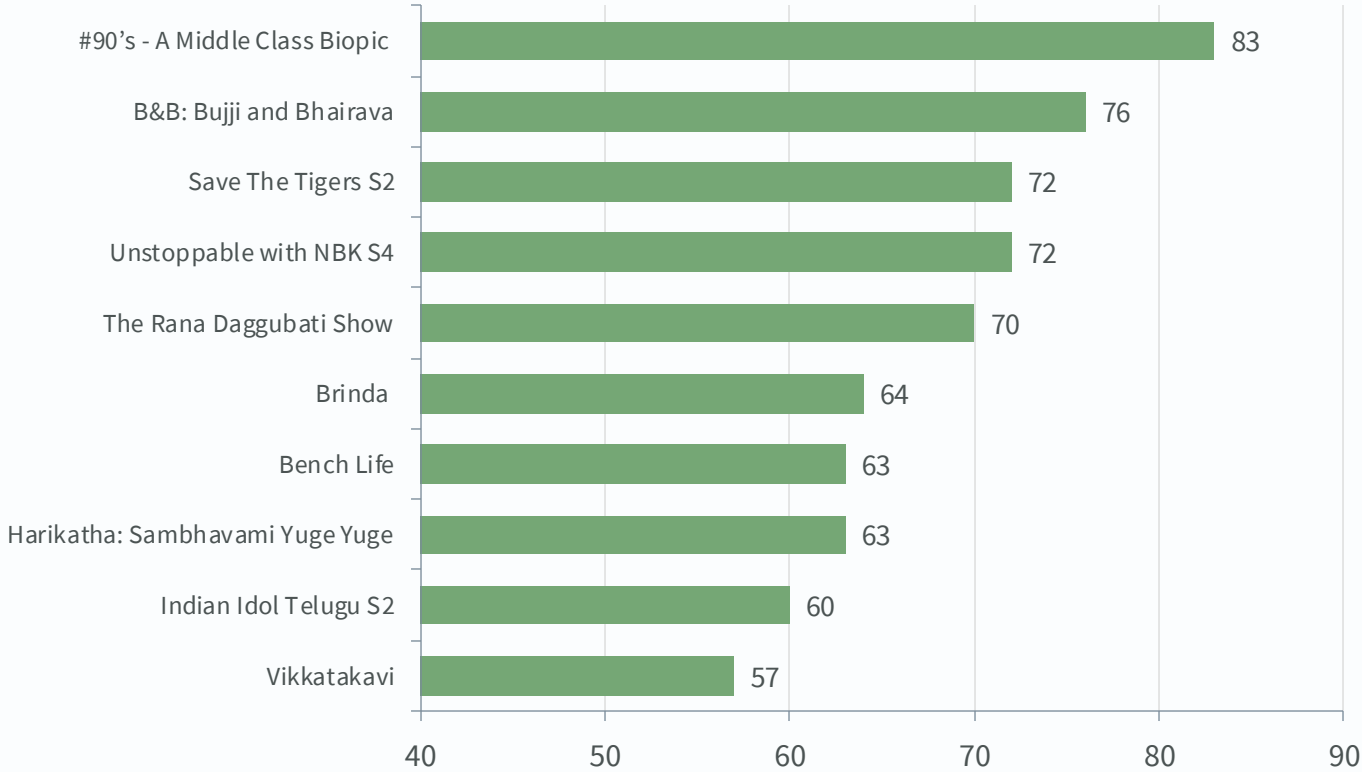
Ormax Power Rating (OPR)



The top three most-liked direct-to-OTT films of 2024 all belong to Netflix, with Maharaj topping the list. Eight films achieve the 60-mark, of which six are Netflix films.

Most-Liked Telugu Shows/Films

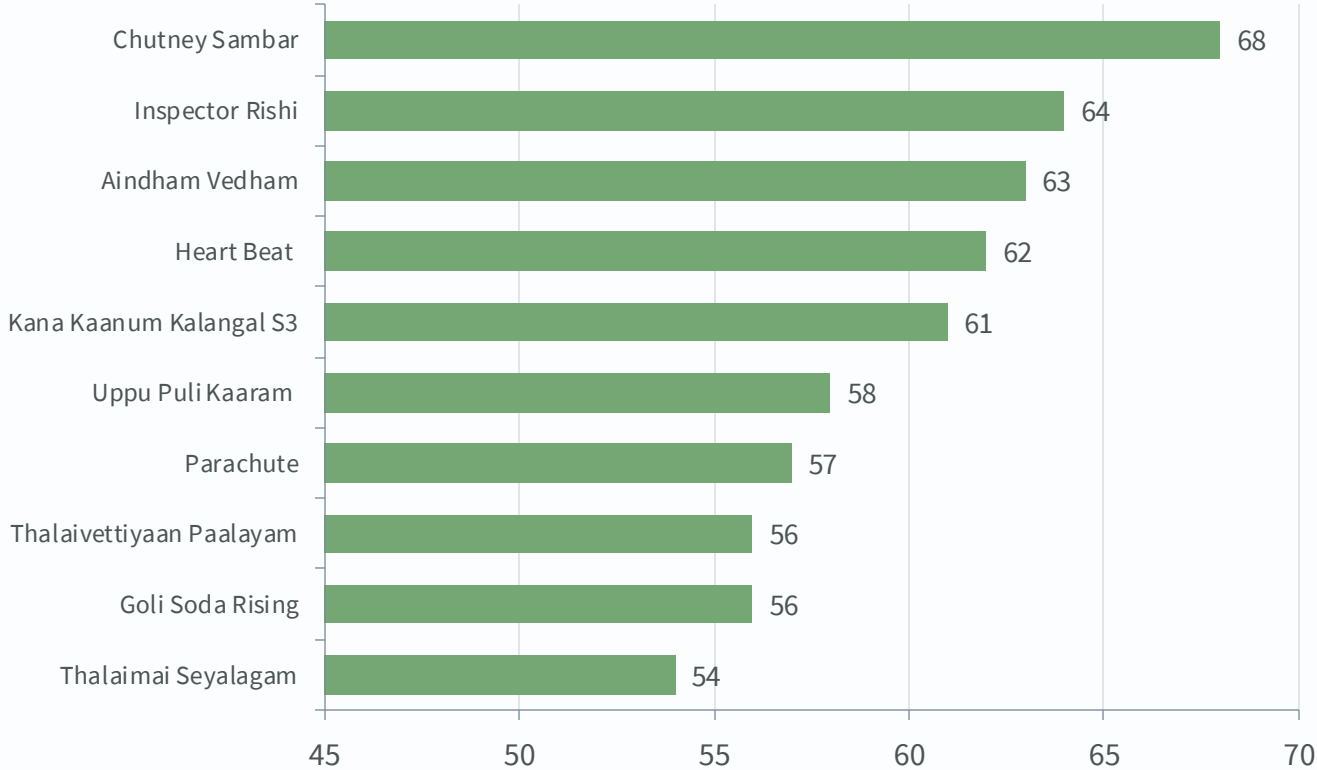
Ormax Power Rating (OPR)



ETV Win's #90's - A Middle Class Biopic and Prime Video's B&B: Bujji and Bhairava emerge as breakouts in 2024 with 75+ OPRs. Celebrity talk shows such as Unstoppable with NBK S4 (Aha) and The Rana Daggubati Show (Prime Video) feature in the Top 5.

Most-Liked Tamil Shows/Films

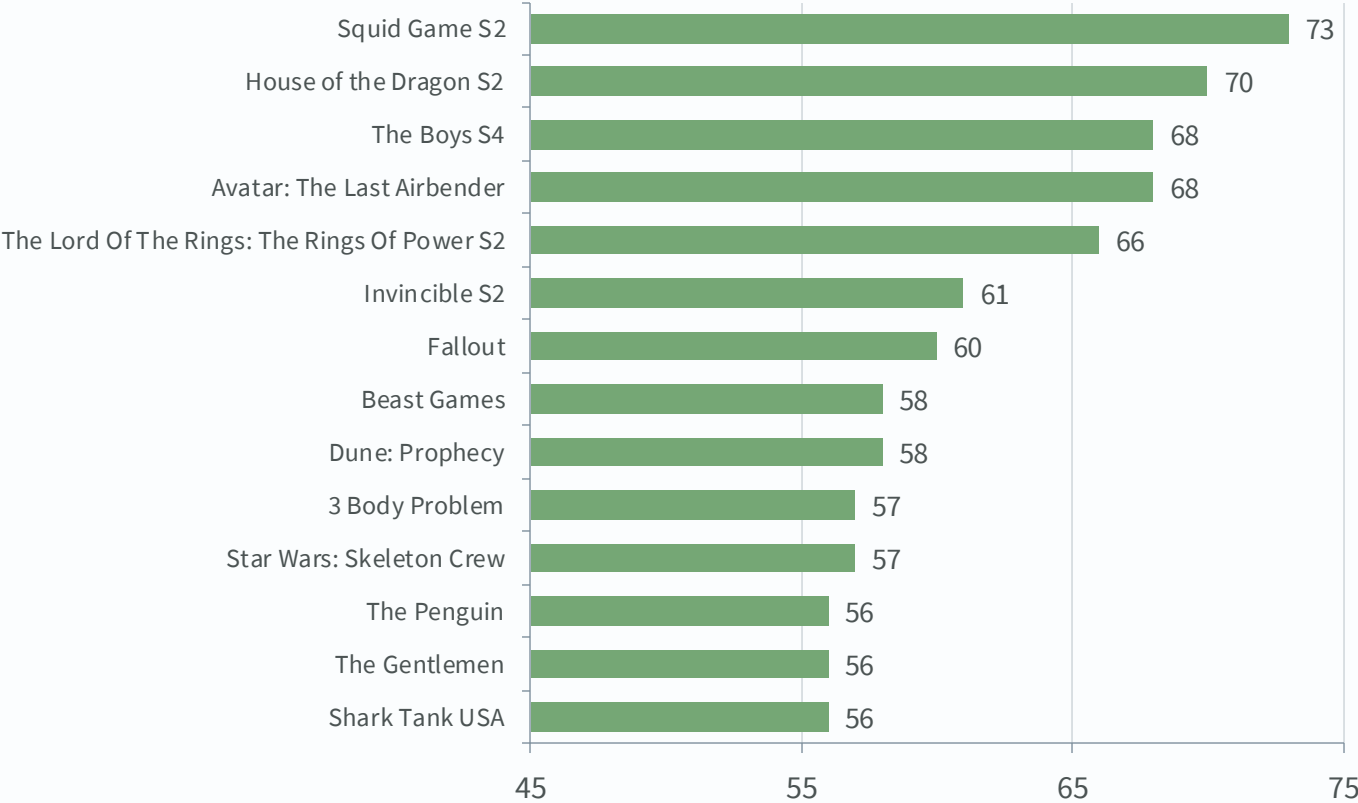
Ormax Power Rating (OPR)



Chutney Sambar (Disney+ Hotstar) is the most-liked Tamil property of 2024, followed by Inspector Rishi (Prime Video).
Disney+ Hotstar dominates the Top 10 list with six entries.

Most-Liked International Shows

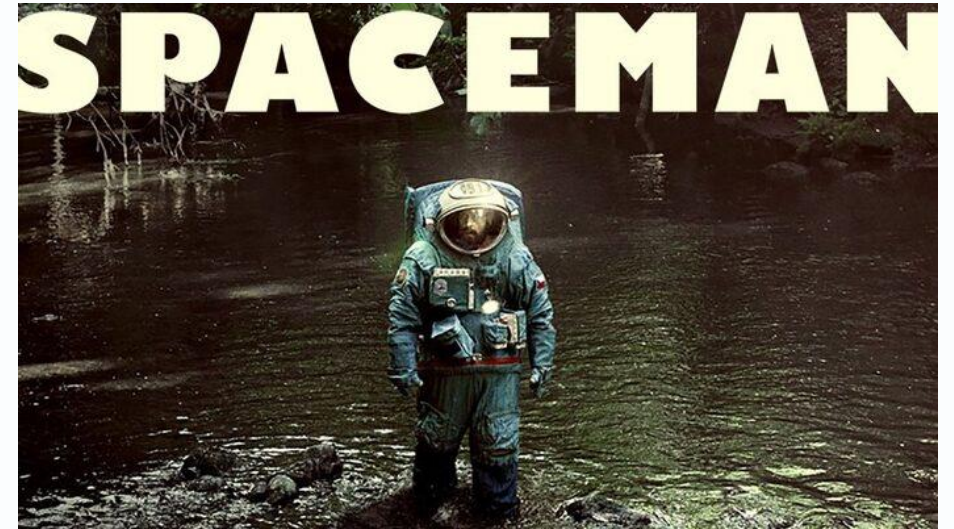
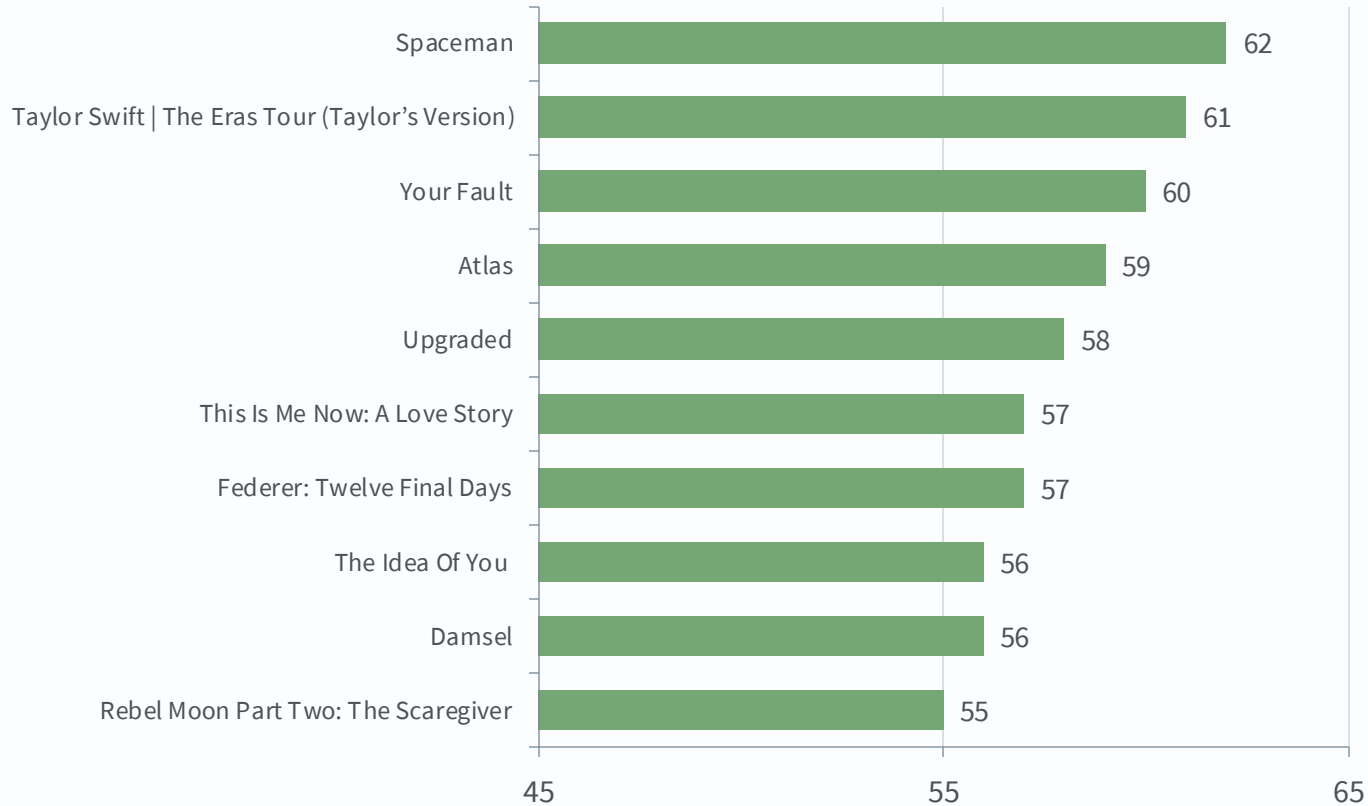
Ormax Power Rating (OPR)



Squid Game S2 tops the list, followed by House of the Dragon S2, becoming the only two properties achieving the 70-mark in 2024.

Most-Liked International Films

Ormax Power Rating (OPR)



Netflix's *Spaceman* tops the list, followed by the documentary film based on Taylor Swift's tour (Disney+ Hotstar). No property in the list emerges as a break-out success in terms of audience likeability, with only three achieving the 60-mark.



Streaming Originals in India

The 2024 Story

An Ormax Media Report



www.ormaxmedia.com



@OrmaxMedia