INDIA WATCH
REPORT
2019

hotstar

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Video entertainment ecosystems have rarely evolved faster than what we are witnessing in India. With affordable smartphones and abundant access to data, the small screen is becoming the preferred medium of entertainment for new consumers. Consumers across different demographics and geographies are more accessible than ever before and the propositions to these consumers are being reimagined through an enterprising mix of content and technology. The future is exciting – for consumers, for marketers, and for content platforms.

Until a few years ago, online entertainment was restricted to the urban affluent. However, we now see newer horizons of customer reach, with non-metro towns driving online consumption. Digital viewership among women has also grown by leaps and bounds. Moreover, Hotstar's pan-India consumer base reveals how each person has unique and individual choices – men are watching drama and movies from the South are being consumed in the North. While the enchantment of cricket remains unabated, customers are increasingly getting attracted to kabaddi and football. The new Indian consumer is breaking old stereotypes and defying conventional wisdom.

The realm of consumer experience has stretched beyond providing mobility and convenience. Today's consumers want a voice of their own and are not satisfied with passive experiences. They want to interact with the screen, express their opinions, and live the moment with friends and family. Online viewing is becoming both an immersive and a social experience.

It falls upon us to tirelessly deepen our understanding of the customer and promptly respond to their changing needs, since we are trying to earn the most precious currency – their time. Sharp customer insights and deeper customer engagement, when powered by enhanced technological capabilities, will open new possibilities for marketers, who can now run targeted marketing campaigns at scale during live events.

We hope you find our insights and findings in this edition of The India Watch Report useful. We see an unprecedented opportunity to envision the industry's future – let us shape it together.

NOW STREAMING:
THE FUTURE OF ENTERTAINMENT

Image by Hotstar viewer: Neha Ralli
Location: Dharamshala, Himachal Pradesh

THE RISE AND RISE OF VIDEO

400MN+
DOWNLOADS FOR HOTSTAR
One of the most downloaded apps in India

2X INSTALLS
Compared to last year

555 INSTALLS
Per minute in 2019

3X
VIDEO CONSUMPTION
in 2019 vs 2018

1.5X the number of video viewers

2X time spent per viewer

FUN FACT

Hotstar witnessed 8,000 installs per minute during the ICC CWC 2019 Ind-Pak match. That's 36 times the number of new people getting on to the Internet per minute in India.

1. Data as per user consumption on Hotstar   **2.** 400MN+ downloads on Play Store as per Google Play Console
3. 28.5 million users added to the Internet universe in India in 3 months, according to the TRAI Performance Indicators Report, April - June, 2019

ROTI. KAPDA. MAKAAN. DATA.

Data drives India! On an average, a user consumes 9.8GB of data per month.

PER CAPITA DATA CONSUMPTION BY STATE

LOWEST — HIGHEST
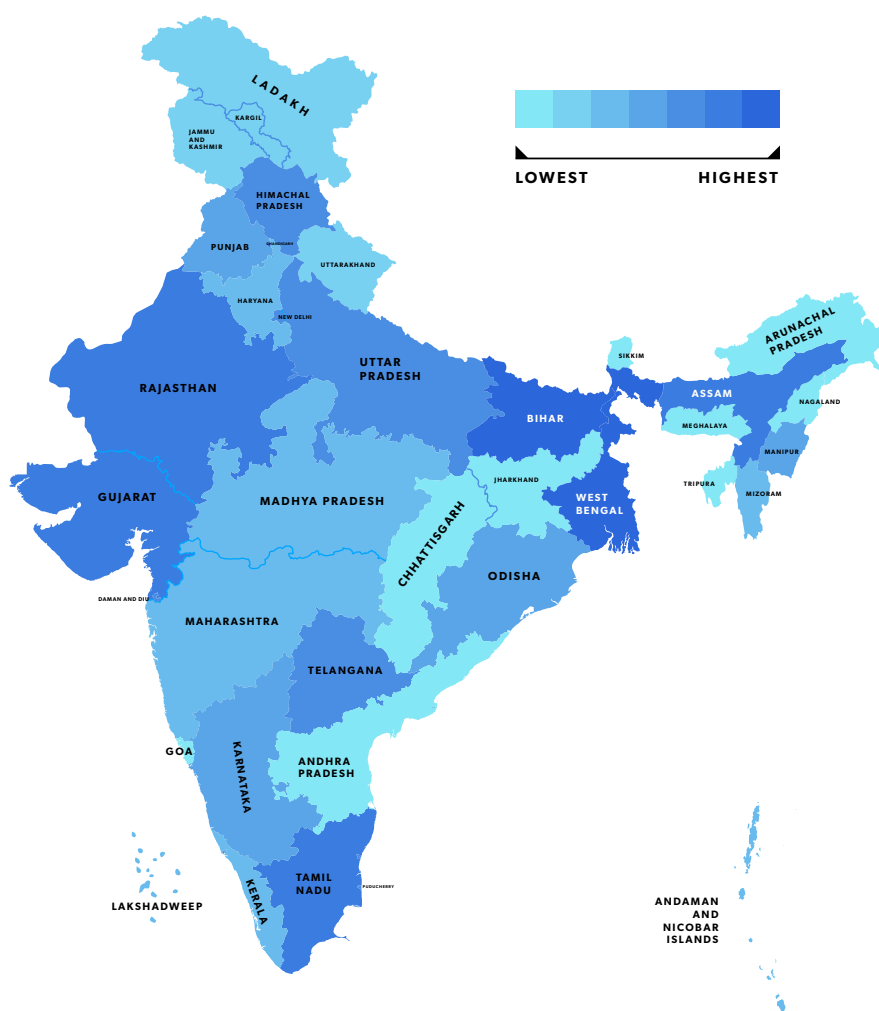
FUN FACT

We have data that West Bengal and Bihar run on data!
In fact, the data consumption per user is even more than that of Maharashtra and Karnataka.

LIVE STREAM IS
NOW MAINSTREAM

365MN

VIDEO VIEWS IN JUST 8 HOURS

IND VS PAK | ICC CWC 2019

~3X the YouTube views for
Avengers Endgame trailer
(the highest grossing movie ever)

25.3MN

LIVE CONCURRENT VIEWERS

IND VS NZ | ICC CWC 2019 Semi-Final
(**5X** New Zealand's population)

FUN FACT

For a moment, India believed. There were 25.3MN people
glued to their screens on Hotstar just before MS Dhoni
got run out.

1. Concurrency defined as simultaneous viewers on a video   2. Concurrency verified by Akamai Technologies, Hotstar's third party CDN, on its platform
3. Data as per consumption of ICC CWC 2019 live-streamed on Hotstar   4. New Zealand population as per 2013 Official Census Data
5. Avengers Endgame trailer had 129MN views on YouTube as of October 2019

LIVE VIEWERSHIP IS GROWING IN PEAKS AND PEAKS

PEAK CONCURRENCY (MN)

30			25.3
20		18.6	
10	10.3		
4.7			
0			
VIVO IPL 2017 FINAL (RPS VS MI)	VIVO IPL 2018 FINAL (CSK VS SRH)	VIVO IPL 2019 FINAL (MI VS CSK)	ICC CWC 2019 SEMI-FINAL (IND VS NZ)

1. Data limited to Hotstar users only   **2.** Concurrency defined as simultaneous viewers on a video
3. Concurrency verified by Akamai Technologies, Hotstar's third party CDN, on its platform

THE WORLD
IS MOBILE.
AND CONNECTED.
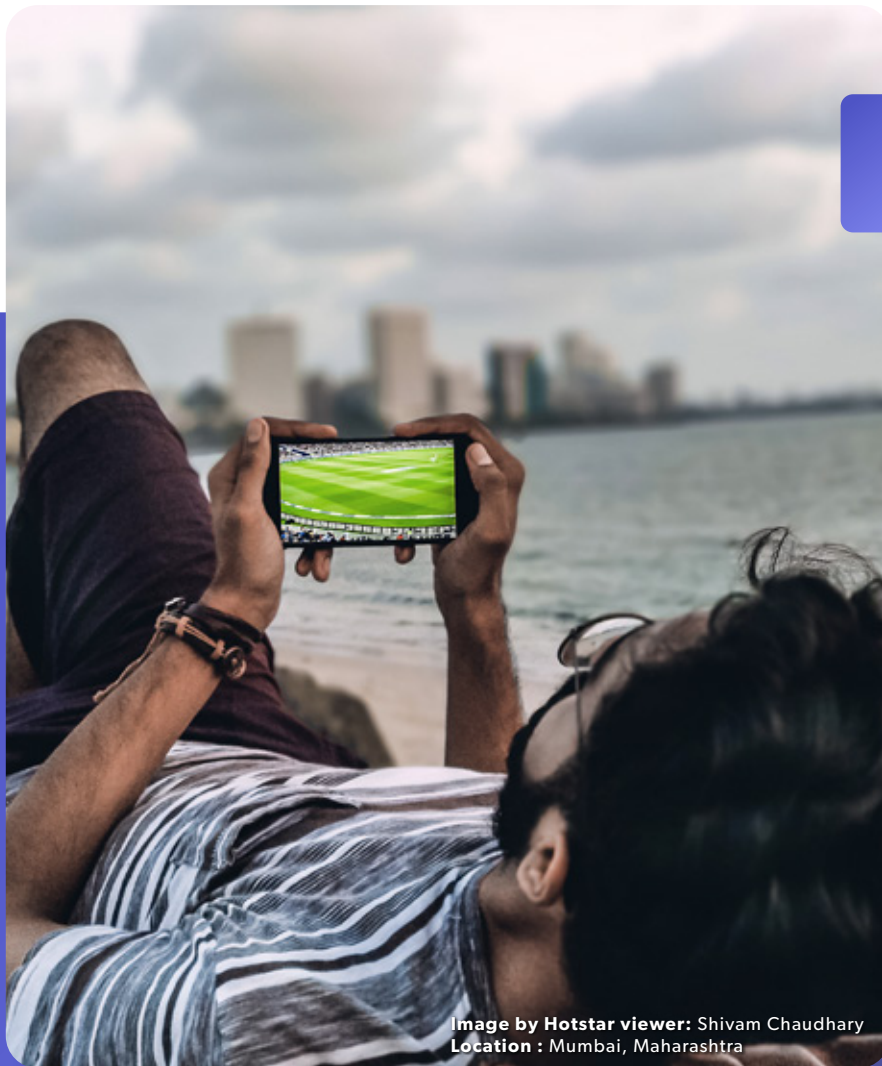
Image by Hotstar viewer: Shivam Chaudhary
Location : Mumbai, Maharashtra

95% OF VIDEO CONSUMPTION COMES FROM MOBILE PHONES

1. Mobile consumption data limited to Hotstar users only   **2.** Mobile phones include Android, iOS, Jio Lyf & Mobile Web

SMALLER SCREEN. BIGGER IMPACT.

Mobile continues to be the primary screen for users, in a big way. During the 2019 cricket season, viewership on Hotstar mirrored the trends on TV.
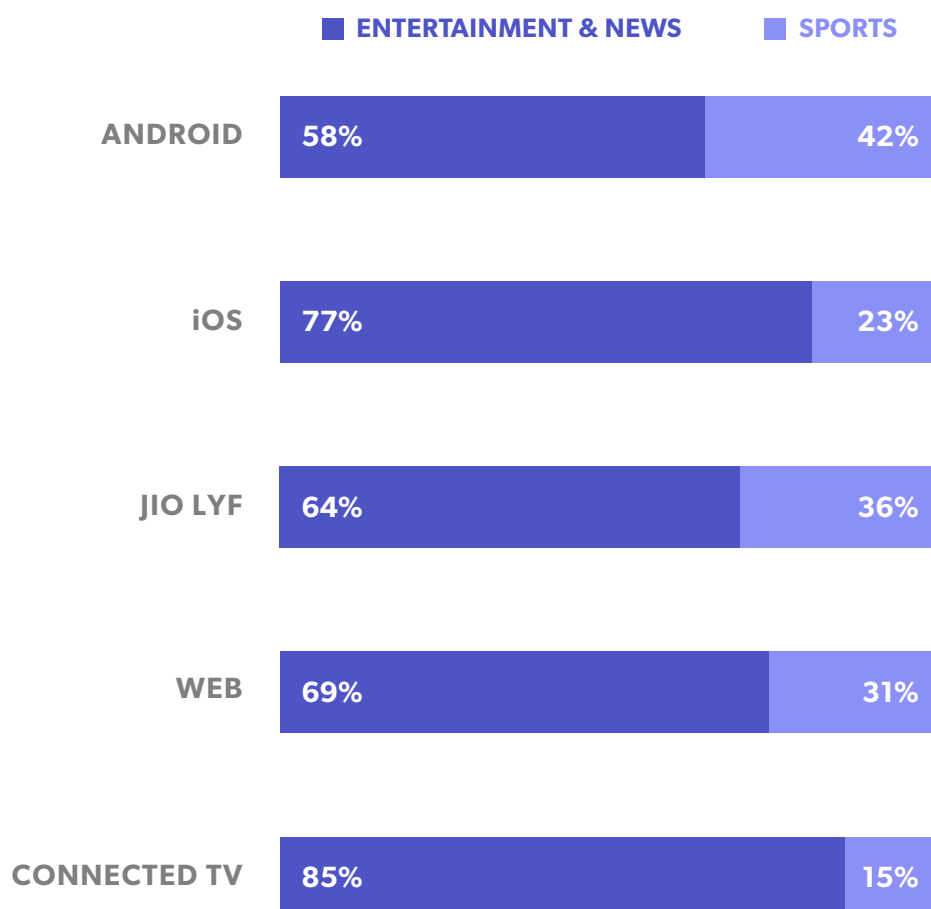
IND VS PAK (16TH JUNE**) | ICC CWC 2019**

■ **HOTSTAR**   ■ **TV**

RAIN
STOPPED
PLAY

INNINGS
BREAK

14:48 15:00 15:30 16:00 16:30 17:00 17:30 18:00 18:30 19:00 19:30 20:00 20:30 21:00 21:30 22:00 22:30 23:00 23:30 23:40

(IN HOURS)

1. Mobile video consumption limited to Hotstar data only   **2**. TV data as per BARC (NCCS AII, 2+, U+R)
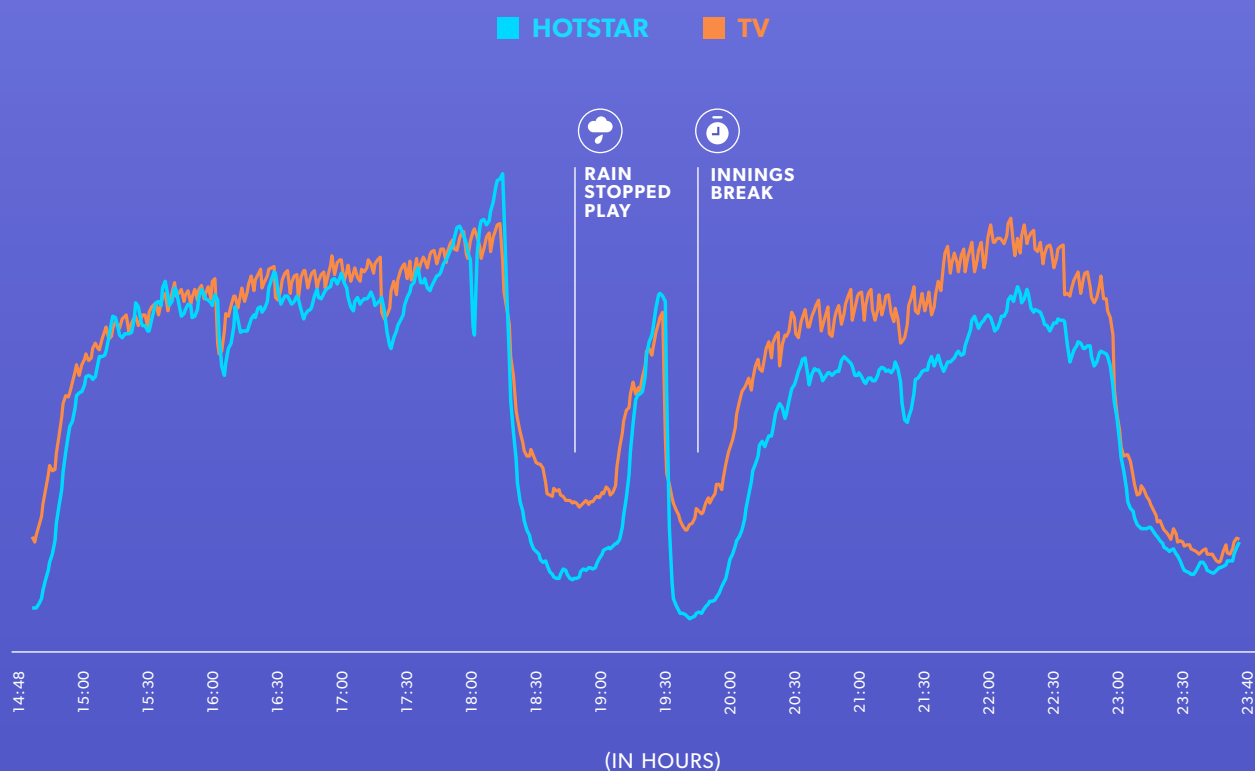
WHAT DOES INDIA LIKE? ENTERTAINMENT. ENTERTAINMENT. AND SPORTS.

No matter the device, Indians love their entertainment.
But, sports isn't far behind.

CONTENT CATEGORY SPLIT BY PLATFORM

■ **ENTERTAINMENT & NEWS**   ■ **SPORTS**

Platform	Entertainment & News	Sports
ANDROID	58%	42%
iOS	77%	23%
JIO LYF	64%	36%
WEB	69%	31%
CONNECTED TV	85%	15%

1. Data as per user consumption on Hotstar

SMARTPHONE AND CONNECTED TV LEADERBOARD

SMARTPHONE

1. MI
2. SAMSUNG
3. vivo
4. OPPO
5. motorola
6. Lenovo
7. HUAWEI
8.
9. micromax

Xiaomi took a leap in the smartphone race, replacing Samsung at the pole position.

CONNECTED TV

1. androidtv
2. fire tv stick
3. TIZEN
4. Google Chromecast
5. webOS
6. tv

Android TV's growth in the last one year was higher than that of Fire TV Stick.

FUN FACT

While most people don't think twice before switching smartphones, West Bengal and Kerala still remain loyal to Samsung.

1. Leaderboards have been created using Hotstar data only

TV JUST GOT AN UPGRADE. IT'S NOW ONLINE.

4X

GROWTH IN VIEWERS
for Connected TV
compared to last year

7X

GROWTH IN CONSUMPTION
for Connected TV
compared to last year

TOP 3 SHOWS ON CONNECTED TV:
1. Game of Thrones
2. Criminal Justice
3. Kasautii Zindagii Kay

FUN FACT

While Game of Thrones was the most watched show overall, Hindi took the throne for being the most preferred language on Connected TV.
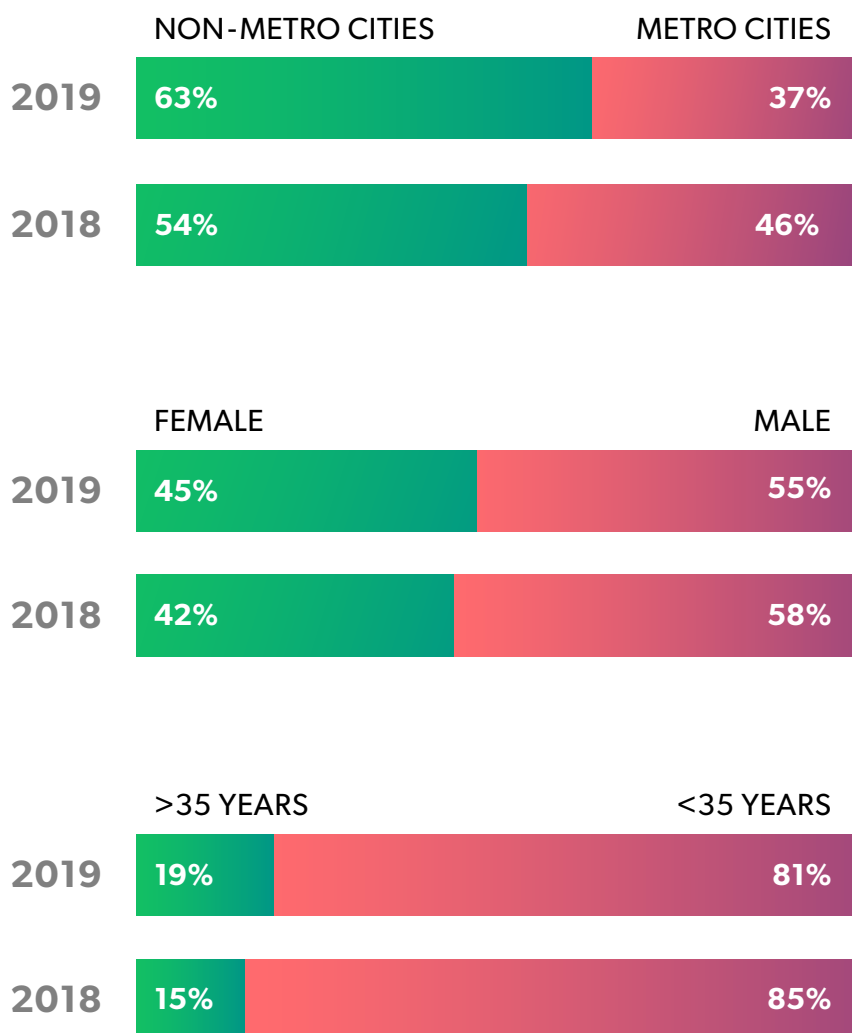
1. Data as per user consumption on Hotstar

Image by Hotstar viewer: Ganesh Vanare
Location: Mumbai, Maharashtra

BREAKING BARRIERS.
BREAKING STEREOTYPES.

CONTENT HAS EVOLVED. AND SO HAS VIEWERSHIP.

There has been a shift in the demographics online, with non-metros and women consuming more entertainment than before.

SHARE OF ENTERTAINMENT CONSUMPTION

	NON-METRO CITIES	METRO CITIES
2019	63%	37%
2018	54%	46%

	FEMALE	MALE
2019	45%	55%
2018	42%	58%

	>35 YEARS	<35 YEARS
2019	19%	81%
2018	15%	85%

1. Data specific to Hotstar users watching entertainment content

NON-METROS ARE AHEAD OF THE CURVE

63%
TOTAL VIDEO CONSUMPTION
Comes from non-metros

2X VS 1.6X
NON-METROS VS METROS
Growth in time spent per viewer
in 2019 vs 2018

LUCKNOW, PUNE, PATNA
Top non-metros
(Surpassed Hyderabad, Bengaluru
& Kolkata in video consumption)

FUN FACT

'Yeh Rishta Kya Kehlata Hai' is the most watched show in non-metros, with 2.5X the viewership in metros.
Yeh Rishta Kya Kehlata Hai? Obviously, Hotstar Fangiri.

1. Cities categorized as per their population from 2011 Census of India   **2.** Data as per user consumption on Hotstar

IT'S A WOMAN'S WORLD. AND IT'S NOW ONLINE.

3.2X
VIDEO CONSUMPTION BY WOMEN
Compared to last year

3.5X VS 2.2X
WOMEN VS MEN
Growth in time spent watching cricket
in 2019 vs 2018

45%
TOTAL ENTERTAINMENT CONSUMPTION
Comes from women

FUN FACT

More women are owning their right to me-time! Video consumption by women in Maharashtra and Odisha is 5.5X that of last year.

1. Data as per user consumption on Hotstar

WEEKEND BINGE. NOW FEATURING CONTENT, FOOD, AND SHOPPING.

There has been a huge surge in shopping and food enthusiasts online, with these becoming the fastest-growing affinity base on the Internet.

AUDIENCE AFFINITY CATEGORY

91% Technology/Mobile

91% Shopping

91% Media & Entertainment

65% Food & Dining/Cooking

52% Lifestyle & Hobbies

50% Sports & Fitness

FUN FACT

Indians are Windows-shopping more than window shopping as the online shopper base increased 4X.

1. Affinity data based on Firebase Realtime Database for Hotstar users

REGIONAL LANGUAGES TRAVEL THE DISTANCE

>40%
VIDEO CONSUMPTION
Comes from regional content

TAMIL, TELUGU & BENGALI
Top regional languages

BIGG BOSS TAMIL
Highest watched entertainment show
1.5X the consumption of Yeh Rishta Kya Kehlata Hai (top Hindi show)

NATIVE CONTENT. LITERALLY.
80% of Tamil & Telugu consumption comes from the native states

FUN FACT
There's a Bengali in every gully. 35% of Bengali consumption comes from outside the state.

1. Data as per user consumption of entertainment on Hotstar   2. Regional languages include all Indian vernacular languages other than Hindi and English

KING'S LANDING. HARRY KANE. KARAN JOHAR. SAME UNIVERSE?

GAME OF THRONES

41% **GAME OF THRONES VIEWERS**
Also watch Hindi family dramas

PREMIER LEAGUE

71% **PREMIER LEAGUE VIEWERS**
Also watch cricket

KOFFEE WITH KARAN

30% **KOFFEE WITH KARAN VIEWERS**
Also watch Hindi family dramas

YEH RISHTA KYA KEHLATA HAI

40% **VIEWERS OF FAMILY DRAMAS ARE MEN**
'Yeh Rishta Kya Kehlata Hai' is the most watched show

FUN FACT

What connects Cersei to Komolika? Not a crazy crossover, but the fact that Game of Thrones fans' most-watched Hindi show is Kasautii Zindagii Kay.

Image by **Hotstar viewer:** Karl Kolah
Location: Mumbai, Maharashtra

2.5X TOTAL ENTERTAINMENT CONSUMPTION
COMPARED TO LAST YEAR

WHILE SOME ARE LOOKING FOR DRAMA, OTHERS GET REAL.

What are men and women watching? A quick look at their inclination towards various genre offers some interesting and stereotype-defying insights.

Legend: Drama · Romance · Family · Reality · Thriller · Mythology · Others

	Female			Male		
	18-24	25-34	35+	18-24	25-34	35+
Others	4%	4%	3%	6%	8%	7%
Mythology	4%	4%	5%	10%	8%	8%
Thriller	11%	11%	8%	10%	10%	9%
Reality	20%	18%	12%	28%	28%	18%
Family	6%	6%	8%	7%	7%	7%
Romance	19%	18%	18%	11%	10%	11%
Drama	36%	38%	45%	29%	30%	40%
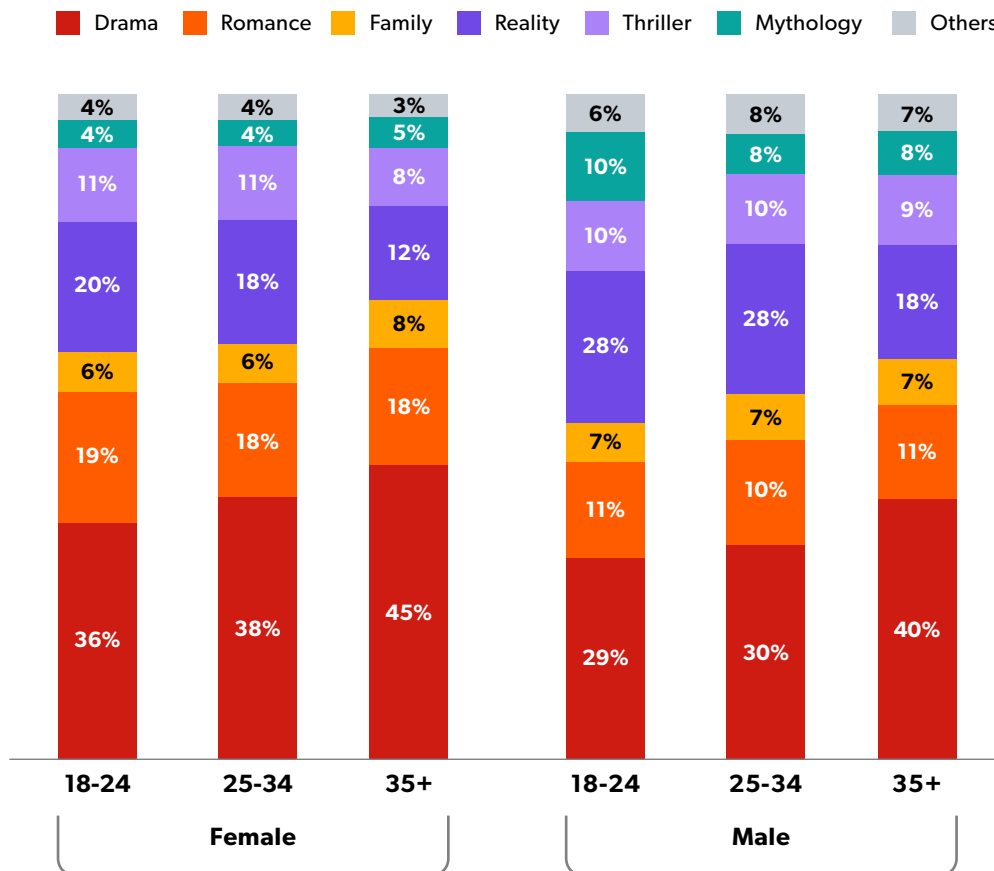
FUN FACT

Contrary to popular belief, men don't dislike Hindi TV serials. Turns out, their interest for family and mythological shows is at par with women.

1. Data as per user consumption of entertainment on Hotstar

THE THINGS WE DO FOR GAME OF THRONES

For Season 8 of Game of Thrones, spoilers trumped sleep. Fans chose to watch every episode at 6:30AM on Monday mornings, Live with America.

PEAK VIEWERSHIP AT 6:30 AM

Live with America on Hotstar

MARATHRONE BEFORE SEASON 8

57% viewers watched the previous seasons again

PRIMARY SCREEN FOR FANS

7X consumption on Hotstar vs TV

FUN FACT

Delhi proved itself to be the biggest fan of Game of Thrones, with the most number of viewers coming from the capital. King's Landing of India, perhaps?

1. Data as per user consumption on Hotstar 2. TV data as per BARC (NCCS All, 2+, U+R)

CELEBRITIES ARE CLOSER THAN THEY APPEAR

MUMBAI'S FAVOURITE GENRE: CELEBRITY GOSSIP

1/3rd of all Koffee with Karan viewers are from Mumbai

2X consumption compared to Delhi

ROLL THE RED CARPET FOR SARA & SAIF ALI KHAN

MOST WATCHED KOFFEE WITH KARAN EPISODE

1.4X the average viewers per episode

FUN FACT

Women like their Koffee strong and Bollywood news stronger. 60% of Koffee with Karan viewers are women.

1. Data as per user consumption on Hotstar

LESS SLEEP. MORE ENTERTAINMENT.

With the ever-growing options for entertainment, it comes as no surprise that sleep comes second.

CITY-WISE LOG OFF TIMINGS

11:00PM - 12:00AM

12:00AM - 2:00AM

2:00AM ONWARDS

SRINAGAR 11:20 PM

AMRITSAR 01:38 AM

SHIMLA 11:20 PM

NEW DELHI 01:46 AM

GURUGRAM 03:04 AM

JAIPUR 11:48 PM

GANGTOK 01:35 AM

GUWAHATI 01:03 AM

KANPUR 02:06 AM

BHOPAL 01:03 AM

RANCHI 11:42 PM

AHMEDABAD 01:32 AM

KOLKATA 01:56 AM

HYDERABAD 01:04 AM

MUMBAI 02:26 AM

PUNE 01:31 AM

CHENNAI 11:45 PM

BENGALURU 01:56 AM

KOCHI 02:37 AM

FUN FACT

Turns out, Mumbai, the city that never sleeps is not the last to sleep. Kochi and Gurugram stay up more for entertainment.

1. Data as per user consumption on Hotstar

MOVIES LEADERBOARD

TOTAL DHAMAAL
HINDI

AVENGERS : INFINITY WAR
ENGLISH

SAAMY 2
TAMIL

SAAMY 2
TELUGU

ARAVINDANTE ATHIDHIKAL
MALAYALAM

BAGH BANDI KHELA
BENGALI

FUN FACT

Hindi movies are a hit with Mumbai. The city shows the highest consumption, while Bengaluru leads the fandom for English movies.

TV SHOWS LEADERBOARD

YEH RISHTA KYA KEHLATA HAI

HINDI

KOFFEE WITH KARAN

ENGLISH

BIGG BOSS SEASON 3

TAMIL

BIGG BOSS SEASON 3

TELUGU

KASTHOORIMAN

MALAYALAM

KE APON KE POR

BENGALI

FUN FACT

Women prefer scripted dramas over reality shows. 60% of Yeh Rishta Kya Kehlata Hai's audience is women, while it's 40% for Bigg Boss.

1. Leaderboards have been created using Hotstar data only **2.** Bigg Boss audiences include those for both Bigg Boss Tamil S3 and Bigg Boss Telugu S3

THE NEW WAY TO NEWS
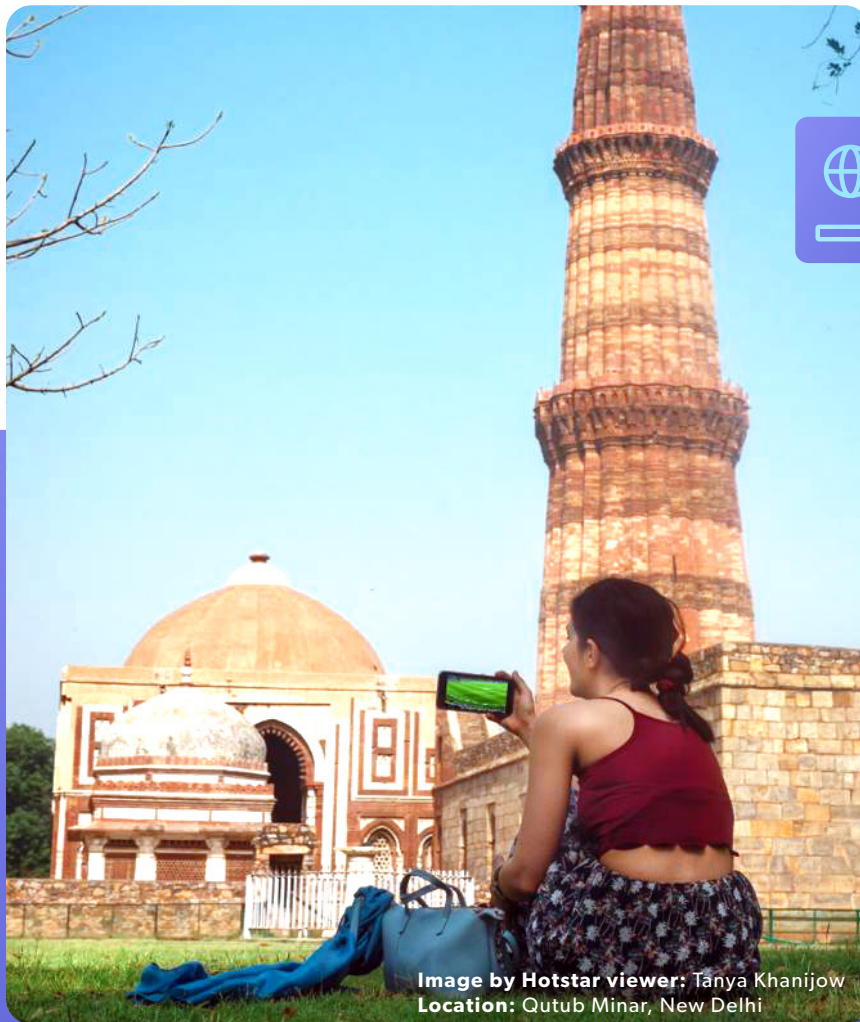
Image by Hotstar viewer: Tanya Khanijow
Location: Qutub Minar, New Delhi

THE LATEST HEADLINES

10X
ONLINE VIDEO CONSUMPTION OF NEWS
Compared to last year

3.5X
GROWTH IN CONSUMPTION PER USER
Compared to last year

FUN FACT

Millennials are more 'woke' than you'd think! 65% of news consumption comes from people in the age group of 15-34.

1. Data as per user consumption on Hotstar

D-DAY FOR NEWS

10X

NEWS CONSUMPTION

On the day of General Election results compared to average news consumption per day

34MIN

AVERAGE TIME SPENT PER USER

Watching news on Hotstar compared to 48 min on one of India's leading TV News Channels
(on the day of General Election results)

FUN FACT

Breaking news: Delhi consumes the most news in India. In other news, Lucknow and Patna watch more news than Mumbai.

1. Data as per user consumption on Hotstar   2. TV data as per BARC (NCCS All, 2+, U+R)

CRICKET IN INDIA:
ALL TIME
PRIME TIME

Image by Hotstar viewer: Varun Chaudhary
Location: Shimla, Himachal Pradesh

WHEN EVERY RECORD IS A WARM-UP TO THE NEXT

300MN⁺

REACH ON HOTSTAR DURING VIVO IPL 2019

1.5X of VIVO IPL 2018

25.3MN

PEAK CONCURRENCY

IND VS NZ Semi-Final, ICC CWC 2019
Breaking our own record of
18.6MN (VIVO IPL 2019 Final)

100MN REACH

CROSSED IN A SINGLE DAY
Multiple times throughout ICC CWC 2019

FUN FACT

If Hotstar was a nation, it would soon outnumber America! The platform's reach during VIVO IPL 2019 was comparable to the entire population of the United States.

1. Data as per user consumption on Hotstar **2.** Concurrency defined as simultaneous viewers on a video
3. Concurrency verified by Akamai Technologies, Hotstar's third party CDN, on its platform **4.** US Population as per United States Census Bureau

CRICKET CROSSES ALL BOUNDARIES IN INDIA

Compared to VIVO IPL 2018, Hotstar took the cricket fever to 20% more cities and towns in 2019. 65% of the total consumption came from non-metros.

CONCENTRATION OF DATA USAGE ACROSS INDIA (REPRESENTATIONAL)

2019

2018
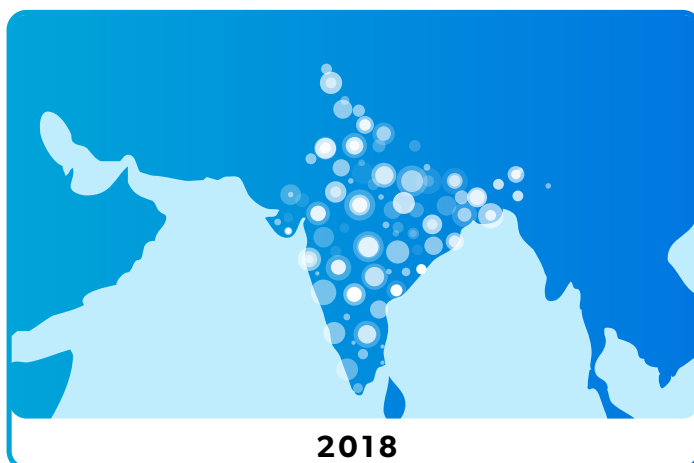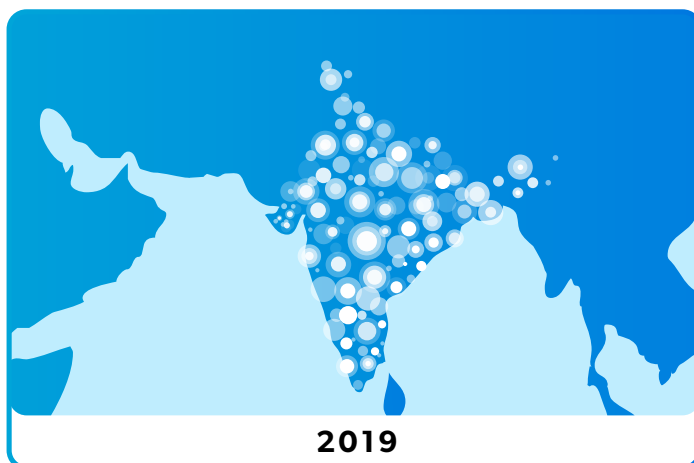
FUN FACT

Non-metros dominated the consumption of VIVO IPL 2019. Pune overtook Hyderabad, while Lucknow raced past Chennai and Bengaluru.

PASSIVE VIEWING IS PASSÉ. CRICKET JUST GOT MORE INTERACTIVE.
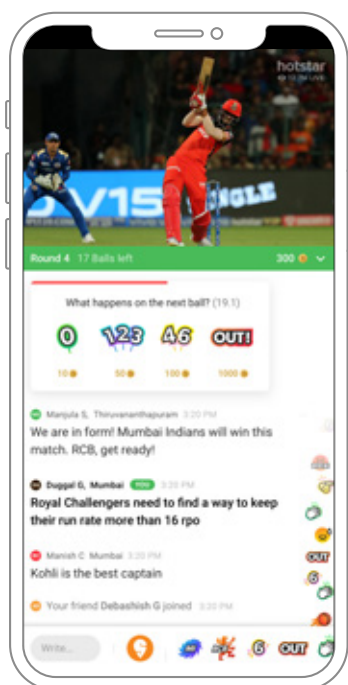
64MN
PLAYED ALONG LIVE
on Watch 'N Play
during VIVO IPL 2019
2X compared to VIVO IPL 2018

1.5X
TIME SPENT
by viewers who participated
in Watch 'N Play compared to
those who didn't,
during VIVO IPL 2019

44MN
**COMMENTS SHARED
ON WATCH 'N PLAY**
Live on the social feed
during VIVO IPL 2019

FUN FACT

Dhoni vs Kohli is a match in itself. And it shows! CSK vs RCB attracted the most chatter on Watch 'N Play during VIVO IPL 2019.

1. Data as per user consumption on Hotstar
2. Watch 'N Play allows for an immersive LIVE cricket viewing experience, where users play along, cheer through emojis and chat on the social feed

CRICKET, FANDOM AND FOOD. ALL ON ONE SCREEN.
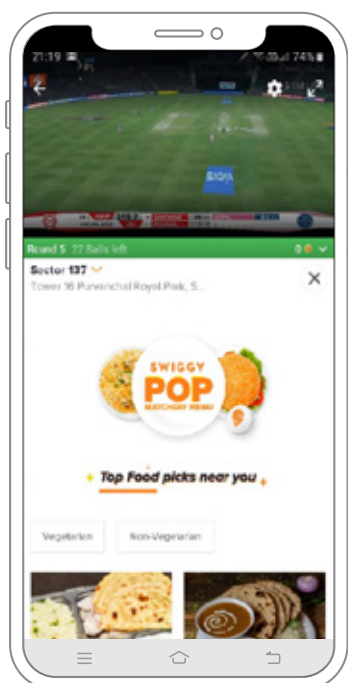
CHEERING HAS A NEW LANGUAGE

6BN
EMOJIS SHARED
during VIVO IPL 2019

TOP EMOJIS SHARED

OUT!   6   CSK

ORDERING FOOD LIVE ON HOTSTAR

18MN
SWIGGY MENU VIEWS
during Live matches on Hotstar for VIVO IPL 2019

FUN FACT

Whether it was retirement rumours or his classic finishes, people talked about MS Dhoni the most on the Watch 'N Play social feed.

1. Data as per user consumption on Hotstar
2. Watch 'N Play allows for an immersive LIVE cricket viewing experience, where users play along, cheer through emojis and chat on the social feed
3. Data basis the Swiggy POP integration on Hotstar's live cricket matches

INDIA EATS, TALKS, AND KNOWS ITS CRICKET.

TOP 3 CORRECTLY ANSWERED QUESTIONS ✅

Q1. What is Virat Kohli's jersey number in ODIs? **98%**

Q2. Who captained India in the 2018 Asia Cup Final? **90%**

Q3. Which country does Tom Latham play ODIs for? **90%**

A1. 18 A2. Rohit Sharma A3. New Zealand

TOP 3 INCORRECTLY ANSWERED QUESTIONS ❌

Q1. How many ODI 5-wicket hauls has Zaheer Khan taken for India? **91%**

Q2. What was the highest score made by Ross Taylor in ICC Cricket World Cup 2015? **87%**

Q3. How many hundreds did MS Dhoni score in ICC Cricket World Cup 2015? **83%**

A1. 1 A2. 56 A3. 0

FUN FACT

The simplest questions can sometimes leave people shockingly stumped: 55% didn't know that a yellow ball is never used in International cricket!

1. Data as per user answers on Watch 'N Play during ICC CWC 2019 on Hotstar

LANGUAGE AND LOYALTY GO HAND-IN-HAND

There's a surge in the consumption of regional languages, corresponding to the team playing during VIVO IPL.

~2X
JUMP IN
TAMIL CONSUMPTION
During CSK matches

~1.6X
JUMP IN
BENGALI CONSUMPTION
During KKR matches

~1.5X
JUMP IN
KANNADA CONSUMPTION
During RCB matches
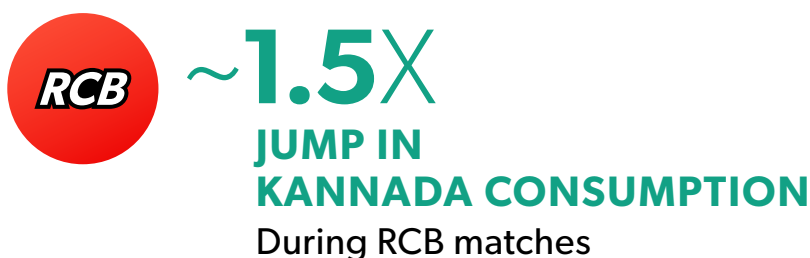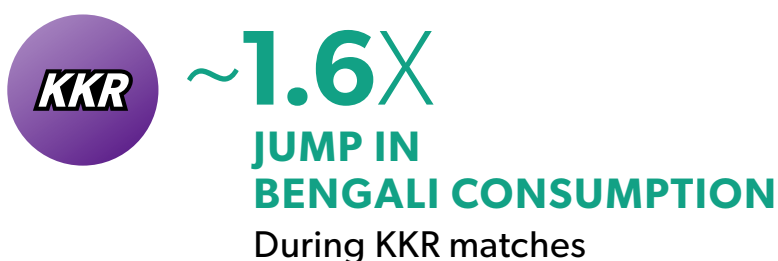
FUN FACT

Kolkata makes way for the new Dada of VIVO IPL. During Russell's iconic 80 off 40 knock (KKR vs MI), there was a 2.3X jump in Bengali consumption.

FIRST LANGUAGE.
FIRST PREFERENCE.

80% Cricket consumption in Tamil and Telugu comes from the native states

38% Bengali consumption comes from outside West Bengal

32% Malayalam consumption comes from outside Kerala

FUN FACT

Interestingly, 25% of cricket consumption in Tamil Nadu is in Hindi.

1. Data as per user consumption on Hotstar

MOST WATCHED TEAMS DURING VIVO IPL 2019

1. MI
138.2MN
73 MN (IN 2018)

2. CSK
138.1MN
86 MN (IN 2018)

3. DC
129.1MN
69 MN (IN 2018)

4. KXIP
125.6MN
70 MN (IN 2018)

5. SRH
124.9MN
82 MN (IN 2018)

6. KKR
124.6MN
78 MN (IN 2018)

7. RR
123.2MN
70 MN (IN 2018)

8. RCB
122.8MN
71 MN (IN 2018)

FUN FACT

While Mumbai Indians moved to the top spot in overall consumption in 2019, Chennai Super Kings retained its top spot with respect to consumption by women.

1. Data as per user consumption on Hotstar
2. Viewership number shown denotes the number of unique video viewers who watched matches of the respective teams

MOST CHEERED-FOR TEAMS

Team emojis were a hit on Watch 'N Play, with Chennai Super Kings leading the table during VIVO IPL 2019.

CSK

MI

RCB

DC

KKR

SRH

RR

KXIP

1. Order of teams by number of emojis sent on Watch 'N Play thoughout VIVO IPL 2019 on Hotstar
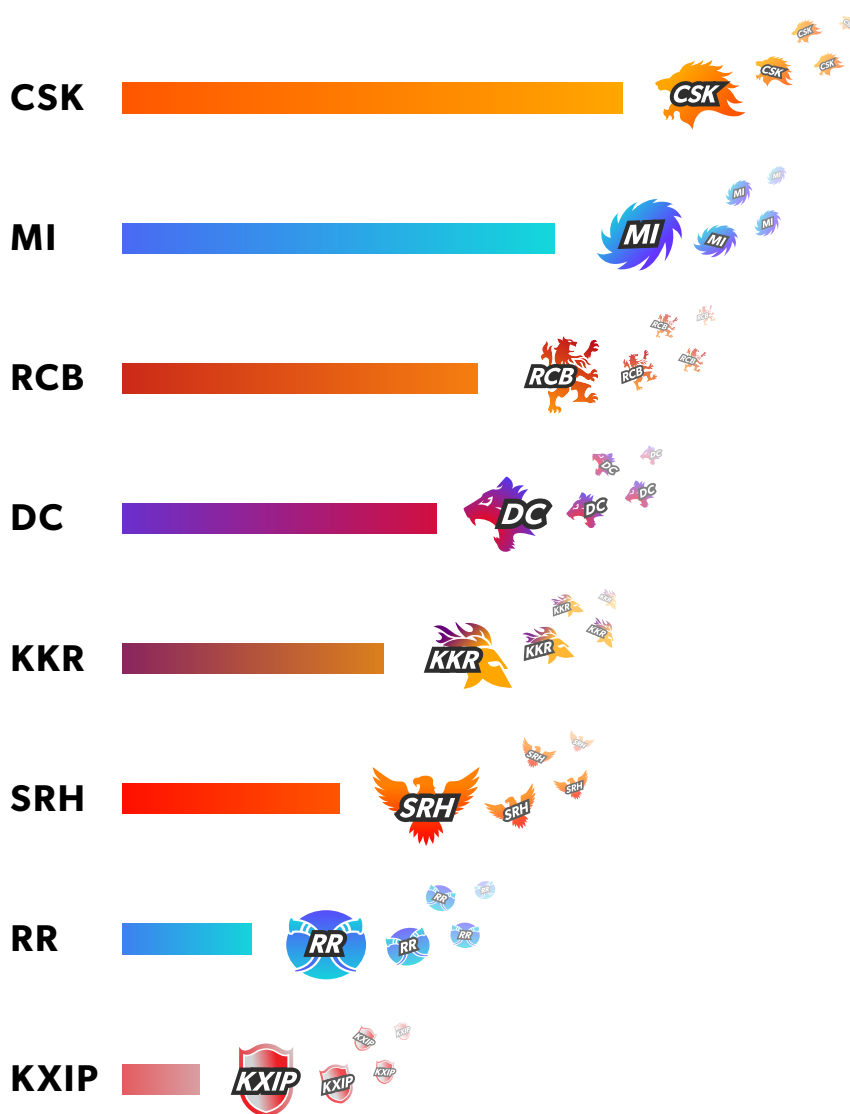
AND AFTER CRICKET, THERE'S ALWAYS MORE TO WATCH.

59%
Cricket fans stay on for entertainment

80%
WATCHED TV SHOWS
Most-watched TV show: **Nazar**

60%
WATCHED MOVIES
Most-watched movie: **Total Dhamaal**

FUN FACT

Lights, camera, drama! Drama is the most watched genre, followed by Action. Together, they make up 45% of the entertainment consumption by cricket viewers.

1. Data as per user consumption on Hotstar

INDIANS BAT FOR OTHER SPORTS TOO.

FOOTBALL

2.1X
CONSUMPTION OF PREMIER LEAGUE
Compared to previous year

1.3X
CONSUMPTION OF HERO ISL
Compared to previous year

KABADDI

2.3X
CONSUMPTION OF VIVO PRO KABADDI
Compared to previous year

FUN FACT

Think metros watch more football? Hero ISL proved otherwise. Non-metros contributed to 62% of the consumption during the 2019 Final, compared to 44% during the 2018 Final.

1. Data as per user consumption on Hotstar

FOOTBALL. KABADDI.
A LEAGUE OF THEIR OWN.

Football is popular in South India and East India, while Kabaddi is most-watched in Uttar Pradesh and South India.

CONSUMPTION OF FOOTBALL AND KABADDI IN INDIA

FOOTBALL

KABADDI
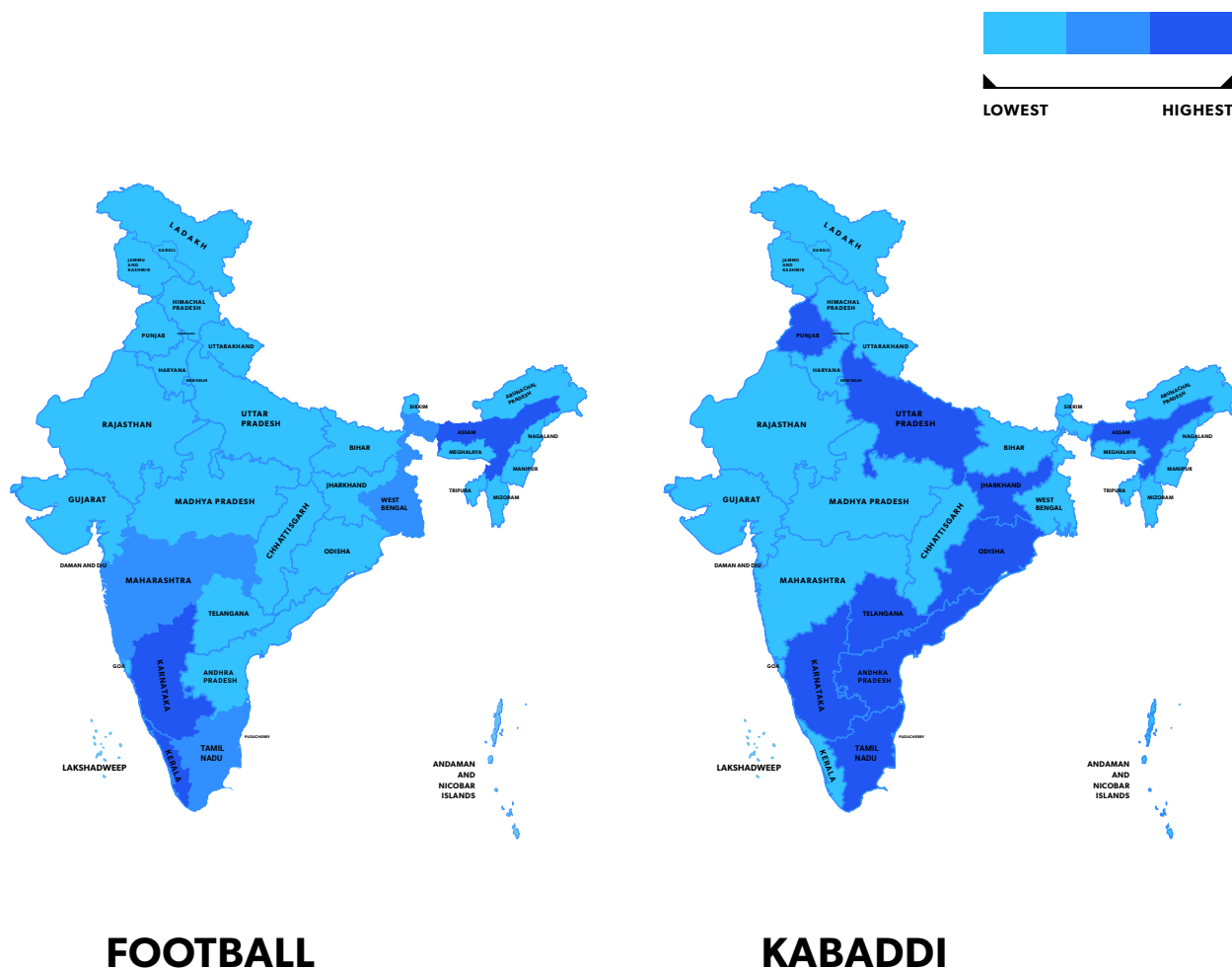
HALL OF
FAME

Image by Hotstar viewer: Raghav Ralhan
Location: India Gate, New Delhi

TOP MOMENTS
THAT GRIPPED INDIA

1.
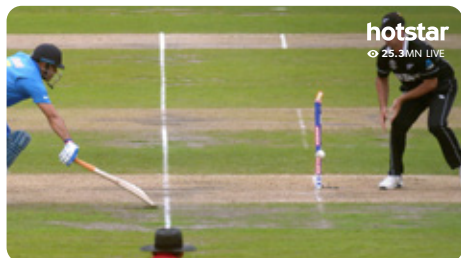
MS Dhoni gets run out by Guptill

IND VS NZ

(ICC CWC 2019 SEMI-FINAL) 25.3MN

2.

MI beats CSK by 1 run

MI VS CSK

(VIVO IPL 2019 FINAL) 18.6MN

3.

MS Dhoni on the chase

IND VS ENG

(ICC CWC 2019 MATCH 38) 18MN

4.

Last over of the first innings

IND VS PAK

(ICC CWC 2019 MATCH 22) 15.6MN

5.

Guptill-Stokes overthrow incident

ENG VS NZ

(ICC CWC 2019 FINAL) 15.6MN

6.

Hardik Pandya at the crease

RCB VS MI

(VIVO IPL 2019 MATCH 7) 12.7MN

1. Top moments based on the matches where the highest concurrency was seen   **2.** Concurrency defined as simultaneous viewers on a video
3. Concurrency verified by Akamai Technologies, Hotstar's third party CDN, on its platform

CRICKET 2019 LEADERBOARD

ICC CRICKET WORLD CUP

IND VS **NZ**

Semi-final | JUL 9

PAK VS **IND**

Match 22 | JUN 16

ENG VS **IND**

Match 38 | JUN 30

VIVO IPL

MI VS **CSK**

Final | MAY 12

RR VS **CSK**

Match 25 | APR 11

RCB VS **MI**

Match 7 | MAR 28

1. Data as per user consumption on Hotstar

FOOTBALL & KABADDI 2019 LEADERBOARD

HERO ISL

BENGALURU FC
VS
FC GOA

Final | MAR 17

ATK
VS
KERALA BLASTERS

Opening | SEP 29

PREMIER LEAGUE

MANCHESTER UNITED
VS
LIVERPOOL

Match 269 | FEB 24

VIVO PRO KABADDI

BENGALURU BULLS
VS
GUJARAT FORTUNE GIANTS

Final | JAN 5

PATNA PIRATES
VS
TELUGU TITANS

Match 40 | OCT 30

GUJARAT FORTUNE GIANTS
VS
UP YODDHA

2nd Qualifier | JAN 3

1. Data as per user consumption on Hotstar

MOST WATCHED ADS DURING VIVO IPL 2019

(In alphabetical order)

AMAZON PAY
"Ab Bada Hoga Rupaiyaa"
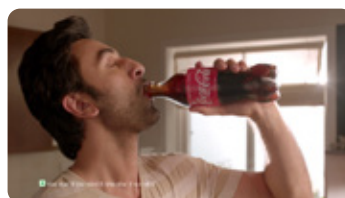
COCA-COLA (COKE)
"Say it with a Coke"
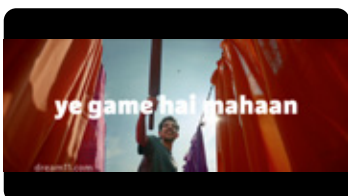
DREAM11
"Ye game hai mahaan"

KWALITY WALLS
"Cornetto Oreo"
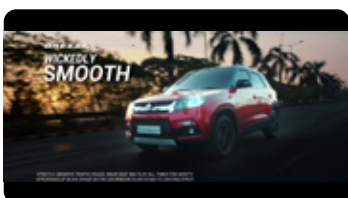
MARUTI SUZUKI BREZZA
"Wickedly Smooth"
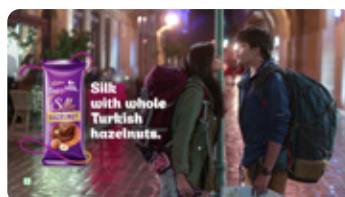
MONDELEZ - CADBURY SILK
"Silk with whole Turkish Hazelnuts"

NESTLE KITKAT
"Break Hai Banta Hai"
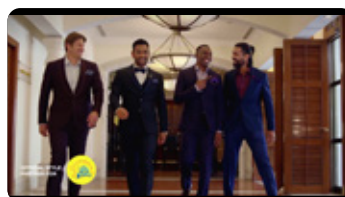
PETER ENGLAND
"Great Fashion @999"
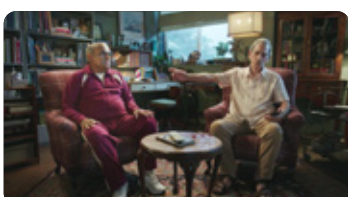
SWIGGY
"50% off Matchday Mania"
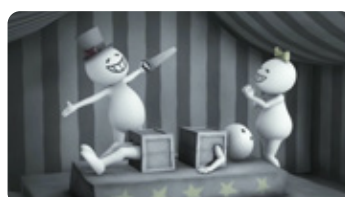
VODAFONE
"FANtastic Break Contest"

1. The ads presented have been classified as top ads based on engagement, time spent and reach

CASE STUDIES

Image by Hotstar viewer: Kushagra Tiwari
Location: Amritsar, Punjab

CASE STUDY: SWIGGY

OBJECTIVE

To create a deeper bond with their cricket crazy fans and to tap into new customers during VIVO IPL 2019 by building brand awareness and reach across metros & tier 1 cities.

APPROACH
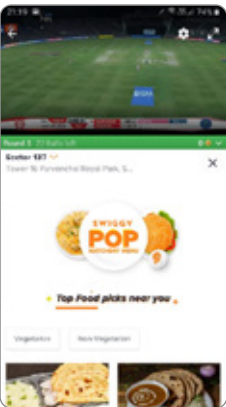
POP Integration on LIVE matches
A global first at this scale, Swiggy and Hotstar got together to allow consumers to order their favorite meal from Swiggy, without taking their eyes off a single moment in the match. The integration saw ~14MN interactions.
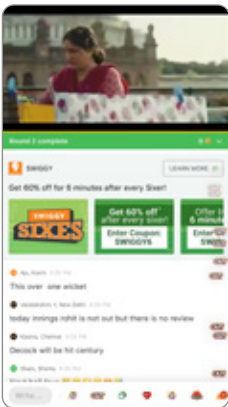
Match Day Mania
Optimized for discount-led contextual messaging to drive users to order and avail 60% discount on every six!
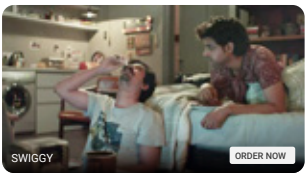
Offer & Audience Based Targeting
Bumper ads were used pan India to drive traffic. Thematic midrolls were used to drive the message of convenient ordering. City-specific branded cards were used to promote offers from local restaurant partners.

RESULTS

Overall Audience – Brand Metrics
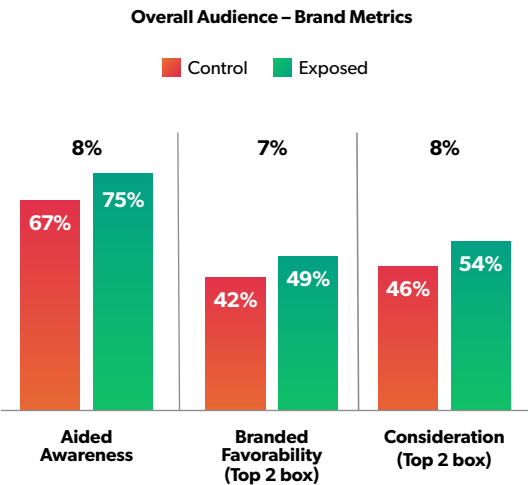
Significant uplift on all key brand metrics, as well as across messages and attributes. All metrics uplift were 'above average' with uplift in consideration being 'excellent' as per Kantar India and Asia norms.

Source: Kantar BLS

"Our collaboration with Hotstar aims to satisfy the insatiable love we Indians have for Cricket and Food. We believe a nail biter of a match accompanied with great food is a delicious combination to serve up this cricketing season. We are extremely pleased to present this innovation in association with Hotstar. Through this, we hope to build a deeper bond with our cricket crazy fans by offering them an uninterrupted viewing and extremely convenient food ordering experience."

Srivats TS
VP - Marketing
Swiggy

CASE STUDY: COCA-COLA

OBJECTIVE

To build awareness and reach for the new 'Say it with a Coke' campaign.

Make the brand dominate during VIVO IPL 2019 on Hotstar through innovation, contextualisation & smart media planning.
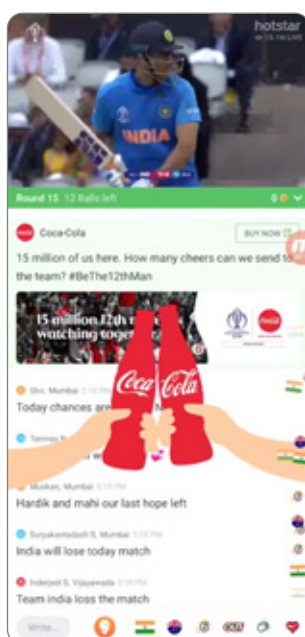
APPROACH

In line with the 'Say it with a Coke' campaign, we broke cricket into moments that could be related to over 150 songs in 6 languages.

61 MN viewers reached on the 'Coca-Cola' brand campaign.

Leveraged geo-targeting to drive high share of voice in key markets.

60% of the reach delivered at a frequency of 3+.

Over 950 MN impressions on contextual branded cards served at key moments such as toss, free hit, extras; amplified through **'Coke Cheers' animation.**

Native Emojis
300MN+ clicks on the Coca-Cola 'heart' emoji amplified with custom 'cheers'.

RESULTS

Overall Audience - Brand Metrics

Control Exposed

	Aided Awareness	Online Ad Awareness	Purchase intent (Top 2 box)
Control	49%	24%	29%
Exposed	59%	35%	42%
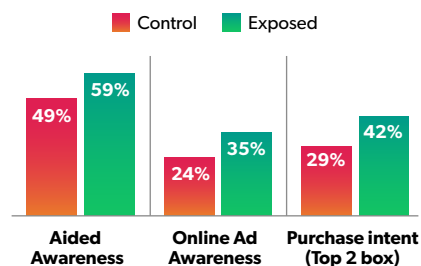
Significant increase seen in all key brand metrics. The purchase intent uplift was 'excellent' as per Kantar India and Asia norms.

Source: Kantar BLS

"Indian Premier League has become an annual fest for this country. Across the globe Coca-Cola creates moments of bringing together the fans and celebrating their favourite sport. Hotstar played a key role in making Coca-Cola become a part of those special uplifting moments during the tournament. The custom heart emoji enabled the fans to express and engage on the platform during the live game."

Asha Sekhar
VP & Chief Digital Officer
Coca-Cola

CASE STUDY: QUAKER OATS

OBJECTIVE

To capture the attention of young consumers on digital, in an innovative and non-intrusive way.

APPROACH

We collaborated with celebrity chef Vikas Khanna to create a one-of-a-kind web series, where he came up with delectable recipes using Quaker Oats. Through this, we combined taste, health and entertainment to pervade pop culture.
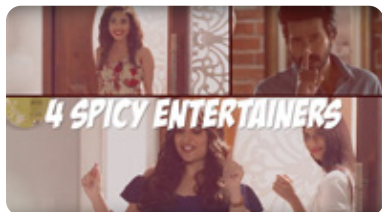
Targeted to health & fitness enthusiasts
The show was targeted on Hotstar using appography. Users with health & fitness apps on their phones were identified.

Leveraged multiple ad formats
Different ad formats were used to target viewers on Hotstar, such as mid-rolls, pre-rolls, billboards and display units. All ad formats were used sequentially.

Social Media posts by celebs
The show resonated with millennials across India, as their favourite celebrities posted about it on their social media accounts.

RESULTS

Overall Audience – Brand Metrics

- Control
- Exposed

21%

13%

Brand Awareness   Purchase Intent
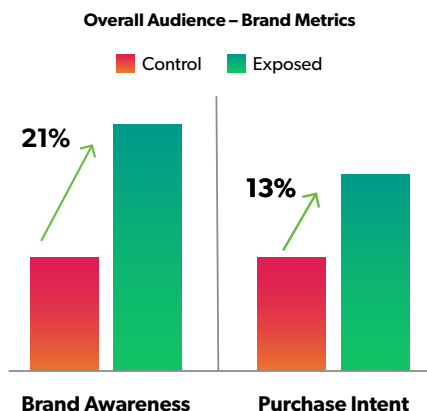
Significant increase seen in key brand metrics - aided brand awareness & purchase intent. Campaign reached over 22MN users and became the number two English show after Koffee with Karan on Hotstar.

Source: Hotstar Internal Analytics

"Our objective with this web series was to help young people understand how easily they can opt to increase the nutrition quotient of their favorite dishes by adding Quaker Oats. We chose to partner with Hotstar as they have a first-rate understanding of the kind of content the consumers demand making them one of the best creators of branded content. Majority of Quaker's consumers are digital natives and Hotstar helped us engage them effectively."

Aastha Bhasin
Associate Director
Quaker, PepsiCo

CASE STUDY: CEAT

OBJECTIVE

Establish CEAT as the preferred 2- and 4-wheeler tyre brand through delivering their core proposition of 'long-lasting tyres'.

APPROACH

Ownership of highlights video

300 MN+ views on 'Highlights by CEAT'.

Cut through the ad clutter and reached audiences beyond the live match.

CEAT MILAZE X3
The 1lakh km* tyre   KNOW MORE

80 MN viewers reached through midroll video ads.

9.3L+ interactions on Call to Action button.

CEAT GRIPP X3
Grip that lasts   KNOW MORE

6 language feeds were used to generate incremental consideration.

Website visits were retargeted to drive purchase intent for CEAT.

RESULTS

Message association lift

3X
Increase in direct search of the website

10%
Increase in the website sessions

40%
Increase in website leads

Source: CEAT Internal Analytics & Kantar BLS

15% **CEAT Gripp**

18% **CEAT Milaze**

"The campaign with Hotstar was an exciting one since the Cricket World Cup is one of the biggest sporting event in the world. We are extremely happy with our association. While, we could see the tangible benefits in terms of increased traffic on our website and leads, our brand lift scores also showed a significant growth with regards to our targeted creative messaging."

Amit Tolani
VP Marketing
CEAT

CASE STUDY: ACKO

OBJECTIVE

To build brand awareness and consideration for Acko Insurance in the bike & car insurance category. Reach out to relevant audience on specific geos with the message, 'Iss mein dimaag kya lagana?'
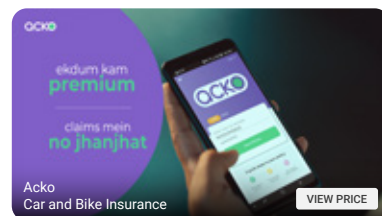
APPROACH

**Drove awareness** throughout the tournament through 2.2 BN impressions on Fall of Wickets squeeze-ups.

Acko
Car and Bike Insurance   VIEW PRICE
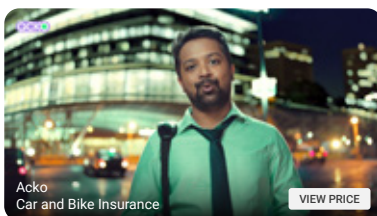
Built message association through longer 30s edits & **drove recall** through high-frequency 10s edits.

Acko
Car and Bike Insurance   VIEW PRICE

Reached 38 MN users in top 6 metros+Maharashtra & Gujarat by leveraging geo-targeted midroll ads.

RESULTS

Significant increase seen in both Brand Awareness and Purchase Intent.

14%   **10%**

Brand Awareness   **Purchase Intent**
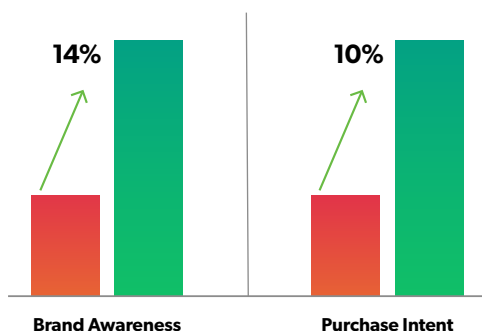
Source: Kantar BLS

"Through our World Cup campaign on Hotstar, we were able to accelerate reach for our new campaign launch while creating brand awareness amongst prospective users. The platform, which has a high affinity with our TG, gave us the flexibility to target, measure and efficiently scale up in key markets that resulted in significant growth in business and brand metrics."

Nitin Khanna
AVP - Marketing
Acko

hotstar

2019