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

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

PER CAPITA DATA CONSUMPTION BY STATE

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.

1. Data consumption per user as on Hotstar
2. 9.8GB data consumption per month as per TRAI Performance Indicators Report, April - June, 2019
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)

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 Akami 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)

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

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.

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
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.

1. Mobile video consumption limited to Hotstar data only  
2. TV data as per BARC (NCCS All, 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**

<table>
<thead>
<tr>
<th>Platform</th>
<th>Entertainment &amp; News</th>
<th>Sports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Android</td>
<td>58%</td>
<td>42%</td>
</tr>
<tr>
<td>iOS</td>
<td>77%</td>
<td>23%</td>
</tr>
<tr>
<td>JIO LYF</td>
<td>64%</td>
<td>36%</td>
</tr>
<tr>
<td>Web</td>
<td>69%</td>
<td>31%</td>
</tr>
<tr>
<td>Connected TV</td>
<td>85%</td>
<td>15%</td>
</tr>
</tbody>
</table>

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. **Apple**
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. **Apple 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
While Game of Thrones was the most watched show overall, Hindi took the throne for being the most preferred language on Connected TV.
BREAKING BARRIERS.
BREAKING STEREOTYPES.

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

<table>
<thead>
<tr>
<th>SHARE OF ENTERTAINMENT CONSUMPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>NON-METRO CITIES</td>
</tr>
<tr>
<td>2019</td>
</tr>
<tr>
<td>2018</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FEMALE</th>
<th>MALE</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>45%</td>
</tr>
<tr>
<td>2018</td>
<td>42%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>&gt;35 YEARS</th>
<th>&lt;35 YEARS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>19%</td>
</tr>
<tr>
<td>2018</td>
<td>15%</td>
</tr>
</tbody>
</table>

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)

‘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
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

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

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
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.

**KING’S LANDING. HARRY KANE. KARAN JOHAR. SAME UNIVERSE?**

- **Game of Thrones**
  - 41% viewers
  - Also watch Hindi family dramas

- **Premier League**
  - 71% viewers
  - Also watch cricket

- **Koffee with Karan**
  - 30% viewers
  - Also watch Hindi family dramas

- **Yeh Rishta Kya Kehlata Hai**
  - 40% viewers
  - ‘Yeh Rishta Kya Kehlata Hai’ is the most watched show

**Fun Fact**

1. Data as per user consumption on Hotstar
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.

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 6:30AM**
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

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

- SRINAGAR 11:20 PM
- SHIMLA 11:20 PM
- NEW DELHI 01:46 AM
- GURUGRAM 03:04 AM
- JAIPUR 11:48 PM
- KANPUR 02:06 AM
- BHOPAL 01:03 AM
- RANCHI 11:42 PM
- KOLKATA 01:56 AM
- HYDERABAD 01:04 AM
- PUNE 01:31 AM
- MUMBAI 02:26 AM
- BENGALURU 01:56 AM
- CHENNAI 11:45 PM
- KOCHI 02:37 AM
- AMRITSAR 01:38 AM
- AHMEDABAD 01:32 AM

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

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

34 MIN 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)

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

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
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.

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

1. Data as per user consumption on Hotstar
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

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

**Cricket, Fandom and Food. All on One Screen.**

- **Cheering Has a New Language**
  - 6 BN Emojis Shared during VIVO IPL 2019

- **Ordering Food Live on Hotstar**
  - 18 MN Swiggy Menu Views during Live matches on Hotstar for VIVO IPL 2019

**Fun Fact**

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**

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
<th>Accuracy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1. What is Virat Kohli’s jersey number in ODIs?</td>
<td>A1. 18</td>
<td>98%</td>
</tr>
<tr>
<td>Q2. Who captained India in the 2018 Asia Cup Final?</td>
<td>A1. 18, A2. Rohit Sharma, A3. New Zealand</td>
<td>90%</td>
</tr>
</tbody>
</table>

**TOP 3 INCORRECTLY ANSWERED QUESTIONS**

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
<th>Accuracy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1. How many ODI 5-wicket hauls has Zaheer Khan taken for India?</td>
<td>A1. 18</td>
<td>91%</td>
</tr>
<tr>
<td>Q2. What was the highest score made by Ross Taylor in ICC Cricket World Cup 2015?</td>
<td>A1. 18, A2. 56, A3. 0</td>
<td>87%</td>
</tr>
<tr>
<td>Q3. How many hundreds did MS Dhoni score in ICC Cricket World Cup 2015?</td>
<td>A1. 18, A2. 56, A3. 0</td>
<td>83%</td>
</tr>
</tbody>
</table>

The simplest questions can sometimes leave people shockingly stumped: 55% didn’t know that a yellow ball is never used in International cricket!
There’s a surge in the consumption of regional languages, corresponding to the team playing during VIVO IPL.

- **CSK**: ~2X jump in Tamil consumption during CSK matches.
- **KKR**: ~1.6X jump in Bengali consumption during KKR matches.
- **RCB**: ~1.5X jump in Kannada consumption during RCB matches.

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.

1. Data as per user consumption on Hotstar
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

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

<table>
<thead>
<tr>
<th>Rank</th>
<th>Team</th>
<th>Consumption</th>
<th>Viewership</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>MI</td>
<td>138.2MN</td>
<td>73MN (IN 2018)</td>
</tr>
<tr>
<td>2</td>
<td>CSK</td>
<td>138.1MN</td>
<td>86MN (IN 2018)</td>
</tr>
<tr>
<td>3</td>
<td>DC</td>
<td>129.1MN</td>
<td>69MN (IN 2018)</td>
</tr>
<tr>
<td>4</td>
<td>KXIP</td>
<td>125.6MN</td>
<td>70MN (IN 2018)</td>
</tr>
<tr>
<td>5</td>
<td>SRH</td>
<td>124.9MN</td>
<td>82MN (IN 2018)</td>
</tr>
<tr>
<td>6</td>
<td>KKR</td>
<td>124.6MN</td>
<td>78MN (IN 2018)</td>
</tr>
<tr>
<td>7</td>
<td>RR</td>
<td>123.2MN</td>
<td>70MN (IN 2018)</td>
</tr>
<tr>
<td>8</td>
<td>RCB</td>
<td>122.8MN</td>
<td>71MN (IN 2018)</td>
</tr>
</tbody>
</table>

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.

1. Order of teams by number of emojis sent on Watch ‘N Play throughout 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

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

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

1. Data as per user consumption on Hotstar
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
FOOTBALL & KABADDI 2019 LEADERBOARD

**HERO ISL**

- **BENGALURU FC VS FC GOA**
  - Final | MAR 17

- **ATK VS KERALA BLASTERS**
  - Opening | SEP 29

- **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”

KWALITY WALLS
“Cornetto Oreo”

MARUTI SUZUKI BREZZA
“Wickedly Smooth”

PETER ENGLAND
“Great Fashion @999”

NESTLE KITKAT
“Break Hai Banta Hai”

MONDELEZ - CADBURY SILK
“Silk with whole Turkish Hazelnuts”

SWIGGY
“50% off Matchday Mania”

DREAM11
“Ye game hai mahaan”

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

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.

“States 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.
- Over 950 MN impressions on contextual branded cards served at key moments such as toss, free hit, extras; amplified through ‘Coke Cheers’ animation.
- 300MN+ clicks on the Coca-Cola ‘heart’ emoji amplified with custom ‘cheers’.
- 60% of the reach delivered at a frequency of 3+.

RESULTS
Overall Audience - Brand Metrics

<table>
<thead>
<tr>
<th>Aided Awareness</th>
<th>Online Ad Awareness</th>
<th>Purchase intent (Top 2 box)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Control</td>
<td>Exposed</td>
<td></td>
</tr>
<tr>
<td>49%</td>
<td>59%</td>
<td>24% 35%</td>
</tr>
<tr>
<td>29%</td>
<td>29%</td>
<td>35% 42%</td>
</tr>
</tbody>
</table>

Significant increase seen in all key brand metrics. The purchase intent uplift was ‘excellent’ as per Kantar India and Asia norms.

Source: Kantar BLS

“In 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.

RESULTS

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.

“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.

80 MN viewers reached through midroll video ads.
9.3L+ interactions on Call to Action button.

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

“The campaign with Hotstar was an exciting one since the Cricket World Cup is one of the biggest sporting events 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

Source: CEAT Internal Analytics & Kantar BLS
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.
- **Built message association**: through longer 30s edits & drove recall through high-frequency 10s edits.
- **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.

<table>
<thead>
<tr>
<th>Brand Awareness</th>
<th>Purchase Intent</th>
</tr>
</thead>
<tbody>
<tr>
<td>14%</td>
<td>10%</td>
</tr>
</tbody>
</table>

“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

Source: Kantar BLS
DISCLAIMER

The data that is compiled in this report is obtained entirely from Hotstar, unless indicated otherwise, and given its prominence in the Indian online video industry, it has been represented in many instances as the state of the industry. We believe that the information contained in this report is accurate and reliable at the time of publication, however, we assume no liability for the accuracy and completeness of such information.

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