MICA
THE SCHOOL OF IDEAS

MICACMES
Center for Media & Entertainment Studies

In association with
Communication Crafts

INDIAN OTT PLATFORMS

REPORT 2018

Streaming the new age narrative

First of its kind in-depth research and analysis compilation that maps the rapidly evolving on-demand video streaming industry with insights from OTT industry stalwarts.



INDIAN TRENDS 2017-18

Relevant Statistics & Insights from an Indian Perspective.

Prologue

Digital technology has steered the third industrial revolution impacting the human civilization as a whole.

Industries such as media, telecom, retail and technology are witnessing unprecedented disruptions and are rapidly evolving their existing infrastructure to support the demands of the digital society.

Thanks to the power of the Digital, the industry is being globalized in true sense of the word. Half the world's 7.6 billion population is now online and nearly two-thirds own a mobile phone. Social media has penetrated into the day-to-day life of every individual with nearly three billion people using some form of social media. People with different nationalities, personalities, races, and beliefs are digitally connected inspite of geographical barriers. They engage, exchange ideas, and also form communities with like-minded values.

There is simultaneously a movement towards 'glocalization', a complex, interactive process among global and local producers to meet local cultural tastes. Lastly, the digital realm has facilitated organizations to connect better with consumers, micro-target and personalize their offerings at an individual level.

When we consider all these changes from the media and entertainment point of view, we observe how digital landscape has caused an explosion of content available at the consumers' fingertips at an affordable price. Besides offering shows from around the world, there is an increased trend among global and local players in conceptualizing original home-grown content that resonate local tastes and preferences. The Indian Media and Entertainment industry is particularly promising, growing at over 13% to reach 1.5 trillion INR in 2017, and digital has been one of its key growth drivers.

MICA, being a premier management institute that integrates design, management and creativity unlike any other institute, is keen to address some of the key opportunities and challenges brought forth by the digital revolution in the Indian scenario.

Dr. Shailendra Raj Mehta
President and Director, MICA

Dean's Message

The global trends in Media and Entertainment sector are rooted in digital technology and platforms, increasingly driven by locally and globally diverse consumer preferences. There is a great opportunity for local language and culture specific appropriate content innovations, and usage of digitally enabled platforms relevant for diverse audience connect around the world.

Media and Entertainment companies are developing and integrating digital strategies and story telling in order to connect better with digitally-enabled consumers for meaningful experiences and long-term relationship.

MICA has been one of the first academic institutes to recognise the disruption and promise of the digital revolution and associated transformation by incorporating the subject learning in school curriculum, as well as develop a business management specialisation in this area.

In addition to business management, strategic marketing, brand management, marketing analytics, corporate and culture communication subjects, the institute now offers a specialization in Digital Communication Management as part of its two year Post Graduate Diploma in Management - Communications programme. Another shorter online Post Graduate Certificate Programme in Digital Marketing and Communication is also offered regularly.

These courses give students a holistic understanding of the digital environment, and they learn about the various digital companies and platforms, strategies, marketing, and the latest digital innovations in order to gain a thorough grounding of consumer insight mining - critical in learning the most effective ways of connecting industry and consumers.

MICA has also launched another timely specialisation in Media and Entertainment Management, an industry that is particularly impacted by the digital disruption and is an increasingly attractive career path for the next generation creative and analytical managers and leaders.

MICA organised 5th International Communications Management Conference (ICMC) themed on 'Media & Entertainment: Disruptions and Beyond' in January 2018. We are also planning to launch a Behavioral Lab in collaboration with the US-based and Indian educational institutions which will focus on experimental and empirical research areas such as experimental research, digital communication and marketing, sentiment analysis and consumer interface.

Through such creative and collaborative initiatives, MICA as an institute continues to remain at the forefront in addressing the needs of a complex, ever-changing market and consumer environment, and prepares our future leaders for digitally enabled tomorrow.

Preeti Shroff, PhD
Dean - MICA, School of Ideas

Foreword

Indian Media and Entertainment (M&E) Industry has been registering tremendous growth year on year. While the India's M&E industry is witnessing a massive transformation, the disruption seems like a go to word. Digital disruption has touched upon all aspects of the growth of the industry. While there are questions as to how the digitally enabled world is going to change the Indian M&E markets altogether; the country has started taking steady steps towards the world of Over the Top (OTT) platforms.

This report happened almost at the right time when the country's M&E industry has started having conversations about the future of digital domain, more importantly about the future of traditional media platforms in light of the emerging platforms. While OTT players are thriving to achieve the best, there was a need to understand the dynamics of each platform from consumption, content, cost, revenue and connections point of view.

Year 2017-18 was an eventful year for the digital domain. While growth of the digital domain recorded the highest percentage growth rate and it shall continue to do so in years to come, there have been many new entrants recognized over the last few years. The industry witnessed coexistence of international, national and regional players. This report has studied multiple data points from various sources to give a relatively clearer picture about how OTT space has been shaping up for India.

This report is the beginning of a journey, surely not the destination. There was a need to contemplate on how the OTT space is developing in the country. At the end platforms are all about content. The content is available in abundance. Technology has been leap frogging. Newer consumers are added every day to the ecosystem. Cutting edge resources make the ecosystem competitive. India is streaming at a high speed. We all are streaming content all the time. This report gives you an exposure to which platform is consumed how much compared to the other.

Darshan Ashwin Trivedi
Ph.D

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Darshan Ashwin Trivedi
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Preface

Binge-watching. The Collins English Dictionary has chosen binge-watch as its 2015 Word of the Year. Meaning "to watch a large number of television programs (especially all the shows from one series) in succession".

For me, the new-found popularity of this term sums up the meteoric rise of OTT platforms in India. Cheaper smartphones and 4G internet are often cited as the reason behind growth of on-demand streaming platforms and obviously so. But I believe, there's more to this trend than just this.

CONTENT CREATION HAS BECOME CHEAP AND EASY. It is no more the prerogative of production studios with large budgets and expensive equipment. Anybody with a smart phone with a few editing apps can produce and create content. Even the professional equipment has become inexpensive and easier to handle. This has given rise to a huge variety of content creators at the bottom of the pyramid.

PUBLISHING VIDEOS IS NOT A CHALLENGE ANY LONGER. YouTube, Facebook and other social media platforms offer a large audience and open forum for any likable content. There are plenty of amateur or semi-professional videos on these platforms which have garnered millions of views.

THE AUDIENCE IS SPOILT FOR CHOICE. The unprece- dented amount of content creators are pro- ducing an extraordinary volume of video content on a record variety of topics in every conceivable language. There are music videos, standup gigs, DIYs, Tech & Fashion tips, Education and Training videos available and free. All of this content is available on-demand consistently pushing the envelope of TV programs.

The audience is ready to take control. It is now for the media networks and production studios to decide if they are ready to adapt to this brave new world. The OTT platforms with sophisticated streaming technology and vibrant content mix is their comeback.

This extensive research report, the first of its kind, will deliver insights into the rapidly evolving OTT space. Hope the read proves as rewarding for the reader as it has been for the entire research team.

Chirag Dagli
Director - Communication Crafts

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or **click here**



THE DIGITAL DISRUPTION IN THE MEDIA & ENTERTAINMENT INDUSTRY

Global media and entertainment industry has seen swift changes over the years. The digital disruption has changed the way we experience content. Print, Radio, Television, Cinema, Games, Events and Music: all of these giant industries are experiencing a digital transformation. And since the content distribution and consumption for all of these industries is also moving to digital platforms, the resultant convergence is unprecedented.

Impact of a changed new world

As per a World Economic Forum's report the global middle class will grow to an estimated 4.9 billion by 2030, creating a demand for new media services focused on convenience, education, premium content and video-on-demand; particularly in emeging economies.

The rapid urbanization is contributing to an incre- ased demand for offerings designed with people's commutes and busy work lives in mind[1]. While the ageing world population is demanding entertainment aimed for older people, The millennials are preferring services that offer convenience, memorable experience and flexible access to content.

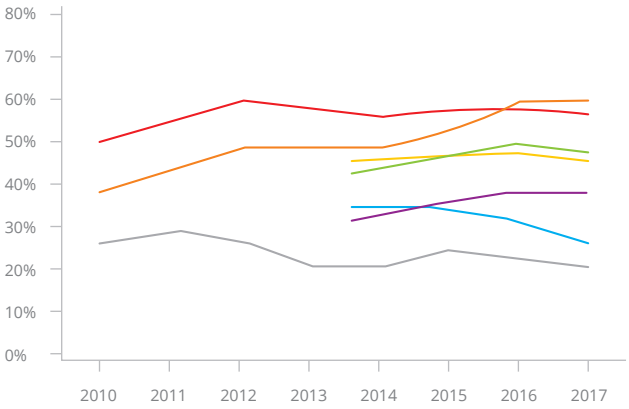
The changing rules of the game

Plain old cable TV viewing is outdated, with most shows seeing flat or no growth and many declining. As opposed to this, platforms like Netflix are rapidly gaining popularity.

A report from Ericsson reveals that massive changes occurring in TV content consumption. The study found that 70% of the consumers now watch TV content and videos on a smartphone, which is double the percentage from just five years ago. Ericsson predicts that by 2020, just 10% of people will watch TV only on a traditional screen.

The growing access to a myriad of devices, such as smartphones, smart speakers, connected cars and connected homes, enables people to be online anywhere and anytime, consuming content on-the-go. It is this fundamental shift in consumer behavior and technological advancement that's driving the rapid growth of music and video streaming.

Changing consumer attitudes to TV and media

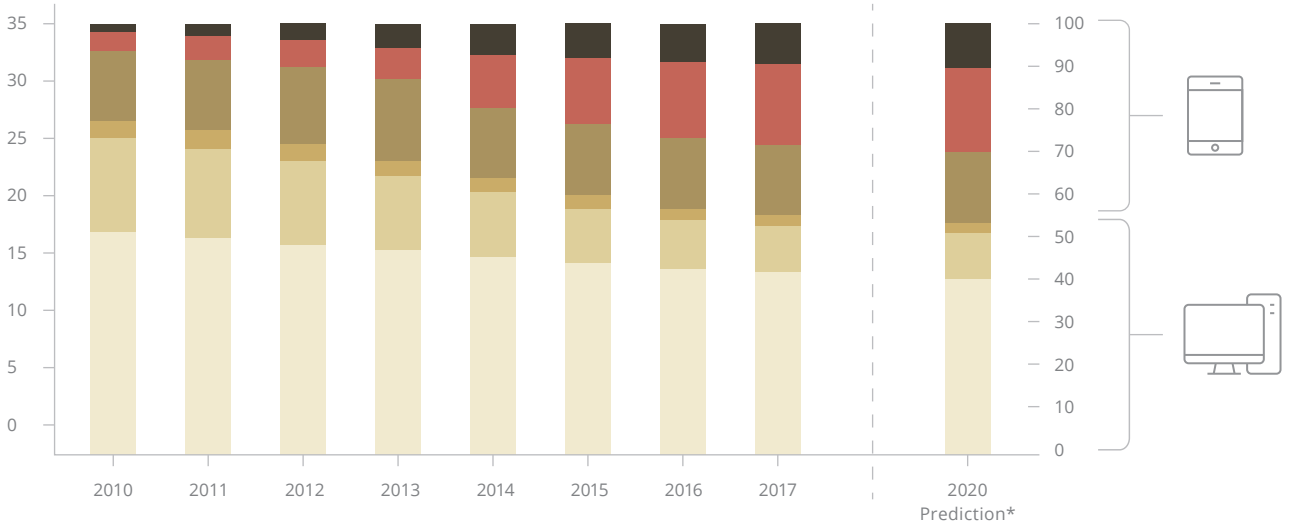


Source: Ericsson ConsumerLab. TV and Media, 2017

Base: Population aged 16-69 that watches TV/Video at least weekly and has broadband at home, in Brazil, Canada, China, Germany, India. Italy, Russia, South Korea, Spain, Sweden, Taiwan, the UK and the US.

[1]Four Digital Trends Reshaping the Media Industry (Rep.). (n.d.). Retrieved August 24, 2018, from The World Economic Forum website.

Device share and average number of viewing hours per week, with prediction* for 2020



*based on best-fit regression analysis

Source: Ericsson ConsumerLab, TV and Media, 2017

Base: Population aged 16-69 that watches TV/video at least weekly and has broadband at home, in Brazil, Canada, China, Germany, India, Italy, Russia, South Korea, Spain, Sweden, Taiwan, the UK and the US

Ericsson Consumer Lab predicts that by 2020 half of all TV and video viewing will be done on a mobile screen - an 85% increase since 2010. 25% will be exclusively on smartphones, which is an increase of almost 160 percent since 2010. Total viewing time is also set to increase, reaching approximately 31 hours per week by 2020 - roughly an hour more than today[2].

The report clearly points towards an increased need for mobile- friendly content, higher network demands and opportunities for new revenue streams.

The global smart phone ownership is expected to reach an incredible 4.6 billion by 2019.

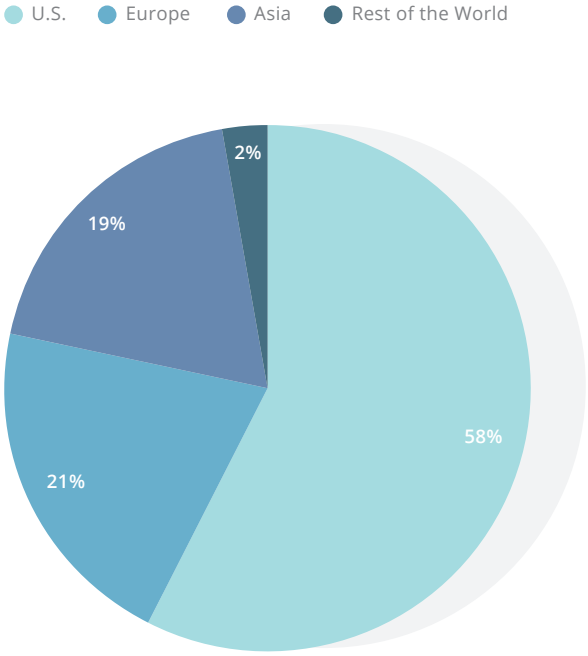
[2]TV and Media 2017 (Rep.). (2017). Retrieved August 24, 2018, from Ericsson website.

THE GLOBAL OTT LANDSCAPE

With the evolution of consumer preferences and advancing digital technology, the world has seen emergence of new entertainment content platforms across the globe.

U.S. accounts for 58% of OTT viewing,

followed by Europe with 21%, Asia with 19% and the rest of the world with 2%[3]



Prominent players in the global over-the-top (OTT) market include FilmOn, Hulu, Roku, Home Box Office, Direct TV Now, Amazon.com, Apple, Facebook, Google and Netflix[4]. The phenomenal success of these platforms is moving the viewers from TV based to mobile based consumption. OTT platforms are specifically popular in younger generation.

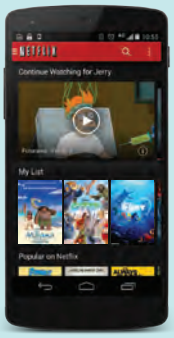
The streaming giant Netflix spent $6 billion on content in 2017 alone. It's already at 100 million subscribers and has committed to spending $20 billion on new content in the future[5]. Netflix and Amazon Prime share a large piece of the global OTT pie with viewers in 200 countries[6]. Amazon's biggest advantage is an already established consumer base across the world. Hulu which provides content in English and Japanese, is confined to USA and Japan[7].

China is not far behind in OTT consumption. Tencent Video has 137 million daily active users on mobile devices. It claims to be China's largest online video platform[8]. With its plans to invest heavily in the platform and a policy to aggressively acquire content[9], Tencent will soon be a major competitor for the global players.

Video streaming revenue is also growing at a staggering rate. According to a report by Research and Markets, global video streaming revenue is predicted to reach an incredible $70.05 billion by 2021, as consumers continue to embrace pay TV and OTT solutions for streaming videos. Moving forward, OTT will experience a substantial growth rate due to the increasing adoption of digital platforms by marketers[10].

Case in Point - Disney

Disney had a distribution deal with the VoD giant Netflix which it eventually broke away from after realizing the potential of OTT platforms. Disney now plans to launch its own streaming platform by 2019. The historic buyout of 21st Century Fox's entertainment assets, including the Fox Movie and Television Studios and a share of Hulu, will allow Disney to increase its television production to provide exclusive content on its forthcoming streaming offering.



[3]Lafayette, J. (2018, January 4). Global OTT Streaming Video Viewing Doubled Study. Retrieved August 24, 2018. | [4]Researchmarket24.com. (2018, February 22). Global Over-The-Top (OTT) Market Expected growth due to Growing Penetration of High Speed Internet Across Developing Countries [Press release]. Retrieved August 24, 2018. | [5]Koetsier, J. (2017, September 29). OTT revolution: Winning in an everything streaming, all the time, everywhere world. Retrieved August 24, 2018. | [6]Stelter, B. (2016, January 6). Countries where Netflix is now available. Retrieved August 24, 2018. | [7]Why can't I use Hulu internationally? (2018, April 27). Retrieved August 24, 2018. | [8]McDonald, A. (2018, March 19). China's TenCent Video reaches 62.6 million subscribers. Retrieved August 24, 2018. | [9]Jiang, S. (2018, March 21). Tencent to invest more in video, payment after profit beats estimates. Retrieved August 24, 2018 | [10]Bludov, S. (2017, December 11). 2017 Trends in Media & Entertainment: What Do They Mean for the Future? Retrieved August 24, 2018

Let's **Look At The Indian Scenario**

Media and Entertainment industry of India is rather small compared to the global markets. Indian M&E market is just USD 22.7 billion but has a high growth rate of 13%.

India's 1.35 billion consumers, the growing internet penetration & speed, and the improving smartphone penetration are attracting many global players.

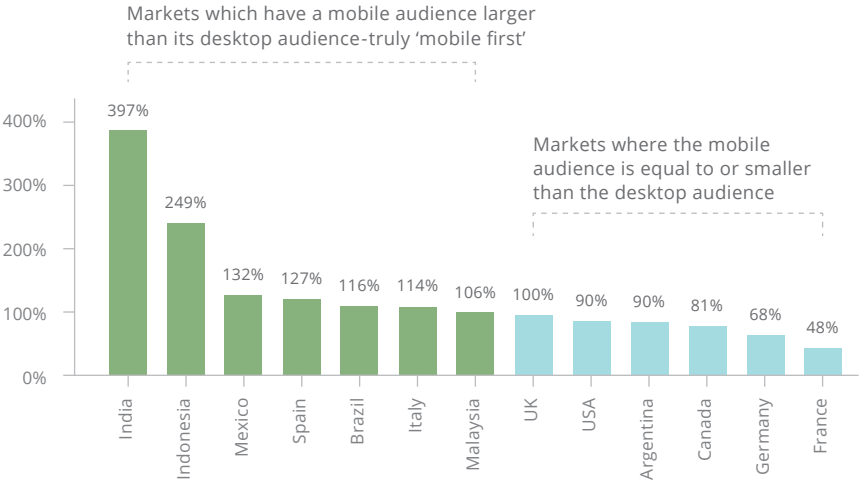
Indian OTT ecosystem is now far more competitive with major global players signing content licensing deals with Indian content generators.

As per EY's Digital Opportunity 2017 report entertainment is the highest searched category con- tributing to 31% of all searches. Within entertainment category, videos and music take away 90% of the weightage. The video viewing audience in India is growing at a CAGR of 13%.

This rapid growth of video consumption has created an opportunity for international studios and content owners to generate additional revenue. By 2020, India is expected to become the second largest video viewing audience globally.

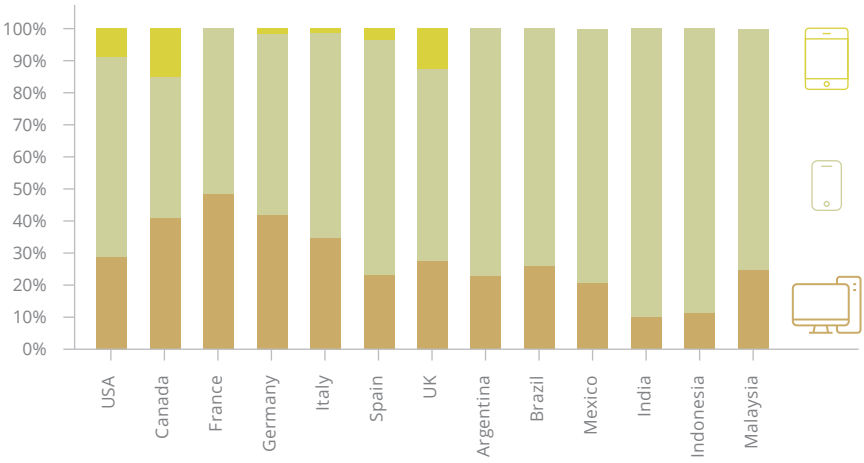






As per ComScore's report Global Digital Future in Focus, Indian has seen a 397% hike in its mobile audience, much faster than that of developed countries like India, UK, USA and France.

Desktop audience vs Mobile audience



Smartphone has emerged as the most preferred device across the world. Interestingly, India has the highest share in terms of total minutes consumed followed by Indonesia and Mexico, all of which are developing markets.

Source: ComScore 2018


Jio



THE JIO EFFECT

App Annie registered a rapid growth in data consumption due to the introduction of Reliance Jio 4G network in September 2016. The Jio launch disrupted the telecom market with its affordable data packages. Eventually all major carriers had to offer cheap data packages. The launch of Jio 4G network led to six times more video consumption in the first half of 2017.This has created a number of new entertainment powerhouses. **Hotstar is now one of the most used video streaming apps in the world, driven almost entirely by its vast Indian audience.**



Reliance Jio has invested INR 700 billion to acquire 4G spectrum, taking their network reach to 600,000 villages in India.

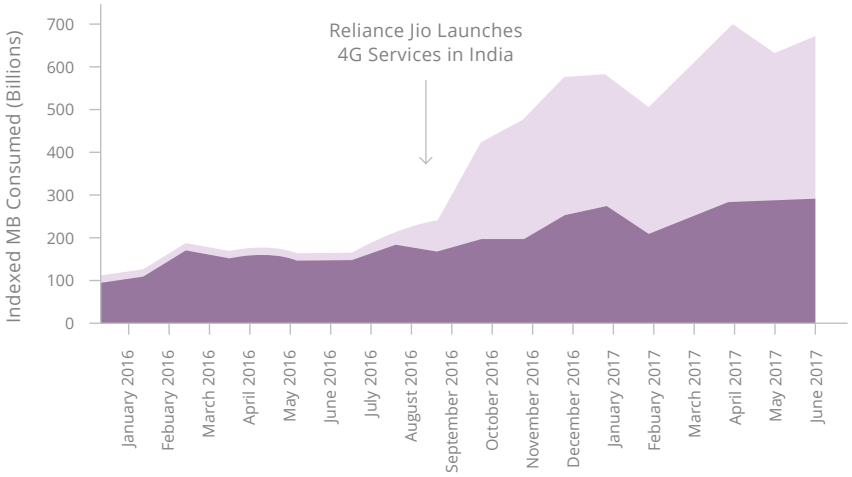
4G is expected to contribute around 58% of the mobile data traffic in India by 2020.

The Digital India initiative by the government is also expected to be instrumental in driving the demand for 4G. Over the next 3 years the government plans to invest INR 70 billion for 4G rollout.

India overtook USA to become the number 2 country by downloads in 2017. As per App Annie, app usage grew rapidly in India, driven by the introduction of subsidized, unlimited 4G access by Jio in September 2016. The same can be corroborated by the data provided by Deloitte analysis which states that smartphone penetration will reach 58% by 2020.

Total MB Consumed in India*

Entertainment Apps

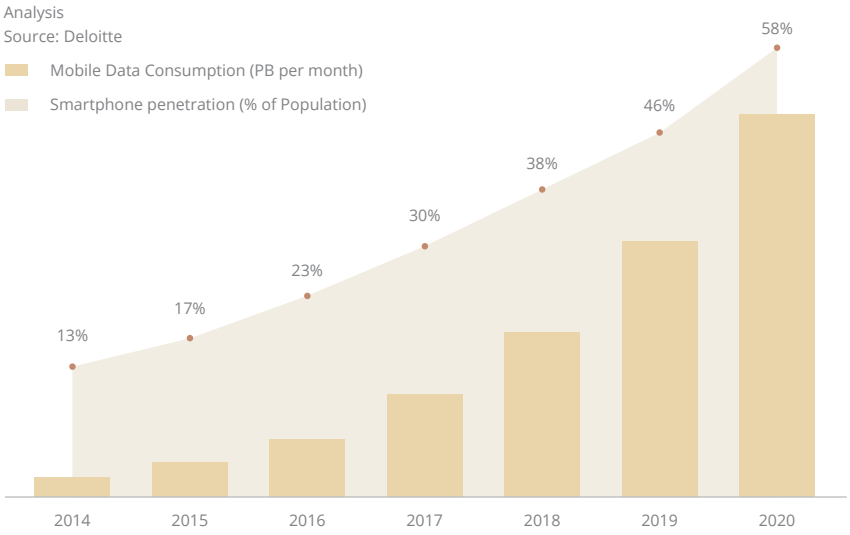


*On Android phone Source: App Annie, 2017

Mobile Data Usage

Wi-Fi Data Usage

Projected smartphone penetration and mobile data consumption (In PB per month) for India.



The competition is just hotting up

With internet dark areas catching up with first time internet usage, the next wave of growth in India's internet population will come from tier II and tier III cities. With 22 languages, 450 plus dialects, India has a unique positioning. Currently 45% of the users consume regional language content and this percentage is expected to increase with the growth of internet users.

One of the key challenges for large players is this regional diversity and preference for local language content. Global players like Netflix and Amazon have started investing in regions with low per capita income with curated local content. The growth will be supplemented with low-cost smart phones, low rates of data plans, increased adoption and awareness in rural India.

This coupled with the Indian Government's keen interest to support digital boom, will show tremendous growth in the sector in coming years. Video viewing habits have been redefined by the OTT video ecosystem and all stakeholders are trying to create footprints across the value chain to be pertinent. Investments in advanced technologies will enable automation, high quality content production and enhanced user experience. Indian Media and Entertainment industry is on the verge of exploding with numerous options, possibilities and opportunities.


BETRAYAL IS CLOSE
GHOUL
A NETFLIX ORIGINAL SERIES
ALL EPISODES
24 AUGUST
NETFLIX


PRIME ORIGINAL
COMICSTAAN
THE FUTURE LOOKS FUNNY
NEW SERIES
JULY 13
amazon
prime video

INDIA'S DIGITAL CONTENT CONSUMPTION LANDSCAPE

A decade back, "Watching TV" meant sitting in front of a screen, waiting for your favourite program to begin at a set time. But with the rapid development of technology coupled with the growth of video-on demand (VoD) options, viewers can now stream content from either a traditional TV package or an online source. VoD platforms have created extensive opportunities for consumers who now have greater control over what, when and how they watch content.

The number of self-reported VoD viewers is significant. As per an online study conducted by Nielsen in 61 countries it was found that nearly two-thirds of global respondents (65%) watch some form of VoD programming, which includes long and short-form content[1]. The key insights for platform owners are the flexibility of mapping the audiences through trillions of interactions, using advanced techniques of AI and Machine Learnings for smart recommendations and marketing. The ecosystem is for the first time keen to look at universal data against sample data. Media & Entertainment content is at the cusp of Art and Technology, Quality and Quantity, Message and Data; these new possibilities have changed the way M&E industry functions.

[1]Nielsen Global Video on Demand (Rep.). (2016, March). Retrieved August 24, 2018, from Nielsen website.

A brief

OVERVIEW OF INDIA'S INTERNET POPULATION

By December 2017, the internet user base in India was 445.96 million (2nd highest in the world only behind China). India's overall internet penetration was 34% by December 2017[2]. The urban internet penetration was 76.4% against only 14% penetration in rural India.

Out of the total internet users in India, 81% (362.87 million) access internet via broadband and 95% (424.76 million) access it wirelessly. 70% (313.92 million) of the total internet users are urban.

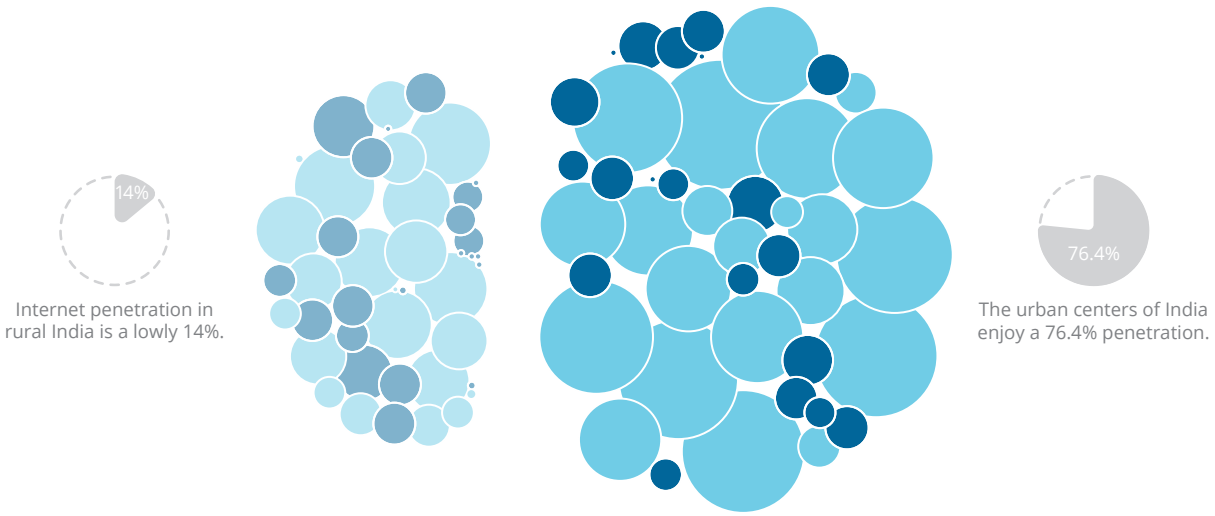
The lightning fast growth of first time internet users is the result of the influx of cheap mobile devices coupled with attractive low-cost data plans both in rural and urban areas. The new generation of internet in India is high speed, broadband and wireless.

Uttar Pradesh had the highest number of internet subscriber base with 19.46 million users in rural and 32.68 million in urban areas. While rural areas of Mumbai had the lowest user base with only 0.65 million with Himachal Pradesh having lowest user base in Urban areas 1.88 million.

Rural Users

132.03 Million
Only 30% of the total internet users live in the rural area in spite of having close to 70% of nation's population.

313.90 Million
About 70% of the total internet users live in the urban area.



India's internet population, December 2017

Narrowband(Rural)
Narrowband(Urban)
Broadband(Rural)
Broadband(Urban)

Source: The Indian Telecom Services Performance Indicators December, 2017

[2]The Indian Telecom Services Performance Indicators December, 2017

India's digital audience comprises predominantly mobile device users

In March 2018, the total unique visitors across digital platforms were 273.3 million. A massive 92% of unique visitors are mobile device users. The highest unique visitors are from the age group 15-24[3].

Around 88% of the total female unique visitors visited internet though mobiles, which is lesser than male visitors.



Total Unique Visitors	User Age Group	Gender 65.21% Male - 34.79% Female	Access Point 92.29% Mobile - 7.71% Other
Total Users 273.30 Million	15 to 24 105.60 Million	Male - 71.17 Million	Mobile - 66.05 Million
		Female - 34.43 Million	Mobile - 30.18 Million
	25 to 34 84.61 Million	Male - 59.81 Million	Mobile - 57.94 Million
		Female - 24.80 Million	Mobile - 23.93 Million
	35 to 44 43.75 Million	Male - 26.31 Million	Mobile - 25.41 Million
		Female - 17.44 Million	Mobile - 16.92 Million
	45 + 33.42 Million	Male - 19.40 Million	Mobile - 18.51 Million
		Female - 14.02 Million	Mobile - 13.29 Million

Total Digital Visitors across digital platforms, March 2018

Data Source: ComScore MMX Multi-Platform Report, March 2018

[3]The Data is extracted from the ComScore Dashboard based on TUVs tagged. The data source is tagged to a multiplatform on Digital space in India for the universe type of desktop above age 6 years and total mobile above age of 18 years as on March 2018.

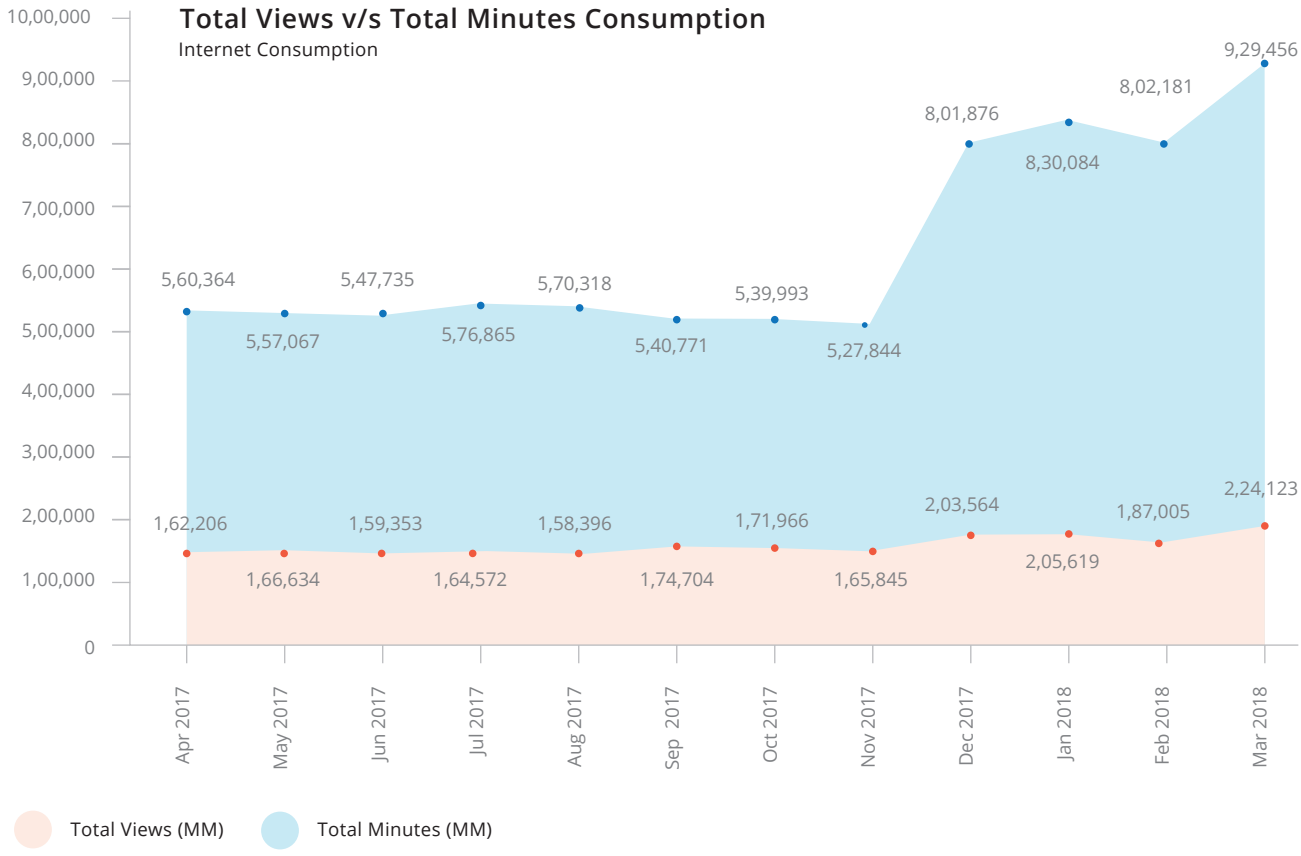
Everybody loves entertainment content

By March 2018, out of the total mobile based digital users 95% visited for entertainment purpose. This figure was 91% in the March of previous year. This shows how entertainment content consumption is an extremely popular activity for digital users.

Total Unique Visitors/Viewers (000) on Mobile Platform

	Mar-2017	Mar-2018	% Change
Total Internet Audience	169,247	252,227	49
Entertainment	153,989	240,134	56

Data Source: comScore MMX Mobile Metrix Report, March 2018



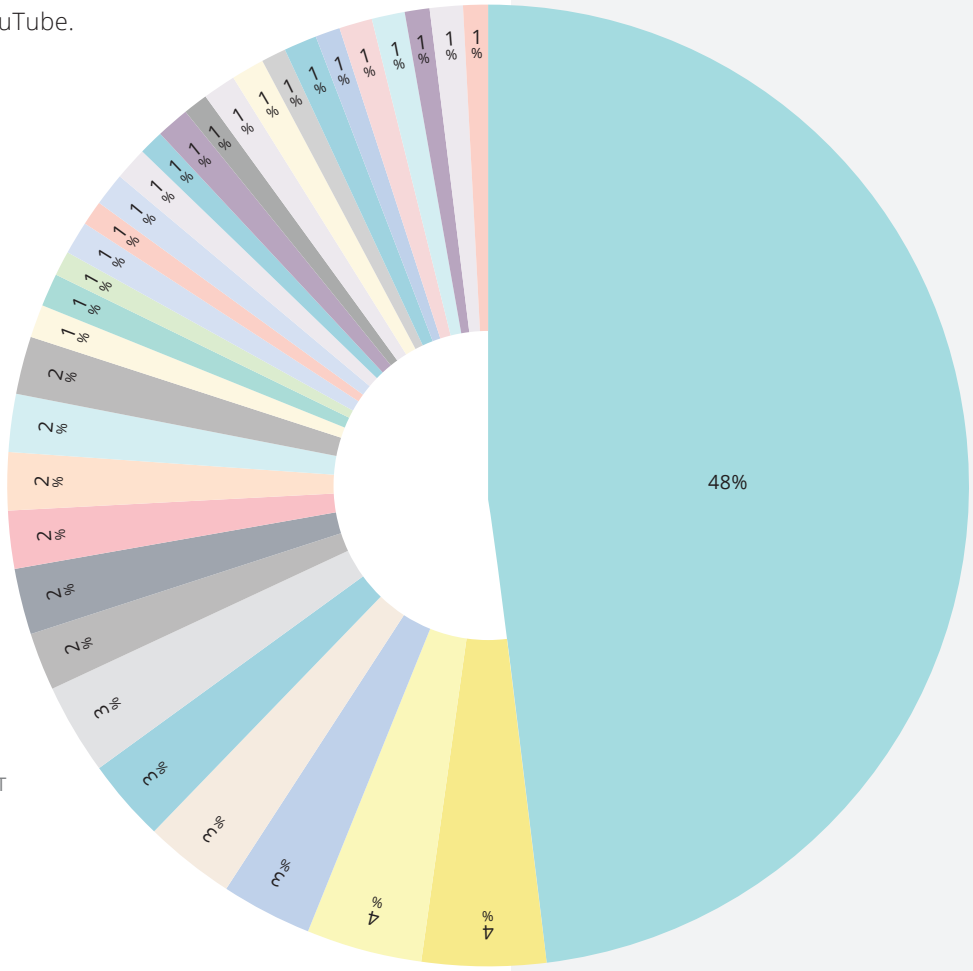
Data Source: comScore MMX Multi-Platform Report, March 2018

In the chart above, it is evident that both total views and total minutes consumed have increased year on year. There is a steep increase in total minutes consumed in November 2017. This increase is now famously known as the JIO impact.



Media & entertainment entities on digital space ranked by total number of unique visitors

The market leader for India is clearly YouTube, followed by Indian television networks owned Hotstar and Voot. India prefers to consume content on AVOD platform YouTube.



- YOUTUBE.COM
- GAANA.COM
- YOUTU.BE
- VOOT.COM
- STAR INDIA
- IMDB
- FILMIBEAT.COM
- CBS INTERACTIVE
- SONY CRACKLE
- ZEE5.COM
- PAGALWORLD.INFO
- NDTV MOVIES
- INDIANEXPRESS ENTERTAINMENT
- DESIMARTINI
- VEVO
- COMCAST NBCUNIVERSAL
- MR-JATT.ORG
- BANDSINTOWN AMPLIFIED
- NETFLIX INC.
- SONY ENTERTAINMENT NETWORK - MULTISCREEN MEDIA
- VICE MEDIA
- HUNGAMA DIGITAL MEDIA ENTERTAINMENT PVT. LTD.
- STARMAKERSTUDIOS.COM
- BOLLYWOODLIFE
- MUSICAL.LY
- DAILYMOTION.COM
- WORLDFREEMOVIE4U.COM
- MOVIERULZFREE.COM
- WARNER MUSIC
- OZEE.COM
- SAAVN GROUP
- SOUNDCLOUD.COM
- BOLLYWOOD BHASKAR

Content

Offering

The nature of content on YouTube India has evolved over time, according to Satya Raghavan, YouTube India's head of entertainment. Until 2013, YouTube was dominated by traditional content put out by movie studios, TV news channels and music labels. 2014 saw a drastic change with the introduction of fresh innovative content created by channels like The Viral Fever (TVF)[7] and All India Bakchod (AIB)[8] based in metros like Mumbai and Delhi. Beauty and how-to videos also gained popularity. Starting 2016, vernacular content in Marathi, Bengali etc. gained traction, and so did technology videos and web series[9].

62% of content consumed on YouTube is short form content[10]. YouTube has shot up the popularity of verticals such as beauty and fashion, comedy and entertainment, food[11], technology, and independent music. Comedy content is particularly effective, with creators raking 100K to 500K views when they release content on YouTube. Such shows have also attracted advertisers' attention thus increasing the avenues of monetization.

By 2017, the regional viewership on YouTube India has tripled, with Hindi, Telugu, Tamil, Kannada, and Malayalam content being watched by millions of viewers.

As a result, regional language content creators are on the rise too[12]. The top 10 regional YouTube channels in India have subscriber bases ranging from 300K to over 800K. Such content has also found an audience among the Indian diaspora. YouTube India is presently attempting to understand the nature of content that works in various regional markets. For instance, it has observed that Punjab prefers music while Bengal prefers movies[13].

SNIPPETS

Launched
May 7th 2008 (India Launch)

Owned by
Google (Alphabet Inc.)

Headquarter
San Bruno, California, United States

Google Play Store Downloads
1 billion+[1]

Unique Users (Mar 18)
229[2] million

Average Minutes/visitor
9.9[3]

Popularity Rankings
YouTube[4]
1st - Monthly Active Users,
8th - Downloads and
1st - Time Spent

Popularity Rankings
YouTube Go[5]
13th - Monthly Active Users,
18th - Downloads and
11th - Time Spent

YouTube Kids[6]
15th - Monthly Active Users,
15th - Downloads and
10th - Time Spent

Country Focus
Asia Pacific is the second largest market for YouTube following Europe. (Asia Pacific 23.3%, Europe 29.9%, Latin America 18.3%, Middle East - Africa 14.0%, North America-14.5%)

Revenue Model
AVOD (Advertising Video on Demand)
SVOD (Subscription Video on Demand)

[1]YouTube - Apps on Google Play. (2018, May 17). Retrieved May 20, 2018.
[2]Source: ComScore MMX Multi-Platform Report, March 2018
[3]Source: ComScore MMX Multi-Platform Report, March 2018
[4]Re-imagining India's M&E Sector (March 2018, p. 129, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.
[5]Re-imagining India's M&E Sector (March 2018, p. 129, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.
[6]Re-imagining India's M&E Sector (March 2018, p. 129, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.
[7]Source: ComScore MMX Multi-Platform Report, March 2018
[8]The Viral Fever is one of India's leading online entertainment company.
[9]All India Bakchod is an Indian comedy sketch group
[10]Rajmohan, S. (2018, April 23). On YouTube's India journey. The Hindu. Retrieved May 10, 2018.
[11]Re-imagining India's M&E Sector (March 2018, p. 108, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.
[12]Mitter, S. (2018, March 26). YouTube monthly user base touches 225 million in India, reaches 80 pc of internet population. Retrieved May 10, 2018.
[13]Rise of regional language TV channels & OTT platforms. (2018, March 12). Retrieved May 10, 2018.

Today, music content rakes in the highest views (over 3 billion), followed by entertainment (2.4 billion) and kids (1.3 billion)[14]. YouTube India has over 300 channels with one million subscribers[15]. The Top 10 YouTube channels in India are largely music (e.g. T-Series[16], Filmi Gaane[17]) or television (Zee TV[18], SAB TV[19]) platforms . Regional content features in this list with Wave Music, the leading Bhojpuri record label in India. Likewise, the presence of ChuChu TV Nursery Rhymes & Kids Songs is testament to the tremendous popularity of kids' content online.

India has over 200 YouTube channels that have hit the 1 million+ subscriber mark, out of which 145 did so in 2017. Of the 200, 80 are original content channels (unlike brand-led ones)[21]. There are close to 100 web series that are live, with south India alone contributing 40% of them, and about two dozen more in the works[22]. Reviewing over 130+ top Indian web series playlists on YouTube, Vidooly[23] compiled a list of top web-series in India as on November 2017 .

Top 10 YouTube Channels in India as on April 10th, 2018

Channel Title	Uploads	Subcribers	Video Views
T-Series	12.3K	44.6 million	37,228 million
SET India	25.2K	23.3 million	17,663 million
Zeetv	73.5K	13.5 million	15,323 million
Wave Music	15.5K	10.7 million	8087 million
SAB TV	18.02K	7.9 million	7562 million
ChuChu TV Nursery Rhymes & Kids Songs	0.22K	17.01 million	13,832 million
Filmi Gaane	4.9K	9.7 million	4649 million
Speed Records	5.1K	10.7 million	6272 million
Color TV	20.7K	9.6 million	6570 million
Gaane Sune Ansune	1.9K	5.9 million	3226 million

Source: Social Blade[20]

Top 10 Web-Series in India as on November 2017

Channel Title	Web Series Title	Viewership
BeingIndian	Mumbai On	41.07 million
Shitty Ideas Trending	Men The Real Victims	36.86 million
TheViralFeverVideos	TVF's Permanent Roomates	31.32 million
YFilms	Sex Chat with Pappu & Papa	30.31 million
VB on the Web	Twisted	28.08 million
YFilms	Bang Baaja Baaraat	25.11 million
YFilms	Ladies Room	24.83 million
VB on the Web	Maaya	22.19 million
East India Comedy	EIC Vs Bollywood	21.69 million
TheViralFeverVideos	TVF Tripling	19.29 million

Source: Social Blade[24]

[14]IANS. (2017, November 08). Internet users in India mostly consume music content from YouTube and news updates from Facebook-Technology News, Firstpost. Retrieved May 10, 2018.
[15]Mitter, S. (2018, March 26). YouTube monthly user base touches 225 million in India, reaches 80 pc of internet population. Retrieved May 10, 2018.
[16]India's largest Music Label & Movie Studio.
[17]A Hindi film music platform owned by Shemaroo Entertainment Ltd., an established integrated media content house in India.
[18]An Indian cable and satellite television channel owned and operated by Zee Entertainment Enterprises.
[19]An Indian Hindi-language based general entertainment television channel owned by Sony Pictures Networks India.
[20]Top 250 YouTubers Channels in India - Socialblade YouTube Stats | YouTube Statistics. (n.d.). Retrieved May 20, 2018.
[21]Afaqs! news bureau. (2018, April 12). YouTube FanFest to be held across 5 cities in India. Retrieved May 10, 2018.
[22]Shankar, S. (2017, September 07). YouTube India is betting big on regional content - ETtech. Retrieved May 10, 2018.
[23]An online video analytics & marketing company
[24]Chandra, A. (2017, November). Most watched Indian Web series on YouTube. Retrieved May 20, 2018.

Independent content creators on such as Vidya Vox (Music)[25], Bhuvan Bam (BB Ki Vines)[26] have also garnered attention, with 80 of them crossing 1 million subscriber mark on the platform.

YouTube is the largest OTT company in the country and in many other territories[38]. While majority of the content on YouTube is uploaded by individuals, media corporations such as Vevo[39] and Hulu[40] also offer their content as part of the YouTube partnership program.

Other important features on the platform include:

• YouTube Red
Paid streaming subscription service exclusively for YouTube in the United States, Australia, Mexico, New Zealand, and South Korea.

• YouTube Creators
A benefits program that grants creators to access to new benefits, resources, and events with increased subscriber count.

• YouTube for Developers YouTube APIs[41] offered for building business on YouTube or enhancing apps with video content.

• YouTube Blogging

• YouTube Live
Live streaming

• YouTube Spotlight
Showcases the new and trending content around the world.

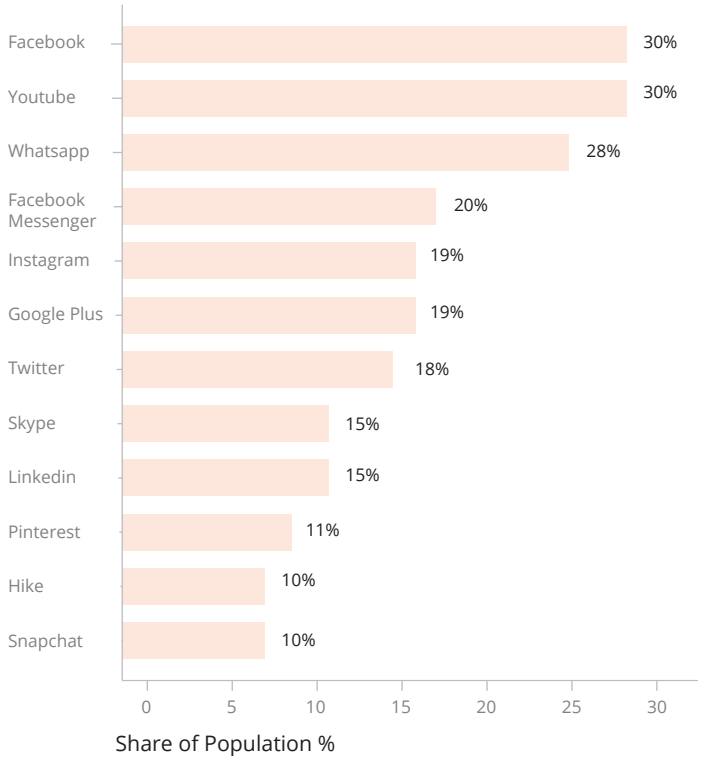
• Virtual Reality(VR)
Official VR channel for VR-ready videos on the platform.

Most Popular Content Creators on YouTube India, 2017

Channel Title	Genre	Subscriber Rise in 2017	Viewership
BB Ki Vines	Comedy	3.2 million	7.6 million[27]
Amit Bhadana	Comedy	2.1 million	6.5 million[28]
Technical Guruji	Tech	3.1 million	5.9 million[29]
Sandeep Maheshwari	Inspirational	2.3 million	5.2 million[30]
Ashish Chanchlani Vines	Comedy	2.1 million	4.7 million[31]
Vidya Vox	Music	2.5 million	4.3 million[32]
TsMadaan	Inspirational	1.7 million	4.2 million[33]
Nisha Madhulika	Food	1.8 million	4.1 million[34]
FactTechz	Mystery	2.5 million	3.9 million[35]
YourHealth	Health	2 million	3.4 million[36]

Source: afaqs!37 and official channel of the content creators

Penetration of leading social networks in India as of Q3 2017



[25]Vidya Iyer, better known by her stage name Vidya Vox, is an Indo-American YouTuber and singer.
[26]An Indian comedian, singer, and YouTube personality from Delhi, India known for his YouTube comedy channel BB Ki Vines.
[27]BB Ki Vines. (n.d.). Retrieved May 10, 2018.
[28]Amit Bhadana. (n.d.). Retrieved May 10, 2018.
[29]Technical Guruji. (n.d.). Retrieved May 10, 2018.
[30]Sandeep Maheshwari. (n.d.). Retrieved May 10, 2018.
[31]Ashish chanchlani vines. (n.d.). Retrieved May 10, 2018.
[32]Vidya Vox. (n.d.). Retrieved May 10, 2018.
[33]TsMadaan. (n.d.). Retrieved May 10, 2018.
[34]Nisha Madhulika. (n.d.). Retrieved May 10, 2018.
[35]FactTechz. (n.d.). Retrieved May 10, 2018.
[36]YourHealth. (n.d.). Retrieved May 20, 2018.
[37]Afaqs! news bureau. (2017, December 17). YouTube Rewind: Top 10 Indian Content Creators and Rising Stars, 2017. Retrieved August 27, 2018.
[38]Nath, V. S. (2017, February). OTT Video in India – Is Our Excitement Over-the-Top? Broadcast & CableSat. Retrieved May 10, 2018.
[39]An American multinational video hosting service.
[40]An American subscription video on demand service.
[41]Application Programming Interface

YouTube has over a billion users worldwide, amounting to one-third of the internet. One billion hours of content is viewed daily. YouTube is available in 88 countries and can be accessed in 76 languages[42]. There are upwards of 5,000 channels across the globe with more than 1 million subscribers[43].

YouTube is tremendously popular in India too, holding 30% penetration as on Q3 2017[44], with 80% of the total internet users in the country using the platform[45].

India is a more engaged market compared to the rest of the world. More than 65% of the viewers subscribe to channels, and 7 out of 10 viewers watch ads with the audio turned on. 60% of the viewership is clocked by non-metros, and almost 90% of all video consumption happens in local languages[46].

[42]YouTube for Press. (n.d.). Retrieved August 27, 2018.
[43]Weiss, G. (2018, March 26). YouTube Says It Now Reaches 80% Of All Internet Users In India. Retrieved May 10, 2018.
[44]Re-imagining India's M&E Sector (March 2018, p. 113, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.
[45]Indo-Asian News Service. (2018, March 24). YouTube Used By 80 Percent of Internet Users in India, Says Google.
[46]Mitter, S. (2018, March 26). YouTube monthly user base touches 225 million in India, reaches 80 pc of internet population. Retrieved May 10, 2018.

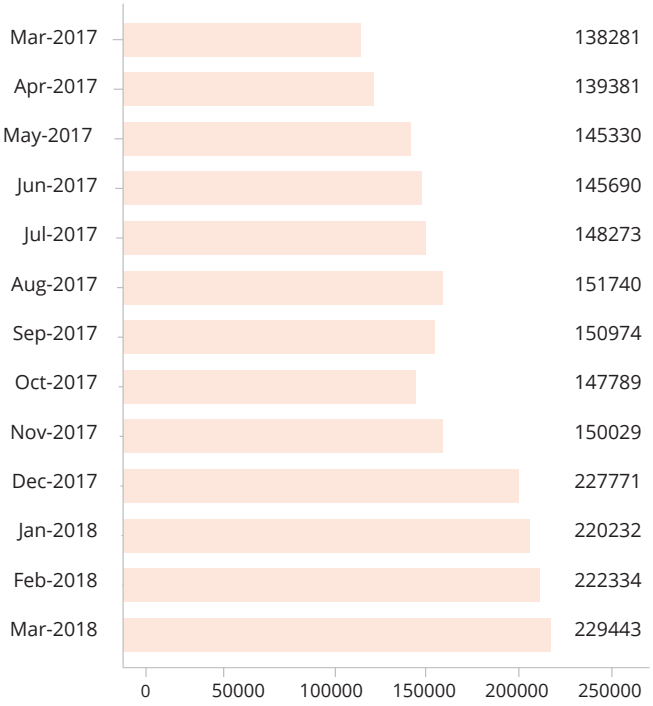
Key Measures of the Platform

YouTube had an astonishing 229 million total unique users in India in the month of March 2018 who spent over 128457.274 million minutes on the platform. This was a 66% jump since the previous year where the visitors stood at 138 million. Viewership shot up especially after November 2017. The total video streams per viewer also increased by 4.1% since May 2017.

Nearly 92% of the total digital popular in March 2018 were mobile users, whose usage has also jumped by 74% since March 2017. Mobile app usage almost doubled during this period.

Source: ComScore MMX % Change Media Trend Report, March 2018

YouTube Total Unique Visitors (000) across multi platform, March 2017 to March 2018

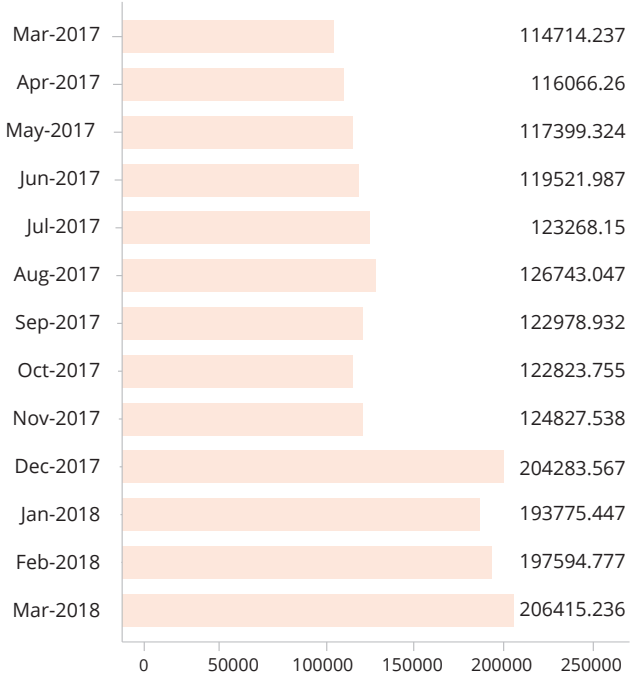


	Change in Total Unique Viewership Between March 2017 and 2018		
	Total Digital Population		
YOUTUBE .COM	Mar-2017	Mar-2018	% Change
	1,38,281	2,29,443	66
	Mobile		
	Mar-2017	Mar-2018	% Change
	1,22,125	2,12,648	74



YouTube Total Unique Visitors (000) across mobile app, March 2017 to March 2018

YouTube Total Unique Visitors (000)



Consumer Demographics

YouTube Audience, March 2018					
Males, Age Group	**TUV (000)**	**Mobile (000)**	**Females, Age Group**	**TUV (000)**	**Mobile (000)**
	741		6-14	1,040	
	64,280	57,326	15-24	30,632	27,511
	51,648	47,455	25-34	20,741	20,426
	21,423	20,993	34-44	13,691	13,691
	14,087	14,087	45+	11,159	11,159
All Males	**1,52,179**	**1,39,860**	**All Females**	**77,263**	**72,788**

Source: ComScore MMX Multi-Platform Demographic Report, March 2018

In March 2018, YouTube's audience share comprised of 66.32% males and 33.67% females, making YouTube a male skewed platform. The 15-34 age bracket is particularly active both for males and females. Female audiences exceed in the only in the age bracket of 6-14.



Ad Metrix

(Source: ComScore Desktop Media Overview Report, March 2018)

Top ad categories:
Online Media
Health
Consumer Goods
Education
Business Services

Most advertised on :
News/Information
Lifestyles
Corporate Presence
Services
Retail
MSN Video



New Features

YouTube Go is the redesigned version of the regular YouTube app optimized for users with poor connectivity or expensive data tariffs. The beta version of YouTube Go launched in India on April 5th 2017 and tested in 14 other countries before officially releasing on February 1st 2018 in over 130 nations including India. The app allows users to stream and download videos at multiple resolutions depending on their internet speed and device storage and lets them preview a video before downloading. It also prioritizes offline viewing and allows users to share downloaded videos locally without using up additional data. YouTube Go has 10 million downloads on Play Store[47] [48].

YouTube Kids, a family-friendly version of YouTube app for younger-children, was launched on November 9th 2017. It has parental control features and video filters as well as a Kid profiles feature which allows parents to create multiple profiles for their kids and segment out the type of content they would like to show kids from different age groups[49]. The developers also plan to introduce a new feature in the near future that gives parents the option to turn off algorithmically recommended videos and only display those suitable for children and handpicked by a team of curators[50]. YouTube Kids has 10 million downloads on Play Store[51].

Future Plans

YouTube India also plans to invest heavily in learning and education, do-it-yourself content after observing a huge demand especially from smaller towns.

YouTube plans to launch of Sponsor Button which allows users to pay creators by giving them INR 159 per month (USD 2.34 approx.). Sponsors get a badge and also a custom emoji while live-chatting with creators. Their comments also get played up in the comments section. In return, creators need to promise exclusive content to sponsors.

YouTube is testing YouTube stories, which is a Snapchat like 'Stories' feature for YouTube creators.

There is a possibility of YouTube Red launching in India in the near future[52].

YouTube FanFest celebrates the talent and diversity of Indian YouTube stars from across five Indian cities. The fest will feature live shows across various genres[53].

YouTube plans to deploy 10,000 moderators to address the issues of fake news and viral content and raise its credibility as an OTT platform[54].

Revenues

Revenue Estimates for YouTube.com in 2017	
Revenues : Advertising	INR 9 billion - INR 11 billion (USD 132 million to USD 161 million approx.)[55]

[47]Gartenberg, C. (2018, February 01). YouTube Go is launching in over 130 countries. Retrieved May 10, 2018.
[48]YouTube Go – Apps on Google Play. (2018, May 2). Retrieved May 20, 2018.
[49]Vikas, S. N. (2017, Nov 03). There's a lesson here for streaming startups companies: Pursuit of profit]. Retrieved from The Economic Times (Online).
[50]IANS. (2018, April 09). YouTube Kids to display videos hand-picked by curators - ETtech. Retrieved May 10, 2018.
[51]YouTube Kids - Apps on Google Play. (2018, May 18). Retrieved May 20, 2018.
[52]K, J. P. (2018, April 27). YouTube India to chase revenues with education app, sponsor button, and Stories feature. Retrieved May 10, 2018.
[53]Afaqs! news bureau. (2018, April 12). YouTube FanFest to be held across 5 cities in India. Retrieved May 10, 2018.
[54]YouTube to hire 10,000 moderators to pull down objectionable content. (2018, March 3). The Hindu. Retrieved May 10, 2018.
[55]K, J. P. (2018, April 27). YouTube India to chase revenues with education app, sponsor button, and Stories feature. Retrieved May 10, 2018.








NEW
MANDARIN
COURT

NETFLIX

Content

Original Content

291 Original Shows
Only one (Hindi Thriller - Sacred Games) is local. Other shows such as Selection Day, based on cricket, and Again, a supernatural detective series, have been announced.

Offering

1500+ syndicated content[6], 2500+ movies[7]. Compared to competing platforms, the number is low. Netflix's first Indian straight to streaming movie was Love Per Square Foot, by Ronnie Screwvala's film production house RSVP. It released in February 2018. Qaushiq Mukherjee's 2016 comedy Brahman Naman, was the first Netflix production in India.

Netflix's latest and much touted series Sacred Games has garnered critical acclaim as well as courted controversy for its content. It is the first homegrown mainstream series - streamed or (web) telecasted on TV - to feature scenes with full frontal nudity. The series holds the possibility to rewrite the rules of content as far as online streaming sites in India are concerned. It can work in two ways. The government could bring streaming content under the same set of laws dealing with the television content. Sacred Games could also bring about less self-censorship among the other content creators in lending authenticity to their content.

Netflix India features 4 languages- English, Bangla, Hindi and Tamil.

SNIPPETS

Launched
January 2016 (India)

Owned by
Netflix Inc.

Headquarter
Mumbai, Maharashtra (India operations)

Google Play Store Downloads
100 million+[1]

Subscribers
125 million (56.71 million in USA & 68.29 million internationally)[2]

Unique Users (Mar 18)
5.39 million

Reach
2%[3]

Average Minutes/visitor
43[4]

Popularity Rankings[5]
9th - Monthly Active Users,
14th - Downloads and
7th - Time Spent

Country Focus
Netflix has services in 190+ countries. It predominantly focuses on North America, Latin America and Europe. The Asia Pacific region is one of the smaller markets.

Revenue Model
SVOD (Subscription Video on Demand)

[1]Netflix. (2018, May 14). Retrieved May 21, 2018.
[2]Molla, R. (2018, January 22). Netflix now has nearly 118 million streaming subscribers globally. Retrieved May 11, 2018.
[3]Source: ComScore MMX Multi-Platform Report, March 2018
[4]Source: ComScore MMX Multi-Platform Report, March 2018
[5]As per App Annie's report on the top video OTT apps of 2017
[6]Figures are approximate. Source: Complete List of Netflix India TV Shows (updated daily). (2018, April 16). Retrieved May 11, 2018.
[7]Netflix India: List of Movies and TV Shows. (n.d.). Retrieved May 11, 2018.

A brief history of Netflix

Netflix started in 1997 with online movie rentals. Next year, it launched a DVD rental and sales site netflix.com and started a subscription service the year after. In 2007, Netflix introduced streaming of television shows and movies on personal computers and extended this facility to Blu-ray disc players and TV set-top boxes, gaming consoles and tablets in the next three years. Netflix's expansion to other territories began in 2010 as its digital footprints spread across Canada, Latin America, Europe and so on. By 2016, it was available worldwide.

Revenue

According to Statista, the company's annual revenue in 2017 amounted to 11.69 billion U.S. dollars, almost 10 times the revenue made in 2007[8]. The international streaming subscription business accounts for around 44% of Netflix's value[9].

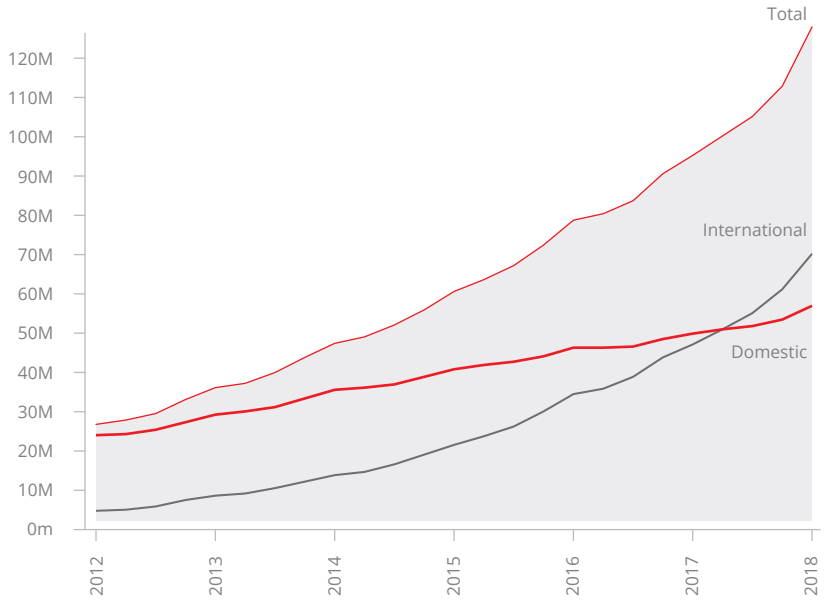
Netflix in India

India is a key subscription drivers for Netflix, with a potential customer base of 100 million[10] [11]. At the end of 2017, Netflix had 520,000 subscribers, according to IHS Markit[12] of which 6-8% pay for the services[13].

Netflix launched in India with an aim to serve international content to Indian audience, so it did not invest significantly in local content. It is gradually changing its approach on realizing that its competitors such as Amazon Prime India and Hotstar have gained a larger subscriber base with local productions[14].

Over 140 million hours of TV shows and movies is consumed daily on Netflix.

Netflix streaming subscribers



Reports suggest greater binge consumption of Netflix in India (3 days) compared to a global average of 4. 44% users state it was among the top five travel essentials[15]. Netflix is also viewed heavily on connected televisions, making up 34% of its viewing hours in India.

[8]Netflix: Revenue in 2017. (n.d.). Retrieved May 11, 2018.
[9]Trefis Team. (2017, December 12). What Is The Potential Upside To Netflix's International Streaming Business? Retrieved May 11, 2018.
[10]Chanchani, M., & Mahanta, V. (2018, February 26). India is a key part of international subscription growth: Netflix. The Economic Times ET Rise. Retrieved May 11, 2018.
[11]ET Bureau. (2018, February 24). Netflix's next 100-m users from India: Reed Hastings, Chairman, Netflix. The Economic Times. Retrieved May 11, 2018.
[12]Bengali, S. (2018, March 3). Big-budget TV meets Bollywood as Amazon and Netflix do battle in India. Los Angeles Times. Retrieved May 11, 2018.
[13]Bhatia, H. (2018, January 5). Netflix restricted to premium subscribers, Hotstar leads Indian OTT content market. ET Telecom. Retrieved May 11, 2018.
[14]Trefis Team. (2017, May 15). Here's How Netflix Is Looking To Drive Growth In India. Forbes. Retrieved May 11, 2018.
[15]The Hindu Net Desk. (2017, December 27). How India binge-watched Netflix in 2017. The Hindu. Retrieved May 11, 2018.

Netflix ended March 2018 with 5.3 million visitors and a reach of 2.0%. A 296% rise in one year. Netflix users engaged on the platform for an impressive average of 43 minutes.

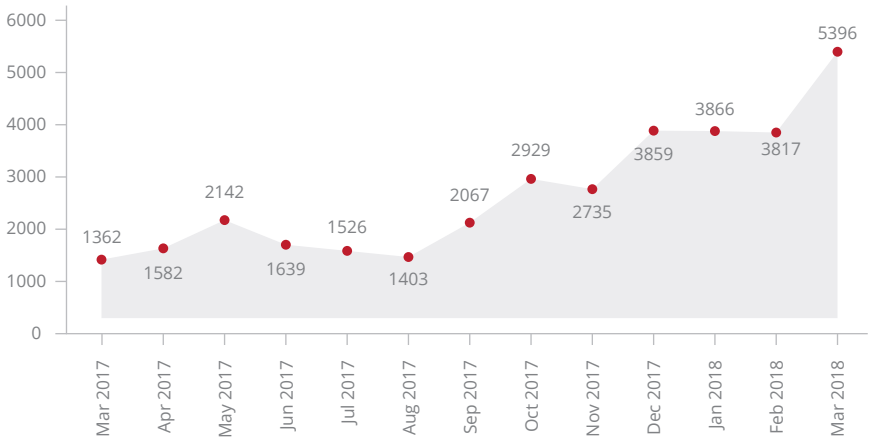
Total viewership was steady until September. 2017 after which it shot up. The binge watching of shows like Stranger Things, The Crown and Black Mirror and the release of Will Smith flick Bright have contributed to the increased viewership[16].

Netflix India has witnessed a tremendous surge of 839% in mobile consumption between March 2017 and March 2018. Viewership however has not grown to the same extent. Desktop visitors have grown at a slower rate compared to mobile.

Netflix India has a larger share of younger male audiences, particularly between the ages 15-24. Female viewers exceed males in the age brackets of 6-14 and 45+.

Key Measures of the Platform

Netflix Total Unique Visitors (000) across multi platform, March 2017 to March 2018



Source: ComScore MMX Multi-Platform Demographic Report, March 2018

Consumer Demographics

Netflix Audience, March 2018

Males, Age Group	TUV (000)	Total Mobile (000)	Females, Age Group	TUV (000)	Total Mobile (000)
6-14	18	-	6-14	27	-
15-24	1923	1180	15-24	796	603
25-34	976	611	25-34	454	382
35-44	566	534	35-44	424	409
45+	83	-	45+	128	-
All Males	**3568**	**2325**	**All Females**	**1829**	**1394**

Partnerships and Distributions

Netflix partnered with Green Gold Animation to launch its first kids' original animated series in India called Mighty Little Bheem, debuting in 2018. Netflix also partnered with Red Chillies Entertainment for a new multilingual Netflix original series based on the book Bard of Blood.

Netflix acquired the rights to stream SS Rajamouli's war epic Bahubali: The Beginning and Bahubali 2: The Conclusion for INR 255 million (USD 3.74 million approx.).

Netflix partnered with Tatasky in April 2018 through which Tatasky subscribers will be able to browse and access the entire Netflix service[17].

Netflix also has partnerships with Airtel, Videocon, and Vodafone.

Future Plans

Netflix plans to spend USD 8 billion (INR 544 billion approx.) globally on content in 2018, compared to the USD 6 billion (INR 408 billion) it spent in 2017[18]. It will create over 700 original shows. For India, it plans to add more than 100 hours of original content for India and is launching 5 new original shows - Leila, Ghoul, Crocodile, Selection Day, and Bard of Blood.

Netflix reportedly set aside INR 20 billion budget exclusively for acquiring content in India[19]

Revenue Estimates for Netflix

Total Revenues

USD 25.87 million (INR 1.76 billion approx.) estimated revenues from streaming[20]

[16]N, V. S. (2018, January 23). Netflix adds record 8.3M subscribers in Q4 2017 - ETtech. Retrieved May 18, 2018
[17]Re-imagining India's M&E Sector (March 2018, p. 117, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.
[18]Koblin, J. (2017, October 16). Netflix Says It Will Spend Up to $8 Billion on Content Next Year. The New York Times. Retrieved May 11, 2018.
[19]Exchange4Media News Service. (2017, April 18). Netflix to double investment in India in 2017, plans its first office in Mumbai. Retrieved May 11, 2018.
[20]Netflix: Streaming revenues in India 2020 | Statistic. (n.d.). Retrieved May 11, 2018.

POPULAR SHOWS[21]

13 Reasons Why
English - Mystery Drama; 1 Season - 13 Episodes



This American web television series is based on the 2007 novel of the same name by Jay Asher. The series is adapted by Brian Yorkey for Netflix. It revolves around the suicide of a girl who suffers a series of demoralizing circumstances brought on by select individuals at her school.

Orange is the New Black
English - Comedy Drama; 5 Seasons - 65 Episodes



The American web television series based on Piper Kerman's memoir, Orange Is the New Black: My Year in a Women's Prison (2010) is created by Jenji Kohan for Netflix. It revolves around a woman in her 30s living in New York City who is sentenced to 15 months in Litchfield Penitentiary, a minimum-security women's federal prison.

Narcos
English - Crime Drama; 3 Seasons - 30 Episodes



This American web television series is created and produced by Chris Brancato, Carlo Bernard, and Doug Miro. Set and filmed in Colombia, seasons one and two are based on the story of drug kingpin Pablo Escobar, who became a billionaire through the production and distribution of cocaine. Season three picks up after the fall of Escobar and continues to follow the Drug Enforcement Administration as they go up against the rise of the infamous Cali Cartel.

Marvel's The Defenders
English - Action Adventure; 1 Season - 8 Episodes



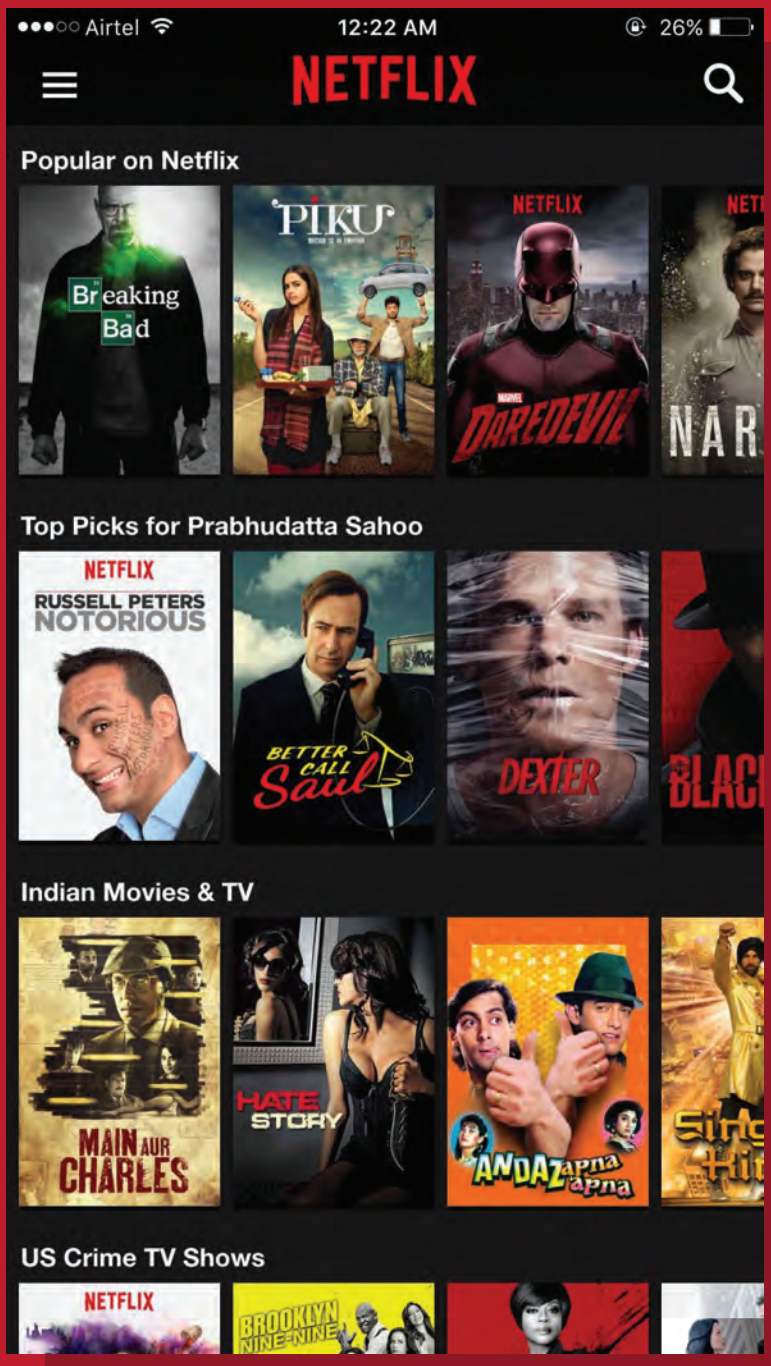
The American miniseries based on the Marvel comics and set in Marvel Cinematic Universe follows the vigilantes Daredevil, Jessica Jones, Luke Cage, and Iron Fist as they team up in New York City to fight a common enemy: The Hand. The show was created by Drew Goddard for Netflix.

Stranger Things
English - Science Fiction; 2 Seasons - 17 Episodes



This American horror web television series created, written, and directed by the Duffer Brothers is set in the fictional town of Hawkins, Indiana, in the 1980s. The first season focuses on the investigation into the disappearance of a young boy amid supernatural events occurring around the town.

[21]The Hindu Net Desk. (2017, December 27). How India binge-watched Netflix in 2017. The Hindu. Retrieved May 11, 2018, from http://www.thehindu.com/sci-tech/technology/internet/how-india-binge-watched-netflix-in-2017/article22288289.ece


Airtel
12:22 AM
26%
NETFLIX
Popular on Netflix
Breaking Bad
PIKU
NETFLIX
DAREDEVIL
Top Picks for Prabhudatta Sahoo
NETFLIX
RUSSELL PETERS
NOTORIOUS
BETTER CALL Saul
DEXTER
Indian Movies & TV
MAIN AUR CHARLES
HATE STORY
ANDAZ apna apna
US Crime TV Shows
NETFLIX
BROOKLYN NINE-NINE


closeup
presents
M bole toh!
Yehi Hai Alia ki Choice
hotstar
ORIGINALS


hotstar
Originals
CINEPLAY
JOB APPLICATION FORM
TYPECASTE
Shreyas Talpade as Mahipat Babruvahan
Postal Address:


hotstar
Originals
CINEPLAY
BOMBAY TALKIES



Content

Original Content

9 Originals (5 Hindi, 2 English, 1 Tamil, 1 Telugu[8])

Offering

50,000 hours[9] in total. With 1128 shows across 29 channels[10], 3000+ movies, 9 sports[11] and news content[12]. 9 languages are dished- Hindi, Bengali, Telugu, Malayalam, Tamil, Marathi, English, Kannada, and Gujarati[13].

The offering includes Star India channels (Star Plus, Nat Geo), HBO (Game of Thrones), ABC Studios (Grey's Anatomy[14]) and SHOWTIME (Twin Peaks[15]), and news-based episodic content from the website Scroll.in.

SNIPPETS

Launched
February 2015[1]

Owned by
Novi Digital Entertainment Pvt. Ltd. (Subsidiary of Star India Pvt Ltd[2])

Headquarter
Mumbai, Maharashtra

Total Downloads
170 million[3]

Google Play Store Downloads
100 million+[4]

Subscribers
75 million

Unique Users (Mar 18)
14.41[5] million

Reach
5.3%[6]

Average Minutes/visitor
9.9[7]

Popularity Rankings
2nd - Monthly Active Users,
1st - Downloads and
2nd - Time Spent

Country Focus
India

Revenue Model
AVOD (Advertising Video on Demand)
SVOD (Subscription Video on Demand)

[1]A beta version of 'hotstar.com' was launched in January 2015.
[2]Hotstar. (n.d.). Retrieved May 21, 2018.
[3]The India Watch Report 2018 (p. 1, Rep.). (2018). Mumbai, Maharashtra: Novi Digital Entertainment Private Limited. Retrieved May 18, 2018.
[4]Hotstar. (2018, May 21). Retrieved May 21, 2018.
[5]Source: ComScore MMX Multi-Platform Report, March 2018
[6]Source: ComScore MMX Multi-Platform Report, March 2018
[7]Source: ComScore MMX Multi-Platform Report, March 2018
[8]Of these, the Tamil comedy As I'm Suffering From Kadhal has been dubbed into Telugu and Hindi and have been considered as separate shows. The Telugu and Hindi dubbed versions are titled As I'm Suffering From Prema and As I'm Suffering From Pyaar respectively
[9]Hotstar. (n.d.). Retrieved May 21, 2018.
[10]The channels are as follows: 1) Star Plus 2) Star Jalsha 3) Star Vijay 4) Star Bharat 5) Life Ok 6) Asianet 7) Star Maa 8) Star World 9) HBO Originals10) SHOWTIME 11) Hotstar Picks 12) ABC Studios 13) Star Pravah 14) Fox Life 15) Nat Geo 16) Asianet Plus 17) Star Suvarna 18) Maa Gold 19) Star Utsav 20) Channel V 21) Star Sports 1 22) Star Sports 2 23) Star Sports Select 2 24) Star Sports Tamil 1 25) Star Sports Hindi 1 26) Star Sports Select HD1 27) Star Sports Select HD2 28) Scroll.in 29) STAR Sports First
[11]The sports are 1) Cricket 2) Tennis 3) Football 4) Badminton 5) Formula 1 6) Hockey 7) Athletics 8) Kabaddi 9) Table Tennis
[12]Figures are approximate.
[13]Hotstar. (n.d.). Retrieved May 25, 2018.
[14]An American medical drama television series.
[15]An American mystery horror drama television series.

Hotstar launched with over 35000 hours of TV and movie content as well as live sports[16]. Streaming the ICC World Cup 2015 in the same month proved a jackpot for Hotstar and the app hit 5 million downloads within a fortnight of its launch[17].

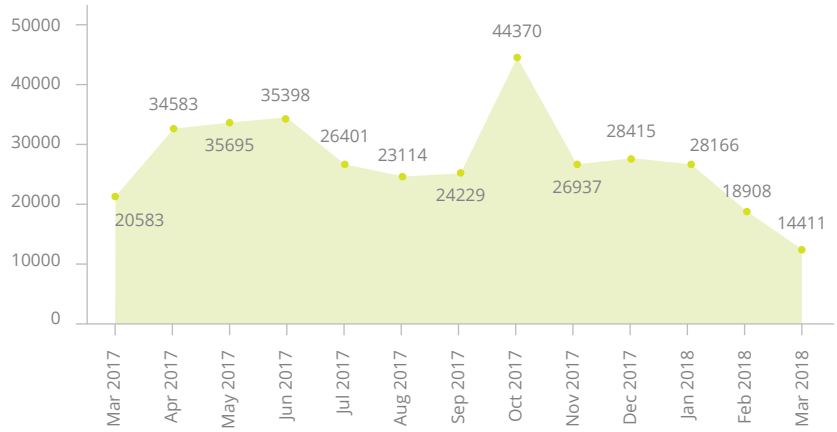
Today, Hotstar is the best performing OTT video streaming platform in the country. It was the most downloaded video app of 2017, with 170 million downloads.

Popular shows on Hotstar include On Air with AIB, Tanhaiyan[18] and Cineplay. The satirical comedy On Air with AIB, which debuted on Star India network and features the popular stand-up comedians of AIB[19], saw a three-fold growth once it moved to Hotstar in its second season[20] [21]. Meanwhile, Cineplay is an interesting concept where the world of theatre and cinema unite[22]. Interestingly 96% of watch time on Hotstar comes from the videos that are longer than 20 minutes[23], thus proving that it is quality content that has worked better for the platform than short, snacky content[24].

With 3000+ films Hotstar has the 2nd highest collection of films among the OTT platforms after Eros Now[25]. The platform has more Malayalam films than Hindi. This isn't surprising considering that data consumption per user is very high in Kerala for Hotstar. Hotstar claims its regional movies have transcended language barriers and are being consumed across India. For instance, 25% of watch time for Telugu movies comes from North and West India, 20% of movie watchers in Delhi watch movies in Tamil, Telugu and Malayalam and 30% of show watchers in Tamil Nadu watch Hindi TV shows[26].

Hotstar Total Unique Visitors (000) across

multiple platforms, March 2017 to March 2018



Most watched films on Hotstar in 2017[35]

Title	Genre	Language
Jolly LLB 2	Comedy/Drama	Hindi
Doctor Strange	Action	English
Maari	Action	Tamil
Khaidi No 150	Action	Tamil
Pulimurugan	Action	Malayalam
Haripada Bandwala	Comedy	Bengali

Sports content has been a key driver for Hotstar, with live sports contributing majorly to the OTT player's overall success[27]. Cricket emerged at the top sport, with ODI[28] watch time witnessing a 5X raise, and the average time spent watching IPL[29] going up from 30-35 minutes (IPL9) to 40-45 minutes (IPL 10). High viewership was also observed for sports other than cricket, with the kabaddi game between Puneri Paltan vs U Mumba[30] and the badminton match between P.V Sindhu and Akane Yamaguchi[31] rated among the most watched matches in 2017. Preference for sport differed state-wise, with football consumed most by regions like Mizoram, Meghalaya and badminton by Andhra Pradesh and Chandigarh[32]. Lastly, Hotstar offers news content through channels like Republic TV, ABP News, Fox News among others[33]. Republic TV performed exceedingly well on the platform, crossing a million viewers within a day of its launch[34].Key Measures Of The Platform Hotstar experienced a 30% decline since Mar '17. Even with the decline, it commands an impressive share of 5.3% of the total digital users in India.

Streaming IPL 10 ensured a 70 - 75% temporary upsurge in viewership between Mar - May '17. Then came

[16]Dina, A. (2015, February 10). With Hotstar, Star India aims to change the way content is consumed in India. Retrieved May 25, 2018.
[17]Gupta, S. D., & Pinto, V. S. (2015, February 18). At 25 mn, Indo-Pak match viewership creates history. Retrieved May 25, 2018.
[18]A Hindi romantic drama
[19]An Indian comedy sketch group
[20]Ghosh, D. (2018, January 01). India's funniest stand-up comedians from 2017. Retrieved May 25, 2018.
[21]Biswas, V. S. (2017, May 5). All comedy on digital need not be crass; Hotstar to prove this with Sarabhai vs Sarabhai Take 2. Retrieved May 25, 2018.
[22]Vijayasarathy, S. (2017, February 13). Hotstar CinePlay Brings Together the World of Theater and Cinema. Retrieved May 25, 2018.
[23]This excludes sports channels.
[24]The India Watch Report 2018 (p. 7, Rep.). (2018). Mumbai, Maharashtra: Novi Digital Entertainment Private Limited. Retrieved May 18, 2018.
[25]Hotstar Movies. (n.d.). Retrieved May 25, 2018.
[26]The India Watch Report 2018 (p. 14, Rep.). (2018). Mumbai, Maharashtra: Novi Digital Entertainment Private Limited. Retrieved May 18, 2018.
[27]Baxi, A. (2018, April 27). Thanks To Live Sports, India's Hotstar Is Going Where No Other Streaming Service Has Gone Before. Retrieved May 25, 2018.
[28]One-Day International
[29]The Indian Premier League is a professional Twenty20 cricket league in India.
[30]The event was held on October 14th 2017.
[31]The Women's Singles Final, 2017 BWF Super series on 4th December
[32]The India Watch Report 2018 (Rep.). (2018). Mumbai, Maharashtra: Novi Digital Entertainment Private Limited. Retrieved May 18, 2018.
[33]Other news channels on Hotstar include Asianet News, News Tak, ABP Majha, ABP Ananda, ABP Asmita, TV9 Telugu, TV9 Kannada, Mathrubhumi News, BTVI, BloombergQuint, Fox Business, and Sky News.
[34]Indiantelevision.com Team. (2017, May 11). Republic TV claims 'stunning' debut on Hotstar. Retrieved May 25, 2018.
[35]The India Watch Report 2018 (p. 15, Rep.). (2018). Mumbai, Maharashtra: Novi Digital Entertainment Private Limited. Retrieved May 18, 2018.

the amalgam of sporting events - the India vs Australia ODI and T20 Internationals, the Pro Kabaddi League 2017 Season 5 and India vs Pakistan Asia Cup Hockey 2017 - which sent Hotstar's viewership through the roof in October 2017 with 44.37 million unique visitors.

During this month, the annual subscription plan also dropped to INR 696, another possible cause for the increased activity. The viewership again has been waning post- Oct 18[36].

The total unique visitors for Hotstar have been underreported between January and March, hence the decline is lower than what the abovementioned data suggest. It also indicates the intensely competitive environment among the OTT players in India.

Hotstar Audience, March 2018

Males, Age Group	TUV (000)	Total Mobile (000)	Females, Age Group	TUV (000)	Total Mobile (000)
6-14	111	-	6-14	110	-
15-24	4437	2562	15-24	2226	1271
25-34	3377	2315	25-34	1067	760
35-44	956	726	35-44	550	471
45+	941	809	45+	636	530
All Males	**9822**	**2325**	**All Females**	**4589**	**3032**

Source: ComScore MMX Multi-Platform Demographic Report, March 2018

Ad Metrix

(Source: ComScore Desktop Media Overview Report, March 2018)

Top ad categories:

Online Media
Retail
Computers & Technology
Media & Entertainment
Telecommunications

Most advertised on

News/Information
Search/Navigation
Directories/Resources
Sports
Games

Films on Hotstar by Language

Language	No. of Films
Hindi	621
Bengali	219
Telugu	428
Malayalam	**866**
Tamil	126
Marathi	83
English	289
Kannada	422
Gujarati	2

Source: Hotstar Website[37]

Hotstar launched a Watch'NPlay game that lets users test their knowledge of cricket with the millions of others users watching the match.



[36]Singh, J. (2018, February 19). Hotstar Annual Subscription Now Available at Rs. 1,200. Retrieved May 26, 2018.
[37]Re-imagining India's M&E Sector (March 2018, p. 92, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.

Partnerships and Distributions

Hotstar and Bharti Airtel have entered into a strategic partnership to bring Hotstar's portfolio to Airtel customers[38].

Star India has acquired a minority stake in **Zapr Media Labs** in Mar '17. Zapr's technology allows users to connect their TV screen with mobile. for engagement across several mediums. Hotstar will be able to create a **personalized advertising service** with Zapr**.**

New Features Hotstar also launched **the IPL 2018 in Virtual Reality experience** and 3D sound system[39]. Also, for the IPL, the new feature **#selectDugout** was introduced, which is a curated offering tailored for the core cricket fan with in-depth analysis, augmented reality, interesting statistics presented by a panel of select experts[40].

Expand Reach Hotstar launched its Subscription Video on Demand (SVOD) service in **the US and Canada** at a monthly subscription of USD 9.99 (INR 676.64 approx.) and CAD 12.99 (INR 678.60 approx.) respectively[41]. The platform plans to go global in the near future[42].

Revenue Estimates for Hotstar as on 2017[43]

Total Revenues	INR 3200 million (USD 46.89 million approx.)
Revenues: Advertising	INR 1680 million (USD 24.61 million approx.)
Revenues: Subscription	INR 1295 million (USD 18.97 million approx.)

[38]Mukherjee, S. (2018, February 12). Airtel Forges Strategic Partnership With Hotstar To Bolster Its Offerings On Airtel TV App. Retrieved May 26, 2018.
[39]Lidhoo, P. (2018, April 10). Hotstar's VR venture: Novelty or game changer?
[40]Star Sports Unveils The #Selectdugout For VIVO IPL 2018 To Keep Fans Ahead Of The Fame! (2018, April 10). Retrieved May 26, 2018.
[41]Re-imagining India's M&E Sector (March 2018, p. 116, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.
[42]Star bets on Hotstar to take Indian content global - ET Telecom. (2018, January 21). Retrieved May 26, 2018.
[43]Shankar, S. (2018, April 24). Hotstar losses widen even as revenues rise.

POPULAR SHOWS

None of its originals feature in the most watched shows on Hotstar in 2017. The popular shows are[44]:

Yeh Rishta Kya Kehlata Hai
Hindi - Drama; 65 Seasons - 2664 Episodes



This is a family drama about a woman who balances her roles as a wife and a daughter-in-law with her life partner by her side. It has been airing on Star Plus since 2009.

Interestingly, half the people who viewed this show on Hotstar were men[45], which goes against the stereotype that women are the sole consumers of television soaps.

Games Of Thrones
English - Drama; 7 Seasons - 67 Episodes



This internationally acclaimed fantasy drama series has become a huge draw[46]. The series is only available to premium subscribers.

Bigg Boss
Tamil - Reality Show; 1 Seasons - 96 Episodes



Bigg Boss is a Tamil reality show hosted by actor Kamal Haasan. The first season originally aired on Star Vijay between June to Sept '17.

Bigg Boss
Telugu - Reality Show; 1 Season - 71 Episodes



This Telugu edition was hosted by N. T. Rama Rao Jr. The show originally aired on Star Maa.

Parasparam
Malayalam - Drama; 34 Seasons - 1458 Episodes



Parasparam is a family drama on Asianet. It is about a loving husband and a self-made man who helps his ambitious wife achieve her dreams.

Khokababu
Bengali - Drama, 12 Seasons - 740 Episodes



Khoka Babu is a Bengali romantic show which aired on Star Jalsha. It revolves around an innocent wrestler from Kusumpur who falls in love with a spoilt brat from Kolkata.

[44]The India Watch Report 2018 (p. 16, Rep.). (2018). Mumbai, Maharashtra: Novi Digital Entertainment Private Limited. Retrieved May 18, 2018.
[45]The India Watch Report 2018 (p. 12, Rep.). (2018). Mumbai, Maharashtra: Novi Digital Entertainment Private Limited. Retrieved May 18, 2018.
[46]Malvania, U. (2016, December 14). 2016: Hotstar becomes Apple TV's app of the year with 130 million downloads - ETtech. Retrieved May 25, 2018.

“

A new generation of users are emerging in India who take for granted round the clock access to the best stories; who know that they can watch the best shows from around the world at the same time as the world (and sometimes way ahead of most of the world); who do not worry about being forced to skip their team's weekend football games because they are not at home in front of their television; and who have the implicit faith that all breaking news will reach them without any effort on their part.

It is an exciting time for marketers too. In an era where new consumer habits are being formed, these leaders have exciting vistas to build their brands, more opportunities to tango with engaged consumers and with more consciousness and understanding of their customers than ever before.

But the biggest change has been how consumers are responding to the explosion in access to affordable data. Three years ago, most new data users would start with messaging, do text search, move on to social platforms and a few braves ones would watch video on the mobile network. This pyramid has been completely inverted. In a world that does not fear data charges, video is very often the first port of call for new data users. Familiar stories, whether TV shows, movies or sports, unconstrained by any language limitation, are acting as powerful triggers to light up their smartphones and their data connections.

This is the world we are excited to shape. We believe the appetite for stories offers a dramatic new opportunity to leverage Hotstar to transform storytelling and bring a billion people online in India. That is our mission."



Ajit Mohan
CEO - Hotstar

”




A ZEE5 TAMIL ORIGINAL
America mappillai
REVEAL YOUR TRUE COLORS


A ZEE5 ORIGINAL
AKOORI
TRAILER


APNI BHASHA
MEIN FEEL HAI
ZEE5

Content

Original Content

9 original shows and 3 original short movies. Apart from Hindi (Life Sahi Hai, The Story) offerings, ZEE5 is experimenting with southern languages like Tamil (American Mappillai), Telugu (Nanna Koochi) and Malayalam (Utsaha Ithihasam).

Offering

1.25 lakh+ hours

500+ series; 2000+ movies (targets 3500); 90+ live channels available in 12 languages – Hindi, Telugu, English, Marathi, Tamil, Bengali, Malayalam, Kannada, Oriya, Bhojpuri, Gujarati, and Punjabi. Dubbed versions of international movies and series are available in Hindi and other regional languages.



SNIPPETS

Launched
February 2018

Owned by
Zee Entertainment Enterprises Limited (ZEEL)

Headquarter
Mumbai, Maharashtra

Google Play Store Downloads
10 million+[1]

Unique Users (Mar 18)
9.93 million[2]

Reach
3.6%[3]

Average Minutes/visitor
42.2 minutes

Popularity Rankings[4]
11th - Monthly Active Users,
9th - Downloads and
8th - Time Spent

Country Focus
97.3% visitors belong to the Asia Pacific region

Revenue Model
AVOD (Advertising Video on Demand)
TVOD (Transactional Video on Demand)
SVOD (Subscription Video on Demand)[5]

[1]ZEE5 - Movies, TV Shows, LIVE TV & Originals. (2018, May 21). Retrieved May 22, 2018.
[2]Source: ComScore MMX Multi-Platform Report, March 2018
[3] Source: ComScore MMX Multi-Platform Report, March 2018
[4]As per App Annie's report on the top video OTT apps of 2017. Performance rankings are provided for OZEE; the platform was subsumed into ZEE5 in February 2018.
[5]TelevisionPost Team (2017, October 17). ZEEL plans to launch new digital content platform ZEE5 in H2 FY18. Retrieved May 8, 2018.

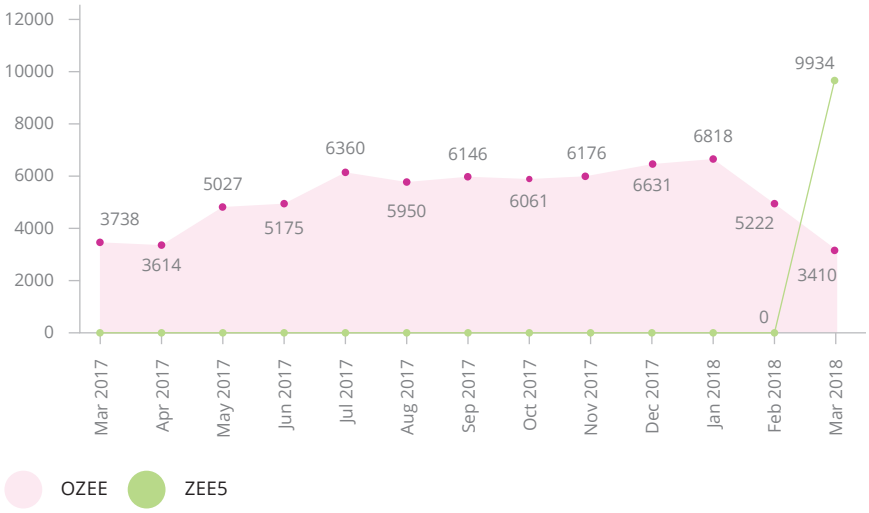
Content of Zee's existing digital linear TV platforms, the advertising-based OZEE and the subscription-based Ditto TV, were subsumed into ZEE5.

With OZEE and Ditto TV absorbed into ZEE5, the app quickly built over 9 million unique visitors, 88.52% (8.7 million) of which visited through the mobile. ZEE5's engagement rate is also very high at 42.5 minutes.

ZEE5 has a larger share of male audience as compared to female. ZEE5 is one of the few OTT platforms where there is low difference between male and female viewers aged 25-34 (other platforms have a much larger share of male viewers in this age group). Female viewers almost double the male viewers in the 6-14 age bracket.

Key Measures of the Platform

OZEE and ZEE5 Total Unique Visitors (000) across multi platform, March 2017 to March 2018[6]



Source: ComScore MMX Multi-Platform Demographic Report, March 2018

Consumer Demographics

ZEE5 Audience, March 2018

Males, Age Group	TUV (000)	Total Mobile (000)	Females, Age Group	TUV (000)	Total Mobile (000)
6-14	19	-	6-14	38	-
15-24	2354	2003	15-24	1295	1029
25-34	1826	1648	25-34	1595	1489
35-44	1069	1011	35-44	604	577
45+	763	705	45+	373	332
All Males	**6031**	**5367**	**All Females**	**3904**	**3428**

[6] In the case of OZEE, total unique visitors across multiplatform is available for the period of March 2017 to March 2018. As ZEE5 was launched in February 2018, the data is available for March 2018.

> The platform is “aiming at tier-II and tier-III cities with strong language content and not just focusing on metros and mini-metro”[7].



Amit Goenka
Chief Executive Officer | Zee International and Z5 Global



Future Plans

Ambit Capital Research states they expect ZEEL to invest INR 8 billion (USD 117 million approx.) in OTT over FY18, over 4x its cumulative past investments[8].

ZEE5 plans to launch 20 original shows by April 2018 across languages such as Hindi, Marathi, Tamil, Telugu, Malayalam and Bengali. It targets to come up with 6 original titles every month, and launch one web-series in each language per month till March 2019, totalling 90 original shows by FY 2019[9].

ZEE5 is looking at grabbing the No.2 position in the OTT space as an immediate target[10].

Ad Metrix

Top ad categories:

Retail
Computers & Technology
Travel
Online Media
Media & Entertainment

Source: ComScore Desktop Media Overview Report, March 2018

[7]Zee entertainment launches new video streaming platform ZEE5. (2018, Feb 14). Retrieved from Mint.
[8]EMIS: ZEEL Perfect Present but future tense (Rep.). (2018). Mumbai, Maharashtra: Ambit Capital. Retrieved May 8, 2018.
[9]BestMediaInfo Bureau. (2018, March 27). ZEE5 eyes subscription revenue with launch of 90 Originals in FY19. Retrieved May 8, 2018.
[10]ZEEL EYES NO.2 POSITION IN VIDEO OTT SEGMENT. (2018, Feb 28). Retrieved from India Business Insight.

POPULAR SHOWS[11]

Life Sahi Hai
Hindi - Dramedy; 2 Seasons - 10 Episodes



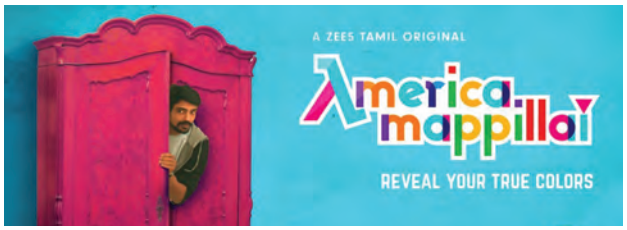
A ZEE5 original, Life Sahi Hai follows four guys who have moved to Delhi to live independently for the first time. Despite the challenges, they breeze through their problems with the motto - 'Life Sahi Hai' (Life is Good). The series is produced by The Lazy Studio. The first season of Life Sahi Hai clocked 35 million views[12].

DID Li'l Masters
Hindi - Reality Show; 4 Seasons - 19 Episodes



The dance reality show originally airing on Zee TV features young dancers who compete to win the title of L'il Masters. ZEE5 offers special snippets and behind the scenes exclusively to ZEE5 subscribers[13].

American Mappillai
Tamil - Drama; 1 Season - 8 Episodes



Another ZEE5 original, the Tamil miniseries produced by Chennai-based digital agency Trend Loud is about a commit-phobe who pretends to be gay in order to avoid getting married. Each episode is around 10 minutes in length. America Mappillai is ZEE5's maiden foray into the Tamil landscape and it aims to break the stereotypes.

Doctor-X
Hindi - Drama; 1 Season - 8 Episodes[14]



The popular Japanese show follows the story of a charismatic and unorthodox freelance surgeon whose questionable practices bring her into conflict with the administrators. ZEE5 dubbed the series in Hindi for the Indian audiences.

Pablo Escobar
Hindi - Drama; 1 Season - 35 Episodes[15]



The Spanish-Language series produced by Columbia-based Caracol Televisión is based on the life of Columbian drug lord Pablo Escobar. ZEE5 dubbed the series in Hindi.

[11]EMIS: ZEEL Perfect Present but future tense (Rep.). (2018). Mumbai, Maharashtra: Ambit Capital. Retrieved May 8, 2018.
[12]BestMediaInfo Bureau. (2018, March 27). ZEE5 eyes subscription revenue with launch of 90 Originals in FY19. Retrieved May 8, 2018.
[13]ZEEL EYES NO.2 POSITION IN VIDEO OTT SEGMENT. (2018, Feb 28). Retrieved from India Business Insight.
[14]Zee entertainment launches new video streaming platform ZEE5. (2018, Feb 14). Retrieved from Mint.
[15]FP Staff. (2018, March 12). Popular Japanese medical drama show Doctor X to start streaming on Zee 5 in Hindi- Entertainment News, Firstpost. Retrieved May 8, 2018.

Once in a blue moon comes along an innovation that revolutionises the way an entire generation consumes entertainment. And being at the right place at the right time allows you to ride the wave too!

Consumption of entertainment-related content is today witnessing exponential growth-and OTT platforms are truly rising up to grab this opportunity. Spurred by the boom in access among youth in tier II cities, towns and villages, a power that is wrested in them by the arrival of handhelds into their palms, a whole new vista has opened up. There are three factors that are prompting this extensive acceptance of OTT platforms to consume entertainment-a promising eco-system, value-driven bandwidth costs and strong consumer demand.

Consumers today have elaborate options and are empowered to consume content across multiple platforms. They are screen agnostic and utilise multiple devices while consuming entertainment-be it TV and Digital, TV and mobile, TV and mobile and tablets, and so on. While television remains the preferred choice for family entertainment, mobile is fast emerging as a default second screen to consume content of one's liking at his/her convenience. They consume content based on their preferences and are adaptable to the best of the available technology solutions.

ZEE5 is set on a very strong technological foundation. We have built in some very innovative and state-of-the-art features into the app including Voice Search, Progressive Web App experience, Content Download options, Multi-CDN strategy for an optimized video viewing experience, and multi- platform support have set it apart in the industry. However, the winner for us has and will always be the unique content that we bring to our subscribers. ZEE5, the digital entertainment destination for multilingual content offers consumers content in 12 languages including English, Hindi, Bengali, Malayalam, Tamil, Telugu, Kannada, Marathi, Oriya, Bhojpuri, Gujarati and Punjabi. Along with a strong focus on regional content, we have created a library of originals with shows which are contemporary and progressive, stirring emotions and conversations. Staying true to our promise, we have brought shows across languages to our viewers of the platform. Shows like Karenjit Kaur : the untold story of Sunny Leone, LOCKDOWN, Life Sahi Hai 2, The Story, Babbar ka Tabbar and Zero Kms have won us both critical acclaim as well as popularity across the masses. Utsaha Ithihasam in Malayalam, Nanna Koochi in Telugu, Mehman and Aranyadeb in Bengali, America Mappillai and Kallachirippu in Tamil, and Horn Ok Please and Liftman in Marathi have got us a phenomenal response from viewers who understand the language across the globe.



Tarun Katial
CEO, ZEE5 India

In this short lifetime, we have been able to garner a few firsts too - Nasseruddin Shah's web-series debut with ZERO Kms, movies such as Padman, Parmanu and Veere Di Wedding debuted Theatre ke baad, Pehli baar on our platform. Hardcore theatre and big screen personalities choosing ZEE5 to make their OTT platform debut is indeed a testimony to their confidence in ZEE5 being a truly global platform.

Since the launch in February, Zee5 has been focussed on bringing Original Content that is relatable, understated, bold, progressive, introspective, layered and open to interpretation. We have curated 10-20 minutes' on-the-go and quick-natured content across genres such as Thriller, Drama, Action, Comedy, Satire, Biopics and Reality - in keeping with the preferences of our audience. Thus, we are well on our way to achieving our goal of offering the most cutting-edge differentiated original content in the OTT space.

OTT platforms give us the freedom to develop content on sensitive and challenging topics, untouched and un-explored by other entertainment formats. Our viewers look for new concepts, fresh themes, regional connections, etc. and these can only be achieved through research and deep diving to formulate exciting original content.

In addition to this, of course, is the entire repertoire of content from the Group's network. The platform hosts popular shows from the entire bouquet of ZEE channels. In addition, national and regional award ceremonies and performances such as Zee Cine Awards, Zee Kutumbam Awards are also available for viewing. The platform has also curated an exciting line-up of premium TV series from across the globe are also available for viewers to binge watch. A collection of Turkish, Korean, Japanese, Pakistani, Spanish and English dramas are available including The Young Pope, Pablo Escobar, Doctor-X, Bread, Love and Dreams, Boys Over Flowers, War & Peace, The Son, Community and Citizen Kane.

The past few months have been exciting for us and as we keep introducing new content on a weekly basis, we only expect subscribers to come into the fold.

Can you hit PAUSE on life?

TIME OUT

A voot Original

All Episodes Streaming
28th November

STARRING TAHIR RAJ BHASIN & SARAH JANE DIAS
DIRECTED BY DANISH ASLAM





LOVE IS IN THE PYAAR

A voot Original

kaisi yeh Yaariaan 3

Powered by Veet

NEW EPISODE OUT NOW



voot Originals
PRESENTS

IT'S NOT THAT SIMPLE

STARRING: SWARA BHASKAR | AKSHAY OBEROI | VIVAN BHATENA | KARANVEER MEHRA
WRITTEN BY: CHARUDUTT ACHARYA | DIRECTED BY: DANISH ASLAM
PRODUCED BY: VICTOR TANGO

Download the App
or visit voot.com

voot viacom18

WANTING WANTING



Content

50,000 Hours

Original Content

11 original series

Offering

450+ series across 12 Viacom18 channels[6] and 550+ movies in 8+ languages[7].

The 11 original shows are in the Hindi and comprise of dramas (4), comedies (3), romance (2) and reality series (2).

Shows like Untag, Yo Ke Hua Bro have gained a solid following[8]. Shows of channels like Colors and MTV generate a lot of traffic as well.

Besides the general shows, Voot Kids features over 72 popular kids' series such as Motu Patlu, Shiva[9]. Voot Kids can be viewed in 6 languages - Hindi, English, Kannada, Tamil, Bangla and Marathi.

Colors Tamil launched on Voot in February 2018 for the Tamil Nadu market.

SNIPPETS

Launched
March 2016

Owned by
Viacom 18

Headquarter
Mumbai, Maharashtra

Total Downloads
75 million+[1]

Google Play Store Downloads
10 million+[2]

Unique Users (Mar 18)
15.8 million[3]

Reach
5.8%[4]

Average Minutes/visitor
52.8 minutes

Popularity Rankings[5]
5th - Monthly Active Users,
3rd - Downloads and
4th - Time Spent

Country Focus
India (Has 3.5% viewers in Middle East & Africa & 2.3% in North America)

Revenue Model
AVOD (Advertising Video on Demand)

[1]As communicated by Sudhanshu Vats, Group CEO, Viacom18, in personal correspondence.
[2]Voot TV Shows Movies Cartoons. (2018, May 15). Retrieved May 21, 2018.
[3]Source: ComScore MMX Multi-Platform Report, March 2018
[4]Source: ComScore MMX Multi-Platform Report, March 2018
[5]Re-imagining India's M&E Sector (March 2018, p. 129, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.
[6]The channels are Colors (97 shows), Colors Marathi (53 shows), Colors Bangla (53 shows), Colors Kannada (43 shows), Colors Tamil (26 shows), Colors Gujarati (23 shows), Colors Super (20 shows) Colors Infinity (5 shows), MTV (99 shows), Nick (37 shows), VH1 (6 shows), and Comedy Central (1 show).
[7]Hindi, Bengali, Kannada, Marathi, English, Tamil, Gujarati, and Telugu
[8]Desk, E. W. (2017, December 23). Most watched shows on Voot. Retrieved May 8, 2018.
[9]Voot. (n.d.). Retrieved May 21, 2018.

> Voot is the company's highest investment after Colors[10] [11].



Gaurav Gandhi
CEO | Viacom 18 Digital Ventures

Voot's performance dramatically shot up in Oct '17 due to the launch of Colors' flagship reality series Big **Boss 11.** The show amassed 70 million views in the first 10 days and clocked an average watch time per day per viewer of over 45 minutes[12]. By Dec '17, the show garnered over 400 million views[13]. VOOT's master- stroke was to include Unseen Undekha and Cutless, two digital shows created with content that was shot but not used in the TV broadcast[14].

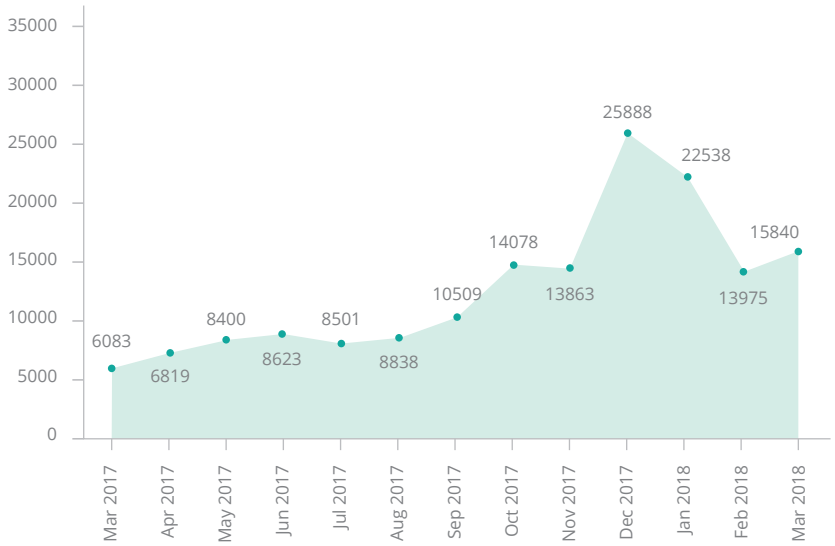
83.16% (13.8mn) of Voot's engagement is on mobile phones. Desktop access is far lower. It fluctuated between 1.5mn and 4.5mn from Mar '17 to Mar '18.

Voot's 87.8% traffic comes from the age group 15-34. These are the early adopters of OTT services[15]. The younger audiences (15-24) love shows like Roadies and MTV Splitsvilla while the age group of 25+ like general entertainment shows Bigg Boss, Naagin, etc.

Overall, Voot's male visitors exceed their female counterparts. Interestingly, in the 45+ age group the female audience is larger, most likely thanks to shows from general entertainment channel Colors which has many shows popular with older women.

Key Measures of the Platform

VOOT Total Unique Visitors (000)
across multi platform, March 2017 to March 2018



Source: ComScore MMX Multi-Platform Demographic Report, March 2018

Consumer Demographics

Voot Audience, March 2018

Males, Age Group	TUV (000)	Total Mobile (000)	Females, Age Group	TUV (000)	Total Mobile (000)
6-14	39	-	6-14	43	-
15-24	3800	3083	15-24	3397	2775
25-34	3584	3259	25-34	2203	2004
35-44	1310	1245	35-44	418	409
45+	328	328	45+	718	697
All Males	**9061**	**7915**	**All Females**	**6779**	**5885**

[10]A Hindi language general entertainment television channel launched by Viacom18.
[11]How TV moved to the internet. (2016), Jul 22). Retrieved from Mint.
[12]BestMediaInfo Bureau. (2017, October 18). 70 million views in just first 10 days of Bigg Boss 11 on Voot. Retrieved May 16, 2018.
[13]Saha, M. (2017, December 12). Bigg Boss is the biggest entertainment property in the online video space: Gaurav Gandhi, Voot. Retrieved May 16, 2018.
[14]Choudhury, A. R. (2018, January 03). Unseen Undekha, Cutless, Bigg Buzz...a look at VOOT's Bigg Boss strategy. Retrieved May 16, 2018.
[15]Sharma, S. (2017, June 27). OTT: Has TV Found Its Competitor? Retrieved May 16, 2018.

Voot has over 350 brands on-board from 175 advertisers[17]. Cost of a 10 second advertising slot on platforms like Voot ranges between INR 400 to 600 CPM (USD 5.87- USD 8.81 approx.)[18].

The Google Advantage

Voot partnered with Google to turn its mobile website into a Progressive Web App (PWA) using features such as Add to Home screen and a service worker. This allows reliable, speedy, and an engaging experience for users on mobile web[19]. Within just a few days VOOT saw a 77% increase in conversion from visitor to video viewer and a 39% increase in session time per user[20]. For its innovation, it received the 'International Broadcasting Convention 2017 (IBC2017) Innovation Award for Content Distribution'.

Future Plans

Regionalization

25% of Voot's viewers are from regional markets like Kannada, Marathi, Bengali and Gujarati. Keeping this in mind, Voot soon plans to offer original content in regional languages starting with Tamil. VOOT would also launch shows in Bengali, Marathi and Kannada. It would offer 30+ new shows in the coming year.

Revenue Model

Evolving from its purely AVOD model, Voot shall instead work on freemium model, under which certain parts of the content will be put behind the paywall[21].

Ad Metrix[16]

Top ad categories:
Retail
Computers & Technology
Online Media
Media & Entertainment
Telecommunications

Most advertised on:
Search/Navigation
Career Services & Devlopment
Directories/Resources
Technology
Sports

Source: ComScore Desktop Media Overview Report, March 2018



[16]Ad Metrix This module shows the top categories of display ads more likely to be displayed on the selected media entity and (if applicable) what categories where the selected media entity is most advertised
[17]Bhagia, R. (2017, December 21). Voot enters 2018 with new look and paywall. Retrieved May 21, 2018.
[18]Bhattacharyya, A. (2018, Feb 26). Digital platforms in 2017: Advertisers see a new hotstar in over the top platforms. Financial Express.
[19]VOOT partners google to launch video-on-demand progressive web app. (2017). Voice & Data.
[20]IBC2017 innovation awards shortlist announced: ESports, OTT, IP-OB trucks, and content delivered on high speed trains amongst industry trends tackled by entrants. (2017, Jun 19). Business Wire.
[21]VOOT ENTERS 2018 WITH NEW LOOK AND PAYWALL. (2017, Dec 20). India Business Insight.

MOST WATCHED **ORIGINALS**

Untag
Hindi - Drama. 1 Season - 7 Episodes



Launched in Jan '17, Untag follows the dreams and struggles of six individuals who attempt to break away from the tags they have received from society. The show sponsor brand Moto Z is deeply embedded into the show.

Stupid Man, Smart Phone
Hindi - Reality show. 1 Season - 9 Episodes



Hyped as India's first digital survival series, the BBC Worldwide India produced this show. The premise is that a smartphone and a super network is the only means of survival in the remote, uninhabited and ruthless terrains of India's wilderness. The show is presented by Vodafone and powered by Motorola. It won the Best Content Marketing Video Series Award at the Content Marketing Summit organized by the World Marketing Congress[22].

MTV Splitsvilla
Hindi - Reality Show. 10 Seasons



In this reality show, boys and girls compete with each other to secure their position in Splitsvilla. Contestants also try to find their soulmate during the show. MTV Splitsvilla is especially popular among the youth for its "hunt for love" theme.

Yo Ke Hua Bro
Hindi - Drama. 1 Season - 5 Episodes



Yo Ke Hua Bro is an edgy comedy set in Haryana and follows the exploits of two desi 'bros' who often land into trouble.

Bigg Boss
Hindi - Reality Show. 11 Seasons



Hosted by Bollywood actor Salman Khan, the official Indian adaptation of UK based Channel 4 series Big Brother has proven to be extremely popular on Voot. The features a great deal of drama, fights and controversies which is now the show's USP.

[22]The Hindu business line: BBC eyes branded content marketing campaigns to woo Indian viewers (2018). Chatham: Newstex.

How do you think Voot has performed in the last one year?

Viacom18 Digital Ventures' over the top video consumption platform VOOT, has experienced tremendous growth in the last two years of its existence. Having firmed its place amongst the top three OTT services in India, VOOT has seen sustained growth both in its monthly active users as well as app downloads.

Voot has over 32 million monthly active users and 75+mn downloads. Its 4-million daily active users (across mobile, web and smart TV/ smart TV devices) spend over 50 minutes per user per day on the service, making VOOT one of the most engaged Video services in the country.

The video viewing audience in India is expected to grow significantly doubling in the next 4-5 years. Hence in tandem with the industry, we foresee VOOT to grow significantly in India's single screen homes.

What are some of the high points of Voot's success in last one year?

In the past financial year, VOOT has seen multiple high points backed by innovation. Content innovation such as content-around-content, building on network ecosystem and creating original properties has worked tremendously for VOOT. For example, for Bigg Boss 2017, we crossed 800 mn views on VOOT and of these, content exclusively created for VOOT (not on TV) contributes to roughly 55 %.

On the original content front, we saw success with both fiction and non-fiction shows. We launched India's first digital only reality show called HDFC Life Young Stars which was a format innovation. We also launched our refreshed the brand's identity and the new color is Purple - standing for being bold, high energy and premium - and promising an exhilarating experience that drives imagination through our powerful storytelling.

What is your long term and vision on Voot?

In this financial year, we are geared to launch a freemium model for VOOT, a mix of ad-supported free content and subscription-supported premium content. 2018 will also see VOOT make its international foray catering to the discerning needs of the Indian diaspora globally. VOOT International will take India to the world and will provide an immersive content and product experience that will include 50,000 hours of Viacom 18's VOD library, VOOT Originals, Indian Kids content and Linear television channels (localized for each key market). We are also looking to enhance interactivity and regionalization in the short to medium term, and that would further enhance the VOOT experience.

"Our OTT service VOOT has experienced tremendous growth over the last two years. We have firmed up our place amongst the top three premium OTT services in the country on the back of over 32mn monthly active users spending ~50 minutes on the service per day. The past year saw us leading the charge on innovative programming in this sector with not only VOOT Originals but also creating content around content for our televised reality shows. In fact, for Bigg Boss 2017, we crossed 800mn views on VOOT and of this, content exclusively created for VOOT (not on TV) contributed to roughly 55 %. As the video consuming audience base in India looks to double in the next 4-5 years, we plan to expand VOOT not only to newer categories but also to newer markets around the globe."



Sudhanshu Vats
Group CEO, Viacom18





Content

Original Content

None

Offering

Live TV, Catchup TV (past 7 days)
583 Channels
15 languages
English, Hindi, Assamese, Bengali, Bhojpuri, Gujarati, Kannada, Malayalam, Marathi, Nepali, Oriya, Punjabi, Tamil, Telugu and Urdu
Free
Hotstar premium membership[5]

JioTV won 'Best Mobile Video Content' award at Global Mobile Awards[6].

SNIPPETS

Launched
September 2016

Owned by
Reliance Jio Infocomm

Headquarter
Mumbai, Maharashtra

Google Play Store Downloads
100 million+[1]

Subscribers
168.39 million
Exclusively for all Jio users available for free.

Unique Users (Mar 18)
31.15 million

Reach
12.4%[2]

Average Minutes/visitor
137.8[3] minutes

Popularity Rankings[4]
3rd - Monthly Active Users,
2nd - Downloads and
3rd - Time Spent

Country Focus
India

[1]JioTV Live Sports Movies Shows. (2018, April 24). Retrieved May 20, 2018.
[2]Source: ComScore Mobile Metrix Report, March 2018
[3]Source: ComScore Mobile Metrix Report, March 2018
[4]As per App Annie's report on the top video OTT apps of 2017
[5]V. (2017, October 07). Reliance Jio to offer Free Hotstar Premium Membership via JioTV. Retrieved May 10, 2018.
[6]TelevisionPost Team. (2018, February 27). JioTV wins 'Best Mobile Video Content' award at Global Mobile Awards. Retrieved May 10, 2018.

Reliance Jio offers a suite of apps (JioCinema, JioTV, and JioMusic) that come pre-loaded with Lyf smartphones[7] as well in the recently launched JioPhone[8].

Key Measures of the Platform

JIO TV saw an incredible rise in total unique visitors in last one year. The visitor base reached 31.15 million in March 2018 growing 273% since March 2017. JioTV is exclusively for Jio users and is free of cost.

Recent Developments

Recently, Jio started offering 10 GB data/month to users specifically to stream JioTV over and above their existing data plan.

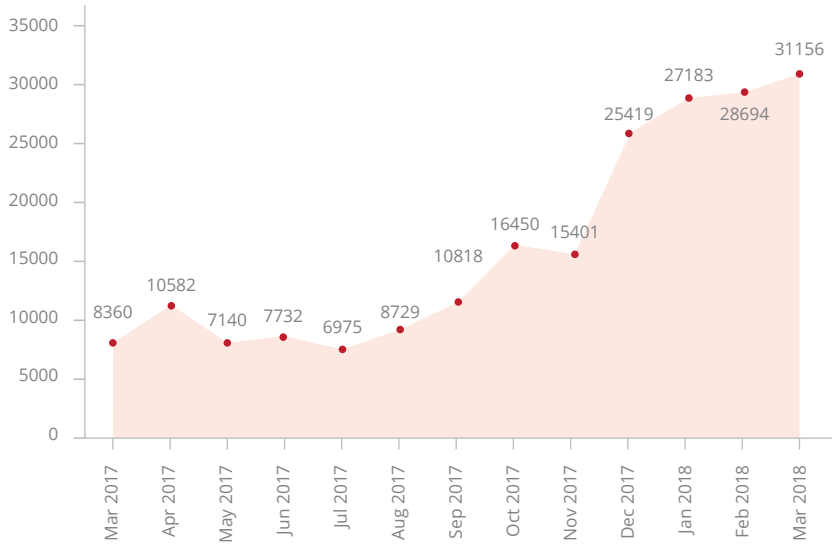
JioTV has started customizing viewing experience for certain sporting events. For instance, for the Nidahas Trophy[9], users could select from 5 camera angles and 5 languages (Hindi, English, Tamil, Telugu, Kannada)[10].

Future Plans

JioTV has 18 to 20 original shows in pipeline. This includes movies, short films, reality series, comedy-food-travel-education shows. Jio TV has content tie ups with Roy Kapur Films[11], Vikram Bhatt[12], Arre[13], AltBalaji[14] and Viacom. Jio is also looking to expand its regional user base by increasing original regional content[15].

JioTV Total Unique Visitors (000) across mobile,

March 2017 to March 2018





[7]Lyf is Reliance Retail's brand of smartphones that was launched in India in 2016.
[8]Bhatia, A. (2017, October 2). OTT players could drive data consumption in India, telcos try their best to seal this new deal. The Indian Express. Retrieved May 10, 2018.
[9]The 2018 Nidahas Trophy was a tri-nation cricket series between Bangladesh, India, and Sri Lanka. It was held in Sri Lanka in March 2018.
[10]Gadgets 360 Staff. (2018, March 12). Jio TV App Adds New Interactive Features for Nidahas Trophy Viewers. Retrieved May 10, 2018.
[11]A film and digital media production house founded by Siddharth Roy Kapur.
[12]An Indian film director, producer and screenwriter.
[13]An Indian entertainment content platform based in Mumbai which produces and publishes videos, audio series, web series, documentaries, text and doodles through its online channel.
[14]A subscription based Video on demand platform owned Balaji Telefilms Ltd.
[15]Sen, S. (2017, December 20). Reliance Jio readies push into original content; in talks with 18-20 production houses. Retrieved May 10, 2018.



JIO Cinema

Content

Original Content

100,000+ hours of syndicated content.
Movies, TV shows, Music videos, short films, trailers etc. are available in 10 languages including Hindi, English, Tamil, Kannada, Marathi, Telugu, Bengali, Gujarati, Bhojpuri and Punjabi.

Apart from feature length films there is a collection of award winning shorts films in various languages. Eros Now's curated content is also available.

Popular TV shows such as Bigg Boss, MTV Roadies, Crime Patrol are offered. JioCinema has tied up with Arré, Alt Balaji and Ultra Shorts to stream their content on the platform.

Shows Offered by Content Creators on JioCinema

Creators	Show Titles
Alt Balaji	PM Selfiewallie, Class of 2017, Romil and Jugal, Four Play
Arré	Official CEOgiri, Official Chukyagiri
Dice Media	What the Folks, Little Things, 2by3, Not Fit
LonerRanger	Twisted
Ulta Shorts	Rise

SNIPPETS

Launched
September 2016

Owned by
Reliance Jio Infocomm

Headquarter
Mumbai, Maharashtra

Google Play Store Downloads
50 million+[1]

Subscribers
168.39 million
Exclusively for all Jio users available for free.

Unique Users (Mar 18)
4.8 million

Reach
12.4%[2]

Average Minutes/visitor
137.8[3] **minutes**

Popularity Rankings[4]
4th - Monthly Active Users,
4th - Downloads and
6th - Time Spent

Country Focus
India

Revenue Model
Free

[1]JioTV Live Sports Movies Shows. (2018, April 24). Retrieved May 20, 2018.
[2]Source: ComScore Mobile Metrix Report, March 2018
[3]Source: ComScore Mobile Metrix Report, March 2018
[4]As per App Annie's report on the top video OTT apps of 2017
[5]V. (2017, October 07). Reliance Jio to offer Free Hotstar Premium Membership via JioTV. Retrieved May 10, 2018.
[6]TelevisionPost Team. (2018, February 27). JioTV wins 'Best Mobile Video Content' award at Global Mobile Awards. Retrieved May 10, 2018.

JioCinema mobile app saw a 78% rise in total unique visitors between March 2017 and March 2018. The lull in the mobile app visitors between May and September 2017 was followed by a dramatic increase in activity post-October. This is likely the effect of the rise in Jio's subscriber base in Q3 and Q4 by 21.5 million and 26.5 million respectively[5].

JioCinema was largely consumed in the Asia Pacific region – Asia Pacific 83.3%.

Recent Developments

JioCinema is now accessible on the **desktops and laptops[6].** Through this development, the platform will acquire a fresh lot of viewers.

The platform has also added a **smart download** option now. The function lets users schedule the download of movies overnight between 2am and 5am, when data usage is absolutely free[7].

Partnerships and Distributions

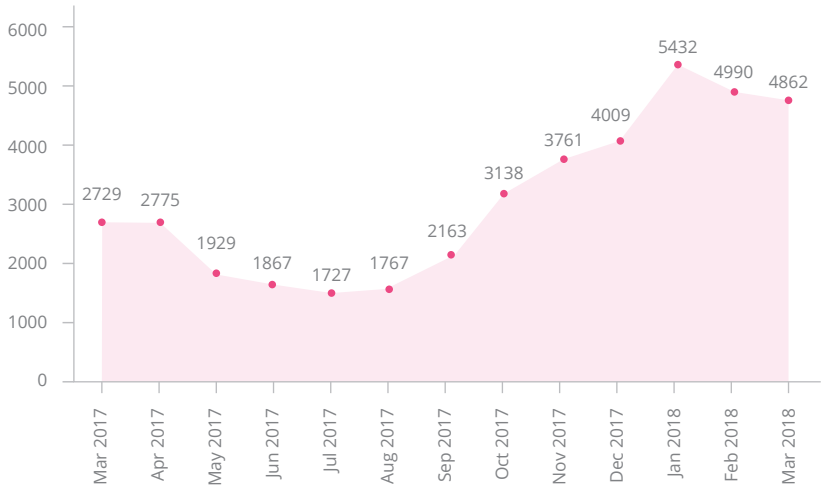
Reliance Jio offers a suite of apps (JioCinema, JioTV, and JioMusic) that come pre-loaded with **Lyf Smartphones** as well on the recently launched JioPhone[8].

Jio secured rights for streaming cricket series live as well as **The Winter Olympics[9].**

In September 2017, Reliance Jio Infocomm Ltd. (Jio) and **Roy Kapur Films (RKF)** signed a multi-year deal to curate, com- mission, develop and produce original digital video content for Jio's streaming platform. The original content would most likely be offered on JioCinema[10].

Key Measures of the Platform

Jio Cinema Total Unique Visitors (000) across mobile app, March 2017 to March 2018





[5]FE Online. (2018, April 27). Jio says it added 26.5 million subscribers in Q4; here's how much 4G data each user consumed. Retrieved May 29, 2018.
[6]JioCinema now available on the web; lets you stream your favourite movies to your desktop- Technology News, Firstpost. (2017, October 18). Retrieved May 27, 2018.
[7]Gadgets 360 Staff. (2017, February 13). How to Download Movies on JioCinema Without Using Your Free Data Quota. Retrieved May 27, 2018.
[8]Bhatia, A. (2017, October 2). OTT players could drive data consumption in India, telcos try their best to seal this new deal. The Indian Express. Retrieved May 10, 2018.
[9]Shahab, A. (2018, April 02). Airtel TV App Will Now Host ALTBalaji Content. Retrieved May 10, 2018.
[10]ET Bureau. (2017, September 27). Reliance Jio signs multi-year content deal with Siddharth Roy Kapur. Retrieved May 27, 2018.



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KamaSutra® CONDOMS

PRESENTS

MARRIED WOMAN DIARIES

PHASE 2

EPISODE - 1





HOUSE PROUD

SEASON 2

POWERED BY

Godrej | APPLIANCES



EP. 05 Entertainment Room Transformation

Content

20 years of content of Sony Pictures Networks India

Original Content

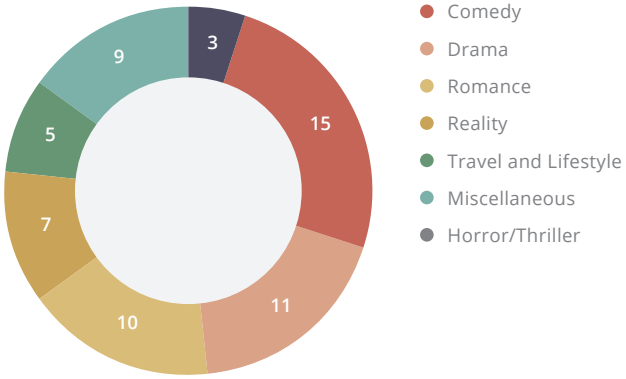
60 originals (44 Hindi, 10 English, 4 Marathi, 1 Gujarati, 1 Kannada)

Offering

40,000 hrs of TV, 18 Live Channels, 4000 hrs of food content, 700+ movies, 550+ Short films Live Features (Music, Kids, LIVFIT, Sports).

SonyLIV partnered with Arre (Hindi comedy Chukyagiri[6]) and Web Talkies (Hindi comedies CM CM Hota Hai[7] and Maid in India[8]) for original content. To build regional viewership, the platform is focusing on less crowded western and eastern markets. It is creating originals in Gujarati (Kacho Papad Pako Papad[9]) and Marathi (YOLO – You Only Live Once[10])[11].

Share of Web Original Programing on SonyLIV by Genre



Source: SonyLIV Official Website[12] [13]

SNIPPETS

Launched
January 2013

Owned by
Sony Pictures Networks India

Headquarter
Mumbai, Maharashtra

Total Downloads
45 million+[1]

Google Play Store Downloads
10 million+[2]

Subscribers
Less than 1% subscribers pay for the services[3]

Unique Users (Mar 18)
5.28 million[4]

Reach
1.9%[5]

Average Minutes/visitor
4.5 minutes

Country Focus
India

Popularity Rankings
7th - Monthly Active Users,
7th - Downloads and
9th - Time Spent

Revenue Model
Freemium
AVOD (Advertising Video on Demand)
TVOD (Transactional Video on Demand)
SVOD (Subscription Video on Demand)

[1]Malvania, U. (2017, December 21). VOOT eyes premium market, international business in 2018. Business Standard.
[2]Sony LIV - LIVE Cricket TV Movies(n.d:). Retrieved May 21, 2018.
[3]Bhatia, H. (2018, January 03). Netflix restricted to premium subscribers, Hotstar leads Indian OTT content market - ET Telecom. Retrieved May 9, 2018.
[4]Source: ComScore MMX Multi-Platform Report, March 2018
[5]Source: ComScore MMX Multi-Platform Report, March 2018
[6]Official Chukyagiri looks at the life of budding intern who journeys from Meerut to Mumbai in pursuit of his dreams.
[7]CM CM Hota Hai depicts the struggle of a honest politician working for the betterment of the nation.
[8]Maid in India is the story of a smart maid who is always a step ahead of her employer.
[9]Kacho Papad Pako Papad showcases the dilemmas of an average, middle-class Gujarati joint family.
[10]YOLO – You Only Live Once captures incidents in the lives of four friends hailing from different families and economic backgrounds.
[11]Menon, B. D. (2017, Jun 18). SonyLIV ties up with content creators for regional shows. Retrieved from Businessline.
[12]SonyLIV. (n.d.). Retrieved May 21, 2018.
[13]Romantic comedies have been included under 'Romance' genre. Miscellaneous includes Bollywood news, reviews, tech, etc.

> The highest consumption of Hindi GEC content on any digital platform is content from SET and SAB on SonyLIV

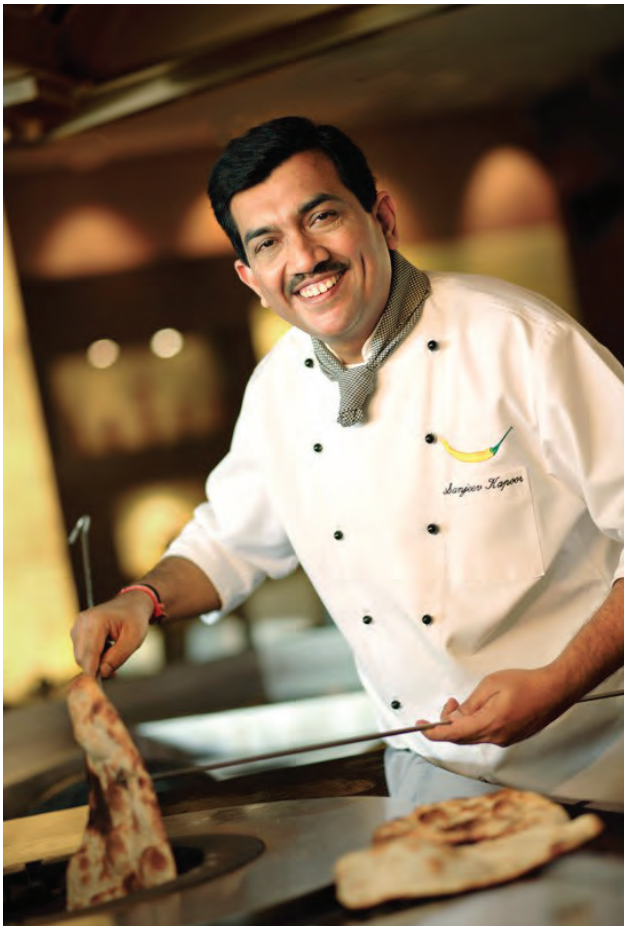


NP Singh
CEO | Sony Pictures Networks | INDIA

Popular shows include The Kapil Sharma Show[14], Porus[15], Yeh Un Dinon Ki Baat Hai[16]. Often, these shows leverage SonyLIV's digital presence. For instance, for the upcoming season of the game show Dus Ka Dum[17], SonyLIV has planned a game app which gives players a chance to land for the auditions[18]. Around 10% of the total watch time goes to for short films[19].

SonyLIV's premium content includes 9 International and 9 Indian[20] live channels. In a tie-up with global media group SPI International SonyLIV would launch 7 more thematic channels[21]. It has also struck an agreement with Republic TV to showcase live news an on-demand videos[22]. By partnering with celebrity chef Sanjeev Kapoor[23] and Rajshri Food, SonyLIV has acquired 4,000 hours of English and Hindi food content[24]. Liv Fit offers first-of-its-kind health and wellness content in an OTT platform in India. It includes workout videos and diet plans with renowned trainers like Suniel Shetty[25], Ramona Braganza etc[26]. LIV Kids feature popular nursery rhymes[27]. Sporting content has also garnered a lot of eyeballs with championships like La Liga[28], T20[29], Barclays ATP World Tour Finals[30] [31].

The secret sauce of success for the on-demand-video market is highly curated content customized for individual tastes. The player who quickly learns their viewers tastes and preferences and dishes out content accordingly will win.



[14]A stand-up comedy and talk show hosted by Kapil Sharma. The Kapil Sharma Show also features interactions with celebrity guests who promote their films on the show.
[15]Porus is a dramatic retelling of the life of Porus, an Indian warrior who fought against Alexander the Great in the Battle of the Hydaspes.
[16]Yeh Un Dinon Ki Baat Hai is the heartwarming story of adolescent romance and first love.
[17]The Indian version of the popular international reality game show Power of 10, Dus Ka Dum is hosted by Bollywood superstar Salman Khan. It airs on the television channel Sony Entertainment Television (India).
[18]Indiantelevision.com Team. (2018, March 19). Sony's 'Dus Ka Dum' gets app boost. Retrieved May 10, 2018.
[19]Indiantelevision.com Team(2018, October 27). Uday Sodhi bets long on short films on SonyLIV. Retrived May 9, 2018.
[20]The Live channels on SonyLIV are a) Indian – Republic TV, BloombergQuint, Sony SET HD, Sony SAB HD, Sony MAX HD, Boogle Bollywood, Sony ROX HD, Sony YAY SD, and Food b) International – FilmBox Arthouse, FashionBox HD, FightBox HD, Sony BBC Earth HD, DocuBox HD, 360 TuneBox, Animax HD, Fast&FunBox HD, and GameToon G HD.
[21]FilmBox Arthouse, FashionBox HD, FightBox HD, DocuBox HD, 360 TuneBox, Fast&FunBox HD, and GameToon G HD.
[22]Indiantelevision.com Team. (2018, May 03). SonyLIV and Republic World announce a strategic tie-up to expand digital presence. Retrieved May 9, 2018.
[23]Sanjeev Kapoor is an Indian celebrity chef, entrepreneur writer and television personality.
[24]SonyLIV to offer food content. (2017, October 17). The Hindu Business Line. Retrieved May 9, 2018.
[25]Suniel Shetty is an Indian film actor, producer and entrepreneur.
[26]BestMediaInfo Bureau. (2017, January 23). SonyLiv launches health and wellness content with Liv Fit. Retrieved May 9, 2018.
[27]Afaqs! news bureau. (2016, November 13). SonyLIV launches LIV Kids. Retrieved May 9, 2018.
[28]The men's top professional association football division of the Spanish football league system.
[29]Twenty20 cricket, often abbreviated to T20, is a short form of cricket.
[30]Men's tennis tournament
[31]Menon, B. D. (2017, Jun 18). SonyLIV ties up with content creators for regional shows. Retrieved from Businessline.

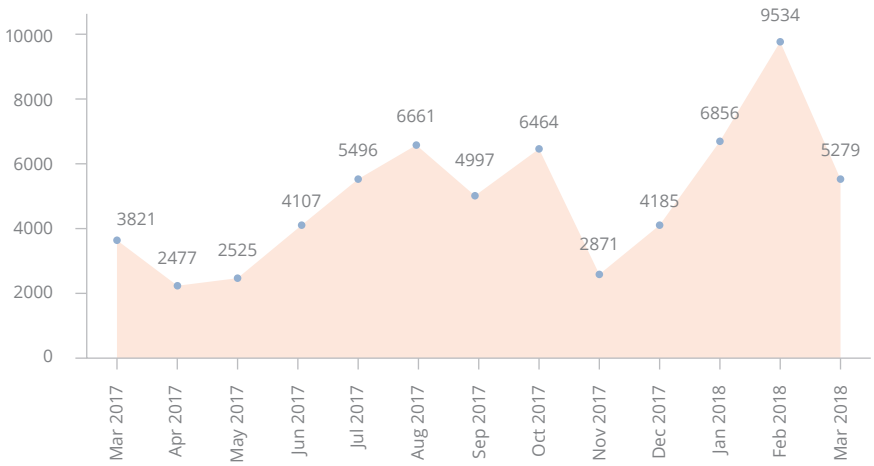
The platform hasn't managed to cross the 10 million mark unlike players like Hotstar and Voot. Majority of spikes in the viewership are created by streaming of cricket matches. The India-SA test series in January 2018 re- corded 30+ minutes average time spent[32].

In March 2018, mobile users comprised around 57% of the total unique visitors.

Interestingly, SonyLIV is being viewed on Desktop almost as much as on the mobile. It has charted a 5.7% growth in visitors on Desktop since March 2017. However, video streams per viewer for the desktop has decreased by 24% since the same period[33], indicating low engagement.

Key Measures of the Platform

SonyLIV Total Unique Visitors (000) across multi platform, March 2017 to March 2018



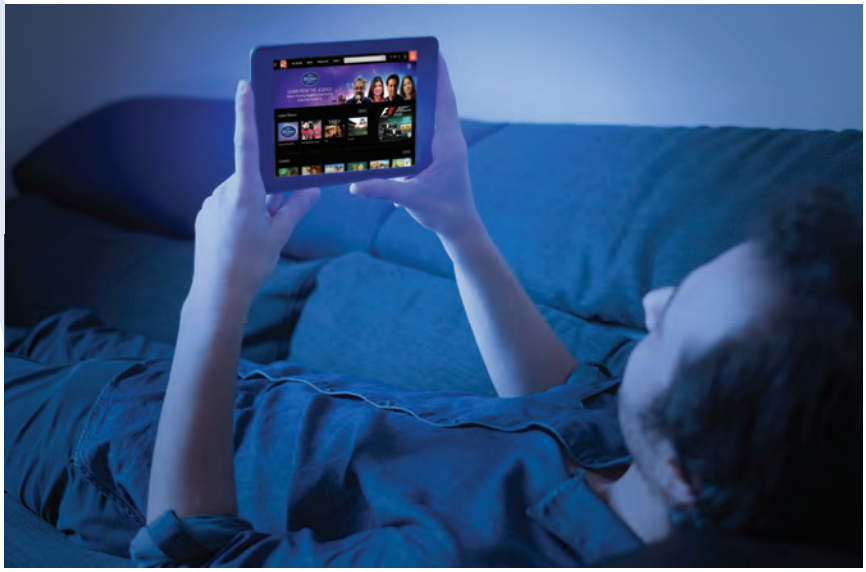
Consumer Demographics

SonyLIV Audience, March 2018

Males, Age Group	TUV (000)	Mobile (000)	Females, Age Group	TUV (000)	Mobile (000)
6-14	63		6-14	48	
15-24	2104	1332	15-24	567	362
25-34	1180	815	25-34	108	95
34-44	615	534	34-44	86	
45+	209	164	45+	300	232
All Males	**4170**	**2844**	**All Females**	**1109**	**690**

Source: ComScore MMX Multi-Platform Demographic Report, March 2018

SonyLIV is largely male-driven, with only 21% female audiences. The male audiences is predominantly interested in sports[34]. Only in the age bracket of 45+ did females surpass male viewers.



[32]TelevisionPost Team. (2018, February 2). SonyLIV records 30 mins average time spent for Ind-SA test series. Retrieved May 17 2018.
[33]TelevisionPost Team. (2018, February 2). SonyLIV records 30 mins average time spent for Ind-SA test series. Retrieved May 17, 2018.
[34]Source: ComScore Desktop Media Overview Report, March 2018

Ad Metrix

Top ad categories:

Computers & Technology
Finance
Media & Entertainment
Telecommunications

Most advertised on:

Entertainment
Social Media

Source: ComScore Desktop Media Overview Report, March 2018

Recent Developments

Partnerships and Distribution

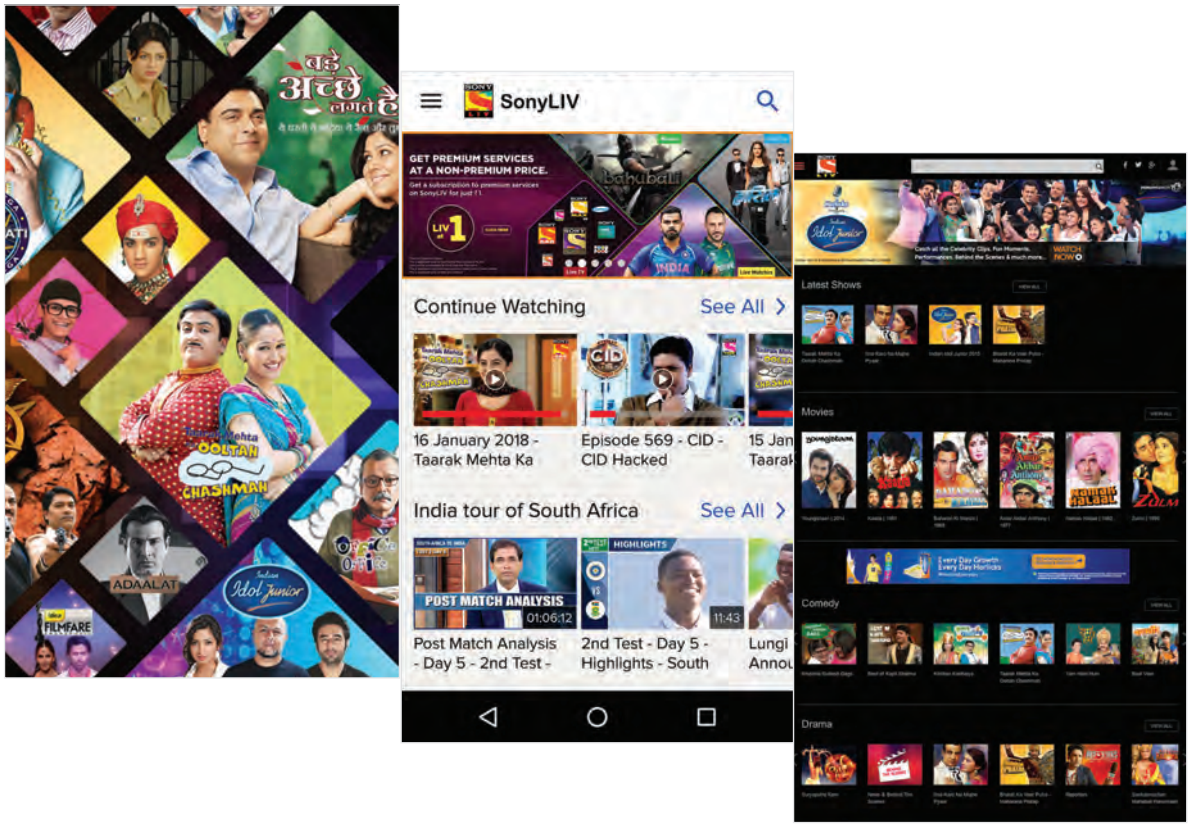
Partnered with Evergent Technologies for provisioning, content access, tracking global developments to personalizing products, bundles and promotions[35].

SonyLIV has also partnered Vewd, a market leader in OTT solutions, to efficiently reach connected device viewers[36].

Future Plans

Content Expansion

SonyLIV aims to double its food content from 4000 to 8000 hours by Oct '18 and introduce the feature in the regional languages[37].



[35]Re-imagining India's M&E Sector (March 2018, p. 118, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.
[36]Mallya, H. (2018, March 15). Vewd continues decade-long quest to make idiot boxes smarter. Retrieved May 9, 2018.
[37]SonyLIV to offer food content. (2017, October 17). The Hindu Business Line. Retrieved May 9, 2018.

POPULAR **SHOWS**

#LoveBytes
Hindi - Romantic Drama; 2 Seasons - 36 Episodes



A SonyLIV original, #LoveBytes captures ups and downs in the relationship of an urban new-age couple. Following the success of the Season 1, SonyLIV renewed the series in October 2017 with a higher budget[38].

The Kapil Sharma Show
Hindi - Comedy; 129 Episodes



The show originally premiered on April 23rd 2016 on Sony TV and was one of their top performers. It has performed exceedingly well digitally as well, becoming the third most viewed show online with 300+ million views on SonyLIV's app, website and YouTube[39].

Married Woman Diaries
Hindi - Romantic Comedy; 17 Episodes



A SonyLIV original, Married Woman Diaries narrates the story of how a married couple deals with the changing dynamics of their relationship. The series was renewed for a 2nd season after 1st season's phenomenal success[40].

House Proud
English - Lifestyle; 11 Episodes



Co-produced by SonyLIV and JossBox, House Proud showcases makeovers to personal spaces helping owners realize the beauty of their own homes. Each episode is 8-12 minutes in length. The series was renewed for a second season on popular demand[41].

Porus
Hindi - Historical Drama; 118 Episodes



Porus is a drama series airing on Sony Entertainment Television. It is about the life of Porus, an Indian warrior who fought against Alexander the Great in the Battle of the Hydaspes. The show is one of the best performers on SonyLIV, with viewership growing by 30% between December 2017 and January 2018[42].

[38]Indiantelevision.com Team. (2017, October 13). LoveBytes 2: SonyLiv's Sodhi says prime focus is youth issues; international Aus matches after Diwali. Retrieved May 10, 2018.
[39]Singh, R. (2016, Sep 29). How kapil sharma has disrupted SonyLIV's OTT space brand equity]. Retrieved fromThe Economic Times.
[40]Indiantelevision.com Team. (2018, April 06). SonyLIV Launches Married Woman Diaries - Phase 2. Retrieved May 10, 2018.
[41]Indiantelevision.com Team. (2018, April 10). SonyLIV launches House Proud Season 2. Retrieved May 10, 2018.
[42]Chauhan, K. (2018, February 19). 'Porus' viewership soldiers on. Retrieved May 10, 2018.

“

With improved networks and better access to the internet, digital media consumption in India has risen exponentially in the last few years. With growing number of screens consumption of content has increased and consumers are spending more time on digital media. New-age media grew at a staggering 29.4% from INR 92 billion in 2016 to INR 119 billion in 2017. With over 481 million internet users in 2017 (295 million in urban and 186 million in rural) and approximately 30% female users, Internet users are expected to reach 829 million by 2021, driven by rural consumers, who are expected to grow from 38% to 52% by 2021.

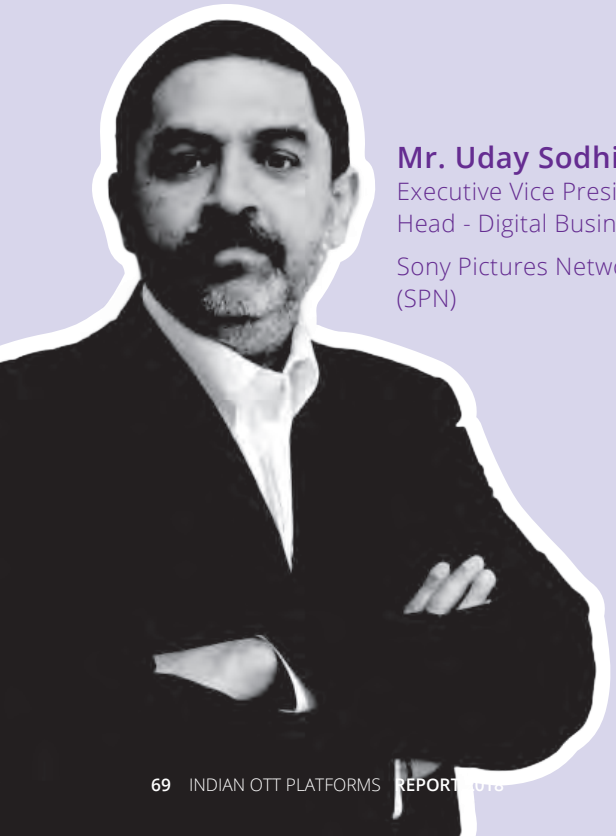
India is on the verge of transitioning into a digital economy with digital payment volumes increasing from 957.5 million transactions in Dec'16 to 1,057.4 million transactions in Dec'17. The digital medium is a rising advertising platform, showing that advertising budgets are following changing content consumption patterns. OTT platforms are helping advertisers to engage with the consumer by targeting motivated buyers according to lifestyle, immediate goals and purchase-driving passions with great content available at a moment's notice. By creating original content, either on their own or in association with production houses give advertises myriad opportunities to integrating with the brand within the content itself takes storytelling to a different level and creating more resonance with the target audience.

Considering the growth in OTT, digital ad spends have contributed to 17% of the total outlay in India in 2017 growing from 15% in 2016 with around 10-15% of the advertising being programmatic in nature. With an increasing demand for variety and original content in the over-the-top (OTT) industry, a major trend that emerged involved consumers spending 93% of the watch time on videos in Hindi and other regional languages. Building on this trend, SonyLIV entered the regional OTT space with an aim to reach to younger audiences through focused content. Since then, through our 5 year journey we have learned, grown and been a vital part in building the digital ecosystem in our country. We became the first OTT player to have over 4000 hours of food content and over 3000+ live matches and 4000+ hours of football action among other content. We have introduced new content formats like original web-series, short films that also in regional languages and established a presence in top Indian metros. in the last two years, advertisers have shown tremendous interest towards OTT. Digital subscription grew 50% in 2017, from INR 2.6 billion in 2016 to INR 3.9 billion in 2017 and is estimated to reach INR 20.1 billion by 2020.

Online video viewing audience grew in 2017 to 250 million audiences with a growth of 64% over 2016. With consumer showing increased preference towards short form content, the average length of video viewed in India stands at around 20 minutes. Mobile is contributing to the success of VOD services in India. Around 40% of total mobile traffic came from the consumption of Video services in 2015 and this figure is expected to touch 72% by 2020. India is expected to become the second largest video viewing audience by 2020 touching 500 million. With the rise of mobile usage, brands have been challenged to figure out how to do more with less screen real estate and shorter attention spans. This trend has led content producers to focus on exclusive and snackable content

Consumption by younger audiences and women is expected to grow at a CAGR of 22% and 33% respectively between 2016 and 2021. This growth will enable several opportunities around sports, women centric content, short videos, edgy content, interactivity and social media integration. Industry discussion suggests that in 2017, around 10-15% of advertising was programmatic in nature. This is expected to grow to 50% by 2020.

Having considered all these points, one can see why the digital universe is so excited about the OTT explosion. I think it is safe to say that the OTT revolution has only just begun and is set to gather even more steam in the years ahead.



Mr. Uday Sodhi,
Executive Vice President and Head - Digital Business
Sony Pictures Networks (SPN)

”




ALT
BALAJI
Bewafaa
sii
Wafaa
#ALTBalajiOriginal



Content

Original Content

19 General Shows (Hindi – 17, Bengali – 1, Tamil – 1) + 5 Kids' Shows

Offering

ALTBalaji currently has 150+ hours of content[10] comprising general shows, kids shows, movies, and special content. It is primarily focused on creating original fiction series and has spent almost 100 crores to cash on its content[11], with INR 1.2 million – INR 1.5 million (USD 17.5K – USD 21.9K approx.) spent to produce a 20-30-minute episode[12].

The general content comprises majorly of dramas (Bewafaa sii Wafaa), comedies (Boygiri), and romance (Romil & Jugal). ALTBalaji has also experimented with period pieces with Bose: Dead/Alive and erotica (Gandi Baat).

ALTBalaji has adopted various strategies to capture audience interest. It roped in established Indian actors like Nimrat Kaur and Rajkumar Rao to bring value to its platform[13]. It has also reintroduced Balaji Telefilms Ltd.'s popular cinematic productions and television super-stars for digital audiences through the shows Ragini MMS: Returns, the third installment in the Ragini MMS movie franchise[14], and Karrle Tu Bhi Mohabbat, which features actors Sakshi Tanwar and Ram Kapoor of Bade Acche Lagte Hain[15] fame.

SNIPPETS

Launched
April 16th, 2017 (India)

Owned by
Balaji Telefilms Limited[1]

Headquarter
Mumbai, Maharashtra

Total Downloads
11 million app downloads + 2.2 million downloads through web browser as of December 2017[2]

Google Play Store Downloads
5 million+[3]

Subscribers
1.2 million paid users[4]

Unique Users (Mar 18)
918k[5]

Reach
0.3%[6]

Average Minutes/visitor
7.6[7]

Popularity Rankings[8]
16th - Monthly Active Users,
12th - Downloads and
17th - Time Spent

Country Focus
India[9]**. ALTBalaji also has traction in Pakistan, Bangladesh, US, and UAE.**

Revenue Model
SVOD (Subscription Video on Demand). The website follows a freemium model.

[1]Balaji Telefilms Ltd is amongst the largest content production houses in Asia and Middle East in Hindi and regional content. The company produces Indian soap operas, reality TV, comedy, game shows, entertainment and factual programming in several Indian languages.
[2]Quarterly Performance Report (Rep.). (n.d.). Retrieved May 24, 2018, from Balaji Telefilms Limited website.
[3]ALTBalaji - Apps on Google Play. (2018, May 16). Retrieved May 21, 2018.
[4]This excludes the Reliance Jio platform users who have access to ALTBalaji original content.
[5]Source: ComScore Mobile Metrix Report, March 2018
[6]Source: ComScore Mobile Metrix Report, March 2018
[7]Source: ComScore Mobile Metrix Report, March 2018
[8]Re-imagining India's M&E Sector (March 2018, p. 129, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.
[9]Source: ComScore Desktop Media Overview Report, March 2018
[10]Quarterly Performance Report (Rep.). (n.d.). Retrieved May 24, 2018, from Balaji Telefilms Limited website.
[11]TelevisionPost Team. (2018, March 01). ALTBalaji eyes profitability with a higher user base at lower ARPU - TelevisionPost.com: Latest news/Research, India's Television, Cable, DTH, TRAI. Retrieved May 24, 2018.
[12]Pahwa, N. (2017, September 01). At Rs 12-15 Lakh, cost of fiction content on digital almost twice that of TV: ALTBalaji. Retrieved May 24, 2018.
[13]Choudhury, A. R. (2017, July 11). "Competition is everywhere": Nachiket Pantvaidya, ALTBalaji. Retrieved May 25, 2018.
[14]Includes the feature films Ragini MMS (2011) and Ragini MMS 2 (2014).
[15]Bade Achhe Lagte Hain was a popular Hindi-language soap opera produced by Balaji Telefilms and broadcast by Sony Entertainment Television India.

ALTBalaji aims to devote 15% of the total show hours to regional content. Presently, the regional originals on ALTBalaji includes the Tamil thriller Maya Thirrai and the Bengali drama Dhimaner Dinkaal. These shows have found an audience not just locally but also among the Tamil and Bengali diaspora in Singapore and Dhaka. Believing the South Indian language to have the highest growth and revenue potential, ALTBalaji also offers dubbed content in multiple languages such as Tamil, Telugu and Malayalam[16].

ALTBalaji is one of the few homegrown platforms to bring out original content for children with live-action do-it-yourself shows (Get Crafty with Rob), nursery rhymes, and animated content (Happy Lucky Ki Katti Batti). Its syndicated offerings for kids includes Reliance Animation Studio's Shaktimaan and Little Krishna, and locally dubbed versions of foreign content like Shuriken School[17] among others.

Another interesting feature is its original stand-up collection in English, Hindi, Tamil, Telugu, Malayalam, Marathi, Punjabi[18]. ALTBalaji CMO Manav Sethi mentions, "We are thrilled to bring original regional stand-up comedy on ALTBalaji. It is fast emerging as high growth genre for web audiences... Based on consumer insight, we understood that the stand-up available to viewers in India is mostly English or Hindi, neglecting the regional language demand and so we have identified local talents from these regions and got them on board"[19].

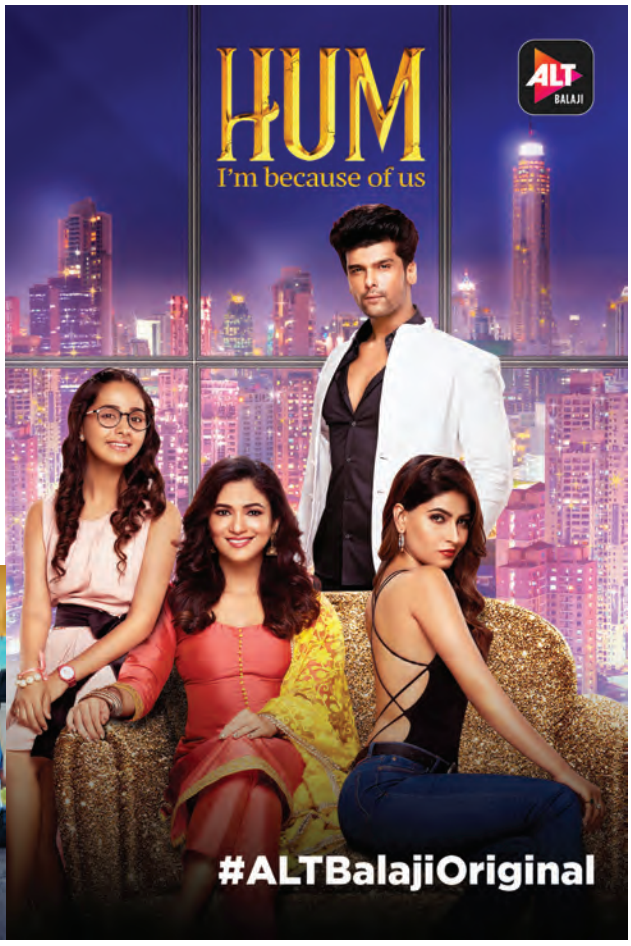
ALTBalaji features over 18 productions by Balaji Motion Pictures namely Once Upon a Time in Mumbaai[20], Lootera[21]. Lastly, it also streamed the Box Cricket League 2018, the third season of the cricket series featuring celebrities.

ALTBalaji is the country's first large OTT platform with only original content tailor-made for Indian audiences[22]. It is aimed at the urban mass that consumes both popular foreign and Indian shows online[23]. Besides its popularity in the metros, over 80% of its traffic coming from Tier I and Tier II towns.

It caters specifically to three audiences– one, female viewership for its drama series; second, male viewership for series such as Ragini MMS Returns[24] and third, a chunk of universal urban viewers for shows like Bose: Dead/ Alive[25] [26].

Within six months of launch, ALTBalaji was ranked among the top three revenue-grossing video streams in the country[27]. Over 800 million minutes of video was consumed till March 31st 2018.

ALTBalaji received the Best OTT Platform of the Year at the DIGIXX Awards 2018[28], among a host of other accolades for its content.





[16]Indiantelevision.com Team. (2017, December 13). Regional content on ALTBalaji to constitute 15% of show hours. Retrieved May 24, 2018.
[17]Shuriken School is a French-Spanish animated series that first aired in 2006.
[18]Alt Balaji Comedy. (n.d.). Retrieved May 24, 2018.
[19]TelevisionPost Team. (2018, March 07). ALTBalaji bolsters its original regional stand-up comedy offering - TelevisionPost.com: Latest news/Research, India's Television, Cable, DTH, TRAI. Retrieved May 24, 2018, from http://www.televisionpost.com/altbalaji-bolsters-its-original-regional-stand-up-comedy-offering/
[20]A 2010 Indian gangster film.
[21]A 2013 Indian period romance film.
[22]Surendar, T. (2018, April 02). India's soap queen eyes digital reign. Retrieved May 25, 2018.
[23]FE Bureau. (2017, April 13). Balaji Telefilms' digital venture set to enter video OTT space. Retrieved May 24, 2018.
[24]An Indian erotic-horror web series produced and distributed by ALT Balaji.
[25]Bose: Dead/ Alive is a show around the circumstances surrounding Netaji Subhash Chandra Bose's death.
[26]Bhagia, R. (2018, April 30). Targeting 8 million paid subscribers by 2020, ALTBalaji to invest Rs 150 crore per year. Retrieved May 24, 2018.
[27]Chauhan, K. (2018, January 05). 2017: The year OTTs went regional in India. Retrieved May 24, 2018.
[28]Adgully Bureau. (2018, March 09). DIGIXX 2018: Revealed – The leading lights of Digital in India. Retrieved May 24, 2018.

ALTBalaji's total unique visitors fell from 4.2 million in May 2017 to 918K in March 2018. Nevertheless, users spent an impressive average of 153.8 minutes per visit in March 2018.

The brief spike in August coincided with the launch of the trailer of Hansal Mehta's Bose: Dead or Alive. Between October and Jan 2018, the launch of Ragini MMS: Returns, Bose: Dead or Alive helped bolster the platform's performance.

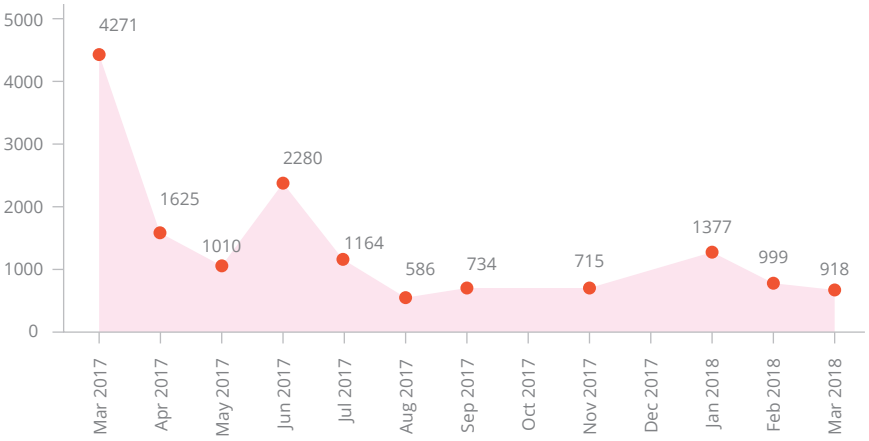
At 745K, mobile visitors took up almost 85% of ALTBalaji's total unique visitors in March 2018. Of these, 494K used the ALTBalaji mobile app to access content. The App usage has declined with time. For instance, in August 2017, close to 91.4% of the total unique users had accessed ALTBalaji via the mobile app, whereas by March 2018 the figure shrank to 53.81%.

Total unique visitors on the desktop were 174K in March 2018. Videos per viewer on the desktop has increased by 10.8% since May 2017[29]. Desktop visitors spent approximately 44.2 minutes on the platform in March 2018.

ALTBalaji was largely frequented by male visitors as on March 2018. Males between 15-44 are the plat- form's largest audience segment. Nonetheless, ALTBalaji did find an audience in younger women between 15 and 34.

Key Measures of the Platform

ALTBalaji Total Unique Visitors (000) across multi platform, March 2017 to March 2018



Source: ComScore MMX Multi-Platform Demographic Report, March 2018

Consumer Demographics

ALTBalaji Audience, March 2018

Males, Age Group	TUV (000)	Total Mobile (000)	Females, Age Group	TUV (000)	Total Mobile (000)
6-14	-	-	6-14	11	-
15-24	208	190	15-24	150	121
25-34	223	204	25-34	106	95
35-44	181	178	35-44	10	-
45+	10	-	45+	18	-
All Males	**622**	**572**	**All Females**	**296**	**216**

[29]Source: ComScore Desktop Media Overview Report, March 2018

Partnerships and Distributions

ALTBalaji signed content partnerships with Reliance Jio, Vodafone and Airtel TV platforms to expand its reach and monetization of content[30],[31]. It also has tie-ups with Ola Play, Amazon Fire Stick, Opera TV, and Roku[32].

Future Plans

ALTBalaji plans to churn out 100 hours of original content in 2018 and is working on 50 new concepts at present. Besides debuting new content like Ghost Who Bombs, FCUK, it also plans to launch second seasons of existing shows such as Dev DD, Haq Se. There will be shows specifically targeted at male audiences. By the end of April 2019, 50 original shows are anticipated on the platform.

ALTBalaji also plans to create regional content for the Bhojpuri and South Indian markets[33] [34].

ALTBalaji plans at 8 million paid subscribers by 2020.

Besides its presence in over 90 countries, the platform is soon to launch in Indonesia, dubbing its content in Bahasa, as well as channelize its focus on US, UK, Middle East and Bangladesh[35].

Revenue

Total Revenues
INR 37 million (USD 541.5K approx.) for the quarter ended 31st March 2018

Full year FY18 revenues stood at INR 68 million (USD 994.8K approx.)[36]
Q4 FY18 revenue greater than the combined revenues in first 9 months of
operations

FY18 Profit After Tax at INR 953 million (USD 13.94 million approx.) vs
INR 127 million (USD 1.86 million) in FY17[37].

[30]Khan, D. (2018, January 25). Reliance Jio inks content deal with ALTBalaji to counter Airtel - ET Telecom. Retrieved May 24, 2018.
[31]Chakraborty, S. (2018, March 29). Airtel Partners ALTBalaji to Bring Its Shows to Airtel TV App. Retrieved May 24, 2018.
[32]Choudhury, A. R. (2018, January 21). How are OTT players fighting the distribution challenge? Retrieved May 25, 2018.
[33]Panjari, S. (2018, May 23). ALTBalaji to launch over 100 hours of original content in 2018 - TelevisionPost.com: Latest news/Research, India's Television, Cable, DTH, TRAI. Retrieved May 24, 2018.
[34]Sharma, J. (2018, April 19). In Conversation with Manav Sethi, Chief Marketing Officer, ALTBalaji.
[35]Panjari, S. (2018, May 23). ALTBalaji to launch over 100 hours of original content in 2018 - TelevisionPost.com: Latest news/Research, India's Television, Cable, DTH, TRAI. Retrieved May 24, 2018.
[36]Varshney, R. (2018, May 21). ALTBalaji reports Rs 3.6cr in revenues, Rs 8.63Cr loss for Q4FY18. Retrieved May 24, 2018.
[37]*Quarterly Performance Report* (Rep.). (n.d.). Retrieved May 24, 2018, from Balaji Telefilms Limited website.

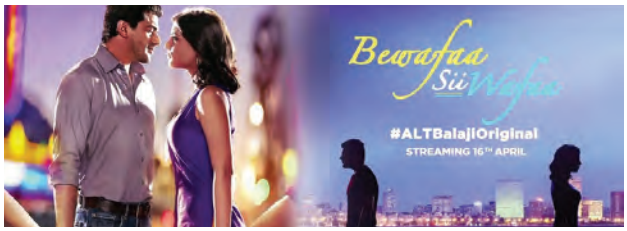
POPULAR SHOWS[38]

Ragini MMS: Returns
Hindi – Horror/Erotic; Total Episodes: 8



Ragini MMS: Returns is an erotic horror web-series set in a college with a mysterious past. The highly anticipated series featured 6th in the list of Internet Movie Data Base (IMDB) Trending Movies and Shows based on real-time popularity. It also garnered over 5 million views on YouTube within two weeks of its release[39].

Bewafaa sii Wafaa
Hindi / Malayalam / Tamil / Telugu – Drama



Bewafaa sii Wafaa follows two individuals who are deeply in love but are married to different people. The series garnered over 5 million views.

Karrle Tu Bhi Mohabbat
Hindi: Drama/ Romance; 2 Seasons – 29 Episodes



Starring the iconic couple Ram Kapoor and Sakshi Tanwar of Bade Achhe Lagte Hain fame, Karrle Tu Bhi Mohabbat is about two people completely different from each other falling love and the problems that they have to overcome in doing so. The second season was launched after the outstanding performance of Season 1, which garnered 7 million views.

Romil & Jugal
Hindi/ Malayalam/ Tamil/ Telugu – Romance/Drama; Total Episodes: 10



Romil and Jugal is a quirky and witty modern-day Indianised adaptation of Shakespeare's Romeo and Juliet, on same sex romance and society's acceptance towards it. The show received over 2 million views.

Bose: Dead/Alive
English – Drama / Biopic; Total Episodes: 9



Bose: Dead/Alive is inspired by Indian author and former journalist, Anuj Dhar's book, India's Biggest Cover-Up. The series takes on the task of discovering the circumstances surrounding Netaji Subhash Chandra Bose's death.

DEV DD
Hindi – Romance/ Drama; Total episodes: 11



DEV DD is set in Rajasthan and depicts the life of a young girl who unapologetically rebels against regressive and patriarchal societal norms. DEV DD was highly talked about and attained over 10 million views.

[38]ALTBalaji Originals Now Available in Malayalam, Telugu and Tamil languages. (2017, December 12). Retrieved May 24, 2018.
[39]Ragini MMS Returns races ahead of blockbusters. (2017, November 11). Retrieved May 24, 2018.

Content

Original Content

21 Shows (Hindi - 10, Telugu - 8, Hindi-Telugu-1, Kannada - 1, Marathi - 1)

Offering

Viu presently has over 40K hours of content that includes 21 original shows, 300+ Movies and 250+ syndicated series. It is dominated by thrillers (5) and talk shows (5).

Viu has a tie-up with filmmaker Vikram Bhatt for long form and short form content for its shows. Other interesting formats include the prank-show Paisa Vasool, 2-minute micro-originals Viru Ke Funde featuring the cricketer Virender Sehwaag, and the adventure series I Can You Can.

The service is building on its regional content with the talk show No 1 Yaari and the comedy Munching With Mahathalli among others. Social, the first bilingual digital show is in Hindi and Telugu. Regional content has worked extremely well for Viu, with Viu CMO Shantanu Gangane stating, "When we launched Pelli Gola and Pilla in last year in Telugu, we had extremely high number of viewers coming back repeatedly week on week, when we were releasing episodes"[7].

The syndicated series are mostly Korean dramas (My Love From The Star[8], Descendants of the Sun[9]) with English subtitles.

Viu also includes over 400 movie titles in Hindi, English, Korean, Telugu, Marathi, and Kannada.

SNIPPETS

Launched
March 4th, 2016 (India Launch)

Owned by
Vuclip

Headquarter
Singapore

Google Play Store Downloads
1 million[1]

Unique Users (Mar 18)
1.15 million[2]

Reach
0.4%[3]

Average Minutes/visitor
1.7[4]

Popularity Rankings[5]
19th - Monthly Active Users,
17th - Downloads and
18th - Time Spent

Country Focus
Asia Pacific (95.9%)[6]

Revenue Model
SVOD (Subscription Video on Demand)

[1]Viu. (2018, May 12). Retrieved May 22, 2018.
[2]Source: ComScore MMX Multi-Platform Report, March 2018
[3]Source: ComScore MMX Multi-Platform Report, March 2018
[4]Source: ComScore MMX Multi-Platform Report, March 2018
[5]Re-imagining India's M&E Sector (March 2018, p. 129, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.
[6]Source: ComScore Dashboard, March 2018
[7]Indiantelevision.com Team. (2018, April 28). Viu India plans to expand in Tamil market. Retrieved May 8, 2018.
[8]A South Korean sci-fi romance story about an alien who lands on Earth and falls in love with an actress. Originally titled Byeoreseo on geudae.
[9]A South Korean romance series about a soldier who falls in love with a doctor. Originally titled Taeyang-ui Huye.

Viu is an over-the-top (OTT) video service mainly offering Asian dramas, variety programs, animation, and entertainment news. It debuted in Hong Kong on October 26th 2015. The service is present in 15 markets including Hong Kong, Singapore, Malaysia, India, Indonesia, the Philippines, Thailand and Middle East countries of Bahrain, Egypt, Jordan, Kuwait, Oman, Qatar, Saudi Arabia and the UAE.

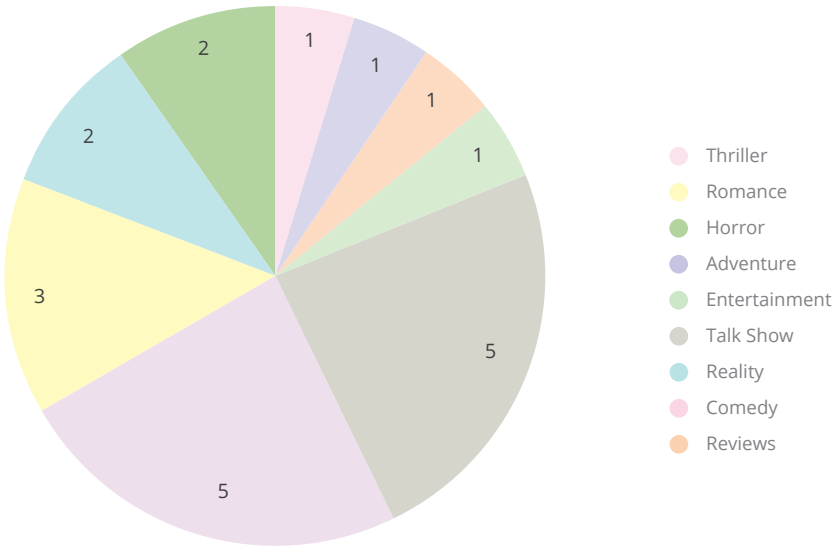
During its India launch, Vishal Maheshwari, Viu India, Country Head, said, "We have witnessed a very healthy uptake by young viewers, aged 18 to 24 years, who are watching Korean TV shows with English subtitles", emphasizing that Korean content has picked up rapidly across the country.[10]

The total unique visitors on Viu were 1.1 million in March 2017. They contributed to over 4 million views.

For most part of 2017, Viu's total unique visitors has well been under the 1 million mark. Starting February 2018, it soar- ed to 0.9 million and crossed the one million mark by March 2018. During this period Viu launched the Marathi talk show No. 1 Yaari with Swwapnil, featuring popular Marathi actor Swwapnil Joshi and celebrity guests. The show was also simulcast on Marathi GEC Colors Marathi[11]. The second season of Vikram Bhatt's Spotlight, a Viu original, also started streaming on January 26th.

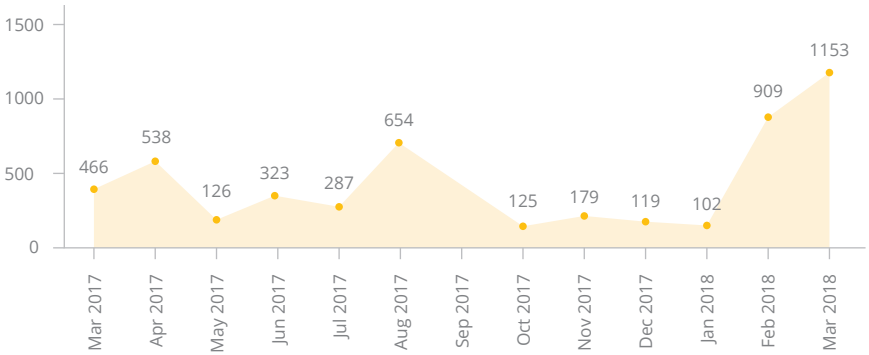
Viu has witnessed a sudden spurt in total unique visitors on Desktop, with a 6116.3% rise since March 2017. Video streams per viewer on the desktop also increased by 53.6% since April 2017, indicating a higher usage.

Share of Original Programming on Viu By Genre



Key Measures of the Platform

Viu Total Unique Visitors (000) across multi platform, March 2017 to March 2018



Source: ComScore MMX Multi-Platform Demographic Report, March 2018

Consumer Demographics

Viu Audience, March 2018

Males, Age Group	TUV (000)	Total Mobile (000)	Females, Age Group	TUV (000)	Total Mobile (000)
6-14	5	-	6-14	11	-
15-24	310	152	15-24	181	121
25-34	284	204	25-34	41	-
35-44	199	178	35-44	31	-
45+	54	-	45+	37	-
All Males	**853**	**2325**	**All Females**	**301**	**121**

[10]Indiantelevision.com Team. (2017, December 27). Viu brings best of korean shows to india. Retrieved May 8, 2018.
[11]TelevisionPost Team. (2018, February 15). Viu, Colors Marathi to simulcast talk show 'No. 1 Yaari with Swwapnil'. Retrieved May 17, 2018.



A large number of shows in a variety of genres is a great way to attract users. Every streaming platform is trying to acquire and project large content volume. To achieve this objective a common strategy used is acquiring foreign language shows. Vie features a wide range of Korean Dramas. Thanks to the personalized consumption pattern of the users this strategy really works.

Viu is largely consumed by males between the ages 15-44. Nearly 73% of the total unique visitors in March 2018 comprised males. Only in the age bracket of 6-14 do females outnumber males.

Partnerships and Distributions

Viu formed partnerships with Samsung, Micromax, Intex, Annapoorna Studios, Shemaroo Entertainment, and Amazon Firestick.

Future Plans

Viu plans to launch 20 new Viu Original shows in India and expand its content library by three times by the end of 2018. Internationally, it targets 70 titles and over 900 episodes of locally produced content by the same time.

Viu Originals has also forayed into full feature movies. High Jack, which is co-produced with award-winning Bollywood Banner Phantom Films in India, will be available on the Viu platform[12].



Regionalization Viu endeavors to enter the Tamil market by associating with content creators. It is also aiming to create multiple bilingual shows and explore other regions[13].

[12]BestMediaInfo Bureau. (2018, April 25). Viu India to launch 20 more Viu Originals in 2018. Retrieved May 8, 2018, from http://bestmediainfo.com/2018/04/viu-to-launch-20-more-viu-originals-in-2018/
[13]Indiantelevision.com Team. (2018, January 09). Branded content drives Viu. Retrieved May 8, 2018, from http://www.indiantelevision.com/iworld/over-the-top-services/branded-content-drives-viu-180109

POPULAR SHOWS

What the Duck
Hindi - Comedy Talk Show; 2 Seasons– 23 Episodes



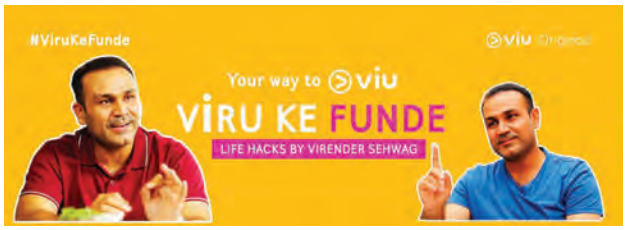
What The Duck is a cricket comedy chat show hosted by Vikram Sathaye and featuring interviews with renowned cricketers like Zaheer Khan, Virendra Sehwag, Kapil Dev among others.

Spotlight
Hindi - Thriller; 2 Seasons - 23 Episodes



Season 1 of Vikram Bhatt's Spotlight captures the story of a famous Bollywood actress and her ups and down, her relationships and the dark side of success and fame. Season 2 works on a similar theme, tracking the rise, the fall and the resurrection of a music superstar.

Viru Ke Funde
Hindi - Entertainment; 15 Episodes



The 2-minute micro-originals Viru Ke Funde features the cricketer Virender Sehwaag as he dishes out advice to his friends on situations faced in our day to day lives.

Pelli Gola
Telugu - Romance; 10 Episodes



Co-produced by Tamada Media and presented by Annapurna Studios, Pelli Gola follows a couple who run away from their own wedding after being forced by their family into an arranged marriage.

Pilla
Telugu – Thriller; 10 Episodes



Co-produced by Tamada Media and presented by Annapurna Studios, Pilla revolves around a young girl who discovers she is accidentally pregnant and attempts to trace back her memory of a party night.


PRIME ORIGINAL
BREATHE



Content

50,000 Hours

Original Content

63 original series including 3 Indian originals– the drama Breathe[5], the suspense thriller Inside Edge[6], and the reality series The Remix[7].

Other originals are mainly in English. Originals targeting child audiences are also available (Gortimer Gibbon's Life on Normal Street[8], The Stinky & Dirty Show[9]).

Offering

4000+ movies[10],1200 seasons[11] of television show and content for children.

Its syndicated content includes popular series such as Young Sheldon[12], 2 Broke Girls[13] etc.

Films are available in 6 languages (English, Hindi, Tamil, Telugu, Marathi and Bengali). The platform particularly focuses on the south Indian market[14].

Content for children include the library of ChuChu TV Studios and Green Gold Animation. Other popular children's shows like Doraemon, Shin Chan etc. are also available.

The Prime Video website and app interface are available in English, German, French, Italian, Spanish, and Portuguese. User can choose multi-language subtitles and audio dubbing for video playback for many titles in the following languages – English, French, German, Italian, Japanese, Portuguese, and Spanish[15].

Amazon has tie-ups with Yash Raj Films, Dharma Productions, T-Series, Shree Venkatesh Films, Everest Entertainment, V Creations and Dream Warrior Pictures.

In Jan 2017, Amazon signed a ground-breaking deal with 14 popular Indian stand-up comedians. These comedy specials with artists like Kenny Sebastian, Biswa Kalyan Rath, Kanan Gil, Rahul Subramanian are extremely popular.

SNIPPETS

Launched
December 2016

Owned by
Amazon

Headquarter
Seattle, Washington, USA

Google Play Store Downloads
50 million+[1]

Unique Users (Mar 18)
6.37 million[2] (Mobiles Only)

Reach
2.5%[3]

Average Minutes/visitor
131.1 minutes

Popularity Rankings[4]
6th - Monthly Active Users,
5th - Downloads and
5th - Time Spent

Country Focus
India

Revenue Model
SVOD (Subscription Video on Demand-the unique subscription model includes product/service deals on Amazon.in and Amazon Music)

[1]Amazon Prime Video. (2018, May 22). Retrieved May 21, 2018.
[2]Source: ComScore Mobile Metrix Report, March 2018
[3]Source: ComScore Mobile Metrix Report, March 2018
[4]As per App Annie's report on the top video OTT apps of 2017
[5]Breathe is an Indian drama that explores the lives of ordinary men faced with extraordinary circumstances.
[6]Inside Edge is the story of the Mumbai Mavericks, a T20 cricket franchise playing in the Powerplay League.
[7]The Remix is a music competition show where a singer and DJ team up to create a fresh spin of popular Bollywood songs.
[8]Gortimer Gibbon's Life on Normal Street follows Gortimer and his two best friends, Ranger and Mel, on magical exploits triggered by their thirst for adventure.
[9]The adventures of best friends and unlikely heroes, Stinky the garbage truck and Dirty the backhoe loader.
[10]All the movies available on Amazon Prime. (n.d.). Retrieved May 28, 2018.
[11]The full list of TV shows available on Amazon Prime | 1200 seasons. (n.d.). Retrieved May 28, 2018.
[12]Young Sheldon is an American television comedy on CBS about a child prodigy who struggles to fit in with his unintellectual family in Texas.
[13]2 Broke Girls is an American television sitcom that aired on CBS about two girls from very different backgrounds who wind up as waitresses in the diner and strike up an unlikely friendship.
[14]Amazon Prime video looking to expand Indian regional content - ETtech. (2018, March 11). Retrieved May 28, 2018.
[15]Primevideo.com. (n.d.). Retrieved May 28, 2018, from https://www.primevideo.com/

Amazon Prime Video was globally rolled out in more than 200 countries. In India when Amazon Prime subscription launched in July '16, it included product deals and quicker delivery options only. Later in December the video services were added.

Within a year, India became the largest and fastest- growing market[16] for Amazon Prime. Interestingly, 50% of the Amazon Prime users were from non-metros[17]. By the end of 2017, Amazon Prime Video was one of the top OTT platforms in the country.

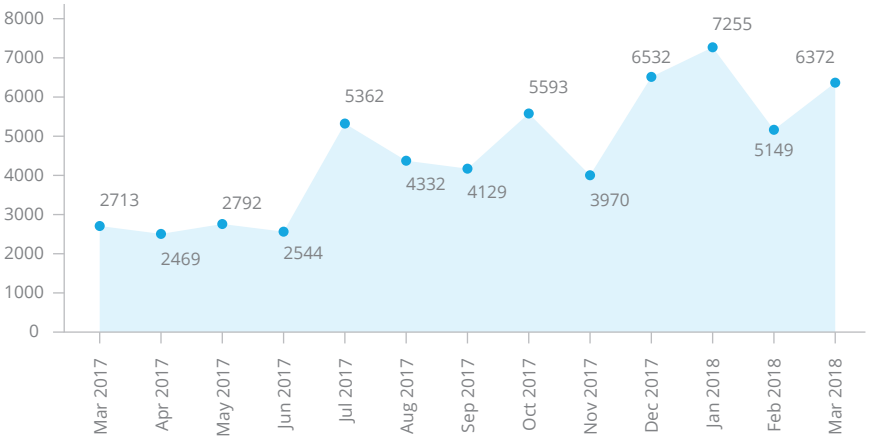
On the platform, mobile visitors increased by 135% between Mar'17 (2.71 million) and Mar'18 (6.37 million). The reach during this period increased by 57.6%, from 1.6% to 2.5%. The rise in visitors resulted in a 187.15% increase in total minutes spent on the platform to 835.6 million minutes. An average visitor spent 131.1 minutes on the platform indicating very high engagement.

The peaks in July '17 and later in Jan '18 were the effects of the launch of Inside Edge and Breathe respectively[18] [19].

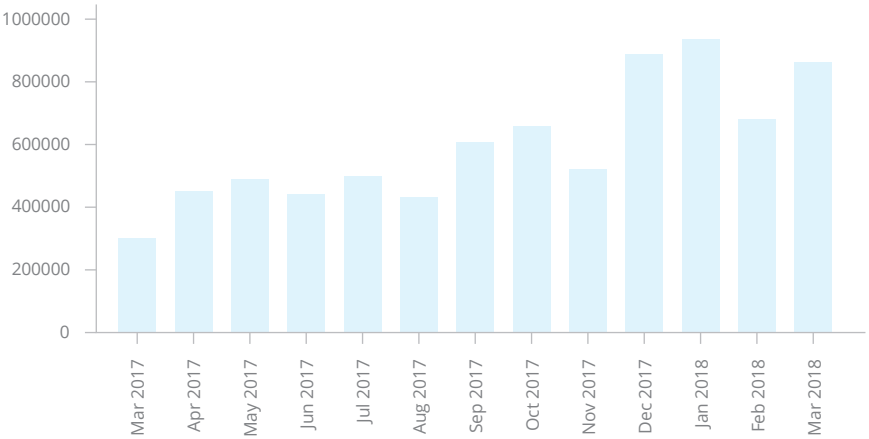
Amazon Prime Video is largely consumed by males who make up 77.6% of the total unique visitors.

Key Measures of the Platform

Amazon Prime Total Unique Visitors (000) across mobile app, March 2017 to March 2018



Amazon Prime Total Minutes (000) spent on Platform, March 2017 to March 2018



Consumer Demographics

Amazon Prime Audience, March 2018

Males, Age Group	Total Mobile (000)	Females, Age Group	Total Mobile (000)
18-24	2208	18-24	483
25-34	1358	25-34	668
35-44	1423	35-44	NA
45+	NA	45+	232
All Males	**4,989**	**All Females**	**1,383**

[16]Variyar, M. (2017, October 13). India is now the fastest-growing market for Amazon Prime. Retrieved May 28, 2018.
[17]'50% of Amazon Prime users from non-metros'. (2017, July 14). Retrieved May 28, 2018.
[18]'Inside Edge' becomes the top watched show on Amazon Prime Video. (2017, July 28). Retrieved May 28, 2018.
[19]Abundantia makes digital début with Breathe. (2018, January 17). Retrieved May 28, 2018.

Recent Developments

Amazon Prime has set aside INR 20 billion for content creation and acquisition with an eye on Indian consumers. It has announced 18 original shows for India[20] and is expected to spend INR 1.5 billion (USD 22.23 million approx.) on advertisements in 2018[21].

Amazon has acquired the exclusive streaming rights for the digital premiere of 2.0, an upcoming Indian science fiction film starring Indian cinema superstars Rajinikanth and Akshay Kumar[22].

Amazon signed a five-year deal with Salman Khan's home production Salman Khan Ventures for exclusive rights to stream their upcoming films even before their television premiere[23].

Amazon has signed a content deal with Disney India for seven upcoming international titles from Marvel and ABC[24] and with AMC Studios to broadcast its shows first on Amazon Prime before they will be available on any other channel[25].
Amazon has announced three reality shows for India, one of which The Remix is already released. The other two shows are Jestination Unknown and Comic Kaun. The company believes that reality shows garner high viewership[26].

Partnerships and Distributions

Thanks to Vodafone Amazon Prime tie up, Vodafone users can subscribe Amazon Prime at a discounted price of INR 249[27].

[20]Choudhary, V., & Jha, L. (2017, April 09). Netflix, Amazon set aside Rs2,000 crore each in battle for India market. Retrieved May 28, 2018.
[21]Tewari, S. (2018, May 09). Amazon plans Rs150 crore ad spend for Prime Video service in 2018. Retrieved May 28, 2018.
[22]Varshney, R. (2017, November 27). Amazon Prime Video to exclusively stream Rajnikanth and Akshay Kumar's film 2.0. Retrieved May 28, 2018.
[23]Choudhary, V. (2017, July 31). Amazon Prime Video ties up with Salman Khan, in fight with Netflix. Retrieved May 28, 2018.
[24]Varshney, R. (2018, February 28). Amazon Prime Video signs content deal with Disney India.
[25]Varshney, R. (2017, November 21). Amazon Prime Video signs deal with AMC Studios.
[26]Choudhary, V. (2017, August 23). Amazon Prime Video bets on reality shows in India. Retrieved May 28, 2018.
[27]SH, S. (2017, March 20). Vodafone India ties up with Amazon Prime Video for discounted subscription.


TVF
OLA DRIVES
permanent
ROMMATES
SEASON 2
EPISODE 1
THE PARENTS


TVF
PITCHERS
EST. 2015
EPISODE 03
THE JURY ROOM


TVF
Tripling
WITH TIAGO
FROM TATA MOTORS
S01E01 TOH CHALEIN...?

Content

Original Content

14 Originals (Hindi)

TVF presently has 14 originals. Of these, Permanent Roommates, billed as the first web series in India is the platform's most celebrated launch with over 50 million views and counting. Other well-known series include TVF Pitchers, Barely Speaking with Arnub, and Chai Sutta Chronicles.

The TVF Qtiyapa: Includes over 78+ sketch videos spoofing the youth centric Indian reality series MTV Roadies, the dating app Tinder, cricket, Indian filmmakers Anurag Kashyap and Rohit Shetty, the news channel Times Now, Indian engineering colleges, Bollywood, etc.

The Screen Patti: 73+ humorous clips targeted for a teenage audience.

TVF Machi: Features the Tamil-dubbed versions of 2 series – TVF Pitchers, Permanent Roommates – and the video Long Distance Celebrations (Diwali Qtiyapa).

NBA Hangout: A localized basketball show about the culture of basketball for casual and non-fans. NBA partnered with TVF to distribute the show, with each episode averaging over two million views .

Discover – Not From TVF: Includes Girliyapa (28 videos), The Time Liners (3 videos), and Funda Curry (1 video) .

SNIPPETS

Launched
2012

Owned by
The Viral Fever (TVF)[1]

Headquarter
Mumbai, Maharashtra (India operations)

Google Play Store Downloads
1 million+[2]

Unique Users (Mar 18)
175k[3]

Reach
0.3%[4]

Average Minutes/visitor
7.6[5]

Popularity Rankings[5]
12th - Monthly Active Users, 21th - Downloads and 12th - Time Spent

Country Focus
India (Asia Pacific – 83.1%; North America – 8.1%)[6]

Revenue Model
AVOD (Advertising Video on Demand)

[1]The Viral Fever (TVF) is an online YouTube channel started by TVF Media Labs, an independent media company established in 2010. TVF is currently owned and operated by Contagious Online Media Networks.
[2]TVF Play - Play India's Best Original Videos. (2018, April 30). Retrieved May 21, 2018.
[3]Source: ComScore MMX Multi-Platform Report, March 2018
[4]Source: ComScore MMX Multi-Platform Report, March 2018
[5]Source: ComScore MMX Multi-Platform Report, March 2018
[6]Source: ComScore Desktop Media Overview Report, March 2018

TVF is one of the initial startups of online video astreaming content in India. Its core audience is the '14-to 40-year-old niche, progressive Indians', specifically those who keep away from television serials.

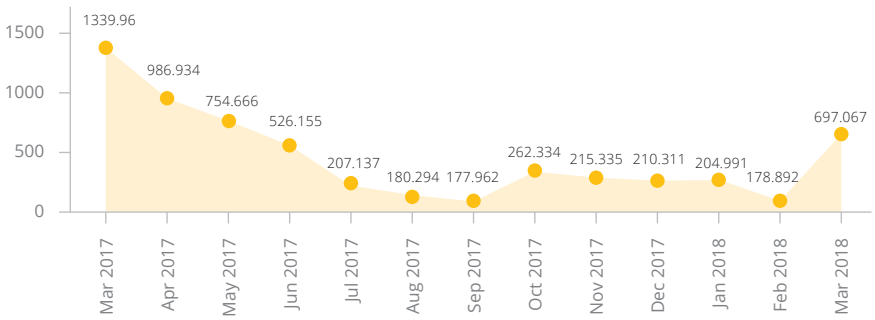
TVF first came into prominence in 2012 with the viral original show Rowdies[7]. Since then, the company has created a range of videos and web series around Indian politics, movies, lifestyle, and emerging social concepts. The company also conceptualized the idea of creating original branded content around movies[8]. Besides its presence on TVFPlay, The Viral Fever is also active on YouTube with six channels[9].

TVFPlay has an overall reach of 0.3% with 697K total unique visitors in March 2018.The platform's usage is low at an average of 1.8 minutes per visit. The total unique visitors on TVFPlay has been on a 32% decline since March 2017. The slight increase in total unique visitors in the month of October 2017 is likely due to the launch of the TVF originals The Inmates.

TVFPlay was largely consumed on the mobile device, with mobile only unique visitors com- prising nearly 75% of the total unique visitors in March 2018. The remaining 25% visitors on the Desktop spent an average of 7.6 minutes per visit, higher than the multiplatform average of 1.8 minutes, indicating a higher engagement on this device. However, the total unique visitor on the desktop has fallen by 73.5% since March 2017. Additionally, video streams per viewer on the desktop has fallen by 100% since November 2017 which signifies lower repeated usage among visitors.

Key Measures of the Platform

TVF Total Unique Visitors (000) across multi platform, March 2017 to March 2018



Source: ComScore MMX Multi-Platform Demographic Report, March 2018

Consumer Demographics

TVF Audience, March 2018

Males, Age Group	TUV (000)	Total Mobile (000)	Females, Age Group	TUV (000)	Total Mobile (000)
6-14	3	-	6-14	-	-
15-24	126	76	15-24	257	241
25-34	87	68	25-34	20	-
35+	187	178	35+	17	-
All Males	**403**	**322**	**All Females**	**294**	**241**

TVFPlay is skewed towards male audiences, who almost 3/5th of the overall audience in March 2018. Interestingly, females in the age group 15-24 comprised the largest share of audience (37%) during the same month. This was followed by males in the groups 35+ (27%) and males between 15-24 (18%). Female Viewership in the 25+ demographic was relatively lower.



[7]A spoof of the Indian youth-based reality series MTV Roadies.
[8]Jhunjhunwala, U. (2016, April 29). How The Viral Fever went viral. Retrieved May 27, 2018.
[9]The YouTube channels by TVF are The Viral Fever, The Screen Patti (teenage humor), The Timeliners (news and lifestyle),Girliyapa (woman-centric content), Qtiyapa (comedy), Funda Curry (infotainment), and TVF Machi (Tamil-language channel).

Awards and Recognition

At the India Content Leadership Award 2018, TVF won Content Enterprise of the Year award along with Best Entertaining Content for Bachelors Season 2. Girliya won the awards for Best Humorous content award and Best Content in a Video marketing campaign. Sameer Saxena, CCO and Head, TVF Originals, was presented the Content Leader of the Year (Person) award[10].

TVF's yet-to-be-released web series ImMATURE has been selected for the first edition of the Cannes International Series Festival - CANNESERIES, a com- petition dedicated to short formats[11].

Ad Metrix

Top ad categories:

Media & Entertainment
Telecommunications
Education
Sports & Recreation
Retail

Most advertised on:

Pacific 83.1%
North America 8.1%

Source: ComScore Desktop Media Overview Report, March 2018



https://pbs.twimg.com/media/DcSLga9WkAEbJNa.jpg

[10]Indiantelevision.com Team. (2017, December 06). The Viral Fever wins big at 22nd Asian Television Awards. Retrieved May 27, 2018.
[11]IANS. (2018, April 03). TVF's web series headed to Cannes International Series Festival. Retrieved May 27, 2018.

POPULAR SHOWS

Permanent Roommates
Hindi - Drama, Romance; 2 Seasons - 13 episodes



India's first web series, Permanent Roommates revolves around a young couple who, after being in a long distance relationship for 3 years, face the prospect of marriage. The first season launched in 2014 and garnered over 10 million views overall. Viewership rose by 100% in the second season, with each episode getting 3-4 million views[12]. The show has crossed 50 million views as of today.

TVF Pitchers
Hindi - Drama; 5 Episodes



TVF Pitchers is about four men who quit their jobs to start their own company. TVF Pitchers garnered over a million views within 24 hours of its release and is currently rated 47th in the Top Rated TV content of IMDb[13] [14].

TVF Tripling
Hindi - Drama; 5 Episodes



TVF Tripling traces the story of three siblings who start a hilarious journey, to venture out on a road trip and rediscover family relationships. The show crossed 12 million views within a month of its release[15] and received the award for the best scriptwriting for a web programme/series at the 22nd Asian Television Awards in Singapore[16].

Barely Speaking with Arnub
Hindi - Comedy; 2 Seasons - 5 Episodes



Barely Speaking with Arnub is a parody of Arnab Goswami, the managing director of the Indian news channel Republic TV and former editor-in-chief of the news channel Times Now.

Girliyapa
Hindi - Comedy; 28 Episodes



Girliyapa features relatable, funny and interesting stories about women. At India Content Leadership Awards 2018, Girliyapa won Best Humorous content award for the segment No More Dishstress and Best Content in a Video marketing campaign - Special mention for Whisper's SitImproper[17].

[12]Srivastava, P. (2016, July 5). Permanent Roommates Season 2 Grows 100% in Viewership, TVF Says It's The New Indian Family Show. Retrieved May 27, 2018, from http://www.adageindia.in/digital/permanent-roommates-season-2-grows-100-in-viewership-tvf-says-its-the-new-indian-family-show/articleshow/53048256.cms
[13]TVF Pitchers (TV Series 2015). (n.d.). Retrieved May 27, 2018, from https://www.imdb.com/title/tt4742876/
[14]Internet Movie Database, is an online database of information related to world films, television programs, etc.
[15]Srivastava, P. (2016, October 5). TVF Writes Another Success Story as 'Tripling' Crosses 12 Million Views. Retrieved May 27, 2018, from http://www.adageindia.in/digital/tvf-writes-another-success-story-as-tripling-crosses-12-million-views/articleshow/54677307.cms
[16]Indiantelevision.com Team. (2017, December 06). The Viral Fever wins big at 22nd Asian Television Awards. Retrieved May 27, 2018, from http://www.indiantelevision.com/iworld/over-the-top-services/the-viral-fever-wins-big-at-22nd-asian-television-awards-171206
[17]MediaInfoline. (2018, May 07). The Viral Fever, Girliyapa win at India Content Leadership Awards 2018. Retrieved May 27, 2018, from http://www.mediainfoline.com/awards/viral-fever-girliyapa-win-india-content-leadership-awards-2018

Content

Original Content

Three Telugu shows: A thriller, 703 and rom-coms Endulika and Hey Krishna. YuppTV created its originals in this language since the Telugu content on the platform received a huge response.

Offering

YuppTV offers more than 25000 hours of content with over 250 TV channels, 5000+ movies and 100+ TV shows in 14 languages[8] including English, Hindi, Telugu, Tamil. Kannada, Punjabi, Malayalam, Marathi, Bengali, Oriya, Gujarati and Bhojpuri.

YuppTV's Live TV is available for over 50 channels, including entertainment (Zoom, ME TV), news (NDTV India, Times Now), sport (DSport), and spiritual (Aastha TV, God TV) among others. News and spiritual channels dominate the share of live channels available. YuppTV also offers Catch Up TV feature for 39 channels.

SNIPPETS

Launched
October 14th, 2015 (India)

Owned by
YuppTV

Headquarter
Hyderabad, Telangana (India Operations)

Total Downloads
15 million+[1]

Google Play Store Downloads
10 million+[2]

Unique Users (Mar 18)
2.02 million+[3]

Average Minutes/visitor
2.9[4]

Popularity Rankings[5]
14th - Monthly Active Users,
16th - Downloads and
14th - Time Spent

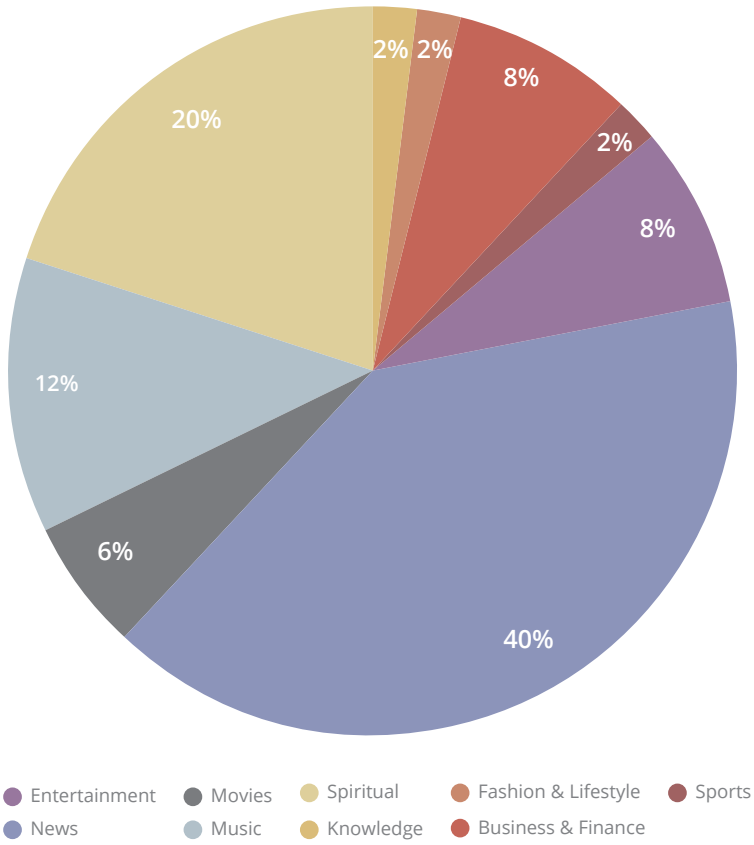
Country Focus
India, US, UK, Europe, Australia, New Zealand, Canada, and the Middle East[6] (Asia Pacific – 51.5%;Middle East –22.7%; North America – 20.1%; Europe – 5.6%)[7]

Revenue Model
AVOD(Advertising Video on Demand) & **SVOD**(Subscription Video on Demand)

[1]Pinto, A. (2018, January 09). 'We expect to break even towards the end of Diwali next year' - TelevisionPost.com: Latest news/Research, India's Television, Cable, DTH, TRAI. Retrieved May 26, 2018.
[2]YuppTV - LiveTV Movies Shows IPL Live. (n.d.). Retrieved May 21, 2018.
[3]Source: ComScore MMX Multi-Platform Report, March 2018
[4]Source: ComScore MMX Multi-Platform Report, March 2018
[5]Re-imagining India's M&E Sector (March 2018, p. 129, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.
[6]Pinto, A. (2018, January 09). 'We expect to break even towards the end of Diwali next year' - TelevisionPost.com: Latest news/Research, India's Television, Cable, DTH, TRAI. Retrieved May 26, 2018.
[7]Source: ComScore Desktop Media Overview Report, March 2018
[8]Yupp TV About Us. (n.d.). Retrieved May 26, 2018.

The platform features web series in diverse genres ranging from romance to mythology, horror, documentary etc. made by content creators such as Arré (The Real High[9]), Blush (Alisha[10]), Humaramovie (Ranjish[11]), Scoop-whoop (Chase[12]), Epified (Mahabharata MINIS[13]), Y Network (Not Out![14]) and Indie Films Channels (Horrorscope[15])[16].

A separate YuppFlix platform offers over 3000 movies in 9 languages across genres like action, comedy, drama, romance, thriller, classics, and devotional. YuppTV has partnered with leading Indian production houses like Yash Raj Films for its content. Movies currently available on the YuppTV Mini Theatre include the Punjabi action flick Jora 10 Numbaria and Marathi drama Baapjanma.



YuppTV Bazaar is a repository of works by independent content creators such as ScoopWhoop, 101 India, Being Indian etc. There are sections on health and beauty, documentaries, cooking, music videos, comedy, and so on. YuppTV Bazaar Kids features rhymes, stories provided by Shemaroo Kids, USP Studios, WowKidz, Bulbul apps among others.

YuppTV is an OTT content provider in South Asian content, offering live TV, 7-day catch-up TV, and a wide range of movies. It was founded in 2006, with its headquarters located in Atlanta, Georgia.

YuppTV's primary goal is to be the largest content aggregator primarily for the Indian diaspora. It claims to be the top Internet Pay TV platform for South Asians living abroad and the largest Internet TV platform for premium content available in India. It is available in over 191+ countries worldwide.

YuppTV Live Channels by Genre

Genre	Channels
Entertainment	4
News	20
Movies	3
Music	6
Spritual	10
Knowledge	1
Fashion and Lifestyle	1
Business and Finance	4
Sports	1

Source: YuppTV website[17]

[9]The Real High is an adventure reality show based on a journey set in Arunachal Pradesh.
[10]Alisha is a crime investigative series set in the backdrop of the fashion industry.
[11]Ranjish is a web series that explores the problem of terrorism.
[12]Chase is a series of new-age documentaries that chronicles untold stories of India.
[13]Mahabharata MINIS narrates adventures of individual characters or events of a key point of stories from the Hindu epic Mahabharata.
[14]Not Out! Follows international cricketer Brian Lara as he embarks on a rigid 2-week training routine in preparation for the All Stars Cricket tournament.
[15]A horror series.
[16]YuppTV Shows. (n.d.). Retrieved May 26, 2018.
[17]YuppTV Live TV. (n.d.). Retrieved May 26, 2018.

YuppTV's total unique visitors has been fluctuating between 1 to 2.2 million throughout March 2017 to March 2018. A 23.1% rise since was seen in the visitors since March 2017.

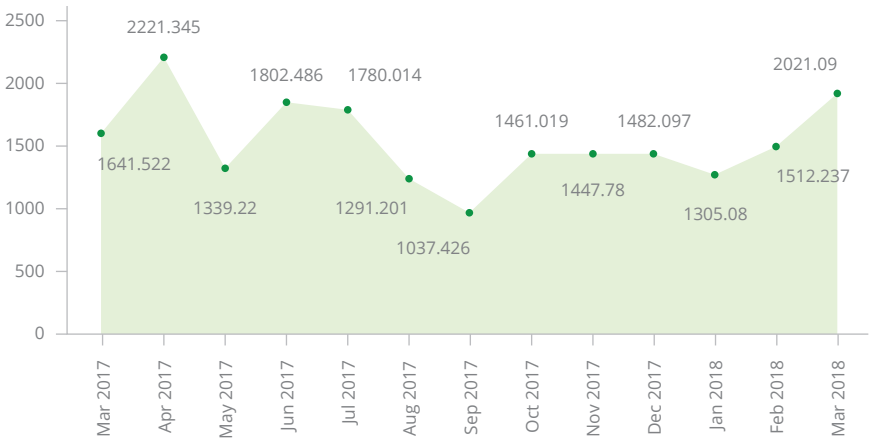
Viewership broke the 2 million mark in April 2017 with the launch of the web original Enduluka and the Freedocast Pro Device and Freedocast Live Streaming Platform[18] [19].

Much of YuppTV's traffic as on March 2018 was on the mobile with 1.58 million visitors. Mobile app witnessed a 14 % rise in the total unique visitors since March 2017. Desktop performance has been stagnant throughout the year and video streams per viewer on this device reduced by 100% since March 2017[20]. On the positive note, engagement on desktop at 6.5 minutes per visit is higher than the overall engagement rate at 2.9 minutes.

Nearly 74% of the total unique visitors in March 2018 were male, of which the largest age-bracket was 15-24 followed by 25-34. Female visitors in age age-bracket 15-34 were also high. App usage is relatively lower among older age group (i.e. 35+) in both genders.

Key Measures of the Platform

YuppTV Total Unique Visitors (000) across multi platform, March 2017 to March 2018



Consumer Demographics

Source: ComScore MMX Multi-Platform Demographic Report, March 2018

YuppTV Audience, March 2018

Males, Age Group	TUV (000)	Total Mobile (000)	Females, Age Group	TUV (000)	Total Mobile (000)
6-14	12	-	6-14	-	-
15-24	788	685.176	15-24	274.448	241.328
25-34	475	407	25-34	197.731	190.901
35-44	34	-	35-44	23.255	-
45+	190	163.797	45+	26.662	-
All Males	**1499**	**1256**	**All Females**	**522.096**	**432.229**



Ad Metrix

Top ad categories:
Telecommunications
Consumer Goods
Online Media
Finance
Computers & Technology

Top ad categories:
Corporate Presence
Entertainment
News/Information
Services
Portals

Source: ComScore Desktop Media Overview Report, March 2018

[18]Freedocast Pro Device and Freedocast Live Streaming Platform allows users to live stream videos instantly across several devices and social media platforms like Facebook, Twitter and Youtube Live.
[19]ET Bureau. (2017, April 24). Yupp TV launches Freedocast device to stream live videos anywhere. Retrieved May 26, 2018.
[20]Source: ComScore, Desktop Data, March 2018

Partnerships and Distributions

Vodafone India partnered YuppTV to strengthen live TV offering on Vodafone PLAY[21].

With tie up between YuppTV and Ola, Ola provides commuters with direct access to an extensive array of Live TV options by YuppTV across categories such as news, music, and general entertainment, on Ola Play[22].

YuppTV bagged the rights for Vivo-IPL 2018 for Australia, Continental Europe and SE Asia[23].

Future Plans

YuppTV is focusing on entering newer markets such as Singapore, Malaysia and the Middle East, Australia, and Europe which have a big expat market[24].

The USD 50 million raised from Emerald Media[25] in 2016 is being invested heavily towards content creation and acquisition, with YuppTV founder and CEO Uday Reddy firmly believing content and an aggregation model to be the key factors in the success of OTT platforms. YuppTV has committed to 12 original shows and is focusing in particular on creating regional content, beginning with the South Indian languages due to the larger footprint from the South Indian diaspora. In terms of genres, it is looking at rom-com, thrillers, young generation centric content[26].

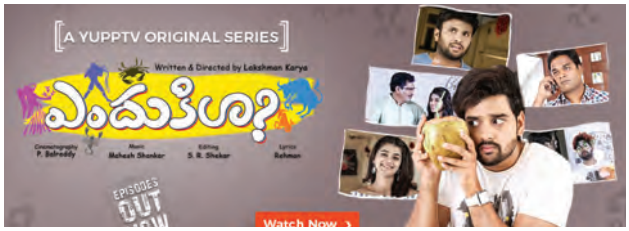
POPULAR SHOWS

Rajakumari
Tamil - Drama; Total episodes: 30



Rajakumari is the story of Nilampari who wants to lead a simple and peaceful life but is beset with problems by people around her. She overcomes them with her optimistic spirit.

Endulika
Telugu - Comedy; Total Episodes: 9



Endulika is about a boy whose bad luck follows him from the birth.

Mana Mugguri Love Story
Telugu – Romance; Total Episodes: 18



Mana Mugguri Love Story is the story of Swathi, a middle class family from Vijayawada whose parents are looking for a suitable groom. The journey follows Swathi as she moves to Hyderabad and starts working in an ad agency. There, she falls for not one, but two guys and how she deals with this dilemma is the rest of the story.

Hey Krishna
Telugu: Romance; Total Episodes: 12



Hey Krishna is about Krishna, 25-year-old engineering graduate leads a boring life as every girl he tries to impress, rejects him. A series of incidents make him believe that lord Krishna is the root cause of his love life.

[21]Varshney, R. (2017, October 12). Vodafone ties up with YuppTV to expand Live TV service on Vodafone PLAY. Retrieved May 23, 2018.
[22]Mitter, S. (2018, February 10). YuppTV, a decade-old video-streaming service for the diaspora, is finally finding a savvy audience. Retrieved May 23, 2018.
[23]W. (2018, March 20). YuppTV bags rights for Vivo-IPL 2018 for Australia, Continental Europe and SE Asia - ET BrandEquity. Retrieved May 23, 2018.
[24]Pinto, A. (2018, March 31). YuppTV looks to build awareness, acquire new customers globally through IPL rights - TelevisionPost.com:Latest news/Research, India's Television, Cable, DTH, TRAI. Retrieved May 26, 2018.
[25]A media entertainment investment platform set up by US private equity giant KKR
[26]Pinto, A. (2018, January 09). 'We expect to break even towards the end of Diwali next year' - TelevisionPost.com: Latest news/Research, India's Television, Cable, DTH, TRAI. Retrieved May 26, 2018, from http://www.televisionpost.com/we-expect-to-break-even-towards-the-end-of-diwali-next-year/


WEB SERIES
FILMS

Content

Original Content

One live music show (Life is Music)

Offering

dittoTV hosts 100+ live channels in over 14 languages - Hindi, English, Kannada, Tamil, Telugu, Malayalam, Marathi, Bengali, Arabic, Urdu, Punjabi, Bhojpuri, Odiya, and Gujarati.

The channels range across genres such as general entertainment, lifestyle, devotional, news, movie, kids, and music. Archana Anand, then Business Head at dittoTV, stated that Hindi general entertainment channels were most watched on dittoTV, followed by regional channels and Hindi movie channels[6].

dittoTV holds the distinction of India's first OTT distribution platform. It originally targeted the affluent segment who had access to high end phones and 3G services in those years. However, with the increase in digital and smartphone population, dittoTV was repositioned as a mass product in June 2017. Following this, its subscription rates economized.

SNIPPETS

Launched
January 2013

Owned by
Zee Entertainment Enterprises Ltd. (ZEEL)

Headquarter
Mumbai, Maharashtra

Google Play Store Downloads
10 million+[1]

Unique Users (Mar 18)
304K[2]

Reach
0.2%[3]

Average Minutes/visitor
2.4[4]

Popularity Rankings[5]
18th - Monthly Active Users,
13th - Downloads and
16th - Time Spent

Country Focus
India

Revenue Model
TVOD (Transactional Video on Demand)
SVOD (Subscription Video on Demand)

[1]DittoTV: Live TV Shows, News & Movies. (2018, February 9). Retrieved May 21, 2018.
[2]Source: ComScore MMX Multi-Platform Report, March 2018
[3]Source: ComScore MMX Multi-Platform Report, March 2018
[4]Source: ComScore MMX Multi-Platform Report, March 2018
[5]Re-imagining India's M&E Sector (March 2018, p. 129, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.
[6]Menon, B. D. (2016, November 7). Partnerships with telcos a boon: Zee's dittoTV. The Hindu Business Line. Retrieved May 23, 2018.

dittoTV offered Live TV, 7-day catch-up TV, adaptive streaming based on internet connectivity, and Chromecast support among others. It also brought out innovative features such as the 'before TV', which allows subscribers to view TV content from the channels under Zee Group before their television premiere[7].

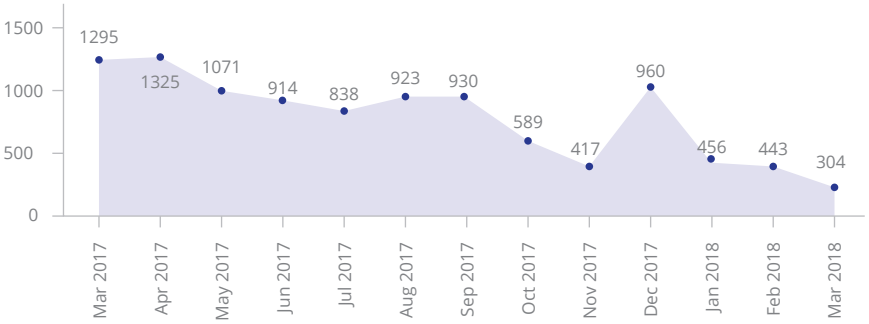
During its six year run, the platform partnered with various telecom operators to widen its penetration and user base in the country. Ultimately, dittoTV subscribers, as well as those of OZEE, ZEEL's other platform, were auto-upgraded to ZEE5 after the latter's launch in February 2018. Existing dittoTV subscribers who have been upgraded to ZEE5 will pay the same amount as before until their subscription ends.

dittoTV was performing below expectations in 2017 especially with the competition from platforms like Star TV's Hotstar and Eros Plc's Eros Now[8]. Its total unique visitors shrank throughout the year and touch- ed 304K unique visitors in March 2017, with December registering the only significant uptrend. **Note: dittoTV did not have mobile data for March 2018 hence desktop data has been considered.**

dittoTV's total unique visitors as on March 2018 largely compris- ed of males who were almost four times the total female users. Although led by males between 18-34, a reasonable activity was seen even among the older age groups above 35. Similarly, the female users on the platform were more or less the same in numbers between the ages of 18 and 54.

Key Measures of the Platform

dittoTV Total Unique Visitors (000) across multi platform, March 2017 to March 2018



Source: ComScore MMX Multi-Platform Demographic Report, March 2018

Consumer Demographics

dittoTV Audience (Desktop Only), March 2018

Males, Age Group	TUV (000)	Females, Age Group	TUV (000)
6-14	3	6-14	-
18-24	76	18-24	19
25-34	66	25-34	13
35-44	46	35-44	11
45+	51	45+	19
All Males	**243**	**All Females**	**62**

Ad Metrix

(Source: ComScore Desktop Media Overview Report, March 2018)

Top ad categories:

Retail
Computers & Technology
Finance
Travel
Telecommunications

[7]Indiantelevision.com Team. (2016, February 01). Ditto TV goes OTT first with before TV. Retrieved May 23, 2018.
[8]K, B. (2017, March 03). Zee is reworking Ditto TV strategy after dropping prices last year. Retrieved May 23, 2018.

Content

Original Content

None

Offering

Sun NXT comprises over 50K hours of content including 4000+ movies, shows from 42 live channels, music content, comedy content, and catch up TV. Of the 42 live channels, 12 are in Tamil, 12 in Telugu, 10 in Kannada, and 8 in Malayalam[5].

The bouquet includes channels with youth content (Kairali We), comedy (e.g. Udaya Comedy, Surya Comedy), four children's channels - Chutti TV (Tamil), Kushi TV (Telugu), Chintu TV (Kannada), and Kochu TV (Malayalam), among others.

Sun NXT crossed more than 1.1 million downloads barely 4 days from launch[6].



SNIPPETS

Launched
June 12th 2017

Owned by
Sun TV Network Limited

Headquarter
Chennai, Tamil Nadu

Total Downloads
10 million[1]

Google Play Store Downloads
5 million+

Unique Users (Mar 18)
129K[2]

Average Minutes/visitor
40.6[3]

Popularity Rankings[4]
17th - Monthly Active Users,
10th - Downloads and
19th - Time Spent

Country Focus
India (Asia Pacific – region.
Asia Pacific – 82.6%)

Revenue Model
SVOD (Subscription Video on Demand)

[1] *Result Update - Sun TV February* 12, 2018 (Rep.). (2018). Mumbai, Maharashtra: ICICI Securities. Retrieved May 9, 2018.
[2] Source: ComScore MMX Desktop Report, March 2018
[3] Source: ComScore MMX Desktop Report, March 2018
[4] Re-imagining India's M&E Sector (March 2018, p. 129, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.
[5] The live channels offered by Sun NXT are as follows: 1) Tamil – Sun TV, Sun TV HD, Sun News, KTV, KTV HD, Sun Music, Sun Music HD, Sun Life, Thanthi TV, News 7 Tamil, Adithya TV, Chutti TV; 2) Telugu – Gemini TV, Gemini TV HD, Gemini Movies, Gemini Movies HD, Gemini Music, Gemini Music HD, Gemini News, Gemini Comedy, Gemini Life, ABN Andhra Jyoti, TV9 Telugu, Kushi TV; Kannada – Udaya TV, Udaya TV HD, Udaya Movies, Udaya Music, Udaya News, Udaya Comedy, Chintu TV, Public TV, Public Music, TV 9 Kannada; Malayalam – Surya TV, Surya TV HD, Surya Movies, Surya Music, Surya Comedy, Kairali, Kochu TV, Kairali We.
[6] Sun TV network shines on launching all new digital content platform 'sun NXT'. (2017, Jun 16). Retrieved from Accord Fintech

Only Desktop data is available for Sun NXT. The platform registered approximately 129K visitors in March 2018, with 11K daily visitors on an average. Although the numbers aren't significant, Sun TV's engagement rate is high with visitors spending an average of 40.6 minutes on the site in the same month. Sun NXT expanded its total unique visitors by 31.9% since June 2017. Additionally, the video streams per viewer increased by 1.1% since July 2017[7]. Sun NXT's desktop performance shot up especially between January and March 2018.

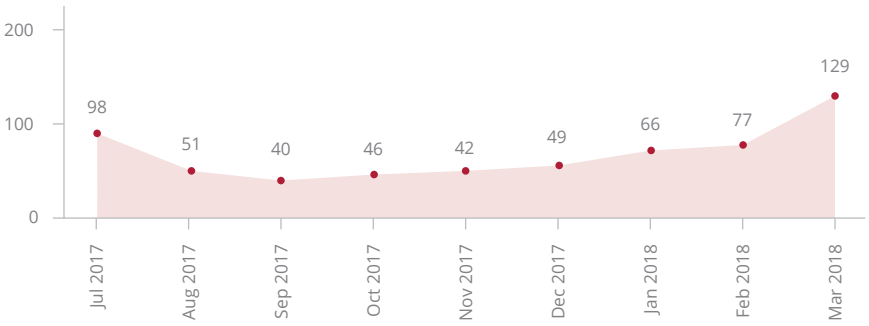
Partnerships and Distributions

Sun Direct satellite television added Sun NXT free with its DTH subscription.

Sun NXT is also available on smart TVs and streaming devices such as Amazon Firestick, Google Chomecast, Apple TV etc[8].

Key Measures of the Platform

Sun NXT Total Unique Visitors (000) across desktop, March 2017 to March 2018



Source: ComScore MMX Desktop Demographic Report, March 2018

Consumer Demographics

Sun NXT caters largely to male audience between 15 and 34.

SunNxt Audience (Desktop Only), March 2018

Males, Age Group	TUV (000)	Females, Age Group	TUV (000)
6-14	5	6-14	N/A
15-24	33	15-24	20
25-34	28	25-34	6
35-44	12	35-44	3
45+	15	45+	7
All Males	**93**	**All Females**	**36**

[7]Source: ComScore Desktop data, March 2018
[8]Indiantelevision.com Team. (2018, January 15). Sun Direct adds Sun NXT free with DTH subscription. Retrieved May 9, 2018.

Content

Original Content

21 original web series in English and Hindi languages.

The series range from adventure (Salute Siachen[4]), sports (RCB[5]), animated series (Mystical Mastani[6]), and food (Kitchen Politics[7]). There is a host of content around Bollywood, including entertainment news, interviews with celebrities, film compilations, special birthday videos for stars etc.

Offering

Eros Now has the vast library of 10,000 movies, television shows, original content, 2,50,000 audio tracks and music tracks from 13 labels[8] [9].

Eros Now Movies are available across genres like action, comedy, animation, devotional, mature, sports, kids, classics, and so on. Movies from the 1960s to the present are available.

Eros Now TV offers shows of Pakistani channels ARY TV and Hum TV. ARY TV currently includes 12 shows namely Roag[10], Dusri Biwi[11], while Hum TV features a larger collection of 110 shows (Humsafar[12], Mohabbat Khawab Safar[13]).

Eros Now Music offers audio content according to moods and themes, playlists, top charts, albums, and music videos.

Stars on Eros Now gives scoop on Bollywood celebrities, including biographies, access to exclusive photos, movies, videos, and music.

Eros Now has content in 11 languages -Hindi, Punjabi, Tamil, Telugu, Marathi, Malayalam, Kannada, English, Bengali, Gujarati, and Bhojpuri.

SNIPPETS

Launched
2012

Owned by
Eros International Plc

Headquarter
Mumbai, Maharashtra

Google Play Store Downloads
10 million[1]

Subscribers
7.9 million paying subscribers worldwide

Unique Users (Mar 18)
139K[2]

Popularity Rankings[3]
20th - Monthly Active Users,
23rd - Downloads and
24th - Time Spent

Country Focus
India (Asia Pacific 68.4%;
North America 15.6%)

Revenue Model
AVOD (Advertising Video on Demand)
SVOD (Subscription Video on Demand)



[1]Eros Now: Best of Bollywood movies and stars (2018, May 25). Retrieved May 27, 2018.
[2]Source: ComScore MMX Desktop Report, March 2018
[3]Re-imagining India's M&E Sector (March 2018, p. 129, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.
[4] In Salute Siachen, celebrities journey to scale the mighty Siachen Glacier, the 'Third Pole' of the world.
[5]RCB features the latest scoop on the Indian cricket team Royal Challengers Bangalore - On and Off pitch.
[6]Mystical Mastani is a motion graphic web series on the life and heroic times of princess Mastani.
[7]A cookery show.
[8]Varshney, R. (2018, January 10). Eros Now has 5 million paid subscribers, to go live with originals soon. Retrieved May 27, 2018.
[9]EROS NOW. (n.d.). Retrieved May 27, 2018.
[10]Roag depicts a story of lament and sorrow that a family face throughout the journey of life.
[11]Dusri Biwi is a show about extra-marital affairs.
[12]Humsafar revolves around the trials and tribulations of a married couple.
[13]Mohabbat Khawab Safar is the story of a girl, who wants to achieve her dreams and goals, but her own father rejects her due to her mother's deeds.



Eros Now boasts of the largest collection of films among the OTT players in India with a catalogue exceeding 10K.

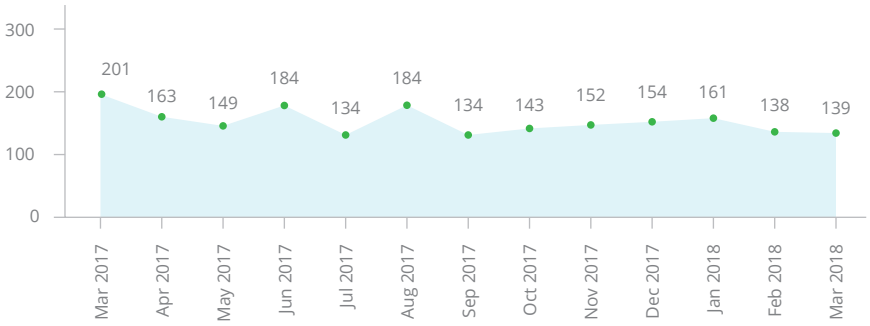
The platform reached over 100 million registered users by end of March 2018. Its paying subscriber base is expected to double over the next 12 months to approximately 16 million paying subscribers by fiscal year end 2019[14].

Fuelled by its success in the digital front, Eros plans to transform from a film studio to a digital content company in the near future[15].

Eros Now's desktop users fell by 30.8% from 201K to 139K between March 2017 and March 2018. Users visited the Eros Now via Desktop for an average of 5 minutes in March 2018 with the total pages viewed totalling to 3 million during the same period.

Key Measures of the Platform

Eros Now Total Unique Visitors (000) across desktop, March 2017 to March 2018



Source: ComScore MMX Desktop Demographic Report, March 2018

Consumer Demographics

Eros Now Audience (Desktop Only), March 2018

Males, Age Group	TUV (000)	Females, Age Group	TUV (000)
6-14	2	6-14	N/A
15-24	47	15-24	24
25-34	22	25-34	7
35-44	11	35-44	2
45+	8	45+	17
All Males	**90**	**All Females**	**49**

Of the 139K Desktop visitors of Eros Now in March 2018, nearly 65% were male and 35% were female.



[14]Exchange4media News Service. (2018, May 9). Eros Now reaches 7.9 million paid subscribers as of FYE 2018. Retrieved May 27, 2018.
[15]Ambwani, M. V. (2018, January 09). Eros focussed on reinventing itself as digital content company. Retrieved May 27, 2018.

Recent Developments

Eros Now announced its first direct-to-digital film Meri Nimmo in association with Colour Yellow Productions and Aanand L Rai. The film had its worldwide premiere on April 27th 2018 on the platform. This association is the first of the many that Eros Now and Colour Yellow Digital are planning in 2018-19[16].

Eros Now collaborated with Dharma Productions for a content aggregation deal that secures it global digital distribution rights for 13 films of Dharma for all territories outside of India on a non-exclusive basis[17].

Eros Now partnered with T-Mobile's video streaming programme Binge On. T-Mobile Eros Now's premium entertainment will be available to T-Mobile users across the United States through Binge On dispensing any data charges[18].

Micromax launched a co-created content packed tablet - Canvas Plex, which comes with one-year premium subscription of Eros Now content[19].

Eros Now is now available to new data users of BSNL in association with SpeedPay, its multipurpose offline wallet[20].

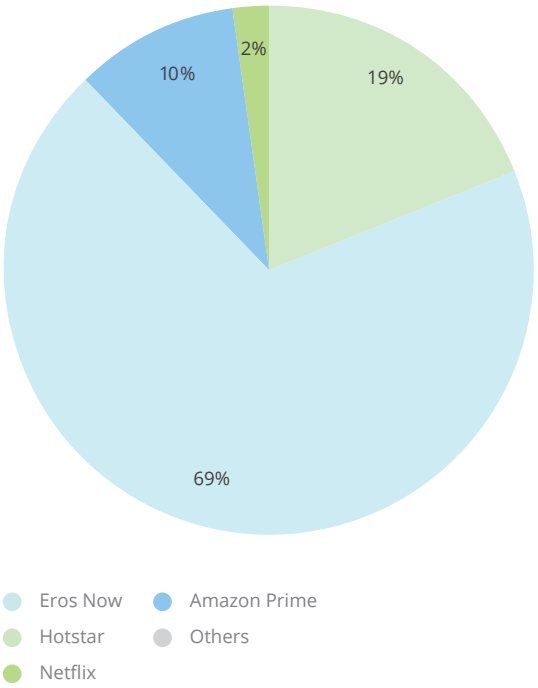
Eros Now renewed its partnership with Reliance Jio to make its content available on Jio phones[21].

Eros Now became the Title Sponsor for Royal Challengers Bangalore in 11th season of T20[22].

Smartron has announced a partnership with Eros Now to provide two months of Eros content to Smartron customers[23].

Eros Now entered the South African market by partnering with telecommunications provider Telecel Global, whose customers can access Eros Now's content library.

Eros Now has partnered with Amazon Prime, Roku, and webOS-enabled LG Smart TVs to make its OTT content from Eros Now available globally[24].



Future Plans

Eros is reducing its dependence on box office and is instead focusing on its online video streaming platform Eros Now. It is only investing in films which are low cost, have a high return on investment and are suitable for digital platforms[25].

Eros Now plans to launch six to eight original shows beginning April 2018.

Revenues

Although exact figures haven't been disclosed, 25% of Eros Now's total revenues comes from its digital platform and the share is expected to triple in the next three years[26].

Ad Metrix

(Source: ComScore Desktop Media Overview Report, March 2018)

Top ad categories:
Computers & Technology
Media & Entertainment
Online Media
Finance
Retail

Most advertised on :
News/Information
Social Media

[16]Team India Television. (2018, April 26). Eros Now to premiere direct-to-digital film 'Meri Nimmo'.
[17]Eros Now ties-up with Dharma Productions for content deal | OTV. (2017, September 22). Retrieved May 27, 2018.
[18]Eros Now Partners with T-Mobile's Binge On. (2017, May 15). Retrieved May 27, 2018.
[19]Haritas, B. (2017, August 29). Micromax Launches Co-created 'Canvas Plex' Tablet With Eros Now. Retrieved May 27, 2018.
[20]Re-imagining India's M&E Sector (March 2018, p. 120, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.
[21]SReliance Jio users to get Eros Now content on phones as companies renew partnership - ET Telecom. (2018, January 18). Retrieved May 27, 2018.
[22]EE News Desk. (2018, April 6). Eros Now on board as Title Sponsor for Royal Challengers Bangalore in 11th season of T20. Retrieved May 27, 2018.
[23]Smartron announces partnership with Eros Now. (2017, June 13). Retrieved May 27, 2018.
[24]Re-imagining India's M&E Sector (March 2018, p. 116, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.
[25]Ahluwalia, H. (2017, December 10). Eros shifting focus from box office to online video streaming. Retrieved May 27, 2018.
[26]Re-imagining India's M&E Sector (March 2018, p. 92, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.



Content

Original Content

3 Original Series

It's my City, a 14-episode mobi-series released in 2016 available in Hindi, Tamil, and Telugu revolves around the everyday lives and struggles of four young girls living together in Mumbai.

In 2015, nexGTv partnered with Indian filmmaker Imtiaz Ali to launch SPOTlight, a project for budding entertainers to develop original short videos. The platform currently features all of its video content, over 107 videos in total which includes 53 fiction, 40 reality, and 14 music videos.

In 2016, nexGTv premiered glamor model and actor Poonam Pandey's miniseries Love Bytes with Poonam Pandey exclusively on its platform. Over 21 videos were produced, which are available on the platform.

Offering

nexGTv's collection includes over 155 Live TV channels and a host of movies, TV shows and videos. Some of the content is available free of cost, while the premium content requires subscription[3].

nexGTV TV shows include Yoga TV (Baba Ramdev Yoga), English TV shows (Going Viral with Vir Sanghvi), classic TV shows (Fauji), kids' TV (The Tara Sharma Show). Content is available in English, Hindi, Marathi, Punjabi, and Tamil.

nexGTv Live TV includes channels across genres- Entertainment (Chardikla Time TV, MK TV), Kids (Maha Mazza), News (Aaj Tak, News X), Devotional (Aastha, Darshan 24), Movies (WOW Cinema, nexG Movies), Music (Raj Music, Kappa TV), Regional (Vasanth TV, Jai Hind), and Sports (DD Sports).

SNIPPETS

Launched
January 2012

Owned by
DigiVive

Headquarter
Haryana

Google Play Store Downloads
10 million+[1]

Popularity Rankings[2]
22nd - Monthly Active Users,
19th - Downloads and
22nd - Time Spent

Country Focus
India

Revenue Model
SVOD (Subscription Video on Demand)
AVOD (Advertising Video on Demand)



[1]NexGTv Live TV News Cricket. (2018, May 25). Retrieved May 30, 2018.
[2]Re-imagining India's M&E Sector (March 2018, p. 129, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.
[3]NexGTv. (n.d.). Retrieved May 30, 2018.

nexGTv has built a niche by concentrating on its regional offerings. They are available in the languages Assamese (DD North-East), Bengali (Akash Bangla), Bhojpuri (Anjan TV), English (Russia Today), French (TV5Monde), Gujarati (Lakshya TV), Hindi (Soham TV), Kannada (Public TV), Malayalam (Kaumudy TV), Marathi (Maiboli), Nepali (Kantipur TV), Oriya (Prarthana TV), Punjabi (Fateh TV), Tamil (Moon TV), Telugu (Calvary TV), and Urdu (Channel WIN).

nexGTv videos include Hollywood and Bollywood tidbits, prank videos, fashion tips, travel and food related clips, music videos, among other content.

nexGTv movies are available in nine languages- English, Hindi, Bengali, Tamil, Punjabi, Bhojpuri, Telugu, Oriya, and Marathi.

DigiVive was awarded in the Digital Experience category at the World Communications Awards 2014. nexGTv was the second most used video application that year.

Major developments occurred in 2016 as nexGTv launched its news app 'nexGTv News' and an app for kids 'nexGTv Kids' , strengthened its regional catalogue by adding Punjabi, Bengali, and Oriya content, and announced its global expansion to 140 countries. News apps – fitness-based 'nexGTv Yoga', devotional app 'iFaith', and humor-based 'Comedy One', were out by 2017[6]. nexGTv Kids app added Think Health content to teach kids about health, fitness and yoga[7].

In December 2017, Abhesh Verma, COO, nexGTv stated that nexGTv was getting 1 million new subscribers each month[8].

Consumer Demographics

nexGTv's core audience is the 15-45 demography. While the younger demographic shows an inclination towards web series, and viral videos, the 30+ age group prefers news. 2-10 year olds consume nexGTv Kids app[9].

DigiVive was founded in 2010 with the ambitions to become the foremost data value-added-service (VAS) provider in the infotainment category[4]. In January 2012, it launched nexGTv as a free app for mobile platforms. By the year end itself, its downloads had reached 8 million with over 40K hours of content consumed on an average each day[5].



[4]NexGTv About Us. (n.d.). Retrieved May 30, 2018.
[5]Mehta, J. (2013, February 04). "Males download the app but women use it more"- With Preetesh Chouhan of Vdopia on MobileTV trends.Retrieved May 30, 2018.
[6]Ganguly, C. (2017, December 4). DigiVive, India's leading OTT expert, bets big on bringing India's MSOs and ISPs to the OTT space. Retrieved May 30, 2018.
[7]Keep your kids engaged this summer with these four apps | Latest News & Updates at Daily News & Analysis. (2018, May 25). Retrieved May 30, 2018.
[8]"Regional content to drive 35-40% growth for OTT viewership in 2018". (2017, December 28). Retrieved May 30, 2018.
[9]Upadhyay, T. (2017, April 21). Lessons from the Gen Next of OTT and VOD. Retrieved May 30, 2018.



Content

Original Content

None

Offering

Hungama Play offers access to 7500+ movies and 1500+ hours of TV. It partnered with ITV studios, one of the largest production companies in the United Kingdom - to bring popular British produced content such as Jekyll and Hyde, Agatha Christie.

Hungama Play has tied up with players like Sun TV Network and Maa TV to expand its catalogue of South Indian content especially in Telugu and Tamil.

The platform also has a section for children featuring their favorite movies and shows. Other content on the app includes music, short films, and documentaries. Content is available in 12 languages – English, Hindi, Tamil, Kannada, Marathi, Gujarati, Bhojpuri, Punjabi, Odia, Bengali, Telugu, and Malayalam.

SNIPPETS

Launched
July 24th 2015

Owned by
Hungama Digital Media Entertainment

Headquarter
Haryana

Google Play Store Downloads
1 million+[1]

Unique Users (Mar 18)
4.98 million[2 3]

Reach
1.8%[4 5]

Average Minutes/visitor
3.4[6 7]

Popularity Rankings[8]
21st - Monthly Active Users,
22nd - Downloads and
25th - Time Spent

Country Focus
India (Asia Pacific – 62.1, Europe – 3.7, Middle East Africa – 18.9, North America 14.6)[9 10]

Revenue Model
SVOD (Subscription Video on Demand)
TVOD (Transactional Video on Demand)

[1]Hungama Play: Movies & Videos. (2018, March 28). Retrieved May 21, 2018, from https://play.google.com/store/apps/details?id=com.hungama.movies&hl=en
[2]Source: ComScore MMX Multi-Platform Report, March 2018
[3]ComScore 2018 provides Hungama Digital Media Pvt. Limited as a whole and not specifically for Hungama Play.
[4]Source: ComScore MMX Multi-Platform Report, March 2018
[5]ComScore 2018 provides Hungama Digital Media Pvt. Limited as a whole and not specifically for Hungama Play.
[6]Source: ComScore MMX Multi-Platform Report, March 2018
[7]S ComScore 2018 provides Hungama Digital Media Pvt. Limited as a whole and not specifically for Hungama Play.
[8]Re-imagining India's M&E Sector (March 2018, p. 129, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.
[9]Source: ComScore Desktop data, March 2018
[10]ComScore 2018 provides Hungama Digital Media Pvt. Limited as a whole and not specifically for Hungama Play.

> Telugu content is the third most consumed language on the app after Hindi and English.

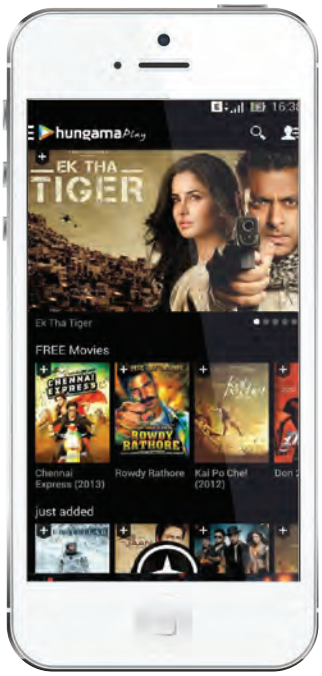


Siddhartha Roy
CEO | Hungama.com

The platform had 4.98 million unique visitors in March 2018, with a majority accessing the app through mobile. Hungama's total unique visitors rose 373% since March 2017.

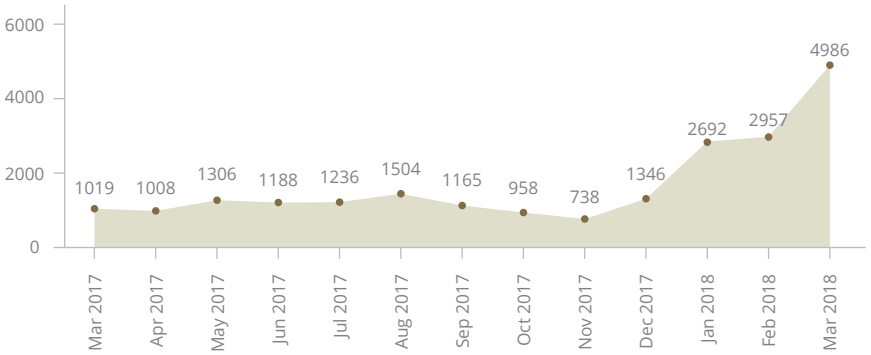
Mobile users dominated Hungama's total unique visitors and has surged over the year by 577.202% from 0.65 million (March 2017) to 4.38 million (March 2018).

As per March 2018 figures, Hungama Digital Media Entertainment Pvt. Ltd. was consumed largely by males who comprised 60% of the audience share. Males in the age brackets of 15-24 and 25-34 dominated followed by females between 15-24. The female digital population on Hungama exceeded the males by a narrow margin in the 35+ age groups.



Key Measures of the Platform[11]

Hungama Digital Media Total Unique Visitors (000) across multi platform, March 2017 to March 2018



Source: ComScore MMX Multi-Platform Demographic Report, March 2018

Consumer Demographics

Hungama Digital Media Audience, March 2018

Males, Age Group	TUV (000)	Total Mobile (000)	Females, Age Group	TUV (000)	Total Mobile (000)
6-14	19	-	6-14	5	-
15-24	1,486	1,294	15-24	1,028	965
25-34	1,078	950	25-34	227	191
35-44	236	178	35-44	439	409
45+	216	164	45+	252	232
All Males	**3035**	**2,586**	**All Females**	**1,951**	**1,797**

[11]ComScore 2018 provides Hungama Digital Media Pvt. Limited as a whole and not specifically for Hungama Play.

Partnerships and Distributions

Xiaomi recently integrated its Mi Video app with Hungama Play and features the latter's music videos[12].

Hungama also formed a partnerships with HTC to preload its smartphones with a one-month free trial of Hungama Play app (and a three month trail of Hungama music)[13].

Vodafone formed a partnership to make available Hungama Play on its Vodafone Play app for a limited period[14].

Hungama Play is content partners with Vewd, a market leader in OTT solutions which enables partners to reliably, seamlessly and efficiently reach connected device viewers[15].

Revenues

Total Revenues

Hungama Digital Media Entertainment Pvt. Ltd. has narrowed its consolidated net loss to INR 305.8 million (USD 4.48 million approx.) for the fiscal ended March 2017[16].

Ad Metrix

(Source: ComScore Desktop Media Overview Report, March 2018)

Top ad categories:

Finance
Computers & Technology
Retail
Travel
Media & Entertainment

[12]FE Online. (2018, April 2). Xiaomi integrates Hungama music service into Mi Music app; here's how to avail it for free. Financial Express. Retrieved May 10, 2018, from https://www.financialexpress.com/industry/technology/xiaomi-integrates-hungama-music-service-into-mi-music-app-heres-how-to-avail-it-for-free/1118356/
[13]Tech Desk. (2017, September 8). HTC smartphones to come pre-loaded with Hungama Music and Play apps. The Indian Express. Retrieved May 10, 2018, from http://indianexpress.com/article/technology/tech-news-technology/hungama-to-provide-music-and-play-services-on-htc-phones-here-are-the-details-4834221/
[14]Bhatia, A. (2017, October 2). OTT players could drive data consumption in India, telcos try their best to seal this new deal. The Indian Express. Retrieved May 10, 2018, from http://indianexpress.com/article/technology/tech-news-technology/ott-players-could-drive-data-consumption-in-india-telcos-try-their-best-to-seal-this-new-deal/
[15]Mallya, H. (2018, March 15). Vewd continues decade-long quest to make idiot boxes smarter. Retrieved May 9, 2018, from https://yourstory.com/2018/03/vewd-smarter-idiot-boxes/
[16]TelevisionPost Team. (2018, May 7). Hungama Digital FY17 consolidated net loss narrows to Rs 30.58 cr. Retrieved May 17, 2018, from http://www.televisionpost.com/hungama-digital-fy17-consolidated-net-loss-narrows-to-rs-30-58-cr/



Content

Original Content

No original content made exclusively for the OTT platform.

Offering

Zee Marathi app includes all the content available on Zee Marathi channel. It features mobisodes of 15 shows airing currently on the channel including popular titles like Tuzhyat Jeev Rangala, Majhya Navryachi Bayko, Lagir Zala Jee among others. The app features 12 old shows as well (Ratris Khel Chale, Dil Dosti Duniyadaari etc). Other content available on the app include nonfiction and kids' shows, cooking and music videos, and memorable snippets from the shows.

Zee Marathi additionally features a section अस्सल मराठीपण (Asal Marathipan) with funny memes, jokes, interesting trivia, updates on art & literature, and simple tips to a happy life. The माZEE मराठी (MaaZee Marathi) feature personalizes content according to the individual viewers' preferences.

SNIPPETS

Launched
2012

Owned by
Zee Entertainment Enterprises Limited

Headquarter
Mumbai, Maharashtra

Google Play Store Downloads
1 million+[1]

Popularity Rankings[2]
25th - Monthly Active Users,
20th - Downloads and
20th - Time Spent

Country Focus
India

Revenue Model
Catch Up TV (Free of Cost for Limited Period)

Zee Marathi app was launched eight years after Zee Marathi's launch in the year 2004.

[1]Zee Marathi. (n.d.). Retrieved May 21, 2018, from https://play.google.com/store/apps/details?id=com.app.zeemarathi&hl=en_US
[2]Re-imagining India's M&E Sector (March 2018, p. 129, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.

POPULAR SHOWS

No information is available on the performance of content on Zee Marathi app. The best performing shows on Zee Marathi television channel were[3] [4].

Tujhyat Jeev Rangala
Marathi - Romance-Drama; 311 Episodes



Tujhyat Jeev Rangala is the love story between a farmer, who is also a wrestler, and a school teacher who moves into his village.

Majhya Navryachi Bayko
Marathi - Romance-Drama; 348 Episodes



Mazhya Navryachi Bayko is the story of a happily married couple whose life takes a turn for the worse when the husband has an affair with his colleague.

Lagira Zhala Jee
Marathi - Romance-Drama; 129 Episodes



Lagira Zhala Jee is a story of a young man who dreams of becoming a soldier in the Indian Army and fighting for the nation.

Home Minister
Marathi - Game Show; 2015 Episodes



Home Minister is a Marathi game show where the host Aadesh Bandekar visits various homes and gets house-wives to participate in various tasks for prizes.

[3]Zee Media Bureau. (2017, December 27). Zee Marathi serials rule in 2017. Retrieved May 8, 2018, from http://zeenews.india.com/television/zee-marathi-serials-rule-in-2017-2070127.html
[4]Total episodes calculated according to their availability on the app.

Content

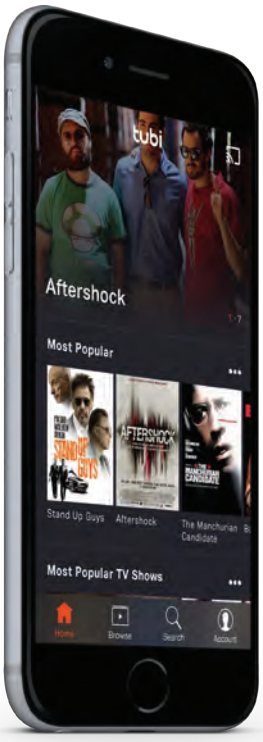
Original Content

None

Offering

tubitv has a collection of over 50K titles on a rotational basis[6], with close to 7.5K titles currently available for streaming. It has partnered with media houses such as Lionsgate, Paramount, MGM, and Starz for its content[7] [8].

It features movies and television content in various genres such as comedy, drama, sci-fi, crime, classics etc. Majority of the titles are in English, nevertheless, the platform includes a category for international cinema wherein English subtitles are provided. There are two separate categories of children's content – Kids shows and Preschool.



SNIPPETS

Launched
2014

Owned by
AdRise

Headquarter
California

Google Play Store Downloads
10 million+[1]

Unique Users (Mar 18)
241K[2]

Reach
0.1%[3]

Average Minutes/visitor
14.6[4]

Popularity Rankings[5]
24th - Monthly Active Users,
24th - Downloads and
23rd - Time Spent

Country Focus
North America and Europe
(North America – 64.5%; Europe – 12.3%)

Revenue Model
AVOD (Advertising Video on Demand)

[1]Tubi TV - Free Movies & TV. (2018, May 7). Retrieved May 29, 2018.
[2]Source: ComScore MMX Multi-Platform Report, March 2018
[3]Source: ComScore MMX Multi-Platform Report, March 2018
[4]Source: ComScore MMX Multi-Platform Report, March 2018
[5]Re-imagining India's M&E Sector (March 2018, p. 129, Rep.). (2018). Kolkata, West Bengal: Ernst &Young LLP.
[6]Perez, S. (2017, May 10). Free streaming service Tubi TV grabs $20 million in new funding. Retrieved May 29, 2018.
[7]Tubitv. (n.d.). Retrieved May 29, 2018.
[8]Hayward, A. (2018, January 17). Tubi: Everything you need to know about the free movie and TV streaming service. Retrieved May 29, 2018.

tubitv is the largest free ad-supported streaming network. It comprises entirely of syndicated content, with Tubi Inc.'s founder and CEO, Farhad Massoudi, confirming that the company shall never create original content nor move to a subscription-based model in the future[9].



Key Measures of the Platform[10]

tubitv achieved 241K total unique visitors in April 2018, a 3802% rise since April 2017. The platform received over 2 million views in April 2018 with an average of 14.6 minutes per visit. Mobile only unique visitors comprising 93.3% of the overall visitors in the same month.

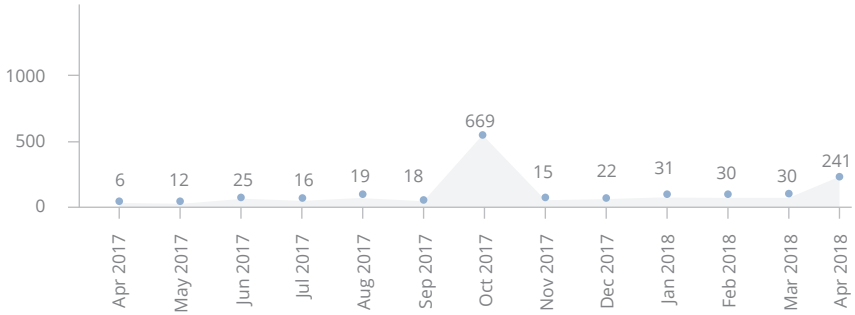
tubitv had a larger share of male visitors, with over 63% of the total unique visitors in April 2018 being males and 37% females. The largest traffic to the platform was coming from the age bracket 15-24.

Recent Development

tubitv has added a personalization engine for its platform[11].

tubitv has partnered with Hulu to provide some of the latter's content (The Mindy Project, Hell's Kitchen) on the platform[12].

tubitv Total Unique Visitors (000) across multi platform, March 2017 to March 2018



Consumer Demographics

tubitv Audience, March 2018

Males, Age Group	TUV (000)	Mobile (000)	Females, Age Group	TUV (000)	Mobile (000)
15-24	146	144	15-24	86	86
25-34	6		25-34	1	
35+	1		35+	1	
All Males	**153**	**144**	**All Females**	**89**	**86**

Source: ComScore MMX Multi-Platform Demographic Report, March 2018

[9]Feldman, D. (2018, January 09). With $35M In Investments, TUBI TV Has Established Itself As A Leading Free Streaming Service. Retrieved May 29, 2018.
[10]tubitv's traffic figures for the mobile have only been reported by ComScore for October 2017 and April 2018, where it fulfilled comScore's mobile minimum reporting standards (MRS). For the other months (i.e. April-September 2017 and November-March 2018), only desktop figures have been reported.
[11]Baumgartner, J. (2017, December 13). Tubi Revs Content Personalization Engine. Retrieved May 29, 2018.
[1]Ellingson, A. (2018, May 8). Tubi TV screening some Hulu content for free. Retrieved May 29, 2018.

Content

Original Content

None. All of the content is syndicated.

Offering

350+ Live TV channels (including 29 HD channels) and 10,000+ movies, short films, series, movie trailers, music videos.

Airtel TV offers its content in 15 languages - English, Hindi, Punjabi, Bengali, Gujarati, Tamil, Telugu, Kannada, Malayalam, Marathi, Bhojpuri, Assamese, Odia, French and Urdu.

Airtel TV has partnered Eros Now, HOOQ, Sony LIV, ALTBalaji and Hotstar, to offer their content on its app[4,5].

The app also offered updates on the IPL 2018[6]. With the help of BrainBaazi, Airtel TV launched live cricket quiz show 'Airtel TV Free Hit Live'.

Bharti Airtel Limited is a leading telecom company with operations in 20 countries across Asia and Africa. In India Airtel enjoys a 29.37% market share with a subscriber base of 304.9 million as of March 2018[7].

The company launched Airtel Digital TV- a DTH service, in Oct 2008[8], which currently occupies a sizeable 21% DTH market share in the country[9]. Airtel later came up with a mobile app Airtel Pocket TV for its existing digital TV subscribers in March 2014. Following intense competition from players like Reliance Jio, which launched its live streaming app JioTV in 2016, Airtel TV upgraded the Airtel TV app in December 2017[10].

SNIPPETS

Launched
December 2017[1]

Owned by
Bharti Airtel Ltd.

Headquarter
New Delhi

Google Play Store Downloads
10 million+[2]

Popularity Rankings[3]
8th - Monthly Active Users,
6th - Downloads and
13th - Time Spent

Country Focus
India

Revenue Model
Free (for all Airtel pre and postpaid customers till June 2018)

Partnerships and Distributions

Airtel partnered with mobile ad platform InMobi. Brands will now have a wider reach to premium ad inventory on the Airtel TV mobile app[11].

Airtel is in advanced talks with Netflix to offer the latter's content on the Airtel TV app[12].

[1]Press Trust of India. (2017, December 28). Airtel revamps Airtel TV app, offers free subscription till June 2018. Retrieved May 28, 2018.
[2]AirtelTV:Movies:TV Series, LiveTV (2018, May 15). Retrived May 28, 2018.
[3]As per App Annie's report on the top video OTT apps of 2017
[4]Mukherjee, S. (2018, February 12). Airtel Forges Strategic Partnership With Hotstar To Bolster Its Offerings On Airtel TV App. Retrieved May 28, 2018.
[5]Chakraborty, S. (2018, March 29). Airtel Partners ALTBalaji to Bring Its Shows to Airtel TV App. Retrieved May 28, 2018.
[6]Chawla, A. (2018, April 08). Airtel TV App Offers Free Access to IPL Matches, Highlights via Hotstar. Retrieved August 24, 2018.
[7]ETTelecom. (2018, May 02). India's total mobile subscriber base stands over 1 bn in March; Airtel leads with 29.37% market share - ET Telecom. Retrieved May 28, 2018.
[8]Airtel launches DTH service, offers 175 channels. (2008, October 07). Retrieved May 28, 2018.
[9]TelevisionPost Team. (2018, May 08). DTH ops added 4.91 mn net active pay subs in 2017 - TelevisionPost.com: Latest news/Research, India's Television, Cable, DTH, TRAI. Retrieved May 28, 2018.
[10]Press Trust of India. (2017, December 28). Airtel revamps Airtel TV app, offers free subscription till June 2018. Retrieved May 28, 2018.
[11]Shrivastava, A. (2018, April 12). Airtel TV app partners with InMobi for video and display monetisation. Retrieved May 28, 2018.
[12]Airtel likely to offer free subscription of Netflix on TV app: Sources - ETtech. (2018, April 19). Retrieved May 28, 2018.

Content

Offering

220+ Live and Catch up TV channels (GEC, sports, kids, movies, music, news, regional, lifestyle), 3500+ shows and movies.

Additional Tata Sky services include:
Kids (Classroom, Fun Learn, Smart Games etc.), Learn (Beauty, English, Vedic Maths, Fitness etc.), Entertainment (World Screen, Music, Karaoke etc.), Regional (Marathi Cinema, Bangla Cinema, Punjabi De Rang), Spiritual (Darshan, Devotional, Guru)

The content is available Assamese, Bengali, Bhojpuri, English, Gujarati, Hindi, Kannada, Malayalam, Marathi, Nepali, Odiya, Punjabi, Tamil, Telugu and Urdu languages.

SNIPPETS

Launched
October 2013[1]

Owned by
Tata Sky

Headquarter
Mumbai, Maharashtra

Google Play Store Downloads
10 million+[2]

Unique Users (Mar 18)
2.15 million[3]

Average Minutes/visitor
9.7 minutes

Popularity Rankings[4]
10th - Monthly Active Users,
11th - Downloads and
15th - Time Spent

Country Focus
India

Revenue Model
SVOD (Subscription Video on Demand)
TVOD (Transactional Video on Demand)





[1]BS Reporter. (2013, October 16). Tata Sky launches TV on mobile for subscribers. Retrieved May 26, 2018.
[2]Tata Sky Mobile- Live TV, Movies, Sports, Recharge. (2018, March 28). Retrieved May 21, 2018.
[3]Source: ComScore MMX Multi-Platform Report, March 2018
[4]As per App Annie's report on the top video OTT apps of 2017

Tata Sky is a joint venture between the Tata Sons and 21st Century Fox. The Mumbai-based company was incorporated in 2001, and the DTH service was launched in 2006. It offered Pay TV and OTT services.

Tata Sky had 2.15 million unique visitors in March 2018, an 18.4% increase since March 2017.

At 1.7 million, mobile users were nearly three times the desktop users during this period. There is also a 45% increase compared to the mobile visitors in March 2017 (1.17 million).

Tata Sky mobile app witnessed a steady rise over 2017, reaching its peak in December 2017 with 1.2 million visitors before declining to 773K visitors in March 2018. The live streaming of the four-day long music festival Sunburn Festival 2017 between 28th-31st December led to the heightened activity during the month[6].

Tata Sky Mobile is the official mobile application of Tata Sky, the second largest Direct to Home (DTH) service in India[5]

Tata Sky Mobile App witnessed almost equal traffic from female and male visitors. Female visitors exceeded male visitors in both 18-24 and 25-34 age brackets. No data was available on female visitors aged 35+.

Partnerships and Distributions

The global streaming giant Netflix has signed a strategic partnership with DTH provider Tata Sky. This partnership will enable subscribers access to the Netflix catalogue in future Tata Sky platforms[7].

Tata Sky is also in the talks to integrate OTT other media services such as Hotstar, YouTube and Amazon Prime[8].

Ad Metrix

Top ad categories:

Finance
Online Media
Telecommunications
Retail
Travel

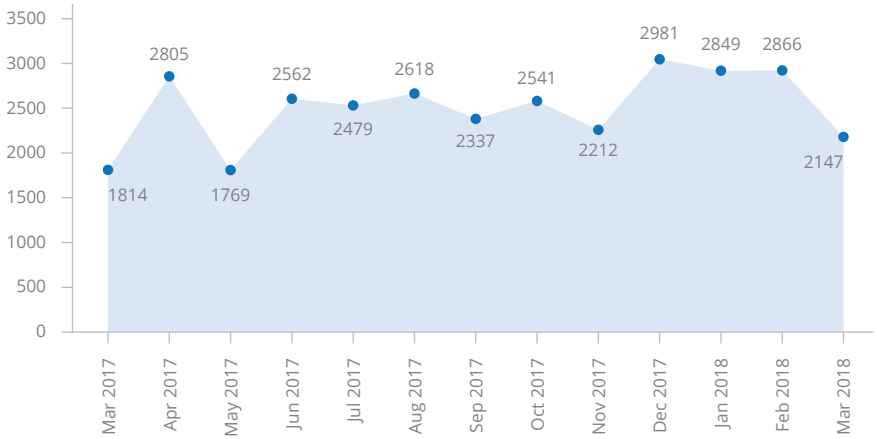
Most advertised on:
News/Information
Entertainment
Search/Navigation
Directories/Resources

Source: ComScore Desktop Media Overview Report, March 2018

[5]Doval, P. (2018, May 04). Dish TV plans to continue with Videocon D2H brand - Times of India. Retrieved May 26, 2018.
[6]BestMediaInfo Bureau. (2017, December 28). Tata Sky Mobile App to live stream Sunburn Festival 2017. Retrieved May 27, 2018.
[7]Ray, S. (2018, April 24). Netflix and Tata Sky have signed a strategic partnership. Retrieved August 24, 2018.
[8]Bhatt, A. (2018, May 23). Tata Sky to offer Hotstar, YouTube, Amazon Prime and Netflix - MySmartPrice News. Retrieved May 27, 2018.

Key Measures of the Platform

Tata Sky Total Unique Visitors (000) across multi platform, March 2017 to March 2018



Consumer Demographics

Tata Sky Audience (Mobile App), March 2018			
Males, Age Group	**Total Mobile (000)**	**Females, Age Group**	**Total Mobile (000)**
18-24	190	18-24	241
25-34	68	25-34	95
35-44	178	35-44	-
All Males	**436**	**All Females**	**337**



Conclusion

The media and entertainment industry witnessed a rapid change in the current year with disruptions due to technological advances and cheap data and mobile penetration. The industry has seen a digital convergence of Print, Radio, Television, Cinema, Gaming, Events and Music. While in India the traditional media remains resilient, digital platforms are showing indications of strong growth. The same can be attributed to increase in spending by the urban youth and the middle class families. With increasing purchasing power, strong consumption from the rural markets, Government's will to set up better infrastructure for digital connectivity, multiple platforms availability for consumption and transformation of traditional platforms; the OTT engagement is expected to grow steadily in the years to come. The Indian market has a huge potential to be one of the biggest media and entertainment markets in the Asia competing with its next door neighbour China.

Over last five years India's overall spending on entertainment and media expanded at a compound annual growth rate (CAGR) of 11.6% – narrowly ahead of China's 10.9%, and more than double the 5.0% CAGR projected for entertainment and media globally. The rise in spending in India will be led by digitally driven sectors such as Internet advertising (at a CAGR of 20.4%), video games (16.7%), and Internet access (15.0%). India is rapidly becoming a market of co-existence of the new and the old. While television and filmed entertainment categories have been growing in the country, digital advertising also has shown growth in the past year. While majority of digital revenue comes from advertising, subscription revenue has been showing steady growth thanks to the international players and their platforms strategy.

India has turned in to the preferred market for OTT players. With combination of local, national and international players making their mark in OTT business, the competition is rapidly increasing. The country has started taking steps towards the digitally enabled entertainment platforms.

The future of the OTT will depend on various factors like consumption pattern, content creation, cost of production, revenue model and connections. Thought 2017-18 did register highest percentage of growth in the digital domain and the same will continue in the coming years with probably new entrants with innovative content and subscription models. With more control for the viewers on "what" and "how" they watch the "content".

Industry Mapping & Trend Analysis

Dr. Darshan Trivedi
Associate Professor
Area Leader: Media & Entertainment Management Area

Report Editing & Data Visualization

Chirag Dagli
Founder & Director
Communication Crafts

Research Team

Saesha (Sashank) Kini
Mitali Rozia
Mansi Shah
Leslin Bastain

Design, Iteration & Compilation by

Adib Ghori | Dhaval Patel | Jayesh Davda
Design & Visualization

Jimesh Gajera
Data analytics dashboard

Drashti Shah
Proofreading & Copy Support

Indian OTT Platforms Report, 2018
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