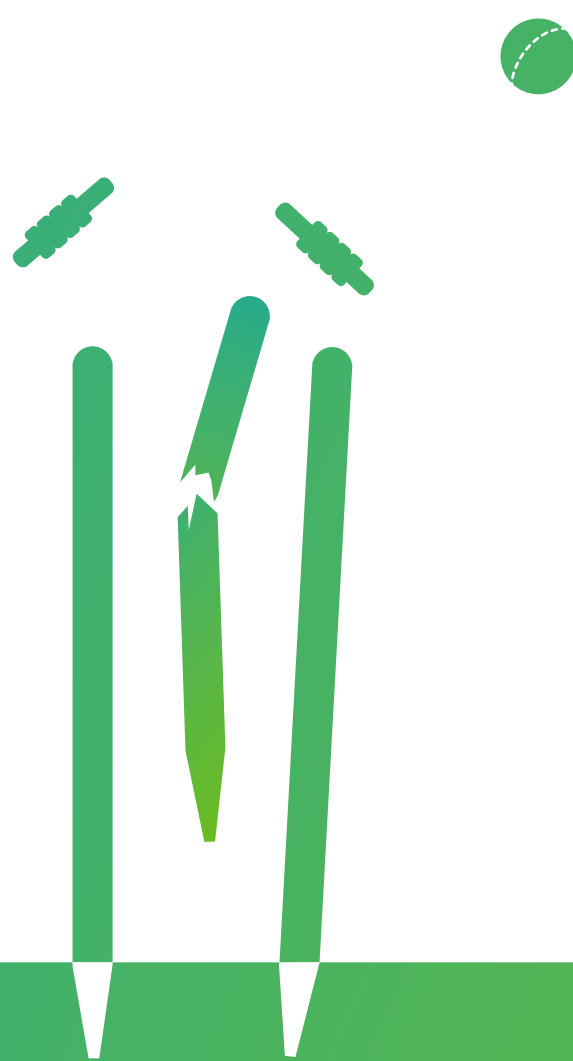


hotstar

The Game Changer

VIVO IPL Watch Report



2 0 1 8

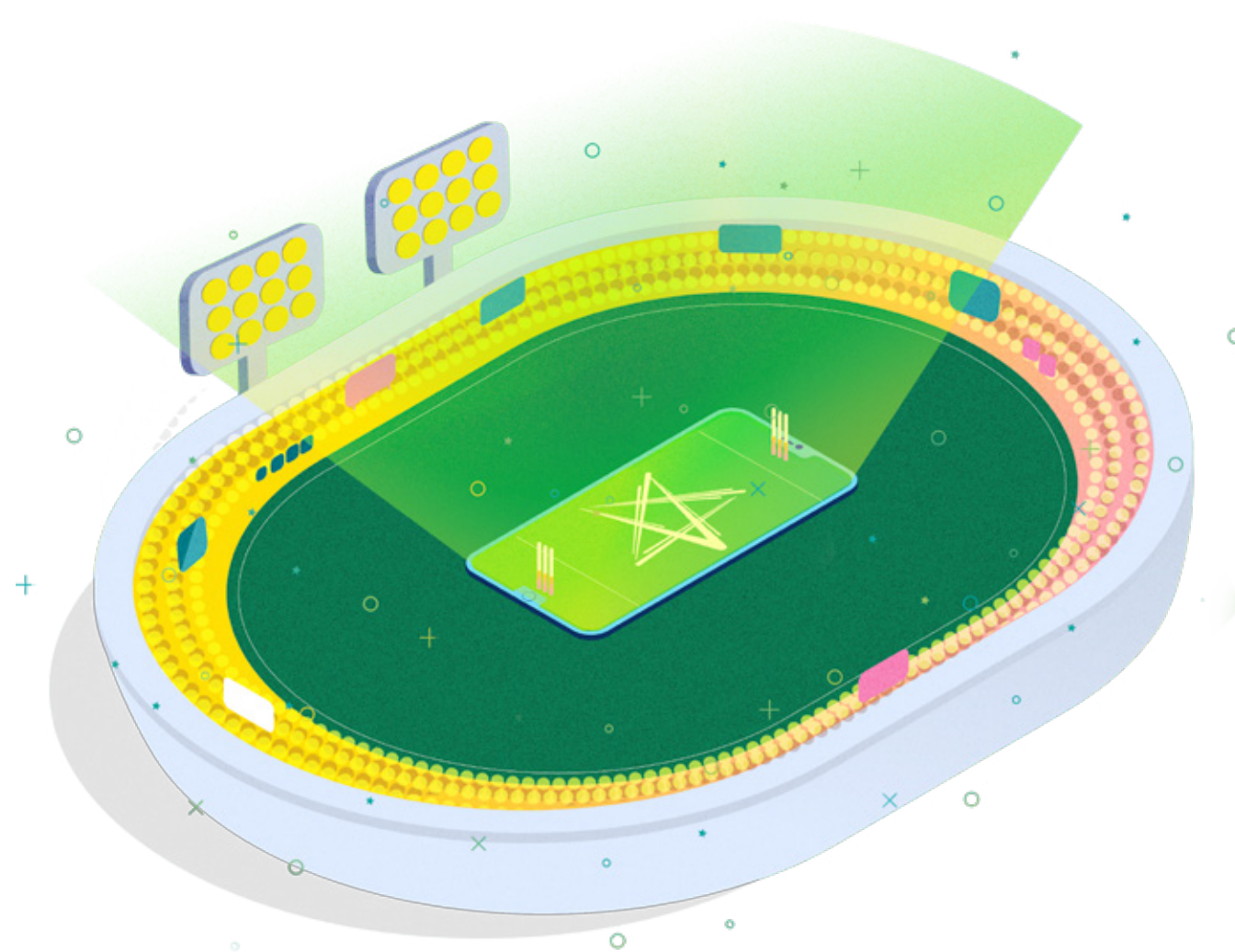
CHAPTER ONE

ALL EYES ON HOTSTAR. ALL AT ONCE.

DURING VIVO IPL 2018

202 MN
USERS ON THE PLATFORM

10.3 MN
PEAK CONCURRENCY



CODED IN INDIA, BREAKING GLOBAL RECORDS

Hotstar set a global benchmark of 10.3MN simultaneous viewers leaving major global events far behind



~8.3MN

VIVO IPL 2018
QUALIFIER 1 | CSK VS SRH
(Crossed in 2 more matches)



~5.5MN

VIVO IPL 2018
MATCH 4 | CSK VS KKR
(Crossed in 17 more matches)



~4.6MN

DONALD TRUMP'S
INAUGURATION
(Crossed in 30 matches)



~3.3MN

EURO 2016
FINAL
(Crossed in 55 matches)



~3.1MN

SUPER BOWL
2018
(Crossed in 58 matches)



The Final peaked at 10.3 Mn, but sustained a steady concurrency of 8.3 Mn and above, for over an hour!

RISING TO THE OCCASION

The VIVO IPL 2018 more than lived up to all the excitement generated since its announcement



3.5x

GROWTH IN WATCH TIME
OVER VIVO IPL 2017



2.1x

GROWTH IN WATCH TIME
PER USER
OVER VIVO IPL 2017



70% of all VIVO IPL 2018 viewers saw 3 or more matches. Now that is commitment!

CHAPTER TWO

MORE RELEVANT THAN EVER.

>55%

OF ALL URBAN
INDIA REACHED

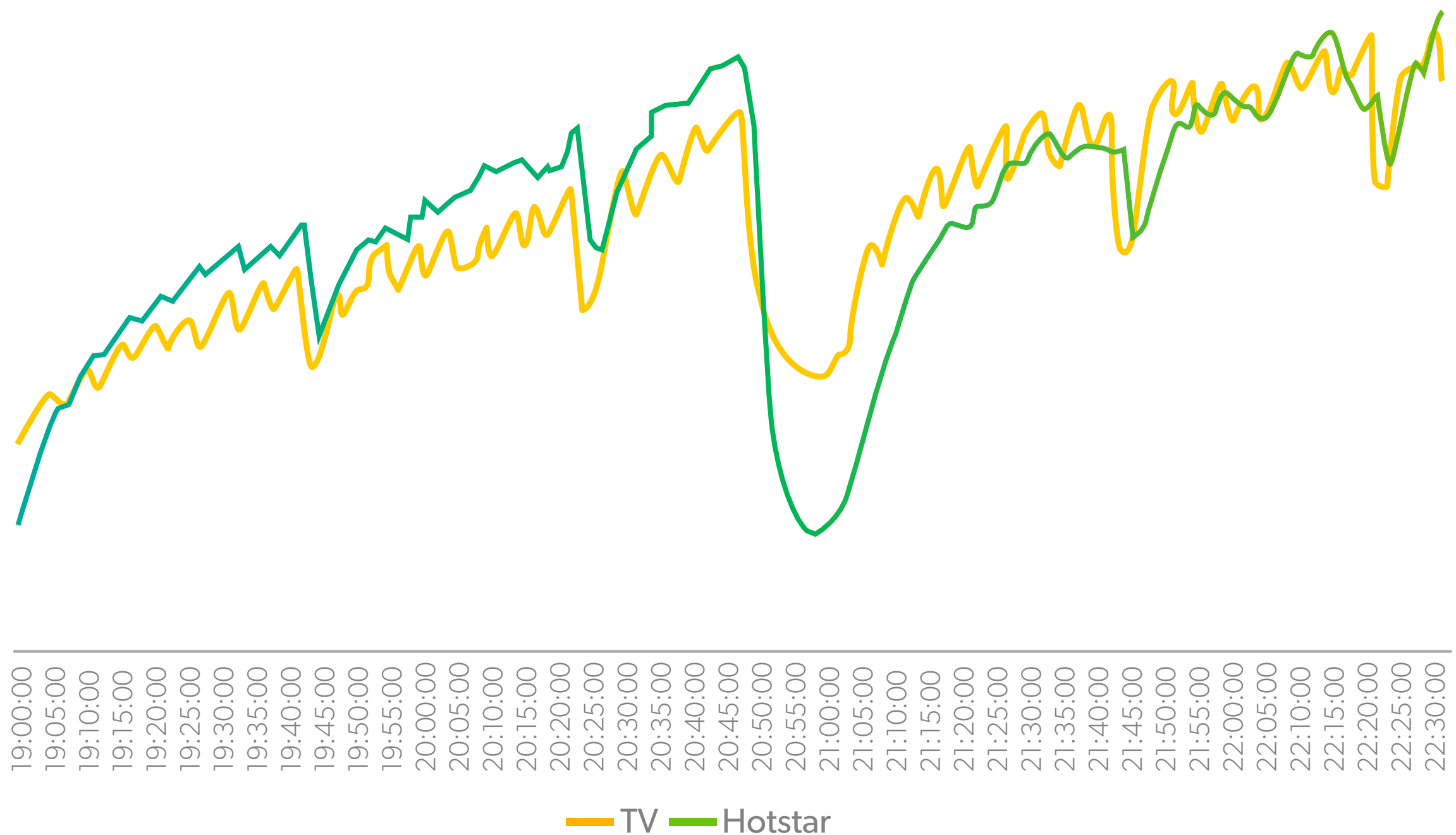
3.1

EQUIVALENT
TVR ACHIEVED*



THE FULL MATCH ON HOTSTAR

Hotstar continues to grow significantly as a primary screen for users and not just a catch up screen



*% of reach during the VIVO IPL 2018 Final
on TV and Hotstar, respectively*



Google Chromecast, Amazon Fire TV Stick, Android TV and Apple TV lead the way in introducing Smart TV to India!

CHAPTER THREE

NOT JUST VIDEO. NOW A GAMING PLATFORM.

33 MN
PLAYERS

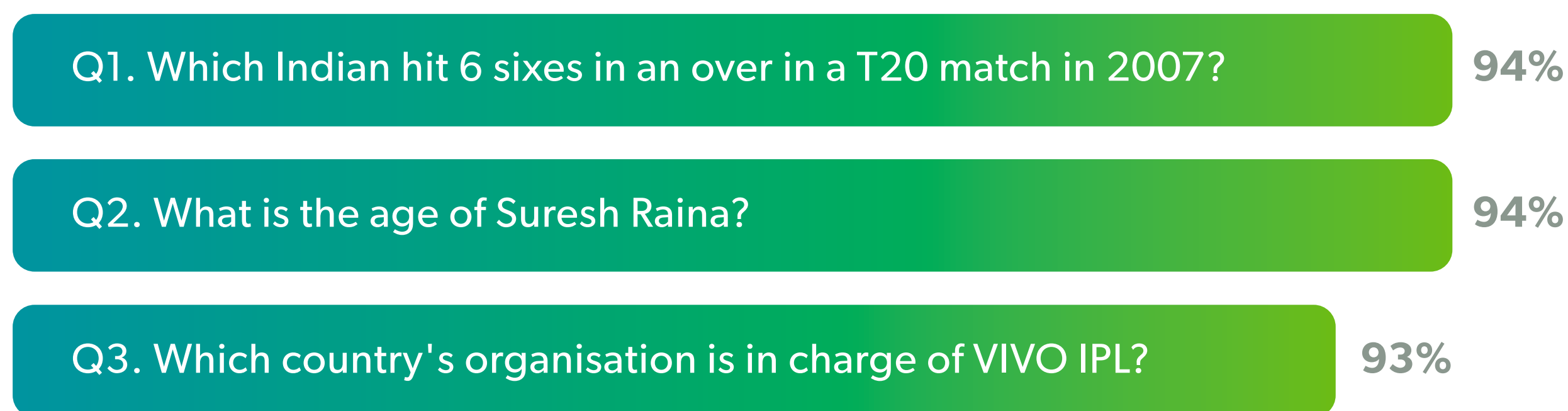
~3X

ENGAGEMENT OF
GAME PLAYERS
VS. NON PLAYERS



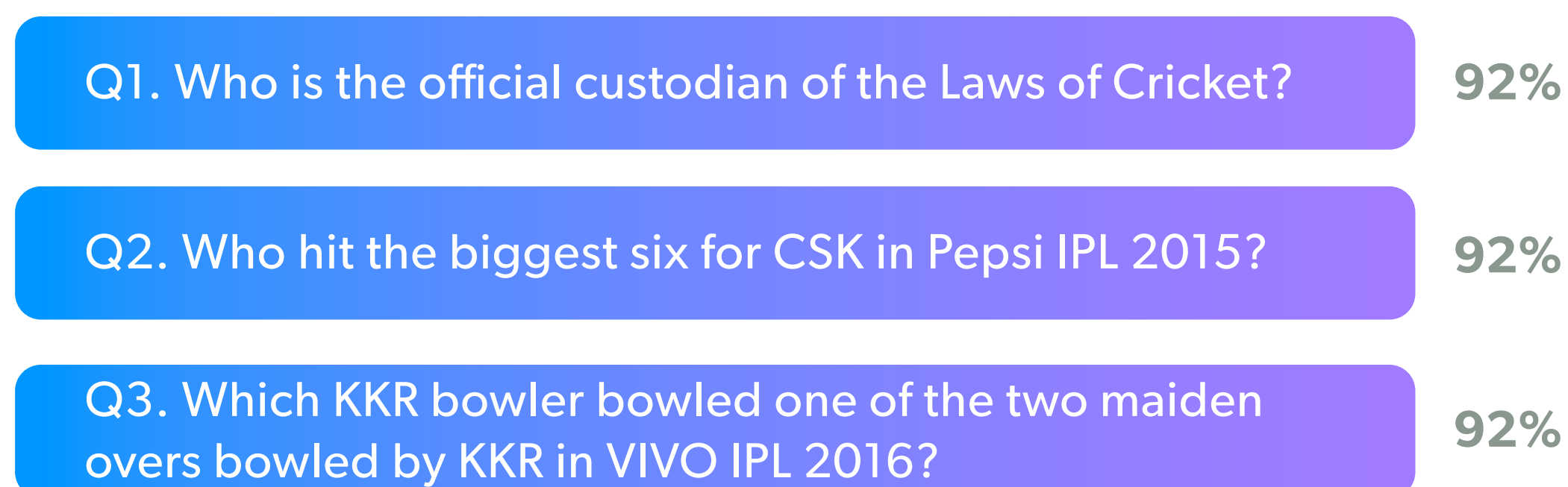
EATING, BREATHING & TALKING CRICKET

TOP 3 MOST CORRECTLY ANSWERED TRIVIA QUESTIONS (% OF PLAYERS)



A1. Yuvraj Singh A2. 31 years A3. India

TOP 3 MOST INCORRECTLY ANSWERED TRIVIA QUESTIONS (% OF PLAYERS)



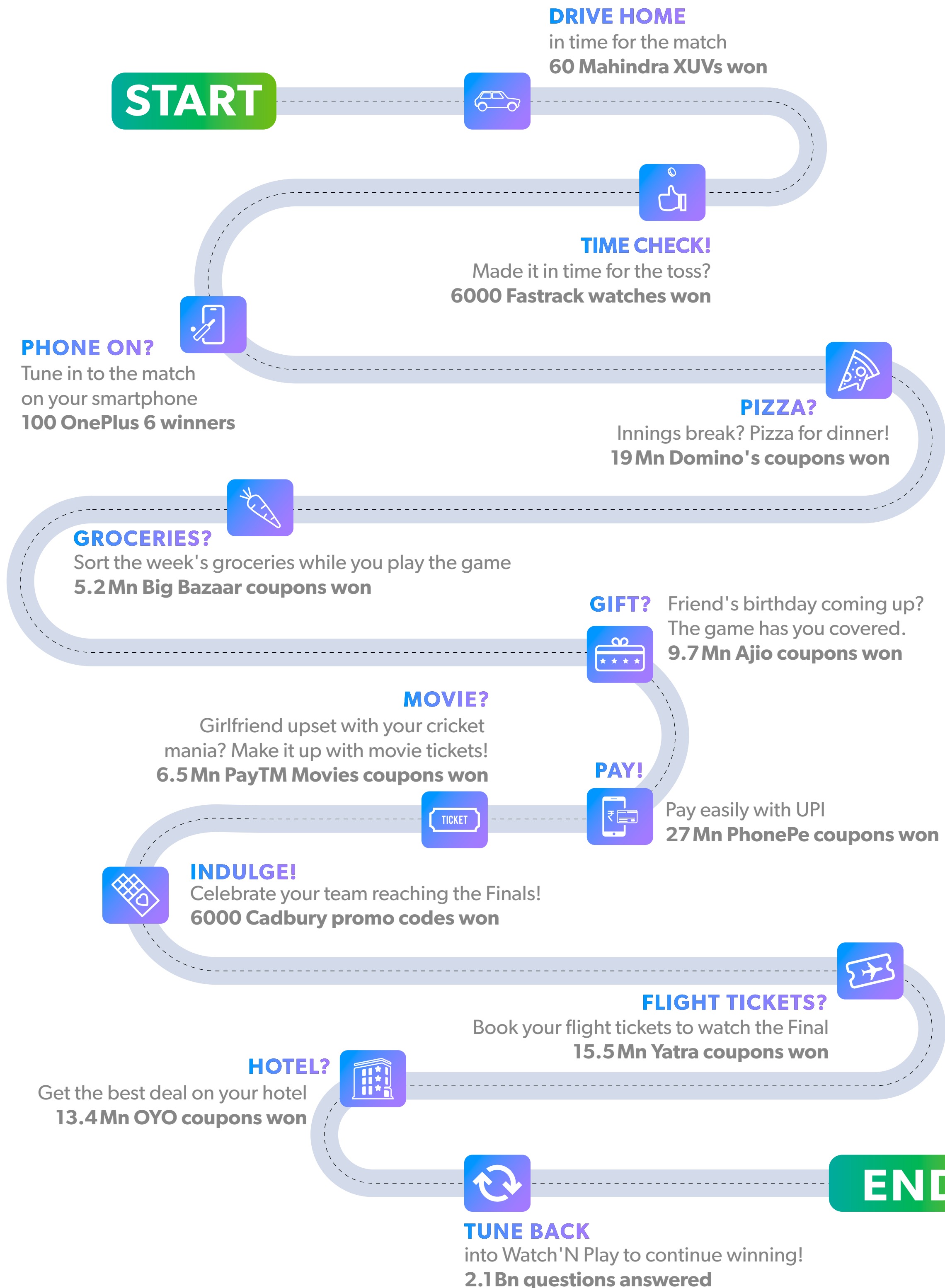
A1. MCC A2. Pawan Negi A3. John Hastings



70% of respondents got "What does the 'I' in 'ODI' Stand for?" wrong!

Almost half a million users attempted the "What does the 'I' in 'ODI' Stand for?" question

GOING BEYOND PASSIVE VIEWING



CHAPTER FOUR

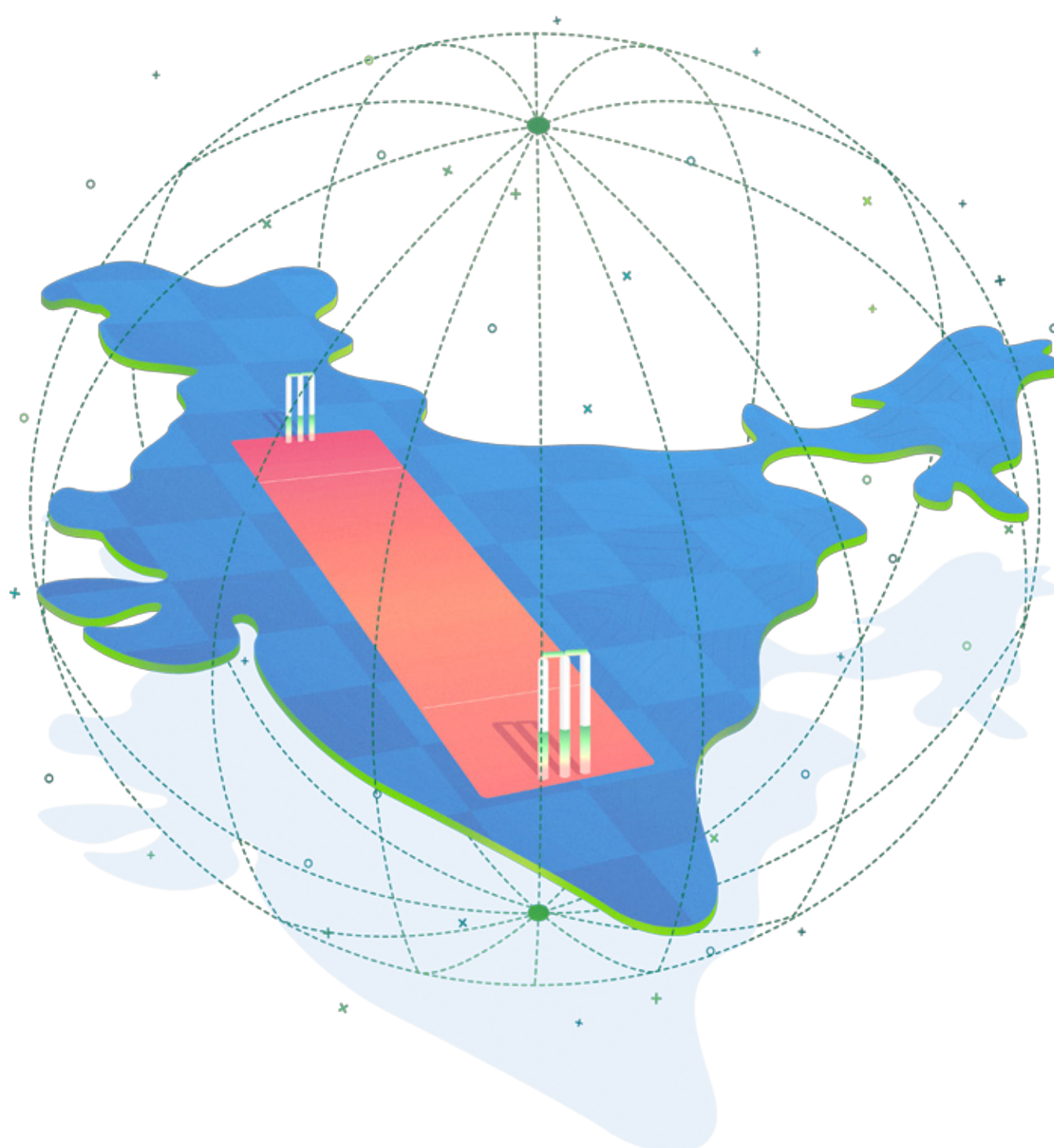
BRINGING MORE AND MORE INDIANS ONLINE.

GROWTH OVER VIVO IPL 2017

2.5X
METROS

5.2X
1MN+ CITIES

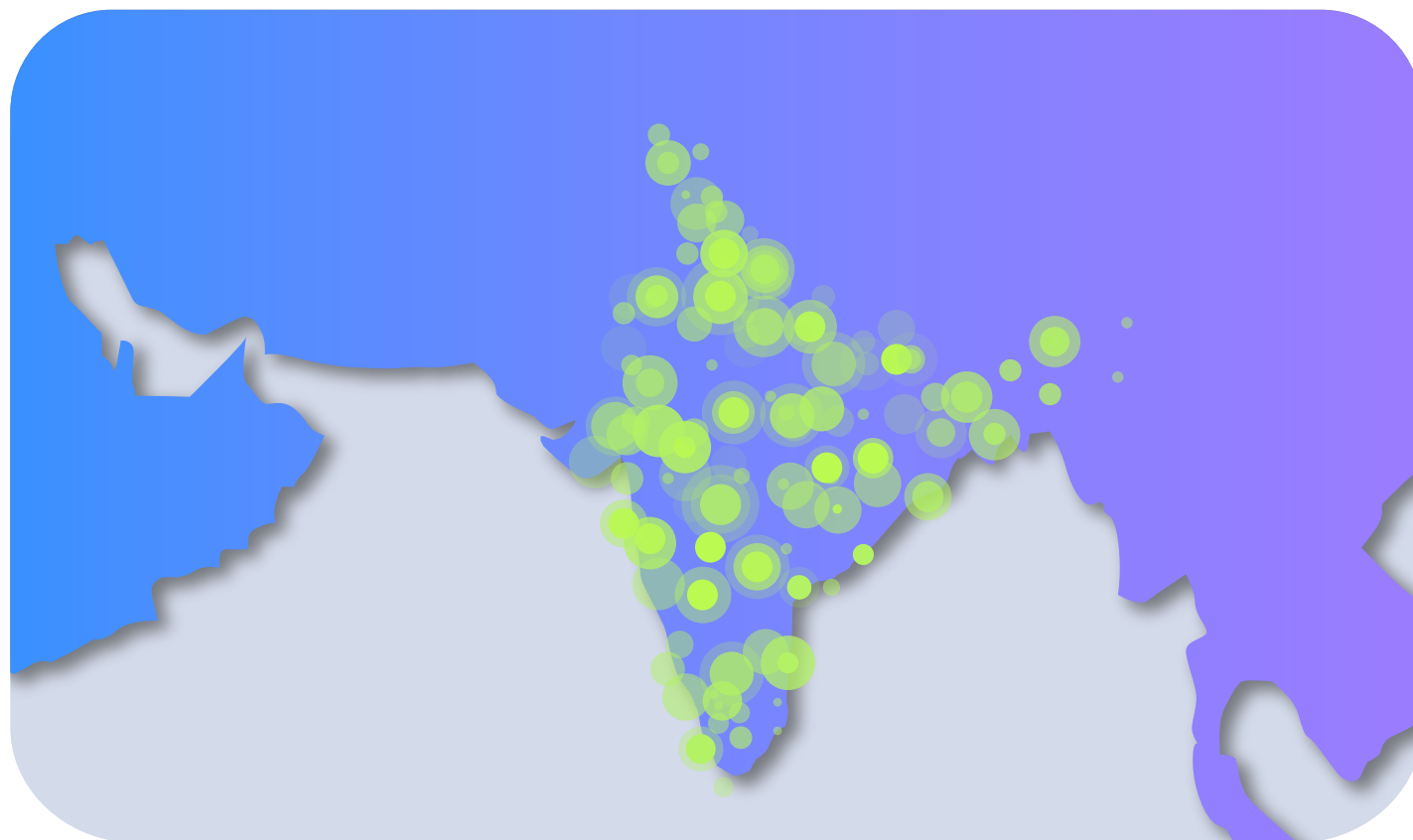
5.9X
<1MN TOWNS



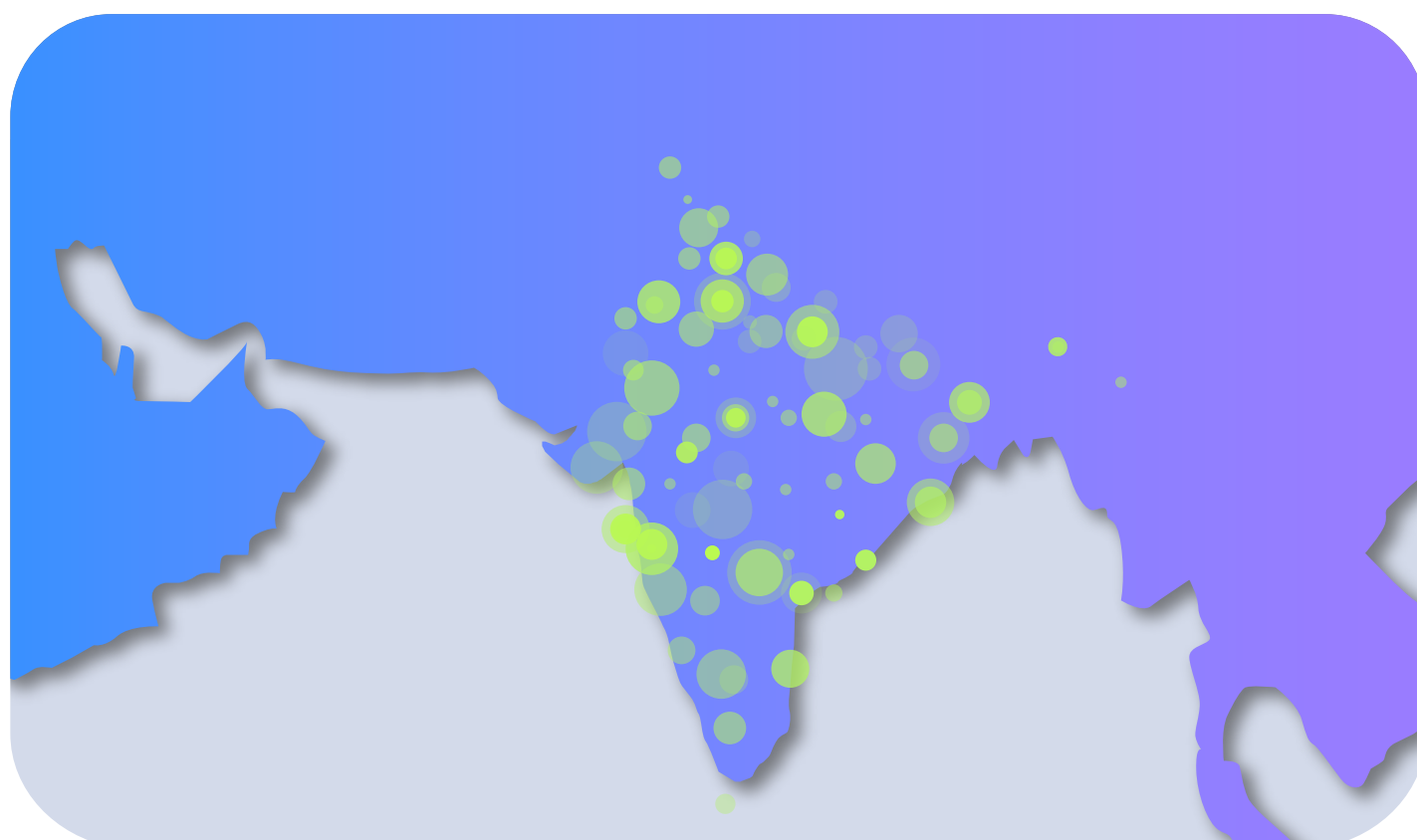
1. Cities categorized as per their population, as defined by BARC 2. 'X' denotes the watch time growth between VIVO IPL 2017 and VIVO IPL 2018

VIVO IPL 2018 LIT UP ALL PARTS OF INDIA

This season of the VIVO IPL travelled the length and breadth of the country in viewership - a significant jump from last year



2018



2017



The average streaming speed in India for VIVO IPL 2018 was 1.1 MBPS - a 35% growth from last year!

HOME OR AWAY - THE FIRST LANGUAGE RULES



~35%

of all watch time in regional languages comes from regions outside their native states

20%

of Tamil watch time came from outside Tamil Nadu

20%

of Kannada watch time came from outside Karnataka

37%

of Telugu watch time came from outside Andhra Pradesh & Telangana

18%

of users who watched in Hindi were from South India



The most engaged sports fans this year were those who watched the stream in Tamil!

CHAPTER FIVE

RIDING THE BIG WAVE.

OF ALL VIVO IPL 2018 VIEWERS

~50%

ALSO WATCHED
TV SHOWS

~48%

ALSO WATCHED
NEWS

~27%

ALSO WATCHED
MOVIES



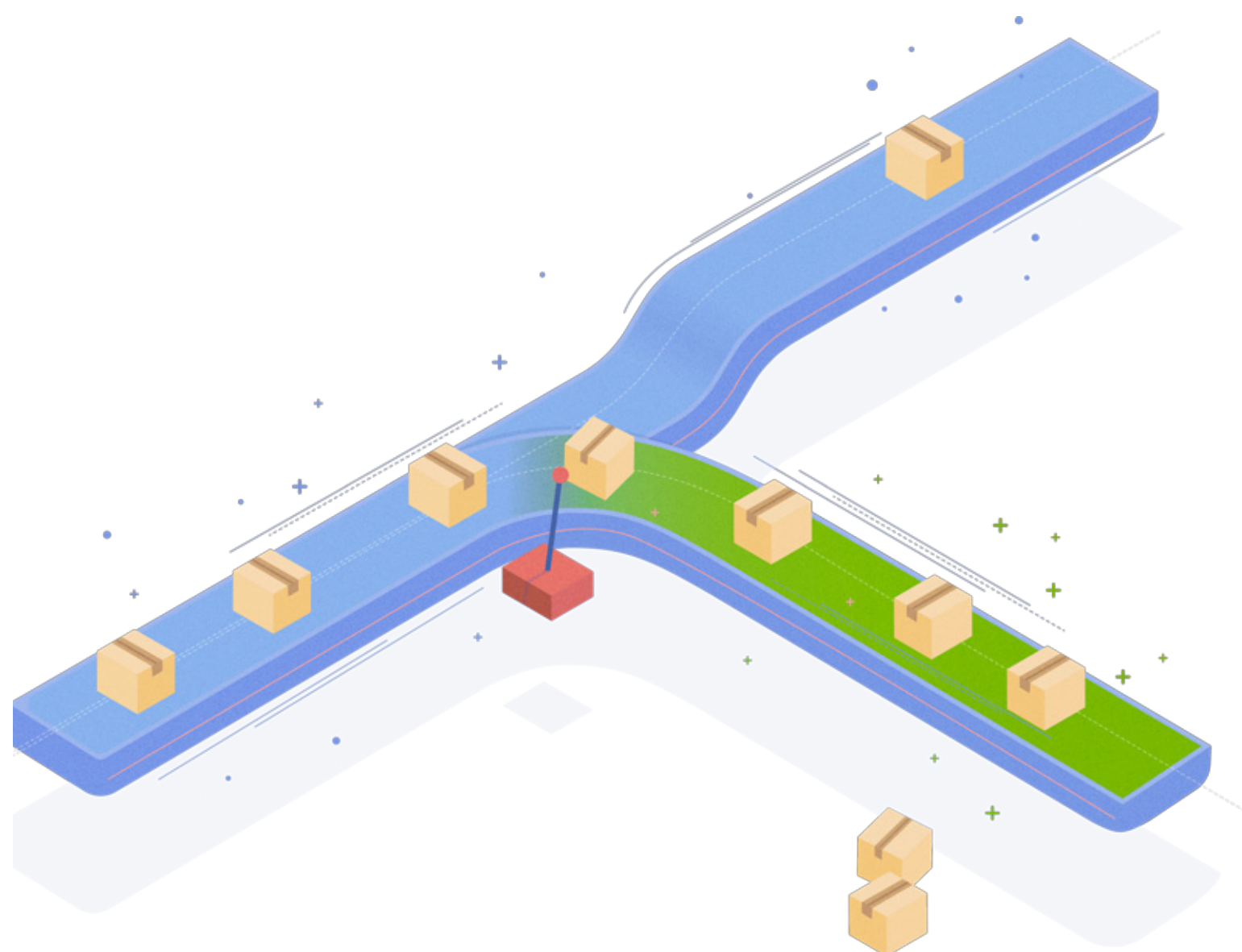
Only viewers with >5 min of watch time on VIVO IPL considered

CHAPTER SIX

REAL ENGAGEMENT ON HOTSTAR.

REAL EFFECTIVENESS FOR YOUR BRAND.

A LOOK AT THE RELATION BETWEEN ENGAGEMENT ON CONTENT
AND RECALL ON ADS DURING VIVO IPL 2018.

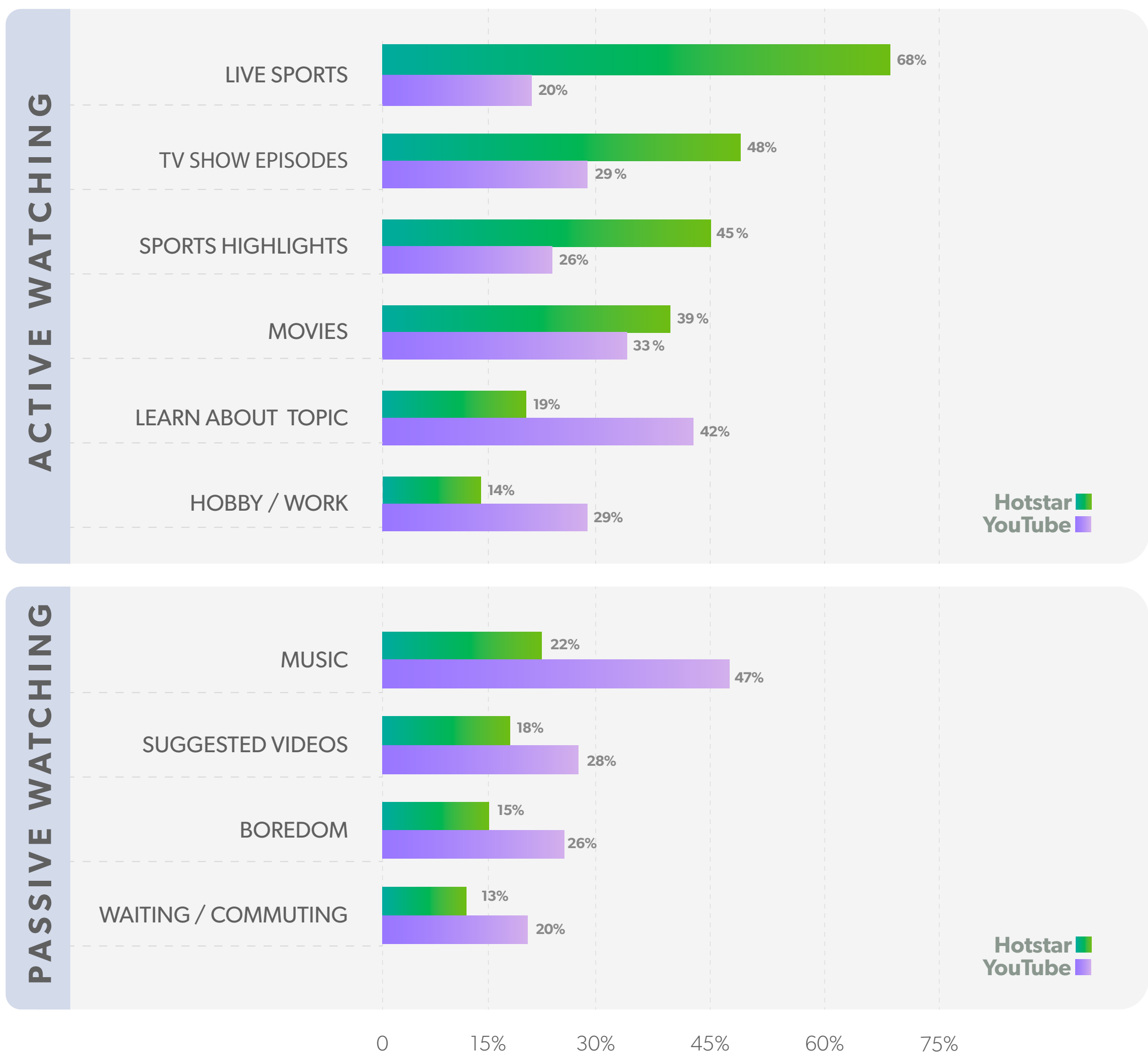


BASED ON RESEARCH CONDUCTED BY NIELSEN.

WATCHING WITH PURPOSE

Unlike on YouTube, most viewers tune in on Hotstar with purposeful intent

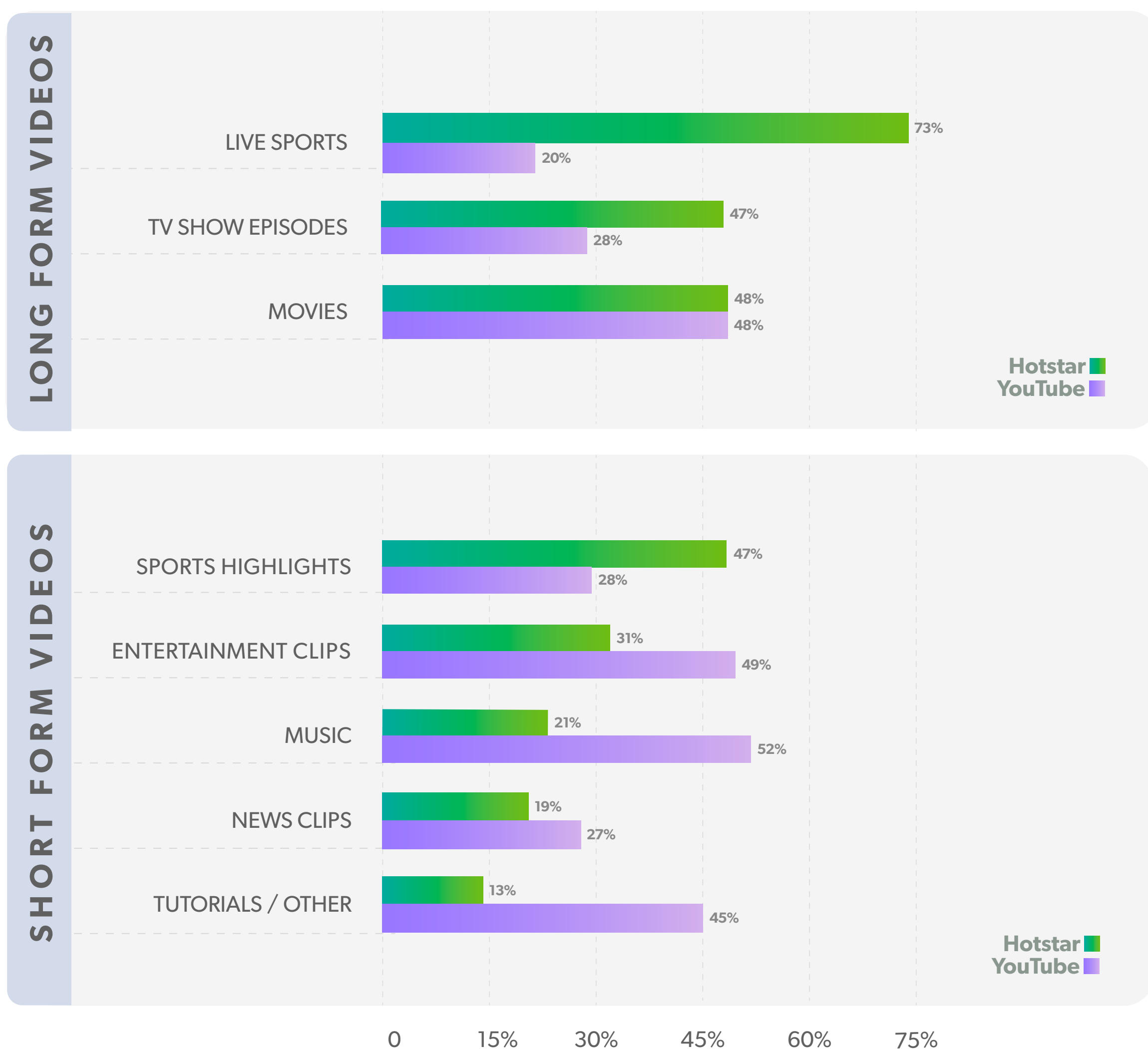
Primary reasons to visit the platform (% of respondents)



ENGAGING WITH LONGER STORIES

Busting the attention-deficit myth, long-form content continues to rivet audience's attention as the bulk of viewers on Hotstar favour long-form content, whereas at least 1 in 2 users on YouTube watch short-form content

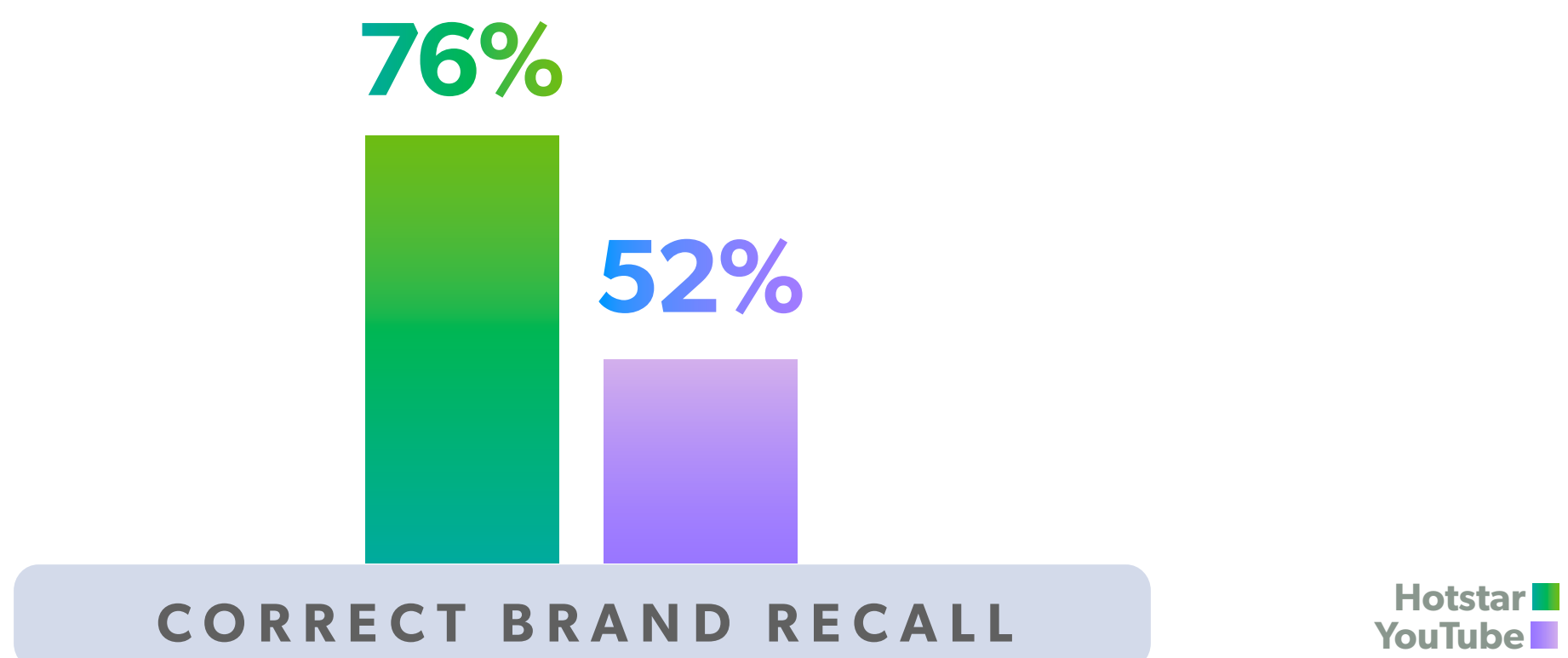
Types of videos you are most likely to watch (% of respondents)



1. Based on research conducted by Nielsen [May 2018, sample size 1417, Refer: 'References' 1a.]; 2. Q: "Please select the types of videos you are most likely to watch on..." 3. 'Other' includes Motivational and Spiritual videos

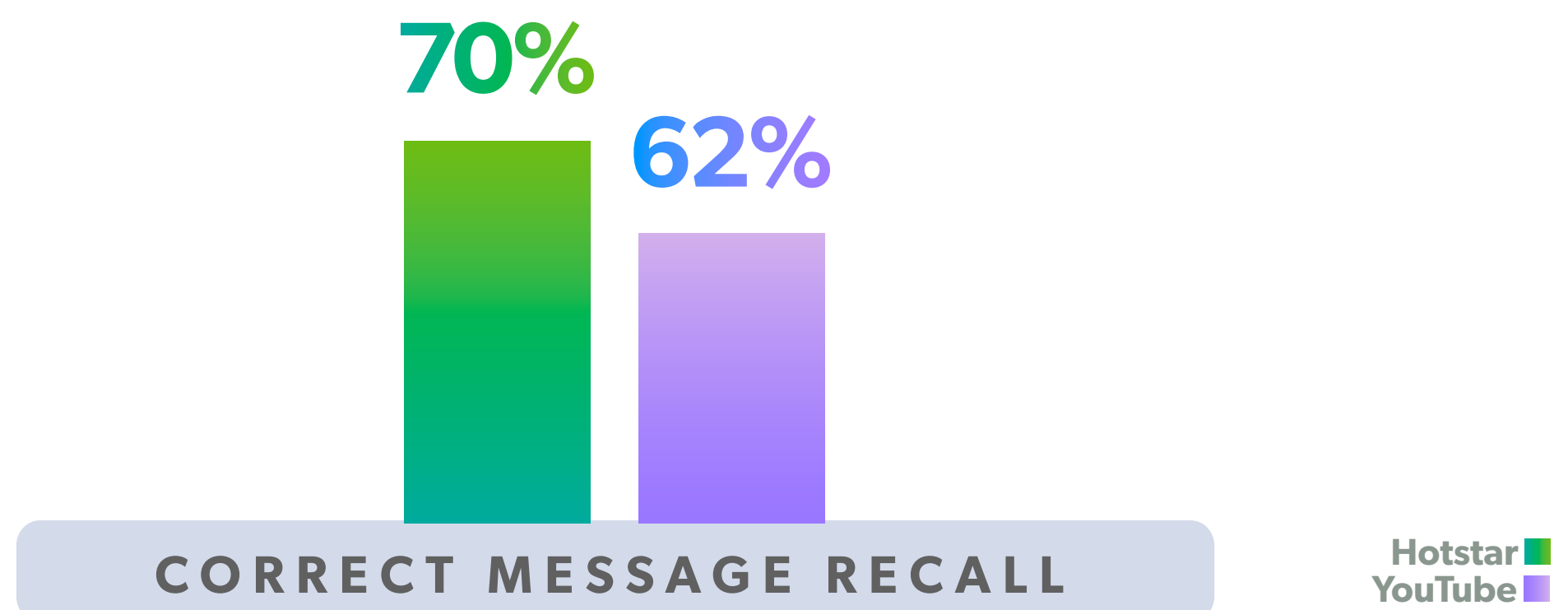
DRIVING HIGHER BRAND AND MESSAGE RECALL

On average, only half of those who saw an ad on YouTube recalled the brand correctly when compared to 3/4 of those on Hotstar



Q: "You said you recall seeing this advertisement. Which brand sponsored this ad? (% of respondents)"

On average, more Hotstar viewers recalled the messaging of the ad correctly vs YouTube viewers



[You recalled the brand correctly] Q: "Could you please tell us what the key message of this Ad was?" (% of respondents)

CHAPTER SEVEN

A VERSATILE AUDIENCE FOR YOUR BRAND.

A LOOK AT WHAT VIVO IPL WATCHERS ON HOTSTAR ARE INTERESTED IN AND PURCHASING.



AUDIENCES BIG ON LIFESTYLE

Compared to an average internet user, watchers of VIVO IPL on Hotstar showed deeper interest in key categories, through activities like price enquiry and website visits

COMPARED TO AN AVERAGE INTERNET USER, HOTSTAR USERS HAVE



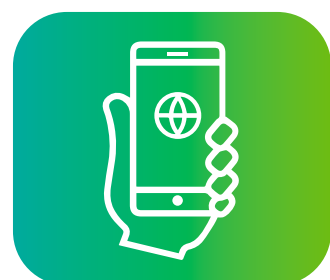
116% higher inclination towards **fashion and apparel**



100% higher interest in **food**



90% more interest in buying **tickets online**



78% more interest in **telecom & mobile data** products



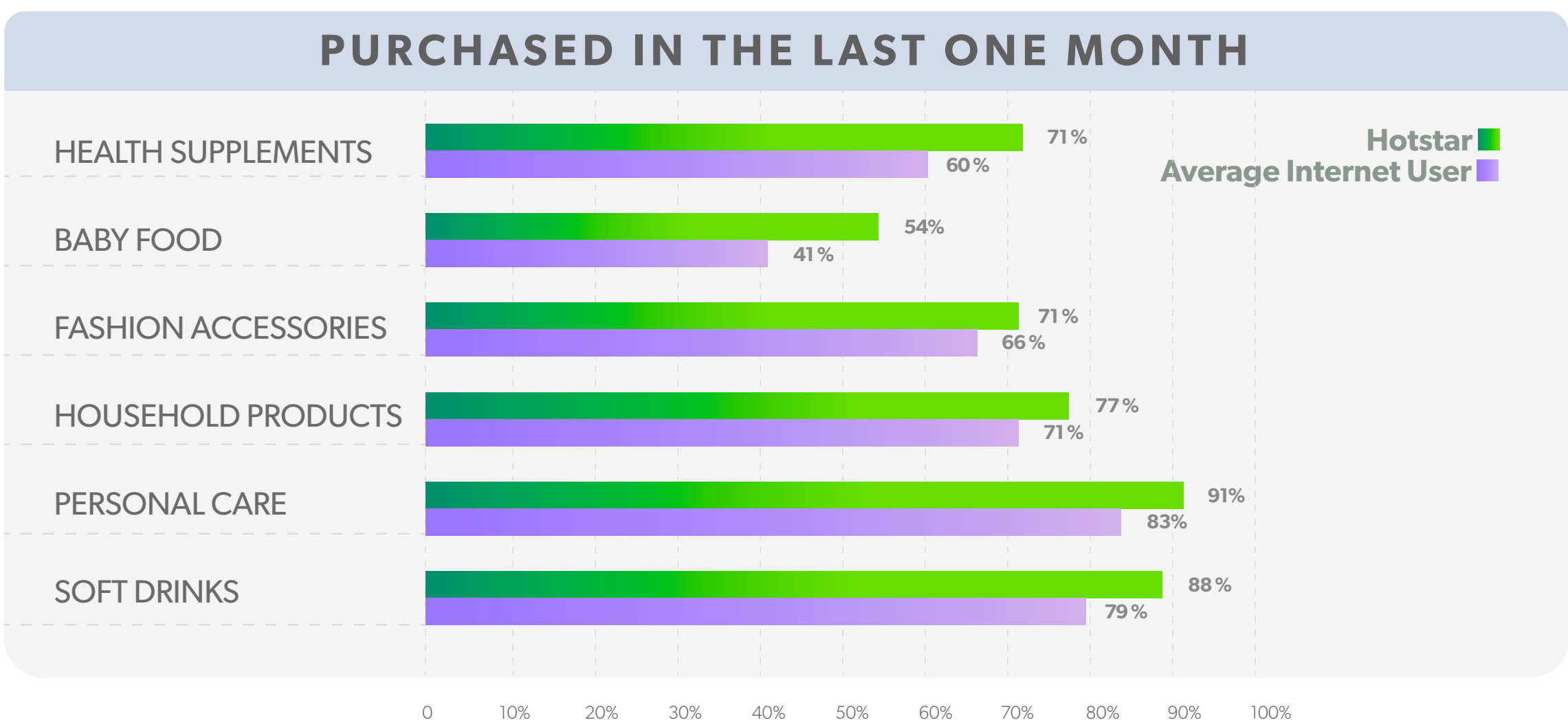
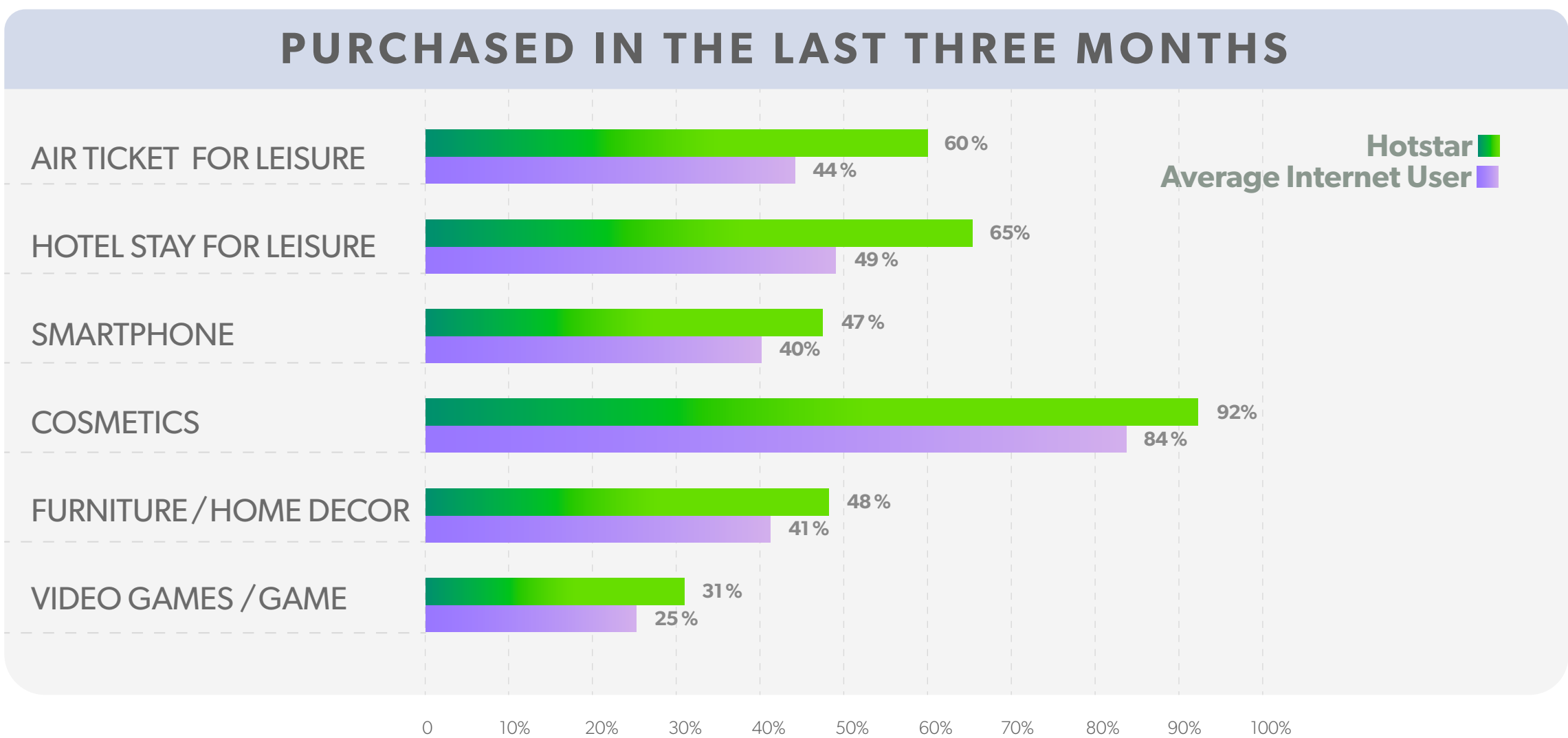
63% more interest in **travel**



50% more drive for **automobiles**

WHAT IS IN YOUR SHOPPING BAG?

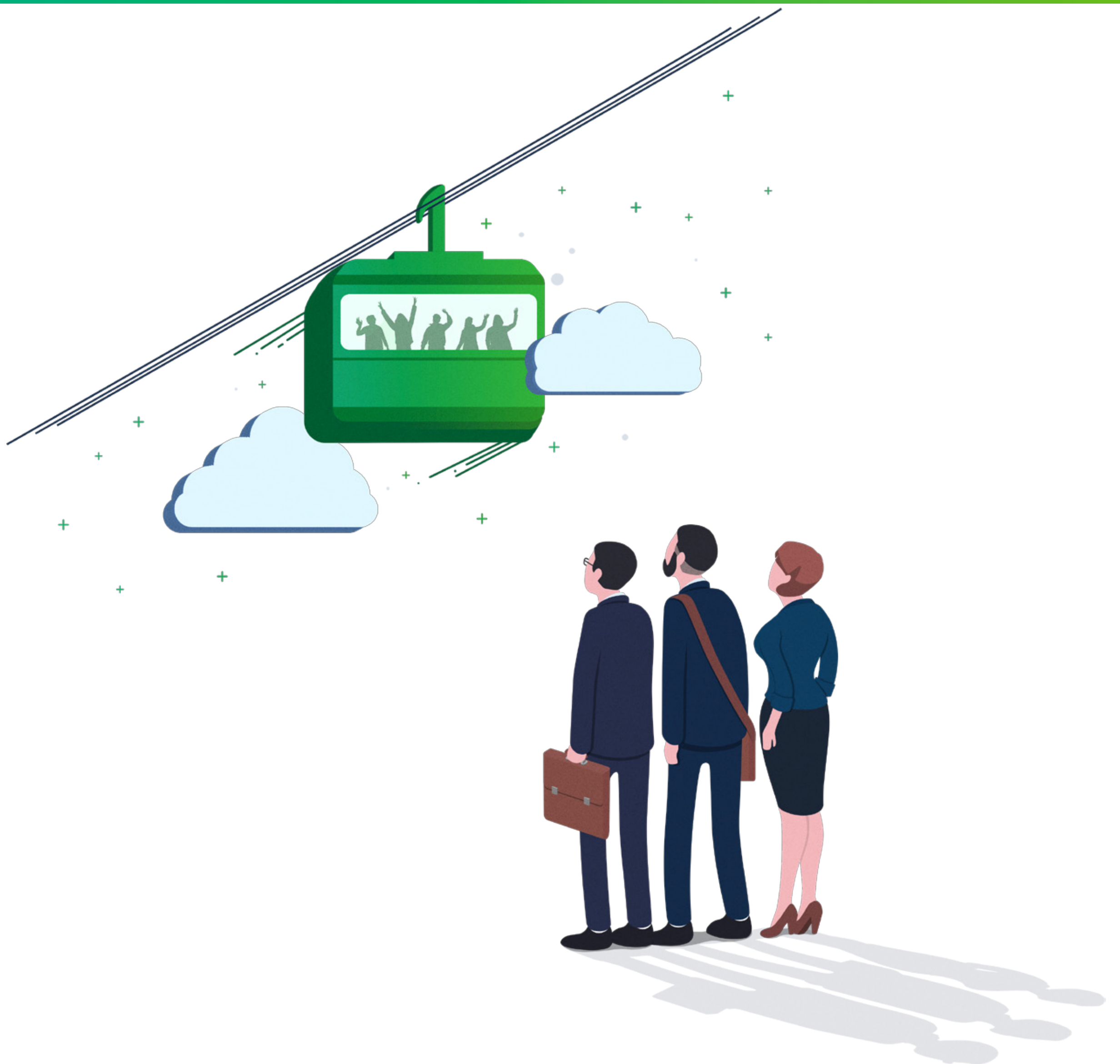
VIVO IPL watchers on Hotstar are 1.2X more likely to purchase key product categories compared to the average internet user



1. 3 month purchase data for April to June 2018 2. 1 month purchase data for June 2018 3. 1.2X on categories displayed 4. Source: This data is part of the GroupM LIVE Panel and [m]Insights Data Management Platform. The panel is a data fusion between offline consumer purchase behavior, mapped with their digital behavior. The audience planning tool is connected with Kantar's market leading data and research assets. This panel helps brands to study deeper consumer insight, seamlessly plan across platforms, and for programmatic targeting.

CHAPTER EIGHT

HALL OF FAME.



MOST WATCHED ADS DURING VIVO IPL 2018

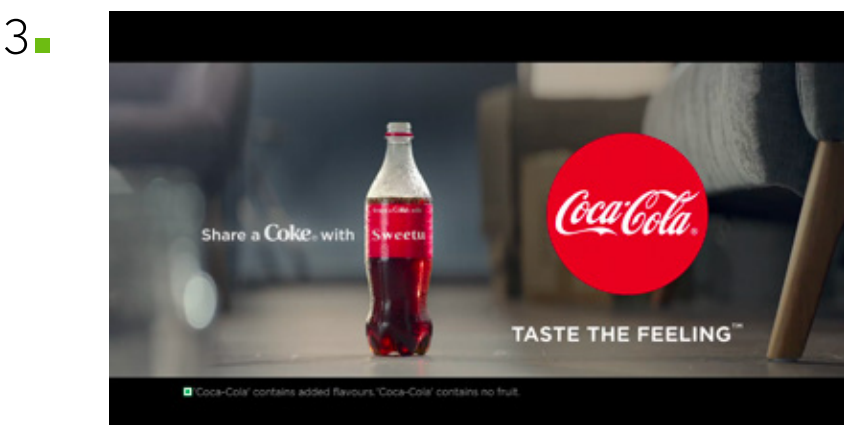


DREAM11

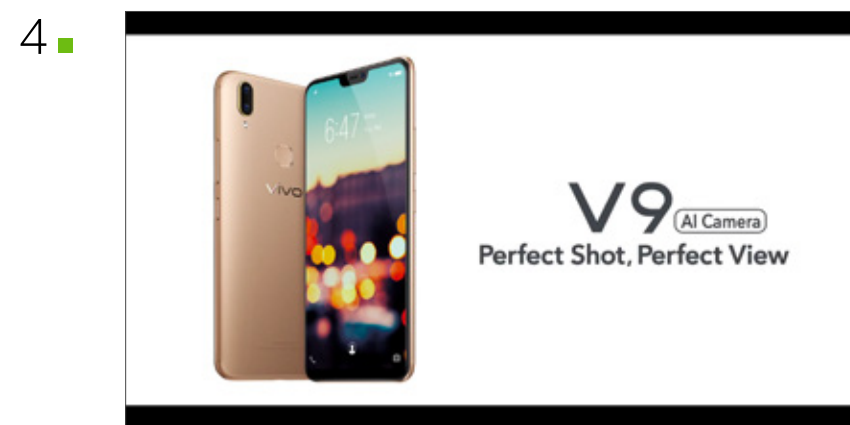
"BANO DIMAAG SE DHONI"



"BEST POSTPAID OFFERS NOW ON THE WORLD'S LARGEST MOBILE DATA NETWORK"



"TASTE THE FEELING"



vivo

"VIVO V9 AI CAMERA: PERFECT SHOT, PERFECT VIEW"



6. "THE SPEED YOU NEED"



8. Hindustan Unilever Limited
"NO GAS BODY PERFUME"



UNITED SPIRITS
A DIAGEO Group Company

10. "JOHNNIE WALKER THE JOURNEY - KEEP WALKING"

CASE STUDY: DUREX

OBJECTIVE

- To drive awareness, recall, reach and frequency for the newly launched, Durex AiR
- And reinstate Durex AiR's positioning as 'India's Thinnest Condom'

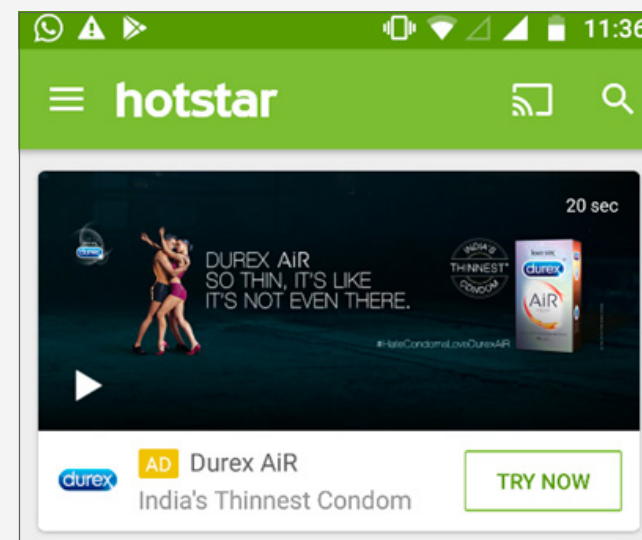
APPROACH

L-BANDS



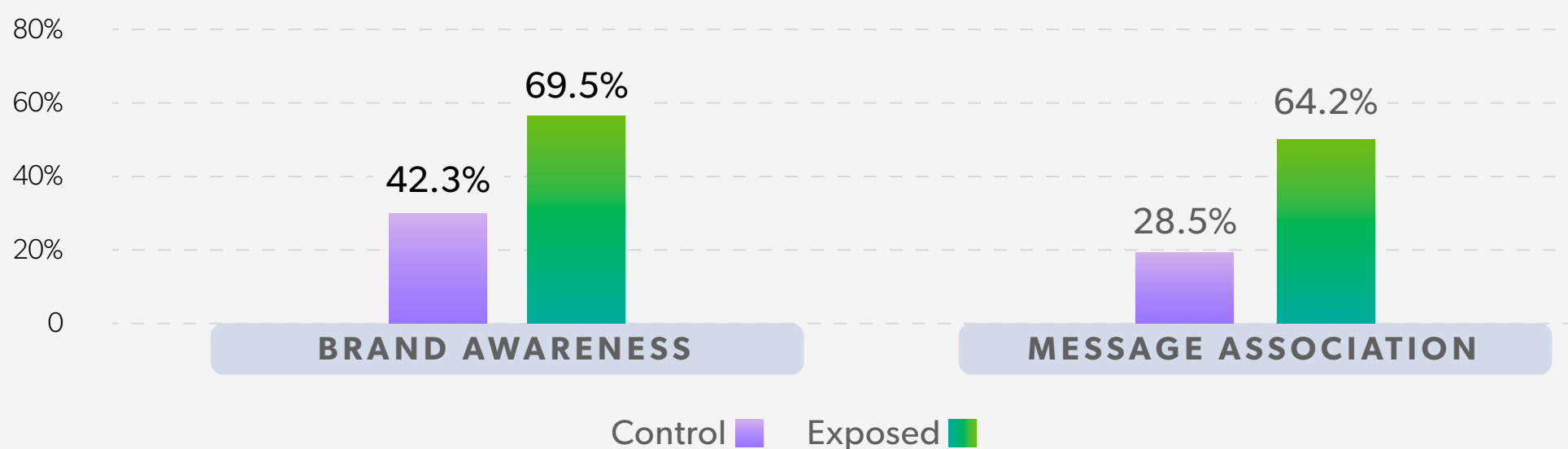
878 Mn Impressions with contextual messaging

HOMEPAGE BILLBOARD



26 Mn Reach and **170 Mn** Impressions on Opening Day

RESULTS



"Popularity of (VIVO) IPL has been steadily increasing. **It was an obvious choice** to leverage acceptance of the tournament. We partnered with Hotstar this (VIVO) IPL for Durex. We used Super 6s and mid rolls as a part of the Hotstar bouquet and **both gave desired results**"

Pankaj Duhan - CMO
Reckitt Benckiser South Asia, Health

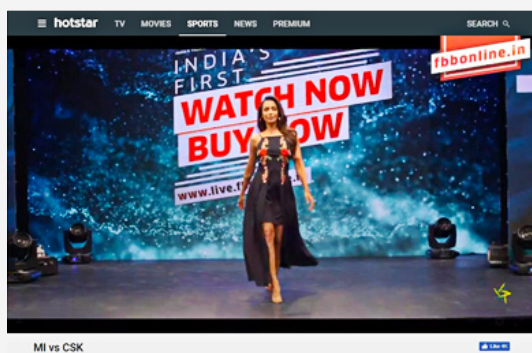
CASE STUDY: FUTURE GROUP

OBJECTIVE

- Leverage Hotstar as an activation medium to drive online-to-offline behaviour
- Solve for metrics beyond awareness by leveraging VIVO IPL

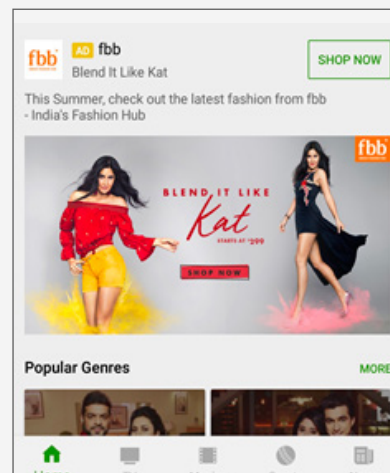
APPROACH

MIDROLLS AND BUMPERS



97 Mn impressions on midrolls and **79 Mn** on bumpers

STATIC ADS WITH CTA



154 Mn impressions delivered

WATCH'N PLAY COUPONS



21.8 Mn unlocked levels with Future Group prizes

RESULTS

28% → **80%**

COUPONS REDEEMED FOR BRAND FACTORY

NEW USERS AMONGST REDEEMERS

“Driving users to our stores has been an integral part of Future Group's digital strategy and hence FG was keen to leverage (VIVO) IPL which garners maximum reach digitally. Gamification is something which has always been of interest to FG since it provides a chance to engage deeply with the consumers and provides “online to offline” through couponing. Watch’N Play provided FG an opportunity to engage with our audience and drive footfalls to our stores.

Pawan Sarda - Group Head - Digital
Future Group India

CASE STUDY: DREAM11

OBJECTIVE

- Establish Dream11 as the biggest game of skill where users need to use their knowledge of sport

APPROACH

L-BANDS



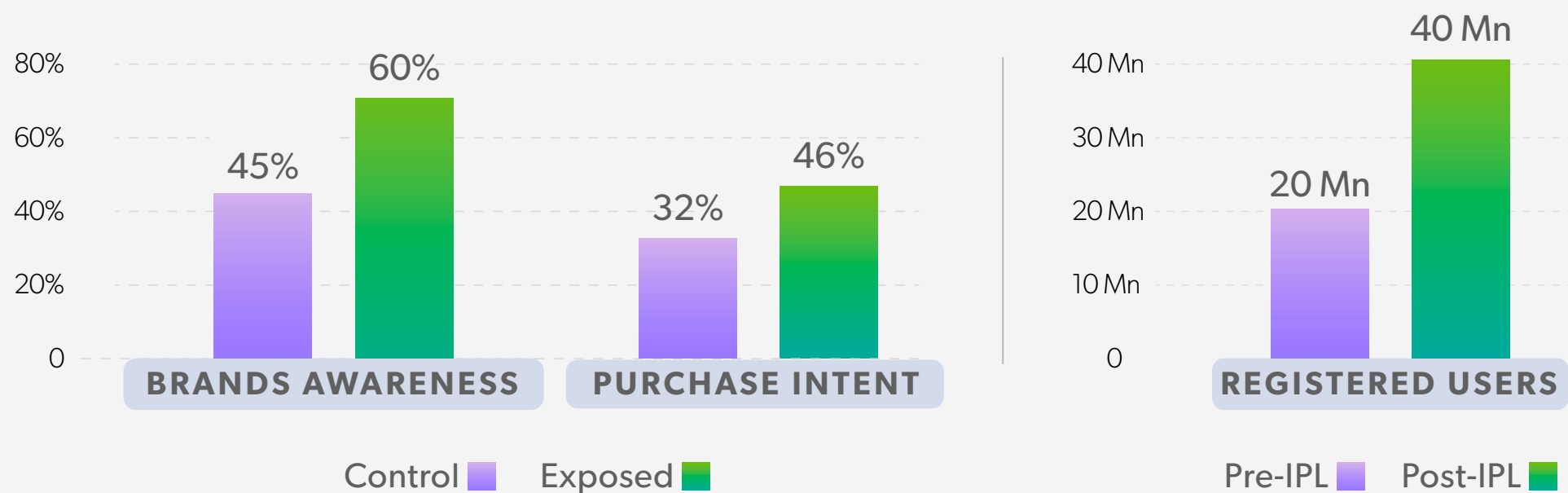
1.5 Bn impressions delivered with direct CTA messaging

MID-ROLLS



421 Mn impressions delivered with an average frequency of **9**

RESULTS



"VIVO IPL has consistently been one of the largest aggregator of audiences on TV and with the rapid growth of data consumption, we have seen a significant spike in it's engagement on digital platforms. **Hotstar has delivered a seamless experience for cricket fans** as well as great value for Dream11 as an advertiser. We see them as one of the **leaders in content consumption online** and look to continue our association on high engagement sports events."

Vikrant Mudaliar - CMO
Dream11

Source: Kantar Millward Brown's Brand Lift Insights study done for Dream11's campaign on VIVO IPL 2018 on Hotstar

CHAPTER NINE

DIVIDED BY LOYALTIES. UNITED ON HOTSTAR.

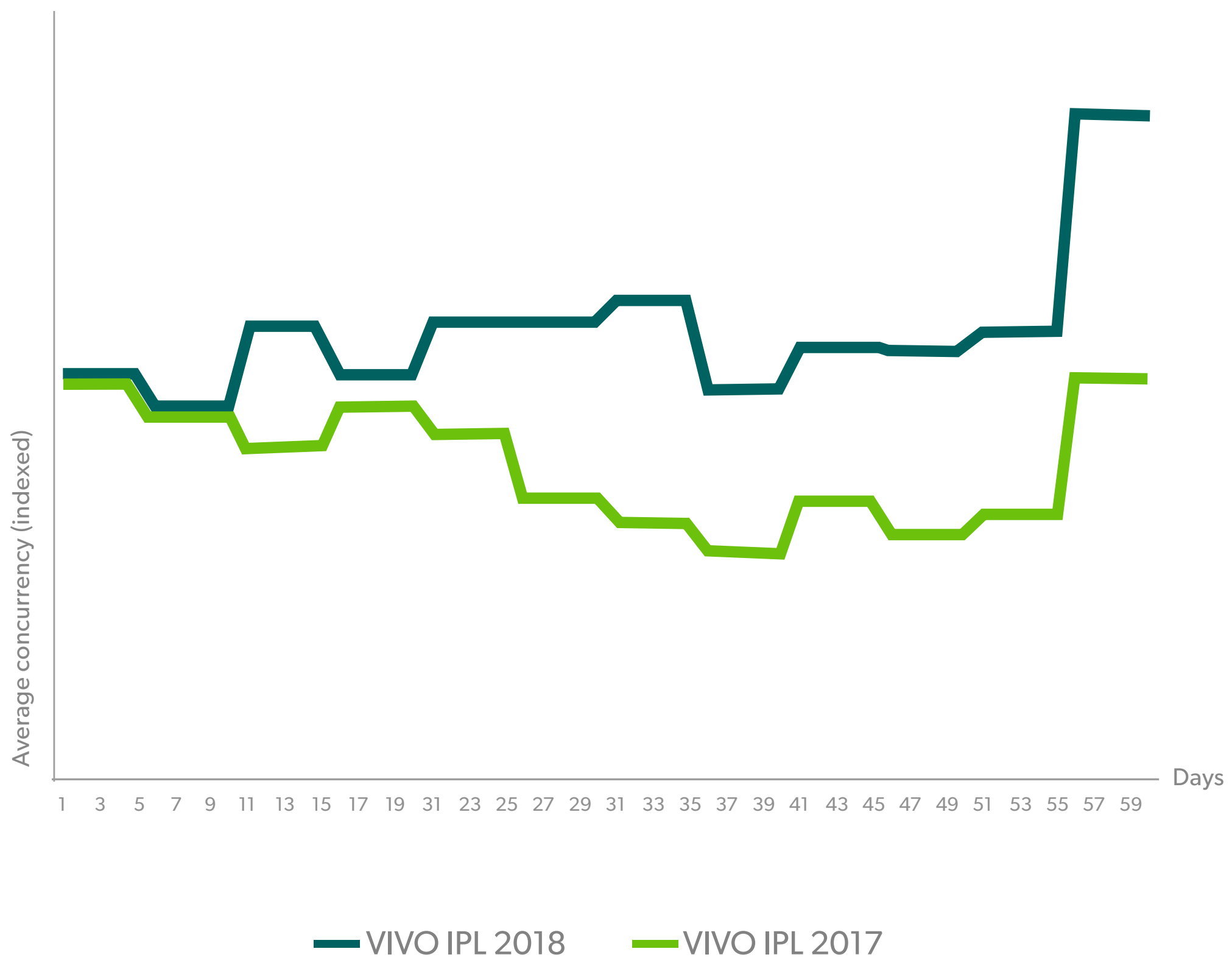
3.5 BN

EMOJIS SHARED
ON THE APP



A SEASON THAT WENT FROM HOT TO HOTTER

2018 sustained the excitement of the first week throughout the tournament compared to last year



Average concurrency (indexed to the first 5 days of each tournament)



This VIVO IPL, we crossed the peak concurrency of last year's tournament, in all matches but one!

1. Concurrency defined as simultaneous viewers on a video 2. Considered average concurrency of 5 days on the chart

DEEPENING TEAM LOYALTIES THROUGH LANGUAGE

Matches saw a dramatic increase in watch time from regional languages that corresponded to the team playing

~3X *Jump in Tamil watch time whenever CSK played*

~2X *Jump in Kannada watch time whenever RCB played*

~2X *Jump in Bengali watch time whenever KKR played*



Tamil watch time jumped by ~2.7X in the Finals vs. the average on a CSK match!

THE POWER OF CLIFFHANGERS

MOST EMOTED MOMENTS DURING THE FINAL

*Brathwaite attempts a 6 to close the innings but gets caught out
1st innings, 19.5 Over*



*CSK win the VIVO IPL 2018
2nd innings, 18.4 Over*



VIVO IPL started and ended with a 'Clap' - the most shared emoji in the first and last match. How fitting! 🙌

BRINGING THE STADIUM SPIRIT TO YOUR PHONE

MOST FAVOURED EMOJIS BY TEAM



More than half a billion sponsored emojis were shared this VIVO IPL including emojis by Coke, Vivo, Vodafone and USL!

MOST LOVED TEAMS OF THE SEASON

MOST WATCHED TEAMS

1.		CSK 86MN	2.		SRH 82MN
3.		KKR 78MN	4.		MI 73MN
5.		RCB 71MN	6.		RR 70MN
7.		KXIP 70MN	8.		DD 69MN



CSK also had the highest engagement with female viewers, closely followed by KKR!

MOST WATCHED MOMENTS

The season saw many iconic moments, was big on adrenaline and carried intense cliffhanger moments

1. CSK



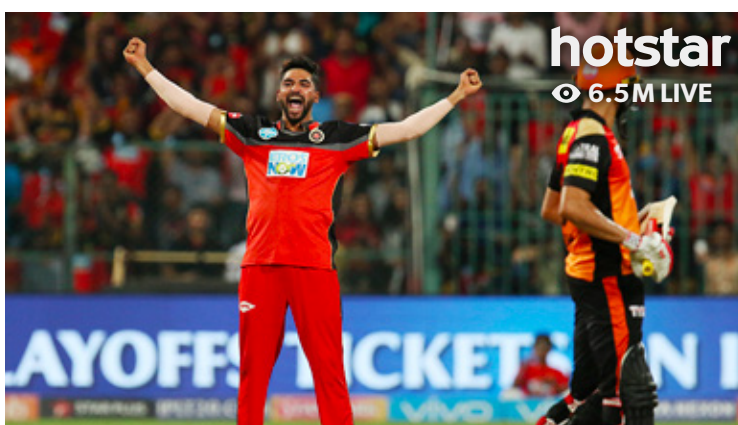
FINAL, CSK VS. SRH, 18.4
RAYUDU HITS THE WINNING FOUR

2. SRH



QUALIFIER 2, SRH VS. KKR, 19.4
BRATHWAITE ON A HAT-TRICK TO WIN

3. RCB



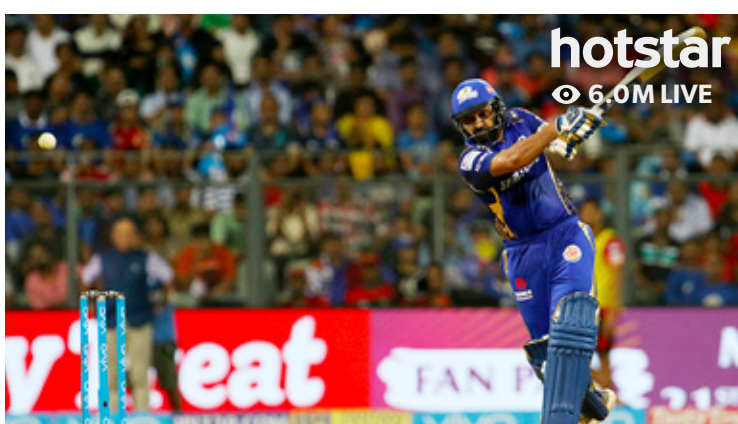
MATCH 51, RCB VS. SRH, 19.1
WILLIAMSON WHO FALLS AT 84

4. KKR



ELIMINATOR, KKR VS. RR, 19.5
KKR WIN BY 25 RUNS

5. MI



MATCH 14, MI VS. RCB, 19
ROHIT SHARMA'S AMAZING KNOCK

6. KXIP



MATCH 16, KXIP VS. SRH, 19.5
VIVO IPL 2018'S GAYLE STORM

7. RR



MATCH 43: RR VS. CSK, 19
DHONI TRIES, RR WINS

8. DD



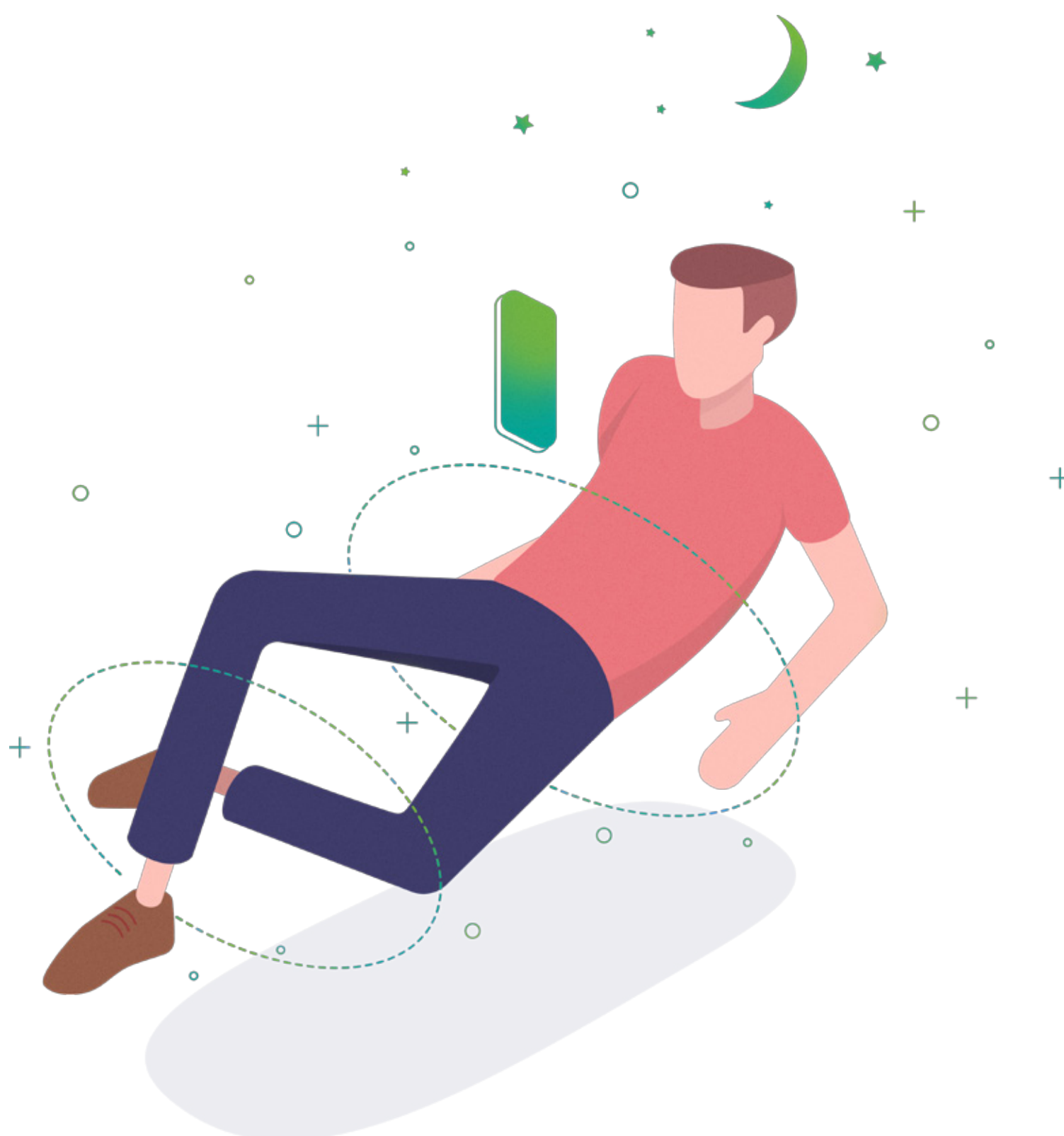
MATCH 26. DD VS. KKR
SHREYAS HITS A 6 TO TAKE THE TOTAL TO 219

CHAPTER TEN

THE WORLD IS ON MOBILE.

99%

OF WATCH TIME
ON APP



Watch time considered is on VIVO IPL 2018

THE DEVICE THAT NEVER SLEEPS

People are glued to their phones watching content late into the night even when they are at home



80%

of matches saw viewership grow significantly **post 11PM**



60%

of those matches saw viewership accelerated **after 11PM**



Almost half the matches that went beyond 11 PM saw more than 35,000 people joining in each minute!

About Live Panel

GroupM LIVE Panel delivers the actionable insights needed to inform media decisions for both global and local campaigns. The new platform connects with multiple data sources across Kantar's market leading data and research assets and integrates with the bespoke planning tools of GroupM's media agencies to accelerate the time from insight to planning to implementation. LIVE Panel is the latest tool that provides the following connectivity and benefits:

- Understanding of consumers and trends via continuous access to research panels (Lightspeed)
- Evaluation of consumer purchase and retail behaviors (Kantar Worldpanel and Kantar Shopcom)
- Integration of brand equity data to motivate and measure changes in awareness, attitude or behavior by re-contacting LIVE Panel with brand equity questions (Millward Brown BrandZ)
- Development of unique audience insights and programmatic audience segments on the basis of consumer attitudes, product purchase and usage behavior (TGI, TNS Connected Life)
- Balancing of plans with understanding of consumer media usage such as multi-screen device consumption (TNS Connected Life)
- Creation of device-optimal strategies and tactics with understanding of mobile phone, tablet and quad-play ownership, usage and purchasing trends (Kantar Worldpanel ComTech)

References

1 a. Based on research conducted by Nielsen [May 2018, sample size 1417, conducted among Males 18- 40 years watching more than 30 min of VIVO IPL matches per week on Hotstar and more than 30 min per week content on YouTube across Delhi, Mumbai, Kolkata, Chennai, Ahmedabad, Pune, Hyderabad, Bengaluru, Ranchi, Kozhikode, Lucknow, Jaipur, Vishakapatnam, Mysore, Indore, Patna].

1 b. The ads tested in the survey that played on Hotstar were Vivo, Dream11, Jio, Sprite. The ads tested in the survey that played on YouTube were Netmeds, Louis Phillipe, Hero Passion, Ford Ecosport.

Disclaimer

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

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hotstar