

# WHAT'S HYD WATCHING?

UNDERSTANDING PAID OTT  
SUBSCRIBERS OF HYDERABAD

RESEARCH REPORT BY:  RMT





# **ONWARDS & UPWARDS**

**HYDERABAD IS GROWING & HOW! IT'S BECOMING HIGHLY ATTRACTIVE FOR BRANDS BOTH NATIONAL & GLOBAL TO BE A PART OF THIS STORY. INVESTMENTS ACROSS DIFFERENT SECTORS IS SEEING THE JOB SECTOR BOOMING & LOT OF INDIANS DECIDING TO MAKE HYDERABAD THEIR HOME.**

**AS A MARKETING CONSULTANCY WITH BIRYANI IN OUR GENES, WE THOUGHT IT WAS IMPERATIVE FOR US TO UNDERSTAND THE CONSUMER DEEPER, UNDERSTAND THEIR BEHAVIORS + ATTITUDE TO HELP OUR PARTNERS COMMUNICATE BETTER WITH THEM.**

**WE MADE THIS REPORT TO UNDERSTAND THE PAID SUBSCRIBERS (OR SVOD) AUDIENCE IN HYDERABAD. WE FOUND SOME AMAZING INSIGHTS & I HOPE THAT THESE WILL HELP YOU CONNECT WITH THE AUDIENCE BETTER.**

**THANKS!**

**SRIKANT, CEO**





**PLAY ON, FOLKS!**



**IN A 1946 INTERVIEW, DARYL ZANUCK, EXECUTIVE PRODUCER AT 20TH CENTURY FOX SAID, "TELEVISION WON'T BE ABLE TO HOLD ON TO ANY MARKET IT CAPTURES AFTER THE FIRST SIX MONTHS. PEOPLE WILL SOON GET TIRED OF STARING AT A PLYWOOD BOX EVERY NIGHT."**

**CLEARLY, THE COMMON PEOPLE DID NOT AGREE WITH HIM, AND WE ALL KNOW HOW TV CONTINUES TO SHAPE THE ENTIRE WORLD EVEN TODAY. WE ARE IN A SIMILAR PLACE NOW, WHERE OTT IS PRECIPITATING A PARADIGM SHIFT IN THE ENTERTAINMENT INDUSTRY AND IS EXPECTED TO BECOME A MUCH STRONGER FORCE WITH EACH PASSING DAY.**

**THROUGH THIS RESEARCH WE WANTED TO PEEK INTO THIS NEW WORLD OF 'PERSONAL(ISED) TV' AND PROVIDE AN UNDERSTANDING OF HOW THE INDUSTRY IS EVOLVING. BY GETTING THE VOICE OF PEOPLE INTO THE BOARDROOMS, THE MARKETEERS CAN ALIGN THEIR OFFERINGS TO WHAT PEOPLE ARE LOOKING FOR, THEREBY BENEFITING THE INDUSTRY AND THE PEOPLE.**

**AMAN. HEAD OF INSIGHTS**

**PLAY ON \M/**

# KEY AUDIENCE



Is quite active on the internet and spends on Internet subscriptions.

Is primarily working. 77% of our audience is either in a job or in their own work

On an average has ~INR 60k/month total household income



**HYDERABAD  
LOVES TO  
GROOVE!**

**FUN FACT**

**62%**

of our audience had an active Music Streaming service as well ahead of cable which was at 58% usership.



# RESEARCH FINDINGS

Let's do this!





**HINDI HAS A CLEAR PREFERENCE**



**52%**

Hyderabadis Prefer Hindi OTT content most

**TELUGU CONTENT FAILS TO GAIN PROMINENCE IN ITS OWN TURF**



**14%**

Hyderabadis Prefer Telugu OTT content most

**ENGLISH BEING A DISTANT SECOND**

**28%**

Hyderabadis Prefer English OTT content most

\*6% other languages

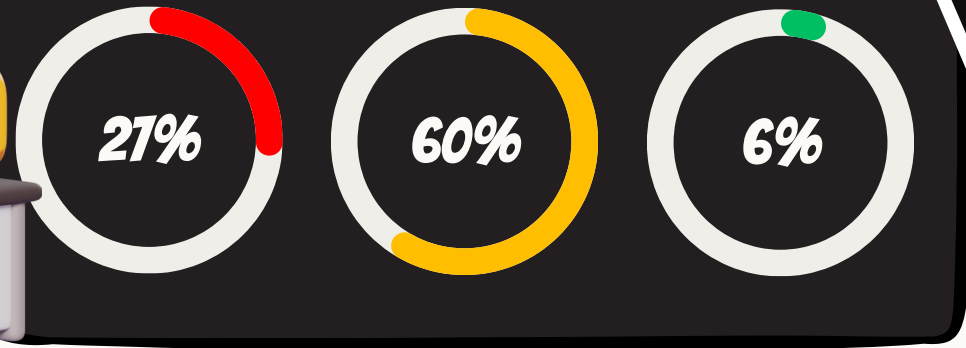
Base (Overall): 491

# MOST PREFERRED LANGUAGE

## CRITICAL NEED GAP

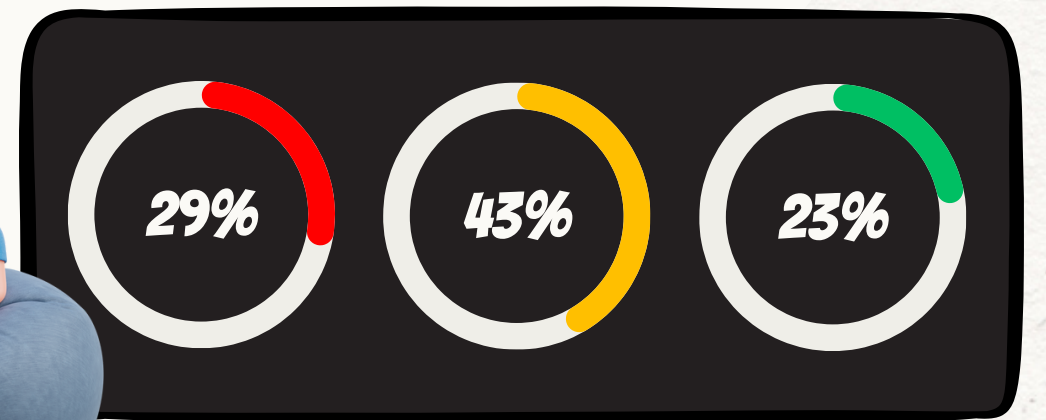
Female users prefer Hindi & English content over Telugu

### FEMALE



English Hindi Telugu

### MALE

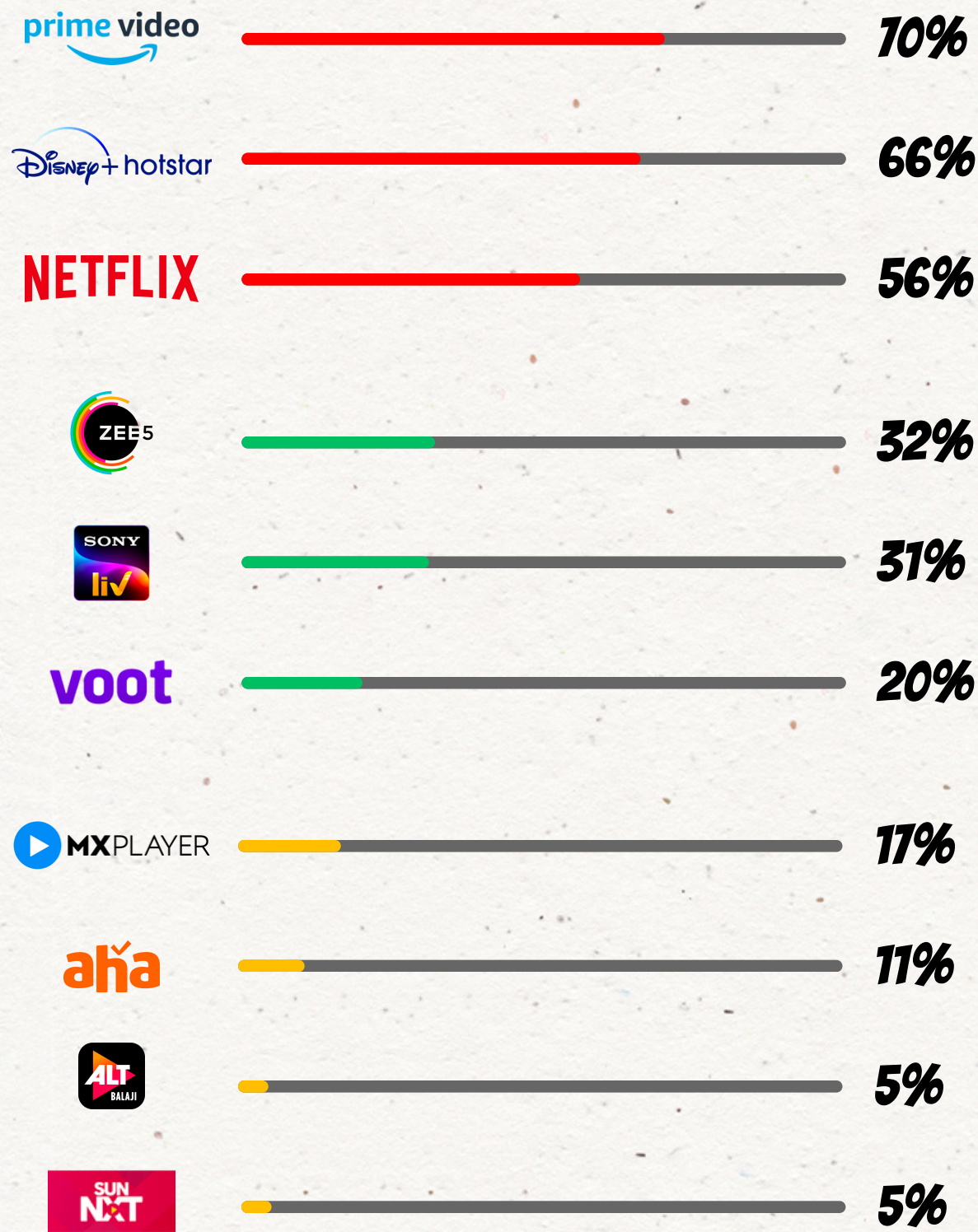


English Hindi Telugu

Base (Female): 247

Base (Male): 244





Base (Overall): 491

**REGIONAL PLAYERS ARE STRUGGLING TO GAIN PENETRATION AND AFFINITY AMONG THE PEOPLE.**

**AMONG THE OTT PROVIDERS, THERE ARE 3 SEGMENTS OF PREFERRED PLATFORMS**

-  **BIG TECH**
-  **BROADCAST COMPANIES**
-  **REGIONAL AND OTHERS**





# HYDERABAD DOESN'T CARE IF IT'S A WEEKDAY OR WEEKEND

Hyderabadis are indulging in 3+ hours of watching OTTs everyday with weekends showing 10% higher viewership than weekdays



**HOURS SPENT ON OTT PER DAY ON WEEKDAYS**

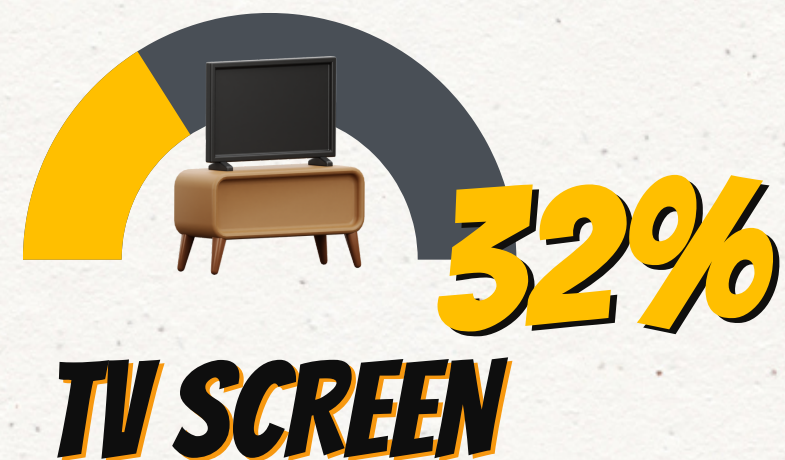


**HOURS SPENT ON OTT PER DAY ON WEEKENDS**

Base (Overall): 491

**OTT VIEWING PREDOMINANTLY A  
MOBILE EXPERIENCE WITH MORE  
THAN 50% PREFERRING TO  
WATCH ON-THE-GO!**

**HYDERABADIS LOVE THEIR  
PHONES!**



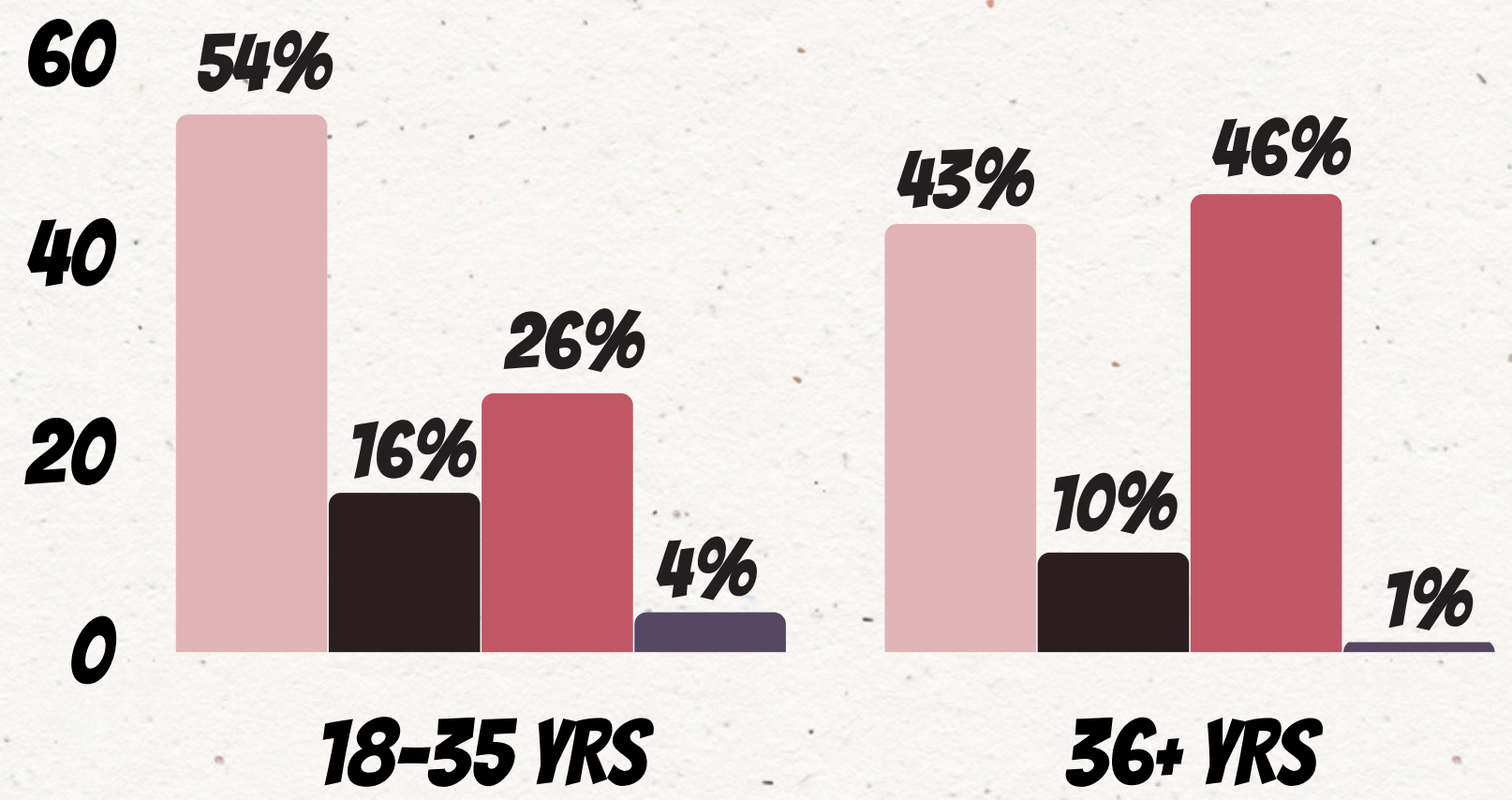
\*3% Tablets

Base (Overall): 491



# COZ VIEWING EXPERIENCE MATTERS

**OLDER AGE GROUPS ABOVE 35+ YEARS SHOW STRONGER PREFERENCE TO TV COMPARED TO YOUNGER**



● MOBILE ● LAPTOP/PC ● TV ● TABLETS

Base (18-35): 330 Base (36+): 161

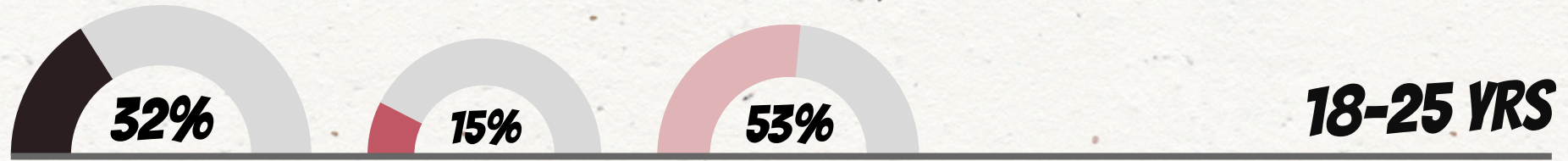


# GENZ LOVES TO WATCH ALONE

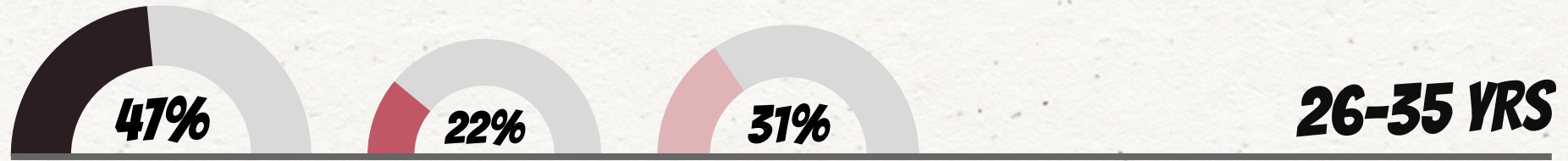
While overall, OTT watching in Hyderabad is done more with family, the under 26 age group prefer watching OTT shows alone.

***THE DISTINCTION IS DRIVEN BY THE  
CONTENT THEY ARE WATCHING***

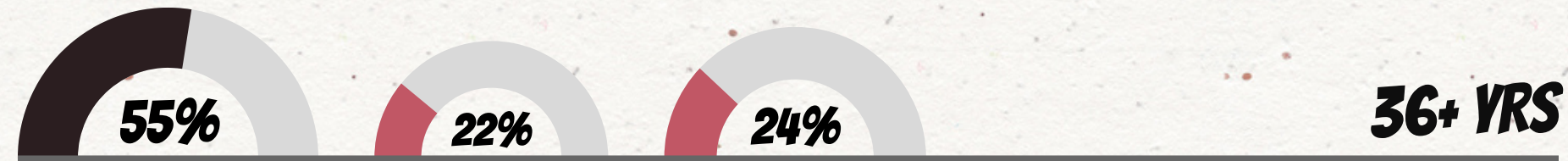




**18-25 YRS**

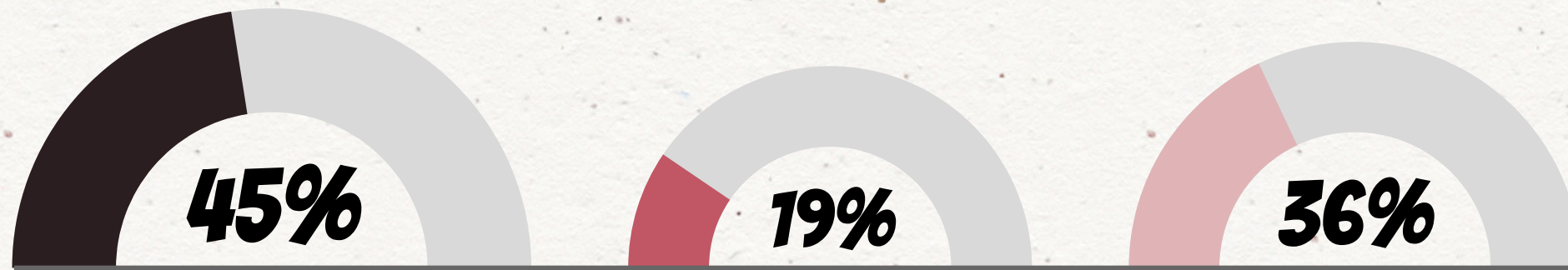


**26-35 YRS**



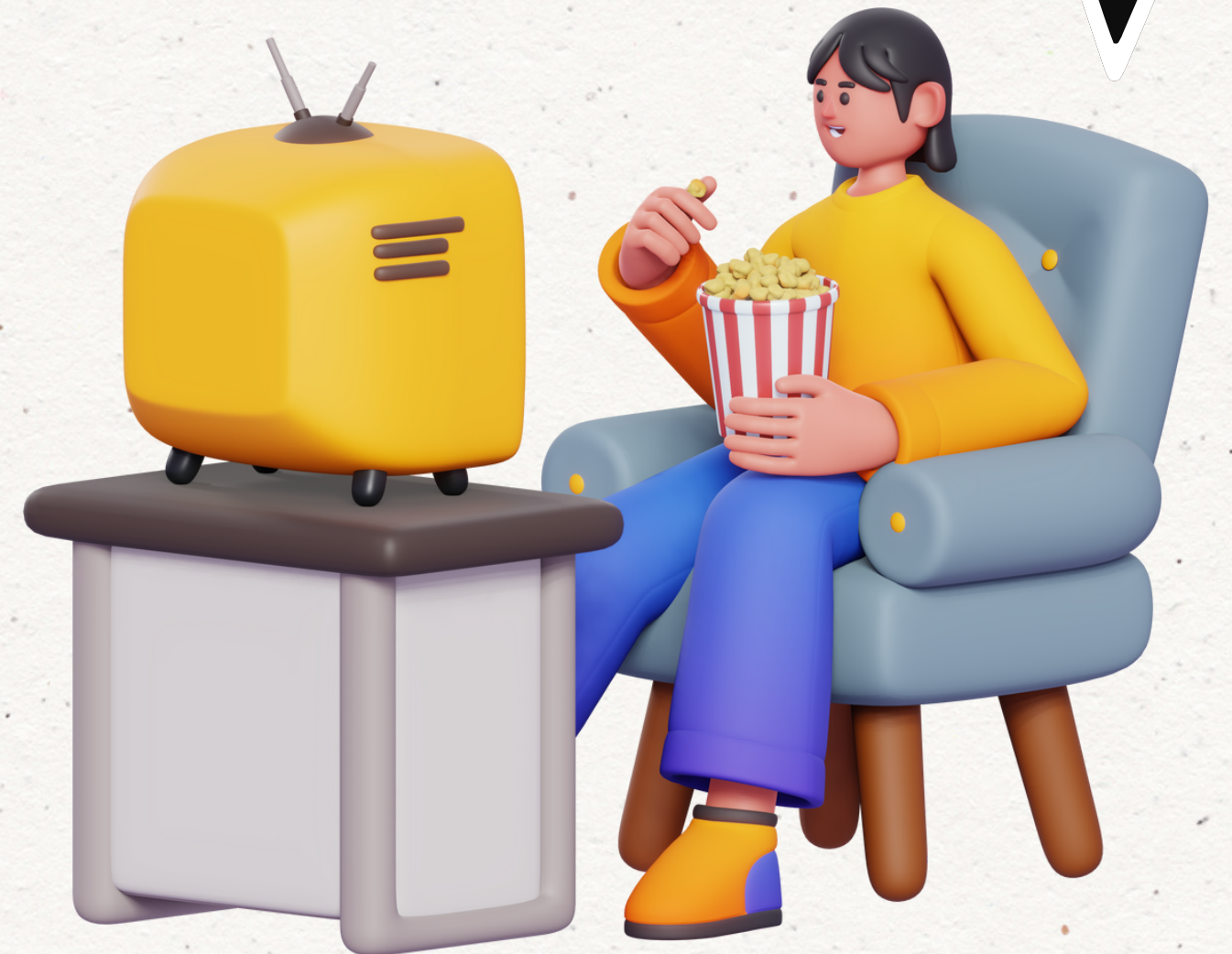
**36+ YRS**

**"WE HAVE DIFFERENT FACE IN FRONT OF OUR FAMILY, IN FRONT OF FRIENDS, IN FRONT OF PARTNER OR EVERYONE ELSE. SO THE CONTENT HAS TO MATCH THAT SORT OF SET-UP."**  
 — Male, 25 yrs



● **WATCH WITH FAMILY MORE** ● **WATCH EQUALLY WITH FAMILY & ALONE** ● **WATCH ALONE MORE**

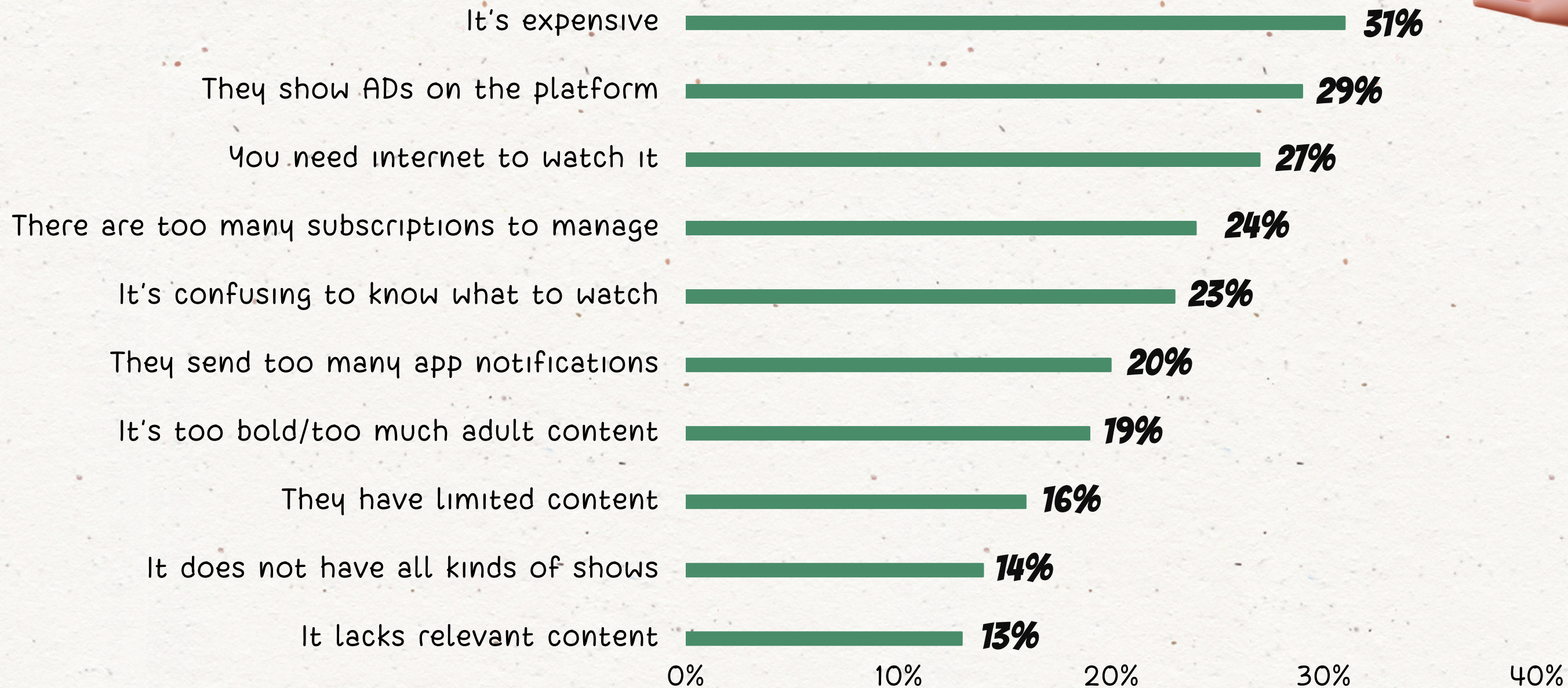
Base (Overall): 491 Base (18-25): 165 Base (26-35): 165 Base (36+): 161



# TOP 10 OTT DISLIKES

SATURATION SEEMS TO BE KICKING IN FOR HYDERABADIS. THEY ARE FINDING IT DIFFICULT TO MANAGE MULTIPLE OTT SUBSCRIPTIONS AND ALSO FEEL OTT SERVICES ARE BECOMING EXPENSIVE.

**AB KYA KARU BROO!**





# **HYD LACKS AWARENESS OF OTT BUNDLING BENEFITS**

"Sometimes we like to change to other channels. Sometime we like to change Amazon Prime, Sometimes Voot. If we take bundle we can't change to another channels. That's the main reason"

**- FEMALE, 37 YEARS**

"I don't have any idea about the bundle but whatever subscription I have taken, I am using it with my phone number and logging in."

**- FEMALE, 32 YEARS**

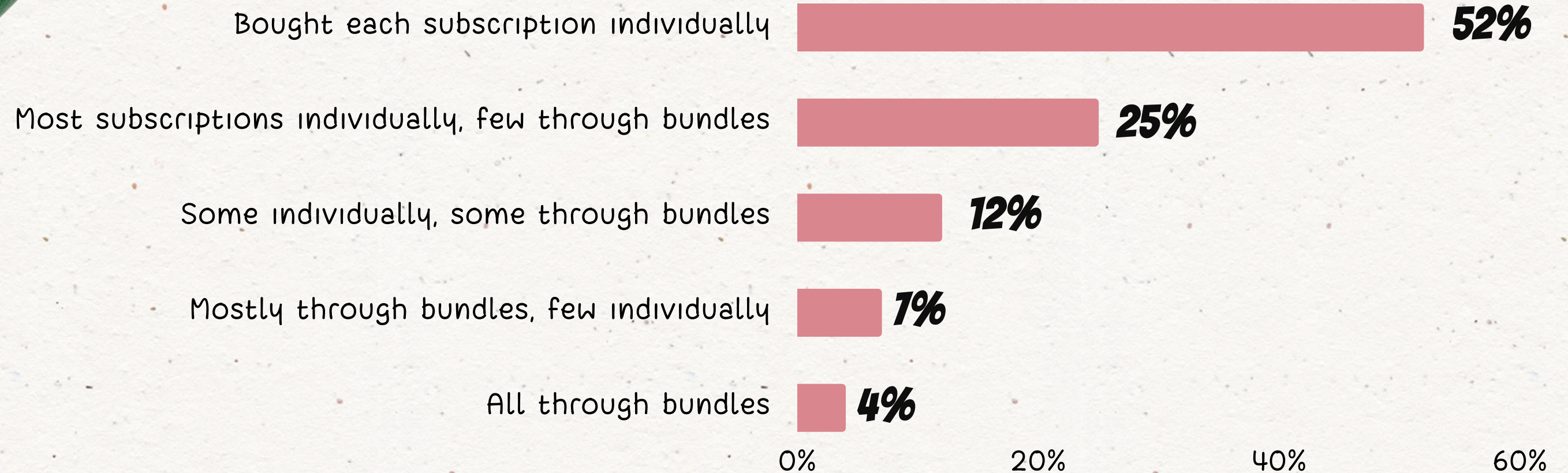


# YE BUNDLING SE KYA MILEGA?



## LACK CLEAR UNDERSTANDING OF OTT BUNDLING BENEFITS

THERE IS A LOW AWARENESS AND ADOPTION OF OTT VIA BUNDLING SERVICES. MOST SUBSCRIBERS ARE PAYING INDIVIDUALLY



Base (Overall): 491



**BUT FIRST, YOU GOTTA  
CATCH EM'  
ON SOCIAL  
MEDIA!**

**"EVERY DAY WE ARE USED TO SCROLLING THE  
CONTENT ON INSTAGRAM REELS AND SHORTS.  
SO, WHENEVER THE CLIP OF CONTENT WAS  
INTERESTING, I USED TO DISCOVER IT."**

– female, 23 years

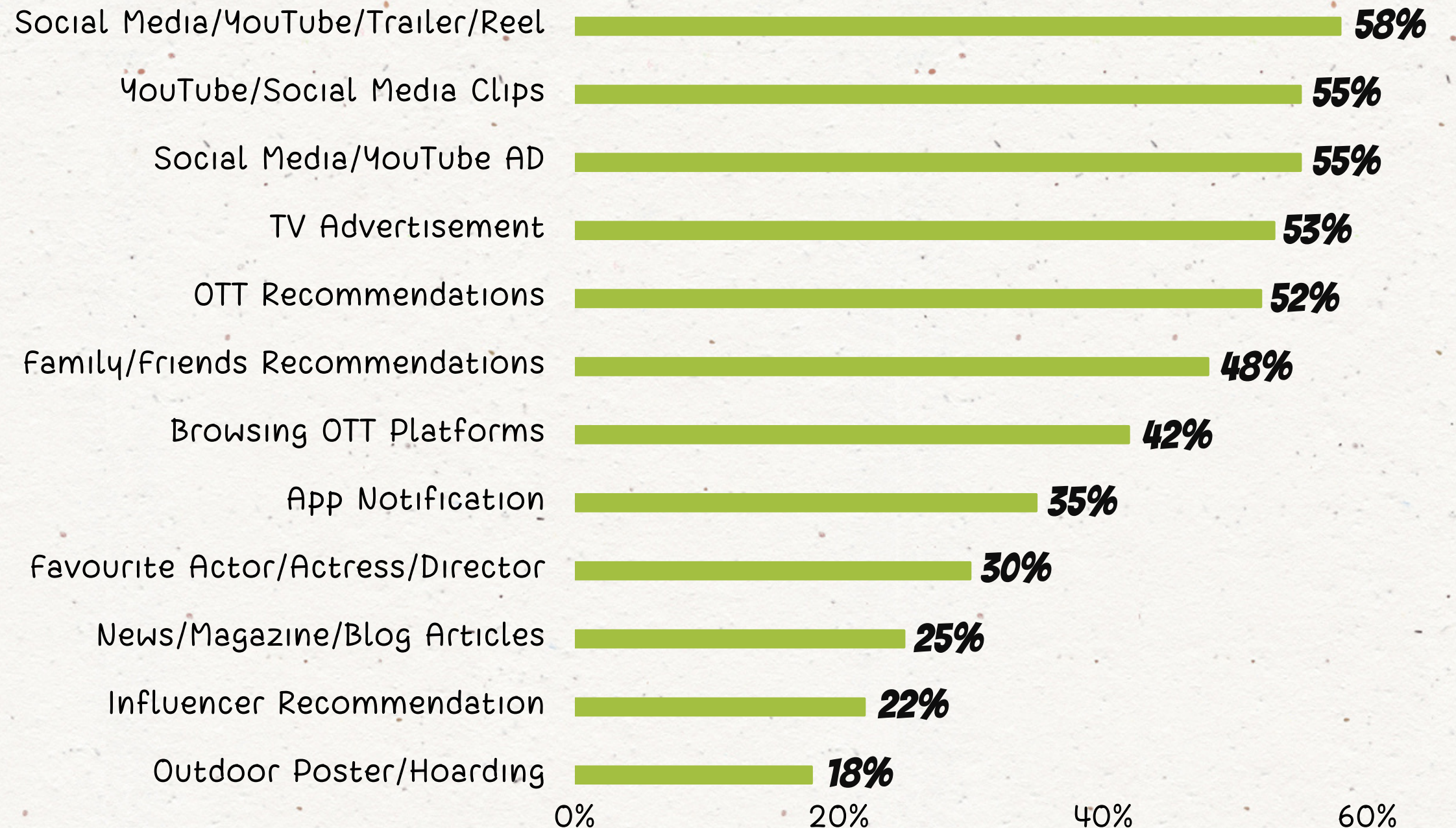
OTT viewers are using social  
media to discover and  
consume snippets & short  
videos of OTT content.

**YOU HAVE 3S TO CATCH MY ATTENTION!**



**THEY VIEW SOCIAL MEDIA AND OTT AS A PART OF THE SAME ENTERTAINMENT CONTINUUM. THERE IS A SEAMLESS SWITCHING BETWEEN BOTH PLATFORMS TO FULFIL THEIR ENTERTAINMENT NEEDS.**

## **SOURCES OF OTT CONTENT DISCOVERY**



**IMPLICATIONS FOR  
BUSINESSES**




**ATTENTION  
MARKETERS!**



**YOU'RE WELCOME,  
MY FRIEND!**

- **WITH PREFERENCE STRONG FOR HINDI AND INTERNATIONAL CONTENT, THE OTT MARKET IS SKEWED TOWARDS BIGGER PLAYERS IN HYDERABAD. THE REGIONAL PLAYERS HAVE A AN OPPORTUNITY TO HONE IN THE OTT MARKET IF THEY ARE ABLE TO CREATE COMPELLING REGIONAL CONTENT**
- **THE BUNDLE MAKERS NEED TO EDUCATE PEOPLE ON THE BENEFITS AND FREEDOM WHICH COMES IN WITH THEM. THIS IS EXPECTED TO HELP THE ENTIRE CATEGORY TO GROW GIVING THE CONSUMERS EASY WAY TO MANAGE THEIR SUBSCRIPTIONS AT A GOOD VALUE**
- **WITH LINES OF ENTERTAINMENT BLURRING, MOBILE FRIENDLY ON THE GO CONTENT DRIVES OTT VIEWERSHIP IN CONJUNCTION WITH SOCIAL MEDIA. THUS, IT IS INDISPENSABLE TO INTEGRATE THE CONTENT ON BOTH PLATFORMS**



**THE STUDY WAS CONDUCTED AMONG THE  
18+ YEARS PAYING OTT SUBSCRIBERS IN  
HYDERABAD. THE STUDY WAS CONDUCTED  
IN 2 PHASES**



# **RESEARCH METHODOLOGY**

**DATA COLLECTION DONE IN FEB'23**



## **QUALITATIVE ONLINE FGDS**

**3 ONLINE FGDS WERE CONDUCTED EACH IN THE AGE GROUP 18-25 YEARS, 26-35 YEARS AND 36+ YEARS TO GAIN INITIAL INSIGHTS ON THE TARGET AUDIENCE'S INTERACTION, USAGE AND PREFERENCES FOR THE OVERALL OTT CATEGORY AND DIFFERENT PLATFORMS**

**INPUTS FROM QUALITATIVE FGDS**



## **QUANTITATIVE ONLINE SELF FILLING SURVEY**

**DATA FROM ~500 RESPONDENTS WAS COLLECTED TO UNDERSTAND THE PAID OTT MARKET IN HYDERABAD. TO ENSURE PROPER REPRESENTATION, EQUAL REPRESENTATION WITHIN THE 3 AGE GROUPS AND BOTH GENDERS WAS ENSURED**

**OTHER UNDERSTANDING OF THE CATEGORY**



**THANK  
YOU!**



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