

WINNING IN THE OTT ERA

WITH DISNEY+ HOTSTAR

A handbook for effective brand building on Disney+ Hotstar. Backed by insights from Kantar, Neurons, Integral Ad Science, Mediasmart, MetrixLab and Disney+ Hotstar.

WHAT TO EXPECT FROM THIS GUIDE?

A 360-degree view of:

Why marketers must include OTT in their marketing strategy

Key principles and creative best practices for optimizing ROIs

Disney+ Hotstar powering brand success

Key insights from leading industry experts

KANTAR

 neurons

IAS Integral
Ad Science

 MEDIASMAAT

METRIXLAB
a toluna company

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FOREWORD



AJIT VARGHESE

Head of Network
Ad Sales at Disney Star

In recent years, I have been fascinated by the impact of OTT (Over-the-Top) content and the revolution it has triggered in the media industry. What I find most exciting about this trend is that it has firmly put the viewer in the driver's seat, giving them unprecedented control over the content they consume. One of the most significant shifts we have seen is delivering high-quality, global content that viewers can access anytime, anywhere. In this playbook, we will explore how OTT is changing the media landscape and what it means for the future of entertainment.

What makes this trend particularly exhilarating is the newfound autonomy viewers have gained, enabling them to enjoy their favorite shows and live broadcasts at their convenience. This paradigm shift has propelled the growth of OTTs as audiences seek high-quality, curated content tailored to their preferences.

For marketers, recognising and adapting to this evolving landscape is crucial. OTT platforms have become an indispensable avenue for reaching and engaging coveted audiences, including Gen Zs, millennials, and families. As digital advertising continues to grow, commanding a significant 56%* share of ad spends as of 2023, embracing OTT has become imperative.

(*Source: GroupM's TNY report on AdEx).

At Disney+ Hotstar, we take immense pride in our role as pioneers of exceptional content creation. We offer a diverse range of acclaimed shows, including Koffee with Karan, The Night Manager, Criminal Justice, Special Ops, and Aarya (nominated at the 49th Emmy Awards). We also cater to regional preferences by featuring favorites like Fall and Jhansi. Furthermore, we are committed to bringing the best blockbusters to our audiences. In 2023, our platform featured blockbuster films like Brahmāstra, Vikram, Avatar: The Way of Water, and more. With these shows and blockbuster releases, we aim to deliver unparalleled entertainment to diverse audiences.

This playbook serves as your compass to navigate Disney+ Hotstar's premium content space and harness the potential of innovative OTT ad formats. Drawing insights from esteemed industry experts such as Kantar, Neurons, Integral Ad Science, Media Smart, and MetrixLab, it provides invaluable guidance for effective media planning and maximising campaign ROI on OTT platforms.

As you embark on this journey through the playbook, I am confident it will equip you with the knowledge and strategies to propel your OTT campaigns on India's leading platform. Together, let us embrace the limitless possibilities of advertising and forge a transformative future in the world of entertainment.

FOREWORD



SAJITH SIVANANDAN
Head, Disney+ Hotstar India

What does the favourite corner of your home and your preferred device have in common? Both of these are bound by the anticipation you feel when you settle down to watch high quality content. The same can be said of the time you spend commuting, waiting and numerous other such use cases when content, be it sports or entertainment, transports you to a place that belongs to you and you alone. Welcome to the streaming service of your choice!

The Indian OTT industry is amongst the fastest growing sectors globally and has immense potential. As the media and entertainment sector grew by INR 348 billion (19.9%) to reach INR 2.1 trillion, digital has immensely fuelled this growth by 22% in 2022*. This is just the beginning, and is an interesting time to be in the game as one of India's leading OTT platforms.

The discerning consumer has seen a rapid shift towards the digital landscape - this has been aided by the consistent e-commerce explosion, ease of access to digital payments, the rise of social commerce, EdTech, HealthTech and of course, digital streaming. With convenience available at their fingertips, consumers tend to spend around 52% of their time spent on digital media on the open internet*1; thereby opening avenues for brands to seamlessly interact with their customers wherever they are.

The open internet reaches almost 600 million consumers in India, which is around 62 million more than the closed ecosystems of the walled gardens or closed networks, and yet, the majority of the digital ad expenditure continues to take place in walled gardens*1. As the open internet becomes an integral part of consumers' lives, we can see a slow but steady shift by brands as they move towards where their consumers reside and Disney+ Hotstar's offerings will help these brands communicate better with this audience.

It is now imperative to include streaming in marketing strategies and Disney+ Hotstar will power our advertisers' brand success by providing a variety of ad formats and targeting options. India has much market potential for OTT players when it comes to tapping into internet and smartphone users, with its digital community being second only to China and smartphone users spending about an average of 7.3 hours on their devices daily across 780 million users*.

For Disney+ Hotstar, delivering results to our partners such as yourselves by engaging users is pivotal. We are committed to innovate, to incredible storytelling and to put our users, across all demographics, at the heart of our service. With the increase in digital penetration and connectivity, semi urban and rural markets are of utmost importance. We intend to build a robust ad-driven offering combined with a healthy subscription business. We've kicked this off by offering the Asia Cup and now the ICC Men's Cricket World Cup available to watch for free on mobile.

We are excited to showcase the results of all the relentless efforts put in by our team at Disney+ Hotstar through this playbook. We hope this playbook comes handy while planning your next marketing campaign!

*Source: FICCI

*1 Source: Gateway to the Open Internet report by Kantar and The Trade Desk

FOREWORD



DHRUV DHAWAN

Head of Ads
at Disney+ Hotstar

In the dynamic landscape of the attention economy, where every second counts, it's essential to recognize that not all digital consumption is created equal. Today, consumer attention is a prized commodity, and understanding its nuances is critical for success.

In the digital realm, much content is consumed "on the go," often in a distracted and largely passive manner. This fleeting engagement contrasts sharply with the world of OTT (Over-the-Top) premium content, where viewers are more engaged than ever. On average, an OTT session lasts significantly longer than most digital platforms, reflecting the shift towards appointment viewing. This isn't a mere coincidence; it's the result of premium, curated content that viewers have come to value.

When it comes to comparing the effectiveness of advertising, the contrast is stark. Empirical evidence from a neuroscience study conducted by Neurons Inc. tells us that OTT outperforms UGC (User-Generated Content) in capturing viewer attention. As the Neuron's study insights reveal, the engagement levels on OTT platforms result in a higher effectiveness per impression. As per the findings of the study, **1 impression on Disney+ Hotstar delivers 2X brand equity** vs UGC OLV platforms.

At Disney+ Hotstar, we embrace this understanding, harnessing the power of premium content. Our platform offers more than 1 lac hours of brand safe, curate content in 18 languages, that captivates consumers and offers opportunities for brands to form profound integrations through in-show placements, host callouts, and more.

In essence, our approach to content can be summed up in three words: **Curate, Create, Collaborate.**

We curate brand-safe, quality content for our customers, providing advertisers with a brand-safe environment to reach their target audience when they are most engaged. We collaborate with our advertisers, harnessing the power of branded content as a meaningful avenue to engage with their consumers through storytelling that goes beyond mere sales pitches.

We create high-quality, critically acclaimed, award-winning content in a diverse range of genres and languages, so that there is something for everyone. At Disney+ Hotstar, we understand the pulse of our audiences, enabling us to create a massive library of world class content that appeals to the unique tastes of all viewers with Hotstar Specials.

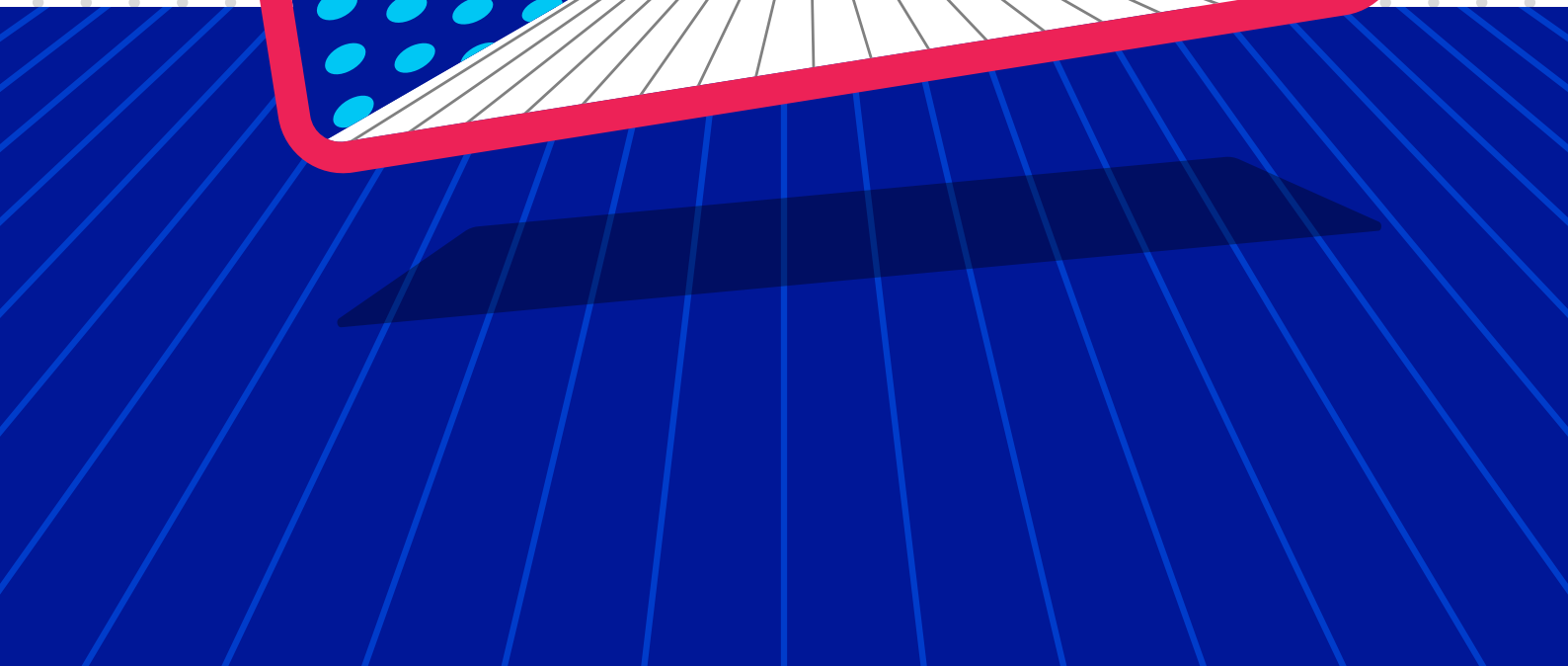
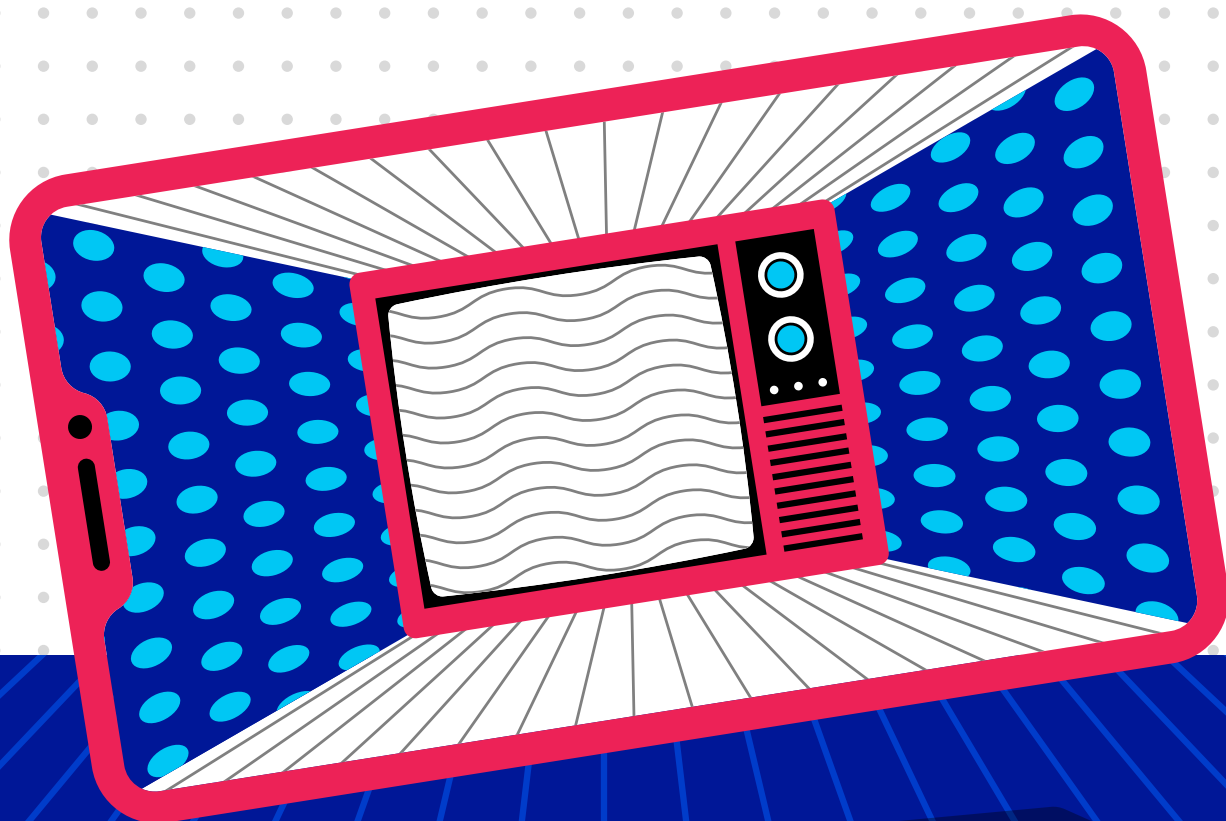
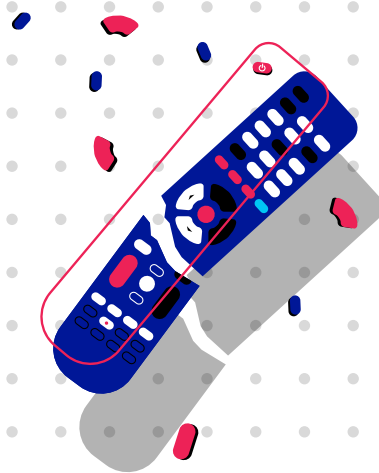
Disney+ Hotstar's CreativeWorks, the in-house division of Disney+ Hotstar Ads, offers a wide range of options, from integrating with our existing shows and IPs to creating custom fiction and non-fiction content. This enables brands to strike the perfect balance between content and advertising.

With this commitment to storytelling and innovation, Disney+ Hotstar is poised to help advertisers connect with their audience in memorable and meaningful ways.

We look forward to working hand-in-hand with you to bring your brand's story to life in the ever-evolving world of OTT.

CHAPTER 1

STREAMING
BECOMES
MAINSTREAM



EMBRACING THE DIGITAL REVOLUTION

In the contemporary era, the internet has emerged as a powerful force, becoming a near-essential commodity, second only to food, shelter and clothing. India's digital landscape has seen remarkable shifts. Notably, India currently boasts more Over-The-Top (OTT) platform subscribers than social media users, showcasing the Nation's enthusiastic embrace of the digital streaming age.

Let's take a closer look at the key data points:



Population: **1.39 billion**



Mobile Subscribers: **1.14 billion**



VOD Viewers: **621 million**



Social Media Users: **531 million**

This data underscores India's digital transformation, highlighting the burgeoning influence of OTT platforms and the immense potential they hold for advertisers in this evolving landscape.

With the democratisation of the internet, media creation and consumption have changed significantly. For a long time, digital platforms powered by user-generated content had been the face of this change.

In recent years, there has been a rapid adoption of online platforms, and OTTs have effectively capitalised on this shift by assigning a premium value to it. OTT platforms have been able to achieve this by delivering high-quality content for everyone. From live events, movies, topical shows and global content, OTTs have successfully amalgamated rich and diverse content on a single platform.

This scenario is optimal for marketers as it allows flexibility in advertising with interactive, seamless, and hyper-targeted ads while delivering an enhanced brand engagement and experience.

India's OTT story is encouraging, as per the Kantar iCUBE Report, with nearly 621 million video consumers in the country. With a current penetration rate of 70% in metropolitan cities, its rapid increase in smaller towns and rural areas beckons a promising growth of OTT platforms.

Disney+ Hotstar: Setting a new benchmark in the OTT world

As an unmatched OTT leader in India, Disney+ Hotstar has been a trendsetter in delivering the most popular and sought-after content consistently. In addition, it has empowered marketers to connect with their target groups through innovative, creative, and transformative ways. Be it through product stories that seamlessly assimilate into popular shows or exclusive branded content to maximise brand affinity and engagement, advertisers can expect increasing ROI on their OTT campaigns with Disney+ Hotstar.

Source: Kantar iCUBE Report & Disney+ Hotstar's Internal Analytics

CHAPTER 1.1

DRIVING IMPACT
THROUGH
INNOVATION

Disney+ Hotstar is one of India's biggest OTT platforms and offers over one lakh hours of content in 10 languages, international and regional, and has something for everyone - kids, women, men, and families. It is growing in tandem with the expanding OTT market, tapping into the vast user base of over 681 million smartphone users across India.

1 LAKH HOURS

18 LANGUAGES

THESE SOLUTIONS INCLUDE

SHARP CONTEXTUAL ADVERTISING

Disney+ Hotstar offers a plethora of content options - popular shows, major sporting events, exclusive digital releases of sought-after movies (Ex. Marvel Cinematic Universe, Fox Studios content), regional content, all of which hold immense opportunities for contextual advertising.

INNOVATIVE AD FORMATS

Video creatives, in-show integration, banner ads, long and short commercials, show-relevant celebrities, co-branded promos, and shoot-based vignettes are some of the options marketers can choose to advertise their brand.

NCCS A FOR DIGITAL

The New Consumer Classification System classifies households in India, presenting a more dynamic and accurate view of audience segments. Marketers can leverage industry-first NCCS approach designed for more accurate classification of households in India.

LONG-FORM ADS

Unlike UGC (User-Generated-Content) online video platforms that allow a maximum of 20 seconds non-skip ad feature, Disney+ Hotstar's diversity in creating premium content allows for long-form ads (non-skippable up to 60 seconds), especially in live streamed content such as sporting events or other entertainment shows. Brands can go over the finer details of their products or build emotionally engaging communication that resonates with the audience. They can leverage the power of storytelling with long form ads to build brand love without losing audience interest.

TRANSACTING AUDIENCES

Disney+ Hotstar enables advertisers to reach Digital Transacting Audiences on its platform.

CTV CAMPAIGN MEASUREMENT

Overcome the challenge of determining your campaign's effectiveness, with an industry-first CTV (Connected TV) Measurement Framework developed in partnership with Kantar. It uses regression-based advanced modelling to scientifically determine the effectiveness of a CTV campaign within the brand's intended target audience.

Native Brand Lift Studies (BLS) by UGC platforms cannot deterministically evaluate the campaign effectiveness within its accurate target group. This is because these platforms cannot ascertain whether their target users are watching and then answering the survey or those who have not even watched their campaign are completing the survey.

Disney+ Hotstar's advanced framework leverages advanced analytics and modelling and measures effectiveness among the brand's intended target group. The study also recommends optimum frequency for impact.

CHAPTER 1.2

DISNEY+ HOTSAR: FOR UNMATCHED PREMIUM REACH

In urban India, OTT reach has grown from 28% in 2020 to 40% in 2021. India's current OTT audience stands at 621 million, as stated by Kantar in its 2022 ICUBE report.

30.7% of the OTT audience, amounting to 130.2 million people, fall under the SVOD (subscription video on demand) category. These subscribers have access to paid content, offering marketers the opportunity to target premium customers with seamless, engaging, and contextual ad formats.

The remaining OTT audience (69.3%) that is accessing free content, is also the fastest growing category, widening the top of the funnel. Here, too, marketers can leverage effective CRM data and ad products to enhance full-funnel.

Disney+ Hotstar: Expand reach across premium and regional audiences

Disney+ Hotstar has emerged as the undisputed leader in the OTT segment with 80% of its reach coming from the 1 million plus towns. Regional content consumption contributes to over 40% of the platform's watch time. 72% of Disney+ Hotstar's subscribers reside at NCCS AB signifying a premium audience and therefore, greater potential for brand engagement.

80%
Reach in
1mn+ towns

50%
Reach contributed
by the top 8 metros

72%
NCCS AB
contribution

Source - Disney+ Hotstar internal analytics

Source: Kantar iCUBE Report & Disney+ Hotstar's Internal Analytics

CHAPTER 1.3

**OTT PLATFORMS
COME OF AGE**

For a long time, brands have focused on global UGC OLV (online video) platforms as a major channel for their video marketing campaigns. While these platforms have been able to garner relatively high views, advertisers have been facing some inherent challenges that include:

- **Targetting premium audiences without hampering the viewing experience**
- **Curtailed brand stories**
- **Low engagement**
- **Limited and standard ad formats**
- **Highly cluttered landscape**

Unlike UGC OLV platforms, where user-generated content constitutes the critical driving force, OTTs offer professionally curated, high-quality, brand-safe video content. OTTs have emerged as an “appointment-viewing” space, where audiences have pre-determined content choices and are entirely focused on viewing the content. Audiences are exposed to global content and marquee international shows, making it an increasingly preferred platform for discerning viewers.

For brands and marketers, this presents a unique opportunity to capture audience attention at a time when they are more attentive and ready to be engaged with appealing brand stories.

Disney+ Hotstar has emerged as a leader in delivering high-quality, popular shows, and branded content that ensures enhanced viewing experience for the consumers and premium engagement for the brands. Marketers can leverage a range of innovative ad formats designed to engage this increasing and diverse pool of premium audiences.

To understand the audience viewing pattern on online video platforms and OTTs, Disney+ Hotstar conducted a few studies.

STUDY 1

7 out of 10 viewers watch UGC OLV passively, according to Disney+ Hotstar's viewership survey in association with Kantar.

OBJECTIVE

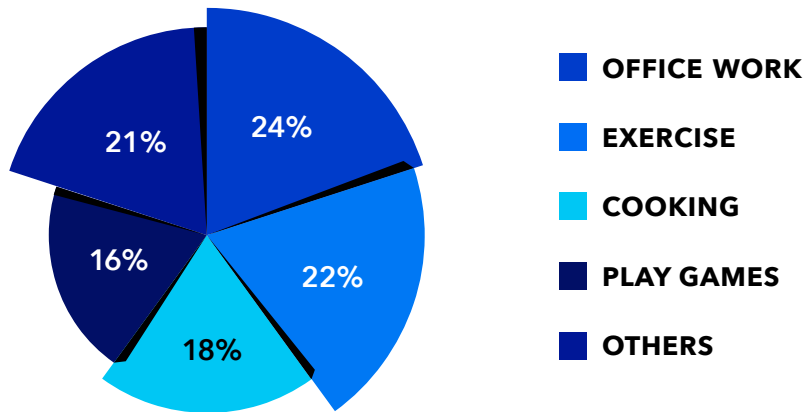
To understand the watch/viewing pattern on UGC OLVs amongst Disney+ Hotstar viewers. The study compared viewing pattern on the largest UGC OLV vis-à-vis Disney+ Hotstar.

RESULTS

More than 1/3rd of UGC OLV audiences spends high amount of time (4+ hrs per week) on the site/app. However, the active engagement on UGC OLV is as low as 30%, with 70% of the audiences passively consuming UGC OLV.

ACTIVITIES DONE IN PARALLEL TO CONSUMING UGC OLV

Office Work (24%) and Exercise (22%) are the most engaged activities.

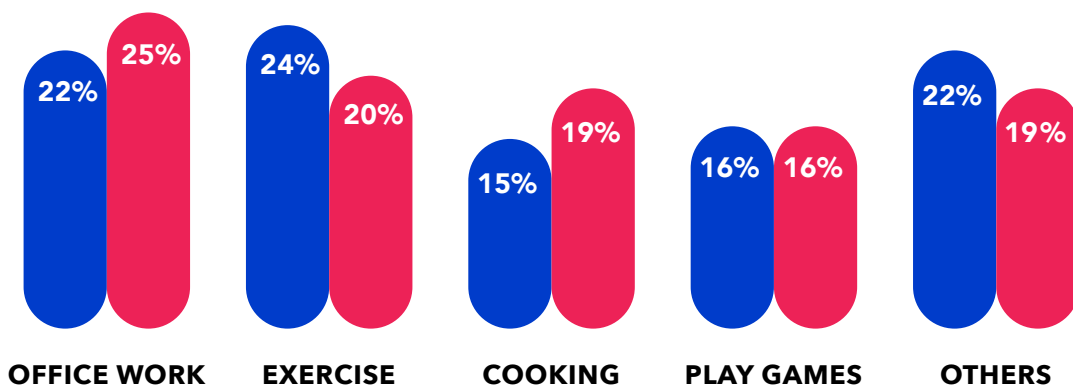


% OF PASSIVE VIEWERS

Across different age groups, Gen Z is more passive as compared to Millennials while watching UGC OLV.



ACTIVITIES INDULGED IN BY PASSIVE VIEWERS ACROSS AGES

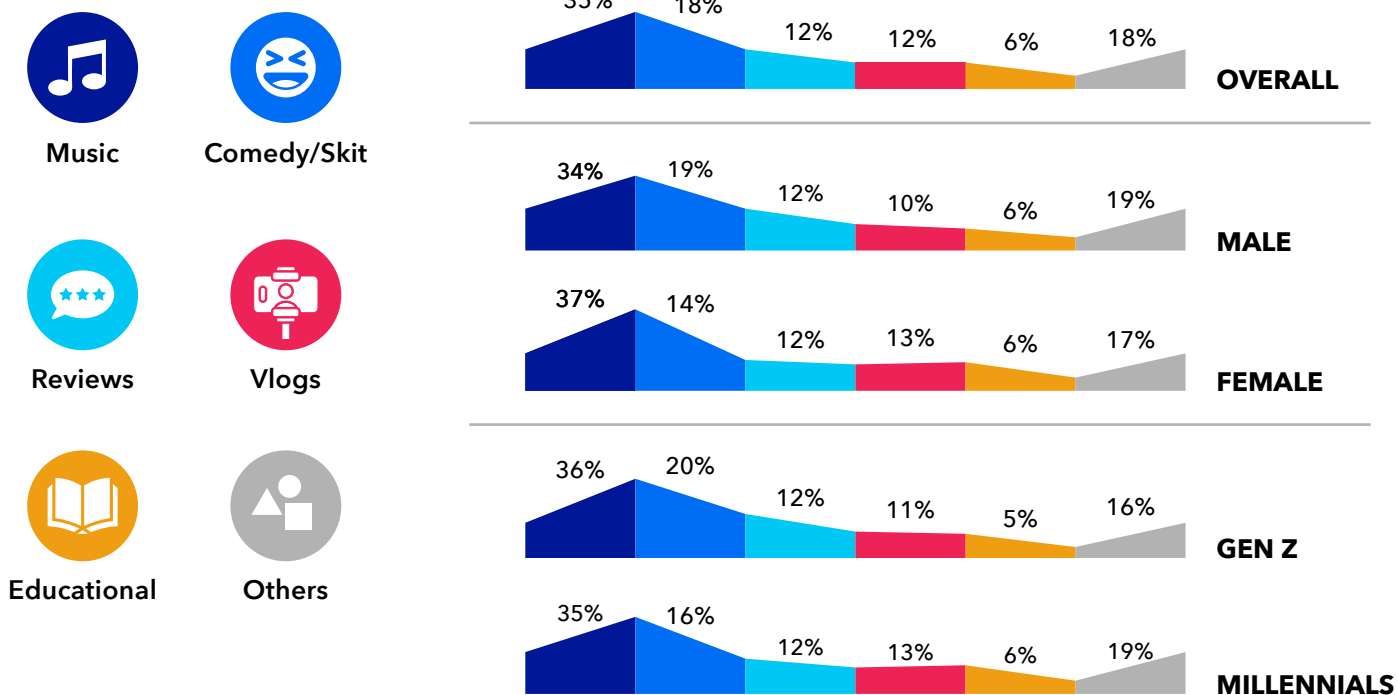


Source: Kantar & Disney+ Hotstar's Internal Analytics

More than 1/3rd of passive viewers of UGC OLVs play music followed by comedy/skit. A similar trend is observed across age and gender.

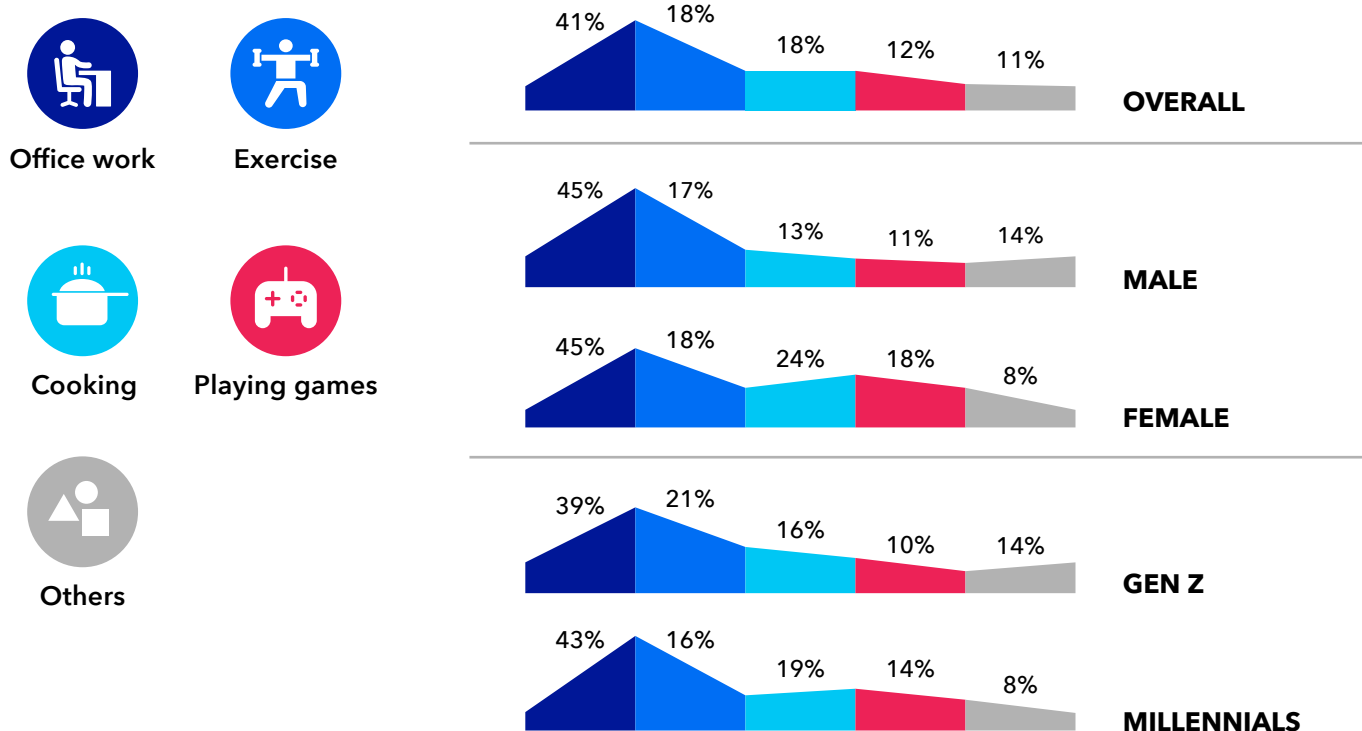
35% UGC OLV passive viewers prefer playing music

Top activities indulged in by passive viewers



Top activities of viewers listening to music on UGC OLV

Majority of audiences are engaged in office work while listening to music.



Source: Kantar

SUMMARY

7/10 People engage into **other activities** while watching UGC OLV.

24% **Office work** & **22%** **exercise** are most engaged activities while watching UGC OLV.

2/3rd of **millennials** consume UGC OLV passively. This number is higher from that of Gen Zs (at 73%).

Music emerged as the **most watched content** among UGC OLV passive viewers & majority of them engaged into office work while listening to music.

STUDY 2

1 impression on Disney+ Hotstar delivers 2X brand equity vs UGC OLV

According to a study by Neurons, emotional and cognitive responses to the same set of ads run on mobile across Disney+ Hotstar and the largest UGC OLV platform saw 2X higher brand equity on Disney+ Hotstar and 3% higher purchase intent.

STUDY METHODOLOGY



SET UP

At a central location, participants were linked to an EEG (Electroencephalogram) & eye tracking equipment to capture all implicit responses to stimulus like focal points, and neural responses. Here they underwent 5 minutes of benchmarking tests to create a baseline of emotional response.

PRE-CONTENT VIEWING

Participants were then exposed to brand logos of different ads. Their emotional responses were captured and recorded.

CONTENT VIEWING WITH ADS

One set of respondents then watched their preferred content on Disney+ Hotstar mobile app, while another set watched their preferred content on UGC OLV mobile app. They viewed the content alongside advertisements, with the "non-skip" feature enabled for ads. Once again, their brain responses were recorded.

POST-CONTENT VIEWING

The same brand logos were shown to the participants after they had viewed their chosen content, and their brain responses, measured.

Inferences based on study done by Neurons, which considers neuro metric measures of attention, emotion and cognitive responses. Analysis based on over 2000 minutes of content consumed on Disney+ Hotstar & a leading UGC OLV basis the same set of ads across both the platforms.

Source: Neurons

UNDERSTANDING THE METRICS

The combination of eye tracking and brain mapping, capturing data in millisecond accuracy, while tapping into attention, emotion, and cognitive responses even from a small sample, can be used to extrapolate to the population at large and predict market responses with strong, scientific accuracy. Our inferences were based on a study conducted by Neurons, which considers neuro metric measures of attention, emotion, and cognitive responses. The analysis was based on over 2000 minutes of content consumed on Disney+ Hotstar and the largest UGC OLV platform, using the same set of ads across both platforms.

BRAND EQUITY

Net positive movement in emotions on viewing the brand's logos pre and post-watching the advertisement determines the positive shift in brand equity.

DISTRACTION

When participants lose focus on an ongoing task and pay attention to a distraction. The response is short-lived and reflected in a spike in the brain responses associated with the distraction score. The level of distraction registers as a spike on the EEG.

MENTAL EFFORT

Indicative of mental processing load. More effort equals less brand recall as its indicative of stress. On the other hand less load indicates boredom. Information overload is strongly correlated with a lack of processing/comprehension. Optimum processing indicates that the information is being held actively, understood, and remembered, and has high correlation to brand recall.

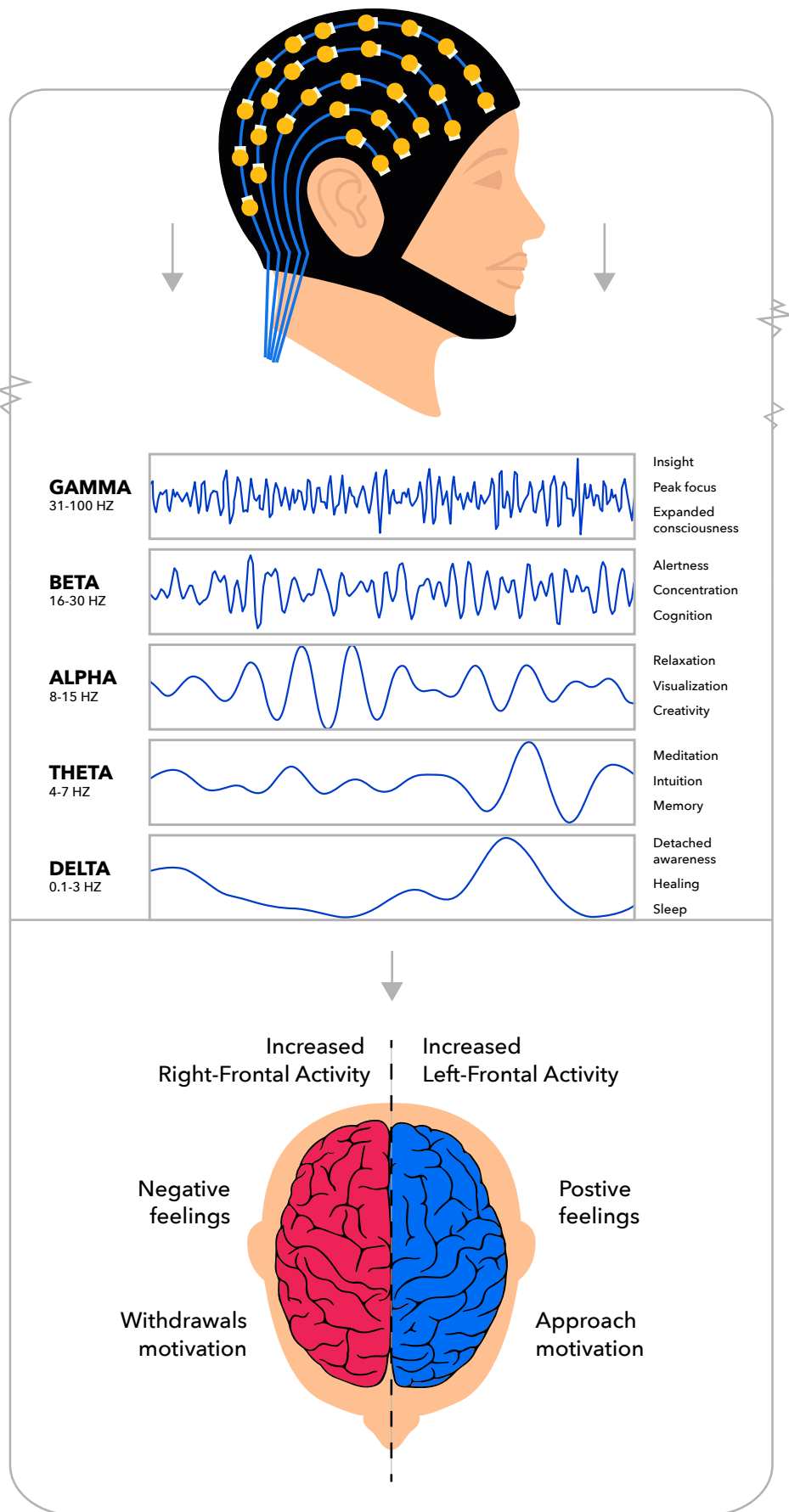
PURCHASE INTENT

Simulation experienced during watching the ad is indicative of implicit motivation to buy or purchase intent. The process to precisely measure purchase intent included the following steps:

- Consumers were set up with a brain-mapping headset
- Their brain responses were captured while watching advertisement on Disney+ Hotstar
- Brain activity was measured from the pre-frontal cortex (brain area behind the forehead)
- Higher alpha activity (waves between 8-15Hz) in the left pre-frontal cortex indicated that consumers were driven to purchase
- Higher alpha activity in the right pre-frontal cortex indicated consumers turned away from purchase

Inferences based on study done by Neurons, which considers neuro metric measures of attention, emotion and cognitive responses. Analysis based on over 2000 minutes of content consumed on Disney+ Hotstar & a leading UGC OLV basis the same set of ads across both the platforms.

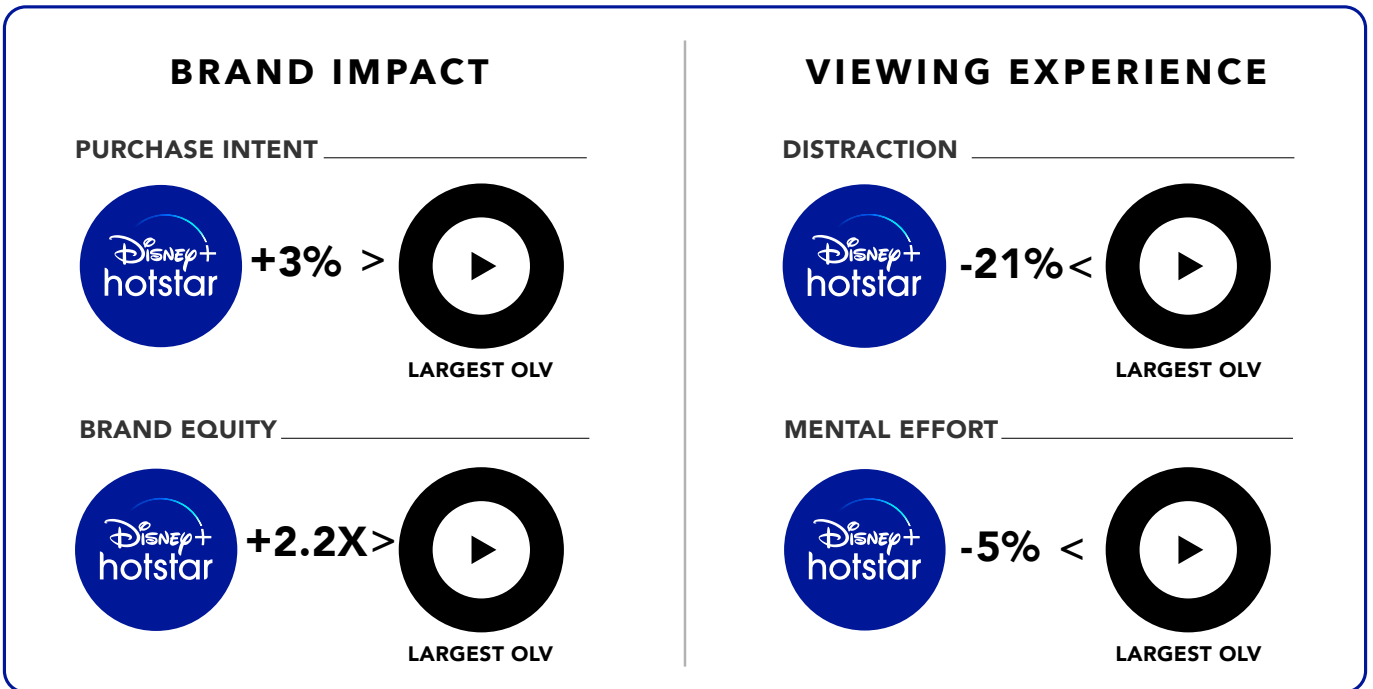
MEASURING PURCHASE INTENT FROM THE BRAIN



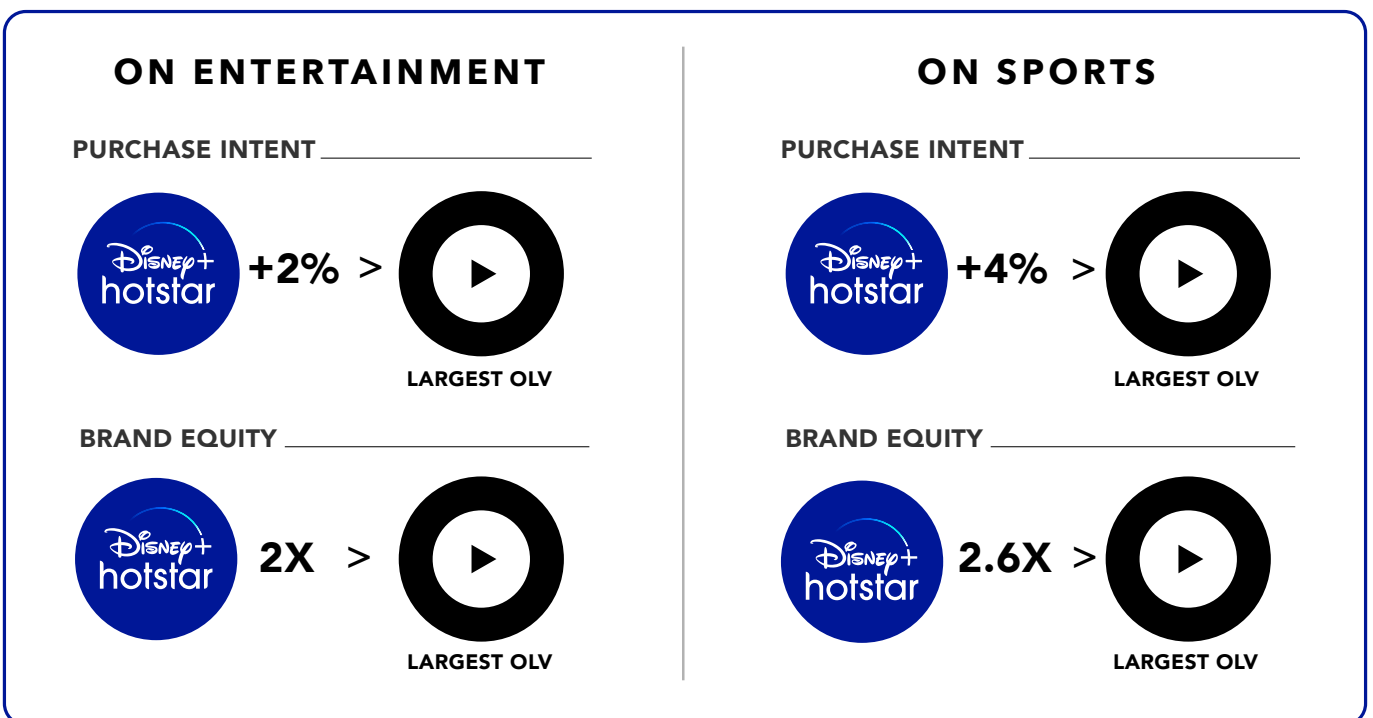
Inferences based on study done by Neurons, which considers neuro metric measures of attention, emotion and cognitive responses. Analysis based on over 2000 minutes of content consumed on Disney+ Hotstar & a leading UGC OLV basis the same set of ads across both the platforms.

RESULTS

Disney+ Hotstar viewers registered more focused viewing, leading to higher impact on brand metrics.



- Distraction was 21% lower for Disney+ Hotstar viewers compared to the UGC OLV platform
- 5% less mental effort was spent on Disney+ Hotstar
- Purchase intent was 3% higher on Disney+ Hotstar
- 2.2X brand equity on Disney+ Hotstar vis-à-vis the UGC OLV platform



Inferences based on study done by Neurons, which considers neuro metric measures of attention, emotion and cognitive responses. Analysis based on over 2000 minutes of content consumed on Disney+ Hotstar & a leading UGC OLV basis the same set of ads across both the platforms.

KEY TAKEAWAYS

Based on the findings from Study 1 and 2, marketers can draw the following key insights:

Disney+ Hotstar stands out as the leading platform in terms of viewing experience and brand impact, surpassing the largest UGC OLV platform regardless of the ad type.

Users on UGC OLV platforms are more inclined towards audio engagement rather than video. Consequently, when the same ad is played on an UGC OLV platform, the subsequent brand impact is notably lower compared to Disney+ Hotstar.

Marketers should prioritise campaign effectiveness over mass reach when making choices. It is crucial to consider platforms like Disney+ Hotstar to ensure higher campaign effectiveness and maximise the impact on the target audience.

By focusing on these insights, marketers can make informed decisions to optimise their advertising campaigns and achieve better results.

ACKNOWLEDGEMENTS

KANTAR

Kantar is a world leading data, insights, and consulting company. It provides key insights and actionable recommendations to global leaders across diverse verticals. By leveraging advanced data collection and analytics methodologies, Kantar helps its customers to improve brand awareness, increase brand penetration and enhance brand credibility.

NEURONS

Neurons Inc is the world's eminent applied neuroscience company with global capabilities employing insights and tools from neuroscience. It works with leading Fortune 500 companies to understand and predict human behaviour, optimising customer journeys across advertising, retail, technology, and more.

The use of neuroscience allows tapping into the subconscious mind of the consumer. Considering 85%-90% of decisions made are subconscious, this methodology is essential for revealing and predicting true consumer behaviour.

METRIXLAB

MetrixLab is a prominent global market research and insights company, reshaping industry norms. Its blend of technology and human expertise empowers clients to make informed decisions, from creative testing to e-commerce optimisation. Their proprietary technologies enable rapid data collection and analysis, delivering timely and actionable insights. With a versatile suite of solutions, MetrixLab adapts to various business needs, maintaining its reputation for excellence.

CHAPTER 1.4

REVIVING **LONG-FORM** **ADVERTISING** IN THE DIGITAL ERA

Historically, ad lengths have been governed by economics and not effectiveness. The longer the ad, the higher the cost. In the age of social media, short-form videos became the norm, given their shareability and lower attention spans of viewers. While short-form ads have effectively created brand awareness, their impact in driving engagement and establishing a lasting emotional connection with the audiences has been limited.

There is a proportional relationship between the length of an ad and impact on long term brand metrics like brand equity, favourability, & brand love. Long-form videos and advertisements (more than 20 seconds) can drive 2X the brand impact by building emotional engagement and brand favourability. Long-form advertising allows a brand to provide a more rounded and comprehensive view of the products or services. Viewers are also more willing to watch longer ads, provided they are relevant and stimulating, with enriching storytelling.

Disney+ Hotstar provides an ideal opportunity for marketers to showcase long-form ads as:

- Enables seamless content integration that delivers an enhanced viewing experience
- Allows greater creative freedom
- It is on-demand
- Delivers premium audience reach
- Enables long-form storytelling on digital medium at scale

CASE STUDY: HDFC LIFE

HDFC Life successfully enhanced brand favourability and message association through an emotionally captivating long-format advertisement.

OBJECTIVE

HDFC Life aimed to drive brand favourability and message association by emphasising the importance of financial security during the pandemic.



APPROACH

A 2-minute video creative was showcased during live sports, connecting with viewers by delving into the real-life challenges experienced by them amidst the pandemic.

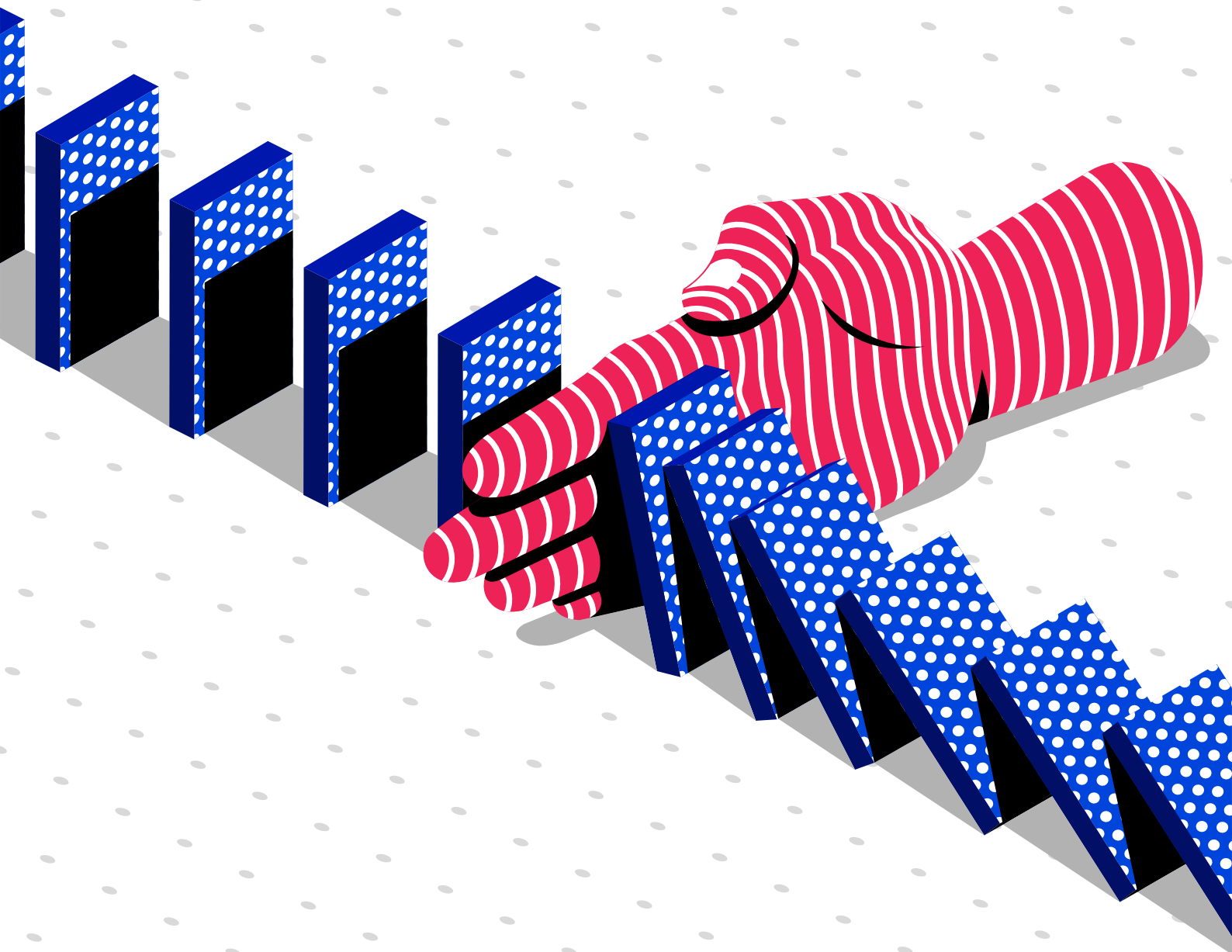
IMPACT

The campaign drove the long-term metric of brand favourability by 13%, 2X of Kantar norms, indicating a strong emotional connect and engagement with the ad.

TESTIMONIAL

“Disney+ Hotstar enabled us to tell our brand story via their long-form ad format on live sports at scale, which is an industry-first solution. What has been the cherry on the cake is the relevance of our brand message with the Gen Zs and 35+ years old cohorts on the platform. This campaign has been able to achieve nearly 86% estimated VTR for a minute long video on live sports, which has enabled us to meet our marketing goals of driving brand favourability and message association.”

Vishal Subharwal, Chief Marketing Officer and Head - Ecommerce & Digital Business, HDFC Life



CHAPTER 2

KEY MEDIA PLANNING PRINCIPLES

Precise media planning for OTT can help marketers decide how, when, and where a selected message is delivered to the target audience to ensure maximum traction. An effective media planning strategy is crucial in driving brand engagement for the rapidly increasing base of digital natives.

Typically, marketers face a challenge in finding answers to crucial questions like:

- **Does it help to have multiple ad creatives?**
- **What is the ideal length of the ads for maximum effect?**
- **Which creative formats can be used to deliver the brand message?**
- **What is the right campaign frequency to deliver on the marketing KPI?**
- **How long must the entire campaign run?**

Disney+ Hotstar has consistently endeavoured to support marketers in overcoming such challenges and making advertising simple and seamless. As a part of this, Disney+ Hotstar, in collaboration with Kantar, analysed more than 200 mobile campaigns across categories to get insights that can help marketers create more meaningful and engaging campaigns and maximise ROI.

MEDIA PLANNING PRINCIPLES

Developed by Disney+ Hotstar in association with Kantar

These learnings are based on an exhaustive meta analysis of brand lift studies done to evaluate performance of 200 mobile campaigns. A brand lift study is aimed to measure the impact of an ad campaign amongst exposed and controlled (an identical set of un-exposed audiences representing a control base) audience sets. It involved rigorous analysis of more than 40 variables of creative and media practices to determine some of the most important attributes of success.

Our Brand Lift Studies determine campaign success at a statistically significant uplift of 95% confidence level, which is a high level of stringency. Success rate across campaigns was evaluated by dividing the number of campaigns with a significant uplift by the total number of campaigns.

DEFINING SUCCESS: To determine campaign success, the study measured the brand uplift and overall success rate. A statistically significant uplift (at 90% or 95% confidence level) indicates a significant improvement. For example, if $A > B$, a confidence level of 95% implies that $A > B$ at least 95 out of 100 times.

SUCCESS RATE: The success rate represents the proportion of campaigns with a significant uplift in any KPI divided by the total number of campaigns.

OPTIMISE YOUR MEDIA PLAN

Based on the meta analysis of brand lift studies, the media planning principles for mobile campaigns are as follows:



Deploy **multiple video creatives**

Tell your story through **longer video creatives**

Use a **combination of ad formats**

Ensure **optimal frequency**

Sustain campaigns for long

Campaigns with **3+ video ads** are most successful in driving brand awareness, favorability, and purchase intent.

No. of Video Ads



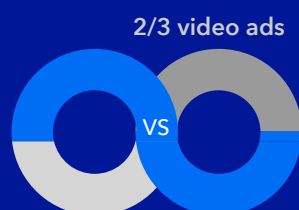
Brand awareness

Online ad awareness

Message association

Brand favourability

Purchase intent



1 video ad

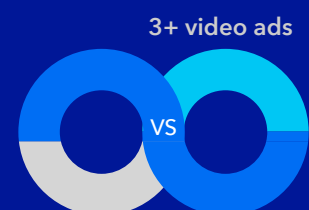
1.2X

1.1X

1.3X

No change

No change



1 video ad

1.7X

1.2X

1.3X

1.3X

1.6X

Figures represent increase in success rate

Source: 193 brand lift studies in H1'22 (Kantar & Disney+ Hotstar's Internal Analytics)

Campaigns with **20+ second video ads** deliver the highest success on mid and lower funnel metrics.

Video Length



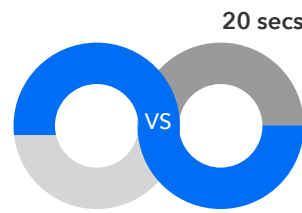
Brand awareness

Online ad awareness

Message association

Brand favourability

Purchase intent



Upto 15 secs

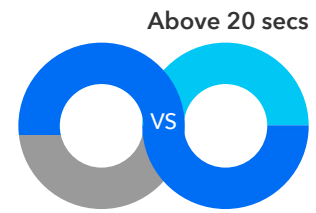
1.4X

No change

1.1X

1.5X

1.3X



Upto 15 secs

1.3X

1.2X

1.2X

1.8X

1.5X

Figures represent increase in success rate

Source: 193 brand lift studies in H1'22 (Kantar & Disney+ Hotstar's Internal Analytics)

Mid-roll campaigns supplemented **with other creative formats** deliver 30% more success on driving brand message and purchase.

AD Formats



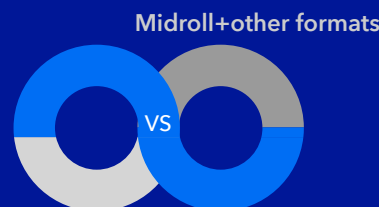
Brand awareness

Online ad awareness

Message association

Brand favourability

Purchase intent



Midroll only

1.1X

1.2X

1.4X

No change

1.3X

Figures represent increase in success rate

Source: 193 brand lift studies in H1'22 (Kantar & Disney+ Hotstar's Internal Analytics)

Operating at a **frequency of 6+** increases purchase intent by 70% and brand awareness by 50%.

Frequency



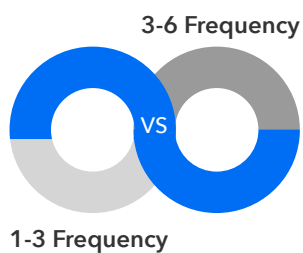
Brand awareness

Online ad awareness

Message association

Brand favourability

Purchase intent



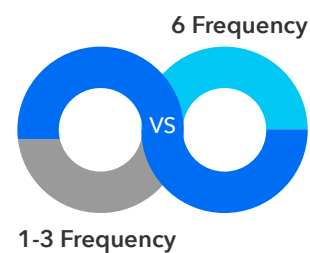
1.2X

1.1X

No change

No change

1.1X



1.5X

1.2X

1.3X

1.2X

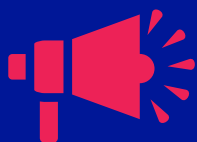
1.7X

Figures represent increase in success rate

Source: 193 brand lift studies in H1'22 (Kantar & Disney+ Hotstar's Internal Analytics)

Longer campaigns (>6 weeks) yield higher success on upper and lower funnel metrics.

Campaign Duration



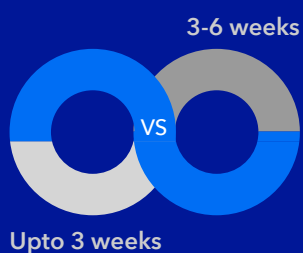
Brand awareness

Online ad awareness

Message association

Brand favourability

Purchase intent



1.2X

1.2X

No change

No change

No change



1.4X

1.3X

No change

1.1X

1.7X

Figures represent increase in success rate

Source: 193 brand lift studies in H1'22 (Kantar & Disney+ Hotstar's Internal Analytics)

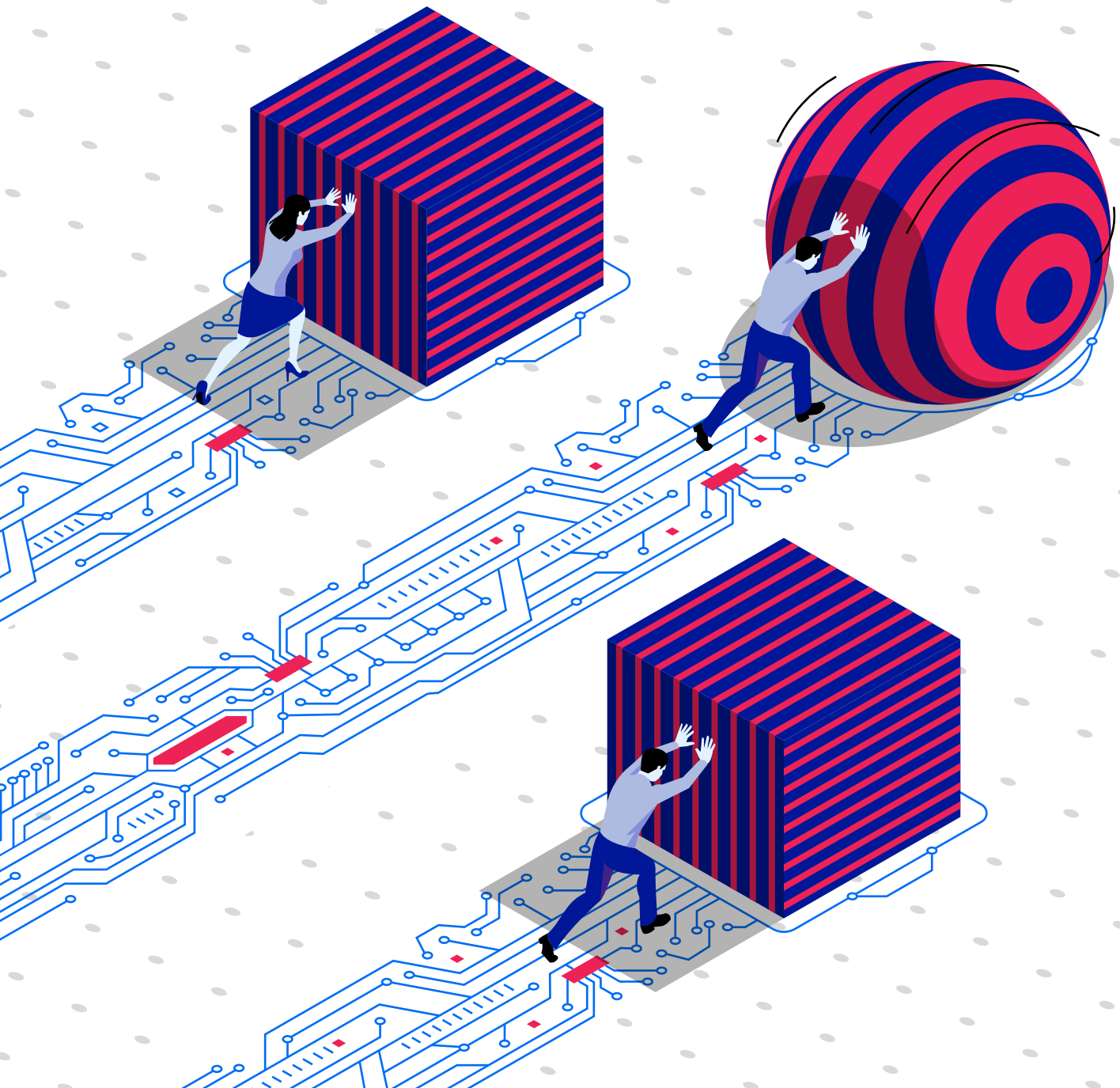
Marketing objective based media planning guide for OTTs

	No. of video ads			Edit length			Ad format		Frequency			Campaign duration		
	1	2-3	3+	15 sec	20 sec	Above 20 sec	Mid-roll	Mid-roll + Others	1-3	3-5	6+	1-3 WEEKS	3-5 WEEKS	6+ WEEKS
BRAND AWARENESS			●		●			●			●			●
ONLINE AD AWARENESS	●					●		●		●			●	
MESSAGE ASSOCIATION	●				●			●			●	●		
BRAND FAVOURABILITY		●				●	●				●		●	
PURCHASE INTENT		●				●		●			●			●

Source: Kantar

CHAPTER 3

CREATIVE BEST PRACTICES FOR OTT VIDEO ADS



DEVELOP EFFECTIVE CREATIVES

A picture is worth a thousand words, and in the OTT realm, a powerful and high-impact audio-visual experience forms the core of any brand narrative.

The Brand Lift Studies detailed in Chapter 2 form the basis of some essential creative best practices marketers should follow to add more value to their brand stories, personalise them, and build lasting relationships with audiences.

These elements can be segregated into two parts: Story and Execution.



STORY

Ensure a **clear role of the brand** in the story
Keep the **messaging simple and direct**.



EXECUTION

Have a **human presence** in the creative
Use **dialogues** to enhance the narrative.

1. CLEAR ROLE OF THE BRAND IN THE STORY

Given the cluttered online marketplace and the audience's overexposure to advertisements, marketers' foremost challenge is making their brand stand out.

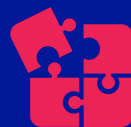
The solution lies in determining a clear role of the brand. Even the most visually compelling video creative is only effective if the brand can claim credit. It is vital to ensure that the brand is well integrated from the beginning, with a key use case/benefit clearly explained throughout the creative. In addition brand assets (Ex: logo, product shot, colour scheme) can help trigger association and create relevance.



BRAND KPIs

Brand awareness	2.1X
Online ad awareness	1.3X
Message association	1.2X
Brand favourability	1.9X
Purchase intent	1.3X



CLEAR BRAND ROLE



"X" represents the success rate of campaigns that did not adhere to creative practices.
Source: 193 brand lift studies in H1'22
(Disney+ Hotstar internal analytics + Kantar's study)

2. SIMPLE AND DIRECT MESSAGING



The most effective way of communication is often the simplest. While different advertisers hold differing views on how to craft the most effective message, it can be argued that buyers expect one of four types of gratification from the product or service - rational, sensory, social, and ego satisfaction. With these factors in mind, marketers can craft messages in the language of their audience, with clear, easily repeatable communication. They must focus on creating messages that are crisp, simple, and not layered.

BRAND KPIs 	SIMPLE AND DIRECT MESSAGE 
Brand awareness	1.7X
Online ad awareness	1.2X
Message association	2.6X
Brand favourability	3.2X
Purchase intent	1.9X

"X" represents the success rate of campaigns that did not adhere to creative practices.
Source: 193 brand lift studies in H1'22
(Disney+ Hotstar internal analytics + Kantar's study)

3. HUMAN PRESENCE



Studies have shown that human presence in ads helps viewers to relate to how the product can help in solving a particular need. In addition, it lowers the cost of quality campaign exposures such as capture, retention and encoding of the brand message. Creative efficiency increases when humans are present in all scenes of an ad.

BRAND KPIs 	HUMAN PRESENCE 
Brand awareness	2.8X
Online ad awareness	1.4X
Message association	2.0X
Brand favourability	1.2X
Purchase intent	1.2X

"X" represents the success rate of campaigns that did not adhere to creative practices.
Source: 193 brand lift studies in H1'22
(Disney+ Hotstar internal analytics + Kantar's study)

4. ACTIVE DIALOGUE

While narration can serve as a shorthand to move the story along, active dialogues are more effective in showing what you want viewers to see. A natural, flowing conversation is relatable, and more emotionally engaging, than a pure brand pitch. Active dialogues form the core of the story and narrative and hence a key pillar for long term brand building.

BRAND KPIs 	DIALOGUE 
Brand awareness	1.4X
Online ad awareness	1.0X
Message association	1.4X
Brand favourability	2.1X
Purchase intent	1.6X

"X" represents the success rate of campaigns that did not adhere to creative practices.
Source: 193 brand lift studies in H1'22
(Disney+ Hotstar internal analytics + Kantar's study)

5. GOOD-TO-HAVE ELEMENTS

While the media planning principles and creative best practices form the basis of successful OTT campaigns, marketers must also incorporate valuable elements that can amplify campaign performance and drive ROI.

These elements can be segregated into two parts: Story and Execution.

STORY 

- Use a **problem solution** approach
- Add **humour** to the narrative
- Use a **quantified message**
- Make the creative **actively engaging**

EXECUTION 

- Use effective **music**
- Develop edits in **regional languages**
- Communicate benefit through **voiceover**
- Use **linear storytelling** approach
- Integrate brand **early** in the story

Campaign Performance on Disney+ Hotstar

Driven by the principles and best practices elaborated above, campaigns on Disney+ Hotstar have surpassed industry success rate across categories, with a 10% higher success rate vs. industry benchmarks defined by Kantar across digital campaigns.

Source: Kantar

CASE STUDY: ICICI PRUDENTIAL MF

OBJECTIVE

ICICI Prudential Mutual Fund aimed to build brand awareness at scale for its Mutual Funds and educate customers about the category, ultimately driving purchase intent.



APPROACH

Considering the scale of cricket, ICICI Prudential Mutual Fund leveraged consistent presence across below cricket tournaments.

- India Bilaterals
- ICC T20 World Cup 2022

Thereby leading to a continuous presence on LIVE cricket for a sustained period of time.

ICICI Prudential Mutual Fund came up with a contextually relevant content to demystify category message and drive consideration.

IMPLEMENTATION

Leveraged Disney+ Hotstar's premium urban audience which is the brand's core TG.

Products used

- The campaign leveraged Disney+ Hotstar's unique NCCS A targeting
- Also built reach amongst affluent audiences through ConnectedTV
- With a mix of Mid-rolls & Display Squeeze Ups, giving the brand an unmissable visibility amongst their targeted audience

OUTCOME

BRAND
AWARENESS UPLIFT



PURCHASE
INTENT UPLIFT



"X" denotes Disney+ Hotstar platform benchmarks

TESTIMONIAL

"At ICICI Prudential Mutual Fund our mission is to spread awareness about conscious and consistent investments. Our aim is to educate people about this category through effective messaging and contextual communication. Keeping in mind the unmatched attention and viewership that cricket gets in our country, we decided to use that as a medium to reach potential investors. This is why we chose to work with Disney+ Hotstar. The campaign we executed through their platform helped us reach our core audience with consistent presence & the results have been nothing short of remarkable. We have seen a substantial increase in key success metrics, particularly awareness, message association and purchase intent. Furthermore, running the campaign through multiple tournaments also enabled us to drive incremental reach on Disney+ Hotstar."

Abhijit Shah, Head - Marketing, Digital & Customer Experience at ICICI Prudential AMC Ltd.

CASE STUDY: NAUKRI.COM

OBJECTIVE

Naukri.com launched the #MyKindaNaukri campaign, inspired by the insight that modern jobseekers prioritise various factors such as work culture, the impact of work, training, and upskilling. The campaign aims to recognise and cater to these underlying trends and motivations of jobseekers.



APPROACH

Clear role of brand

The campaign focused on highlighting the uniqueness of professional journeys and tapped into the distinct aspirations of today's job seekers.

Simple and clear message

'#MyKindaNaukri' campaign addresses multiple motivations of job seekers.

Human presence

Creatives depict the real life scenarios.

Dialogue

Active dialogues with a humorous undertone.

IMPLEMENTATION

Leveraged Disney+ Hotstar's premium urban audience which is the brand's core TG.

- Geographic targeting in top 6 metros
- Need state based targeting of "Job Seekers"
- Content based targeting: Working professionals through Ghar Waapsi show and premium audiences through Koffee With Karan

OUTCOME

BRAND
AWARENESS UPLIFT



CONSIDERATION
UPLIFT



"X" denotes Disney+ Hotstar platform benchmarks

TESTIMONIAL

"At Naukri.com, we understand that every professional's journey is unique, which is the premise behind the '#MyKindaNaukri' campaign that we launched recently. We wanted to reach the job-seekers of today, who have unique aspirations and are not willing to settle for anything less. Disney+ Hotstar enabled us to reach today's digital first audiences at scale via Koffee With Karan Season 7, thus enabling us to build a strong resonance for Naukri.com and furthered our key premise of helping job seekers find their preferred jobs and reach their professional goals. The impact can be seen through the results achieved. The campaign exceeded our expectations of driving significant reach and awareness as can be seen basis team Disney+ Hotstar's brand lift study."

Sumeet Singh, CMO, Info Edge

KEY TAKEAWAYS

These media planning principles and creative best practices are fundamental for creating highly appealing and creative ad campaigns that will help earn more customers, increase retention rates, and grow revenue.

Disney+ Hotstar enables marketers to design campaigns built on the foundation of these media planning principles and best practices and go a step further in creating a lasting impact by providing innovative brand integration techniques.

CHAPTER 4

DRIVING IMPACT THROUGH IMPACT ADVERTISING



Impact advertising refers to effective and seamless integration of a product, brand assets or features in the script of a show or movie that is non-intrusive, compelling, and seamlessly integrated with the content.

As more and more Gen Zs and millennials are looking to go “Ad-free”, advertisers must redefine branding strategies that go beyond the traditional format and style.

Why Impact Advertising works on Disney+ Hotstar

Impact advertising on Disney+ Hotstar has delivered 100% success for sponsors and inventory buyers and outperformed industry benchmarks.

The success of this format can be primarily attributed to the following reasons:

- With access to celebrities and influencers for brand promotions in and during the program, brands enjoyed higher favourability and purchase intent versus regular mid-roll advertising. Example: A host introducing the benefits of Parachute hair oil during Dance+ Season 6 led to 63% better results towards brand favorability
- Brands can explore a host of avenues for collaboration with Disney+ Hotstar’s marquee shows to achieve brand objectives

SUMMARY

Add **celebrities** and **brand influencers** to your brand campaign

Embed branded assets in popular Disney+ Hotstar shows

Source: Kantar & Disney+ Hotstar's Internal Analytics

PRODUCT USAGE DURING A SHOW

Brands can maximise impact by seamlessly integrating their products into the narratives of a show. Through strategic product placements and ingenious usage by the show's cast, brands can establish deep audience connections without hampering their viewing experience.

Ex: The Asian Paints' Royal Glitz range was introduced during Dance+ Season 6 through the innovative use of a spotlight wall.



SPONSOR CALLOUTS AND MENTIONS BY THE HOST

Sponsor callouts and brand mentions during a show by celebrity hosts can help to gain significantly higher brand visibility and engagement. Ex: In the iconic show Koffee With Karan Season 7, the host Karan Johar is seen wearing reading glasses by Lenskart before commencing the highly anticipated rapid-fire round. He seamlessly incorporates brand promotion by requesting Amazon Alexa to turn on the projector and calling for the Jaquar Lights to enhance the overall effect, resulting in a natural and highly effective promotion.



KOFFEE WITH KARAN (KWK) SEASON 7

OVERVIEW

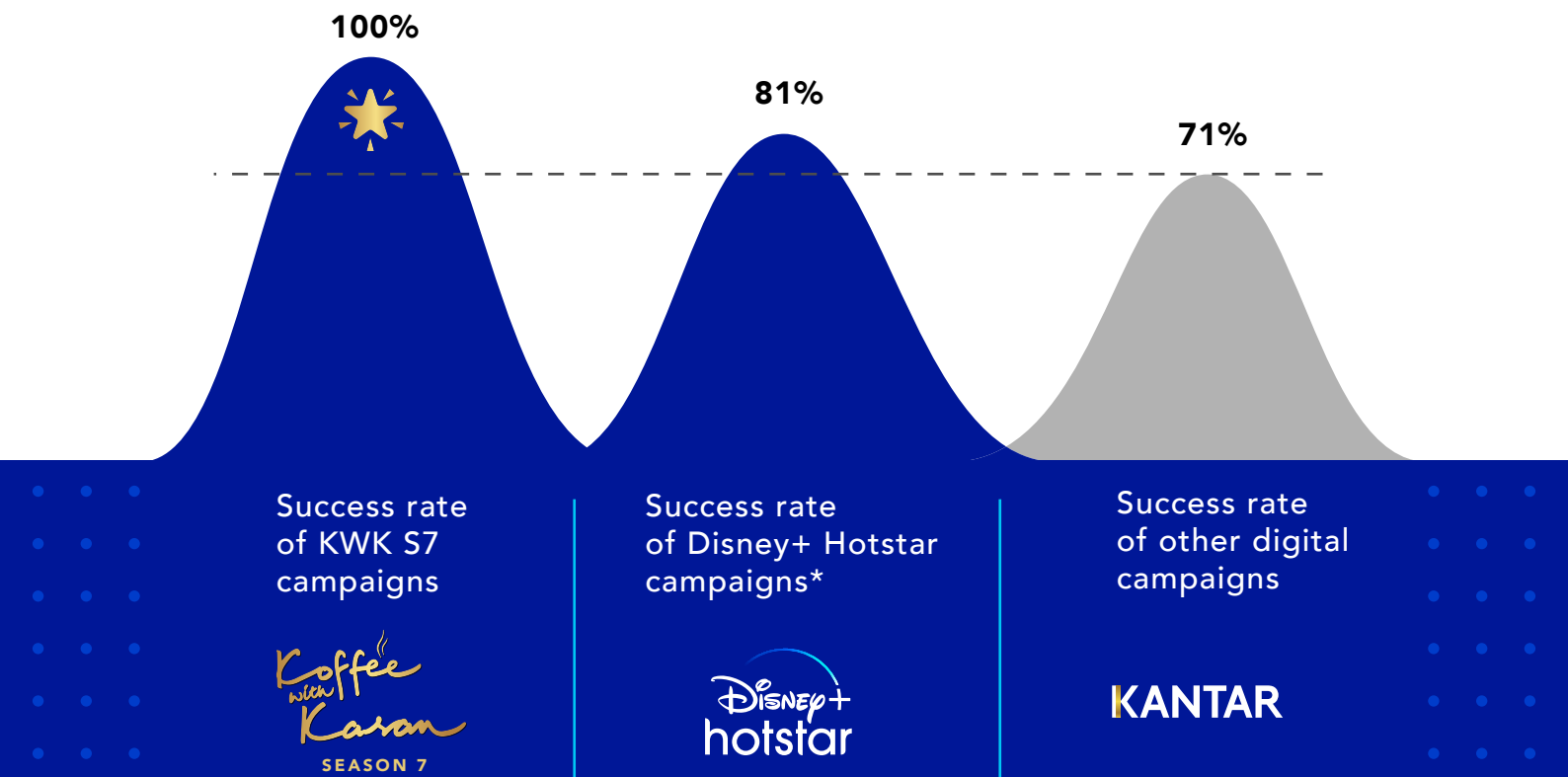
A show that has featured in elite list of Top 20 properties (across formats and languages) that crossed the 20 million mark in 2022, Disney+ Hotstar's Koffee With Karan has set a new benchmark in campaign performance, seamless brand integration and brand uplift.

Sponsors and Inventory Buyers

~20 leading brands across industries were among the sponsors and inventory buyers for Koffee With Karan Season 7.

Overall Success Rate

KWK campaigns delivered 100% success and out performed industry benchmarks.



Source rate is the proportion of campaigns with a significant uplift in at least 1 brand KPI

*Based on ~200 brand lift studies in '22

Source: Kantar & Disney+ Hotstar's Internal Analytics

SURPASSING ROI BENCHMARKS

Koffee With Karan S7 delivered exceptional ROI for brands.

IMPACT AMONG SPONSORS

3X Uplift through in-show integration and branded vignettes compared to uplifts on general entertainment inventory



4X
Brand Awareness



2.8X
Online AD Awareness



3.3X
Message Association



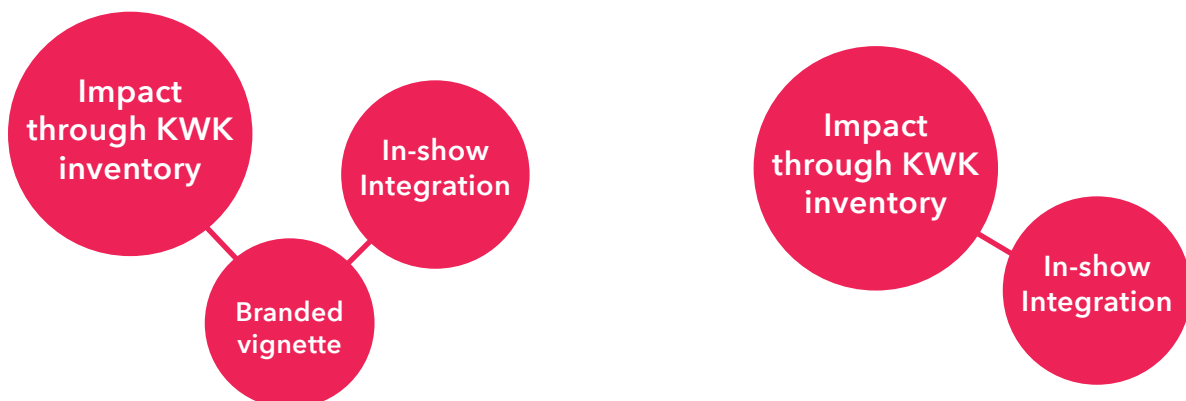
2.8X
Brand Favourability



2.6X
Purchase Intent

"X" denotes uplifts on general entertainment







Sponsors of Koffee With Karan Season 7 were able to leverage Disney+ Hotstar inventory in two significant ways:



Source: Kantar & Disney+ Hotstar's Internal Analytics

IMPACT AMONG INVENTORY ONLY BUYERS

Impact through KWK inventory more than **2X higher** compared to inventory on general entertainment content, with **3X higher** brand awareness.

	Uplift through KWK inventory vs. other GEC shows	
Average of KPIs		2.3X
Brand Awareness		3.2X
Online Ad Awareness		1.7X
Message Association		1X
Brand Favourability (T2B)		1.8X
Purchase Intent (T2B)		2.3X

CASE STUDY: AUDI

OBJECTIVE

Audi, a preferred luxury car of many Bollywood superstars, wanted to drive awareness & create affinity for its brand by showcasing its aspirational features to 30+ year old, premium, affluent urban audiences.



APPROACH

With the brand known for its glamour quotient, Audi partnered with Disney+ Hotstar with an equally glamorous show KWK Season 7.

To build resonance & affinity amongst premium audiences, Audi associated with the show as a Driving Partner with an in-show integration where the show's host, Karan Johar, arrived on the show in the brand's newly launched Audi A8.

IMPLEMENTATION

Leveraged Disney+ Hotstar's premium urban audience which is the brand's core TG.

Products used:

The campaign leveraged in-show integration along with co-branded vignettes featuring Karan Johar travelling in an Audi, which played as mid-roll during ad breaks.

"X" denotes Disney+ Hotstar platform benchmarks

OUTCOME

BRAND
AWARENESS UPLIFT



2.7X

PURCHASE
INTENT UPLIFT



2.5X

TESTIMONIAL

"Audi has enjoyed a strong association with Koffee With Karan and is excited to be a part of it for the second consecutive year. This year, with the show being a Disney+ Hotstar exclusive, it widened the avenue for us to target our core audience - premium, urban, affluent, young achievers - at scale. The Bollywood industry is aspirational, and we are a preferred brand for many achievers from this industry, thus making the show a perfect fit for us further strengthening the likeability of the brand amongst the viewers as well as within Bollywood itself."

Gaurav Sinha, Head - Marketing and PR at Audi India

CASE STUDY: JAQUAR

OBJECTIVE

Jaquar, a renowned luxury bath brand, ventured into the lighting category. Leveraging its existing consumer awareness and brand perception, the company launched a new campaign with the aim of introducing lighting ranges and generating awareness within the category.



APPROACH

The brand used humour in 'Kya chal raha hai' film campaign which tickles audiences with the brand's attempt to raise awareness about the company's foray into lighting products.

Jaquar Lights associated with KWK Season 7 as the Official Lighting Partner, showcasing an in-show integration of its smart lights feature. The show's host, Karan Johar, demonstrated this by calling out to "turn out the Jaguar Lights for the rapid fire."

IMPLEMENTATION

Leveraged Disney+ Hotstar's premium urban audience which is the brand's core TG.

Products used:

The campaign leveraged in-show integration on Koffee With Karan.

To maximise visibility and ensure recall, the audiences were further targetted with Jaquar's 30-second video creative via mid-roll ads during the show breaks.

OUTCOME

BRAND
AWARENESS UPLIFT



PURCHASE
INTENT UPLIFT



"X" denotes Disney+ Hotstar platform benchmarks

TESTIMONIAL

"We associated with Koffee With Karan as a partner for a fourth consecutive season. In the last three seasons, we partnered for Jaquar bath fittings, and this season for Jaquar Lights as the lighting partner. Season seven being a Disney+ Hotstar exclusive, enabled us to reach premium, affluent, highly engaged digital-first audiences, which is our core TG. The premium audiences on Disney+ Hotstar, coupled with a very popular and premium show such as Koffee With Karan, helped us achieve significantly higher brand awareness and purchase intent. We look forward to partnering with Disney+ Hotstar on Koffee With Karan Season 8."

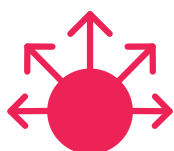
Sandeep Shukla, General Manager & Head Marketing Communications - Jaquar Group

DANCE+ SEASON 6

OVERVIEW

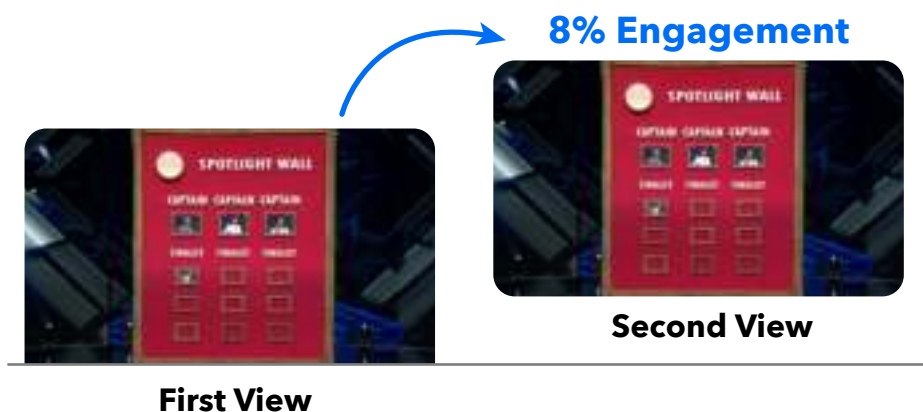
One of the most popular reality shows, Dance+ Season 6 on Disney+ Hotstar delivered significantly higher brand uplift with brand assets embedded in the show creatively and in multiple formats.

The average watch time per viewer was approximately 3.27 hours, nearly 6X the watch time per viewer for the same show online compared to offline. To measure audience engagement and attention during the show, a study was conducted using facial coding and eye tracking. This study provided valuable insights into the viewing behavior of audiences and captured the emotions elicited by them at every given second.



Multiple Exposure → More Engagement

Showcasing the brand multiple times allows for stronger association with the brand.



Clear Aston + A Close-up shot → Better Noticeability

A de-cluttered aston during a close-up shot of celebrities/contestants grabs attention & improves chances of getting noticed.



Source: MetrixLab



Multiple formats → Higher uplifts

Multiple formats (eg. Logo presence, aston bands, branded window, etc.) results in significant uplifts on brand metrics. There was a 2X uplift on purchase intent for Parachute (where "X" denotes average platform uplifts on purchase intent).



Brand Window + Celebrity → Higher Engagement

Spotlight window with Prabhudeva dancing evoked 18% uplift in positive emotions.



Verbal + Visual clues → High impact

Host calling out "Aloe vera face wash will improve your natural beauty" led to +20% uplift for the attribute.



CREATIVE BRAND INTEGRATION

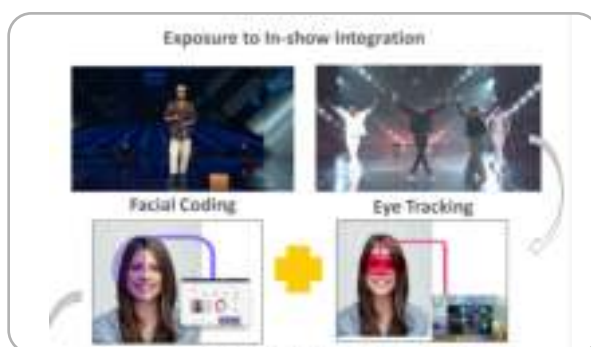
The “Asian Paints Wall” along with the “Spotlight Window” was an integral part of Dance+ Season 6 and was shown multiple times - in the presence of Prabhu Deva and Remo D’Souza at crucial moments, ensuring it wouldn’t be missed. It led to 80% better results on purchase intent for Asian Paints Royale versus its mid-roll advertising. Scenes with high positive emotions, and those that included fun elements such as dance performances by the judges or celebrities landed the brand better.

Similarly, the host introduced the benefits of Parachute hair oil during the show, leading to 63 % better results on Brand Favourability for Parachute hair oil versus its mid-roll advertising.



Brand integration with humour drives engagement

Introducing a brand in a fun way while calling out benefits of the product elicits positive emotions, grabs attention & improves overall engagement. It drove brand trust by +19%.



Brand presence in a popular scene for high impact

Scenes with high positive emotions such as comedy/amazement result in higher engagement. Exposures during scenes with fun elements/dance performance by popular celebrities/judges land the brand better.



Source: MetrixLab



Positive shift across brands and metrics

- Brand awareness
- Imageries
- Interest
- Purchase Intent
- Engagement
- Favorability
- Relevance

Value delivered to sponsors

Impact advertising on Disney+ Hotstar's Dance+ Season 6 also delivered 2X organic value to all the sponsors, making it one of the most successful campaigns across the industry.



CHAPTER 5

KEEP IT
CREATIVE
KEEP IT
CONTEXTUAL

Contextual advertising can contribute significantly to brand building by establishing an emotional connect that builds over time. Brands can create stories that align with the content of the shows or events and creatives that are highly engaging and non-intrusive, leading to a positive brand association and greater recall.

With OTTs, marketers can leverage contextual advertising to create brand stories that are not limited to product or brand promotion. Advertisers can go beyond promotional content and create meaningful, entertaining, high-quality content that is engaging and helps establish a deeper emotional connect that builds over time.

EMPOWERING BRANDS TO MAXIMISE BENEFITS OF CONTEXTUAL ADVERTISING

Disney+ Hotstar has collaborated with several leading brands to leverage contextual advertising in the most effective and creative way. By combining elements like co-branded vignettes, celebrity call-outs and associations, and custom creatives, brands have been able to create impactful campaigns that have significantly contributed towards developing higher consumer engagement and long-term brand metrics.

CO-BRANDED VIGNETTES

Brands can leverage the power of co-branded vignettes to forge a deeper and more meaningful connection between brands and the shows that they partner with by blending the brand's core message with the essence of the show, creating a compelling narrative that resonates with the viewers on different levels.

Brands can use two types of co-branded vignettes: one in which the show's lead/protagonist becomes the voice of the brand, and the other that integrates existing show footage.

Ex: Disney+ Hotstar leveraged existing footage of popular Hotstar Specials "Home Shanti" to create co-branded vignette for Homefirst, a leading housing finance company. This helped Homefirst reinforce their message of a provider of easy home loans by correlating it with the protagonist family's journey of building a home.

BESPOKE CONTENT

Bespoke content refers to custom content developed to highlight a brand's key value proposition or solve a specific brand challenge.

Ex. India's leading coffee brand Bru partnered with Disney+ Hotstar to create first ever micro series (8 episodes of 4 mins each) Aanandam Aarambam. The micro series explores the life of newly weds and at key moments features Bru and how coffee brings the couple closer.

Through this micro series, Bru was able to establish a deeper connect with younger audiences while breaking into South India's filter coffee market.

INFLUENCER CAPSULES

Disney+ Hotstar allows brands to leverage the power of Hotstar influencers to drive brand awareness through self-shot capsules, footage-based content, social media advocacy and creative assets, all of which would feature the influencers.

Ex: Leading global brand Palmolive aimed to create awareness for its product - Palmolive Hand Sanitizers. Disney+ Hotstar helped by creating a vignette and social media promotions by popular actress Shivangi Joshi. The campaign saw her talking about the love and protection that Palmolive Hand Sanitizers provides through self-shot videos and creative capsules. The celeb vignette resulted in a higher CTR than its regular brand commercials and yielded better uplifts than its brand film across all the KPIs (from brand awareness to consideration) stating that the films with influencers/celebrities create more impact as it generates advocacy for the brand.

CONTEXTUAL DRIVES ENGAGEMENT

Integral Ad Science (IAS) conducted a pan-India consumer study, involving 501 digitally savvy individuals aged between 18 and 44. The study revealed that context plays a crucial role in aiding consumers to comprehend brand messages more effectively.

- 95% of consumers are likely to remember a contextually relevant ads
- 92% of consumers find it very important that advertising is relevant to the content being consumed
- 91% of consumers have a more favourable opinion of brands with contextually relevant ads
- 89% of consumers agree that the sentiment of the content impacts feelings towards brand advertising on the page

ACKNOWLEDGEMENTS

INTEGRAL AD SCIENCE

Integral Ad Science (IAS) is a leading global media measurement and optimization platform that delivers the industry's most actionable data to drive superior results for the world's largest advertisers, publishers, and media platforms. IAS's software provides comprehensive and enriched data that ensures ads are seen by real people in safe and suitable environments, while improving return on ad spend for advertisers and yield for publishers.

CASE STUDY: JEEVANSATHI.COM

Associating with popular Hindi and Marathi (regional) shows.

OBJECTIVE

Jeevansathi.com endeavoured to strengthen brand consideration in regional markets with Disney+ Hotstar.



APPROACH

With playful narratives of finding acceptance and a “friend-cum-life partner” across four vignettes starring lead couples of popular shows, Jeevansathi.com drove brand consideration in Hindi and Marathi speaking regional markets.

Lead couples from popular shows Rang Maza Vegla (Marathi), Sukh Mhanje Nakki Kay Asta (Marathi), Yeh Hai Chahatein (Hindi), and Pandya Store (Hindi) were a part of the campaign. Available on Disney+ Hotstar, these shows have a massive regional following, helping the brand reach its intended target audiences.

The storyline picked for the vignettes revolved around the relationship shared by the lead couple in the selected shows. The core message of the campaign was to highlight that people can find their life partner on Jeevansathi.com like the lead couple of the show found each other.

Disney+ Hotstar, which already has an audience that loves its shows, helped the brand promote these vignettes in the intended clusters via geography and language targeting options. Further, the campaign’s reach increased with the actors posting these videos on their social media handles.

IMPACT

With 96% completed views, which is extremely high above the average of 85%, the brand built resonance among Disney+ Hotstar audiences, driving a high engagement and CTR (Click through rate) 2X of platform average.



Brand Awareness

Online Ad Awareness

Favorability & Purchase Intent

TESTIMONIAL

“The objective was to launch a key message in a relatable manner where communication and media planning would enable instant reach and recall. That’s where we partnered with Disney+ Hotstar, who not only helped us identify the top shows watched in some of our key markets, but also helped build a stronger connect with the audiences of these shows by leveraging content-based integrations. The campaign has been a success in getting the message registered and talked about and has driven desired growth. These content vignettes have helped in elevating our brand consideration across markets.”

Sumeet Singh, CMO, Info Edge

CASE STUDY: **RIVAAH** BY TANISHQ

Collaborates with Disney+ Hotstar to co-create and host "The Great Indian Bride," an Indian wedding spectacle!

OBJECTIVE

Rivaah by Tanishq offers traditional wedding jewellery worn by various regional communities in India. They wanted to connect with the Modern Indian bride of today in an engaging and emotional way.

The brand had come-up with insights on today's Indian women being career oriented, high-flyers and achievers. They are explorers, strong and independent yet rooted in their rich traditions and culture.



So, when it comes to being a bride, their choice of jewellery is one that has a modern appeal but holds the significance of their cultural background and traditions.

APPROACH

Disney+ Hotstar CreativeWorks came up with a content idea - The Great Indian Bride - a show that celebrates the modern bride of today.

The show was 5 episode mini series with each episode about 33 mins long and was further amplified by promos.

IMPLEMENTATION

The show's premise narrated the powerful real-life stories of these brides, thus enabling Rivaah to build affinity and resonance amongst its core audience of young, affluent, premium, digital-first females.

The show showcased Rivaah's traditional yet modern line of jewellery crafted for the brides of today. All this through strong storytelling entwined with the rich Indian culture and traditions.

OUTCOME

BRAND
AWARENESS UPLIFT



PURCHASE
INTENT UPLIFT



"X" denotes Disney+ Hotstar platform benchmarks

TESTIMONIAL

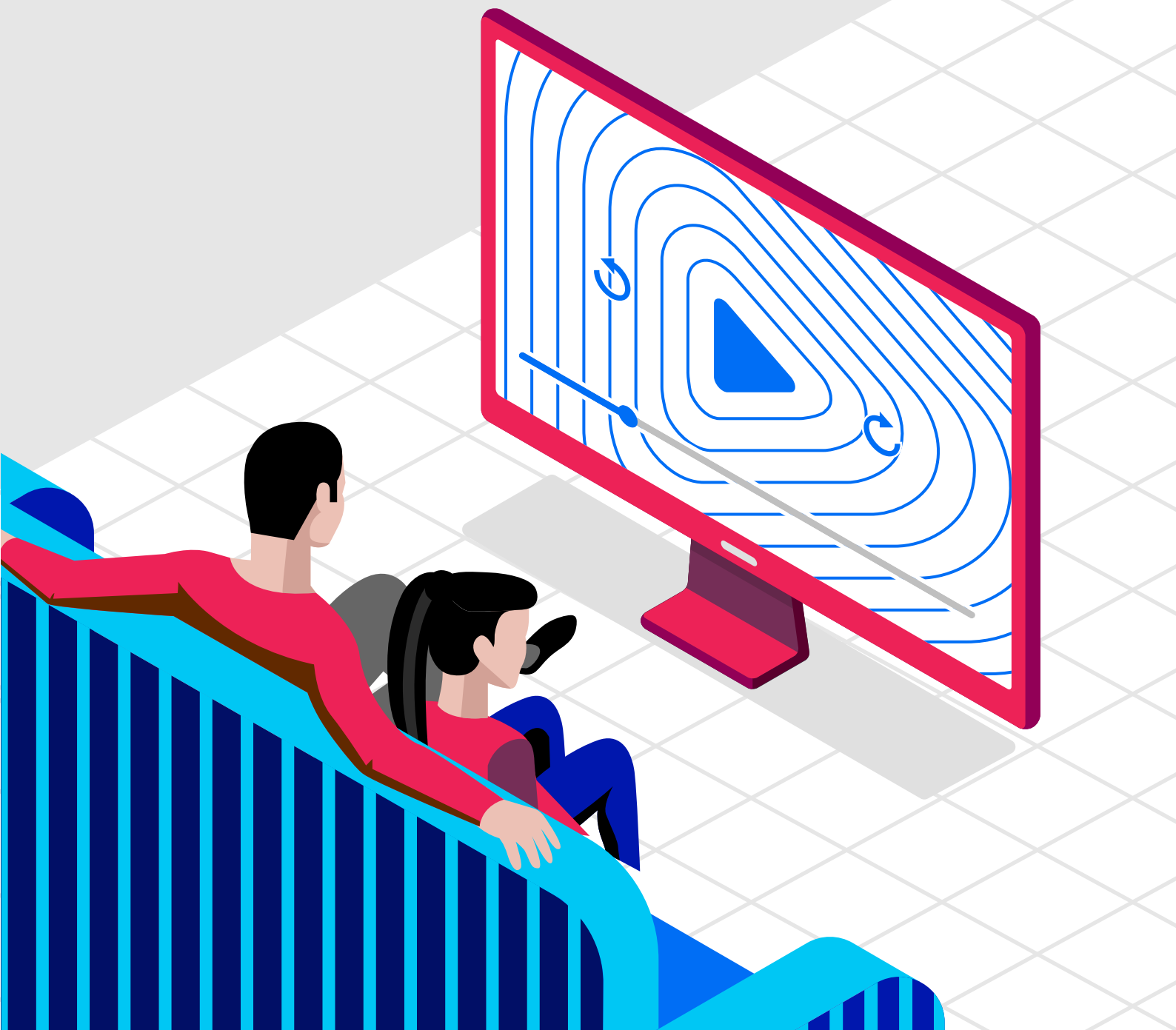
“At Rivaah by Tanishq, we strive to make the most special day of today's modern brides unforgettable with our fine jewellery that is symbolic of their culture and brings out the meaning of the many rituals that are a part of the Great Indian Wedding. Each piece of jewellery from our Rivaah line has been crafted with in-depth knowledge of the cultural symbolisym with fine attention to detail and craftsmanship. To connect with the new-age brides of today, we collbrated with Disney+ Hotstar CreativeWorks to leverage the power of engaging storytelling in the form of The Great Indian Bride. Our endeavour was to to capture the attension of today's modern bride via beautiful, powerful, real stories that celebrate the richness of our culture, the beauty of the jewellery that adorns this culture, and the resplendent bride herself. Disney+ Hotstar proved to be the right platform for us to collaborate due to their innovative approach to content, their in-depth understanding of their audiences, and their wide reach that enabled us to build a connect with today's modern brides at scale.”

Mansoor Khan, Head of Marketing, Services Group, Titan Company Limited

CHAPTER 6

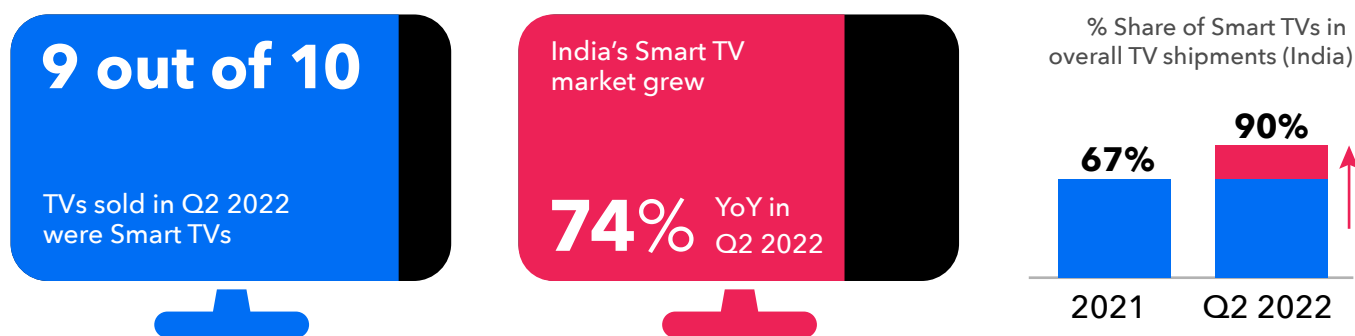
BIG SCREEN VIEWING

MAKES A COMEBACK
WITH OTTs



Content streaming, which had been gaining steady momentum, found its inflection point during the pandemic. Ever since, families have returned to "TV screens" to watch their favourite shows, movies, or live events together. The combination of OTT and CTV (ConnectedTV) has emerged as a highly popular medium for consumers to relish the convenience, range of choice, and unmatched curated content. CTVs are televisions with the ability to stream content via the internet. This includes televisions with built-in Wi-Fi modules, or using internet-enabled dongles, or even streaming via gaming consoles.

India is a young market for CTVs and has seen a significant uptick in recent years owing to the affordability of smart TVs, broadband plans, and OTT subscriptions.



KEY GROWTH DRIVERS



Growth of Smart TVs



Fast Broadband Speeds & 5G



Accessible Devices



Content at affordable price points /AVOD

KEY TAKEAWAYS

90% of all TVs sold in India are Smart TVs, with the market growing **74%** YOY in Q2 2022.

The average data consumption per user in India is around **20 GB per month**.

CTV subscriptions stood at 5 million in 2020 but doubled to **10 million in 2021**. By 2025, it is expected to increase to over 40 million.

Source: Mediasmart

CTV is bringing families together, with as many as 84% households having more than 1 person watching CTV. 64% respondents claimed to prefer watching CTV together with their families.

 **84%** Households have more than 1 people watching CTV

 **64%** Prefer watching with family

84% of users own smart TVs bigger than 32 inches, showcasing that when it comes to content on television, size does matter. Brands can leverage bigger screens for enhanced storytelling to engage with their target audiences. The average time spent watching CTV content has risen to nearly 4 hours, up from 3.5 hours in 2021.

OTT content has emerged as the most preferred choice of CTV audiences. 2X users claimed that they are more likely to watch OTT content/on-demand as compared to Creator Content on CTV (Source: Mediasmart).

KEY POINTS

As CTV consumers have growing discretionary spending power, targeting this premium segment will need marketers to have a strong OTT presence with a dedicated, high-impact OTT campaign strategy focused on engaging this exclusive segment.

CTV ensures that premium brands can reach relevant consumption audiences with minimal wastage.

KEY TAKEAWAYS

About **2/3**rd of CTV households are NCCS A.

82% of CTV viewers are ecommerce users.

OTT gets the highest share of watch time within CTV households. **76%** of CTV viewers subscribe to at least one OTT app.

31% of CTV viewers are Disney+ Hotstar subscribers.

Source: Mediasmart

Industry First CTV Measurement by Disney+ Hotstar in partnership with Kantar

Disney+ Hotstar partnered with Kantar to conduct an industry first 3P CTV Brand Lift Study to help brands measure and analyse the impact and performance of their CTV campaigns better and maximise ROI.

With a CTV device being common across all members of a household, a platform's native measurement framework has limited accuracy to precisely measure the campaign impact among its intended target audience.

Native BLS (Brand Lift Studies) by UGC (User-Generated-Content) platforms cannot deterministically evaluate the campaign effectiveness within its accurate target group. This is because these platforms cannot ascertain whether their target users are watching and then answering the survey or those who have not even watched their campaign are completing the survey.

Disney+ Hotstar's advanced framework leverages advanced analytics and regression based modelling to measure effectiveness within the right target group. The study also recommends optimum frequency for impact.

In partnership with Kantar, Disney+ Hotstar developed a solution that helps to precisely measure campaign impact within a brand's intended audience.

An assessment of 20+ campaigns determined that Disney+ Hotstar CTV campaigns have double the impact vs industry baseline for digital campaigns.

ROI vs Mobile



Reasons for higher ROI

- Less clutter
- Affluent audience reach at scale
- Enhanced viewing experience

ROI calculated as per rate card for mobile and CTV
"X" denotes Kantar India's mobile norms

CASE STUDY: MAMAEARTH

Leveraged Disney+ Hotstar's Connected TV (CTV) offering to create awareness and drive product consideration.

OBJECTIVE

Mamaearth's CTV campaign established the efficacy of its Ubtan Facewash through a 30-second-long video ad that detailed its strong ingredient story. Mamaearth wanted to establish the Ubtan Facewash's key benefit of 'shaadi wala glow' among Disney+ Hotstar's premium CTV audience base.



APPROACH

Their 30-second-long advertisement starring Bollywood Star, Shilpa Shetty, established its proposition based on its properties of de-tanning & providing 41% more glow. The longer edit helped establish its key ingredients, turmeric and saffron, which enjoy a strong resonance with beauty benefits & being natural and safe, in the Indian context.

IMPACT

Thus, leading to significantly higher salience, favourability and intention to buy among premium CTV audiences.



TESTIMONIAL

“Being a new brand known to create disruption in the D2C space, we are always looking for newer ways to reach our audiences. Content consumption on OTTs has seen massive growth in the recent past, and we wanted to leverage the same. Disney+ Hotstar enabled us to reach the right audiences in an impactful manner via their CTV targeting option. The results have been quite positive, which also reflected through positive movement in brand sales.”

Vidushi Goyal, AVP Marketing, Mamaearth

CASE STUDY: MAX LIFE INSURANCE

An exclusive association with Disney+ Hotstar's Connected TV (CTV) offering, Max life launched an ad film on its term plan for homemakers.

OBJECTIVE

Max Life Insurance launched its campaign on term plan for homemakers. The objective was to drive awareness around the need for a term plan for homemakers, who majorly are female, and drive purchase intent amongst them.



APPROACH

The brand leveraged Disney+ Hotstar's CTV offering to reach its target audience of females at scale to drive awareness.

Additionally, to reach deep within regional markets, the ad was also released in six languages including, Tamil, Kannada, Bengali, Marathi, Telugu, and Malayalam.

IMPLEMENTATION

Leveraged Disney+ Hotstar's CTV offering to reach a premium audience.

Identified top-viewed regional shows for targeted language-based advertising of the 20-second mid-roll ad, maximising campaign impact.

Demonstrated the effectiveness of CTV advertising and successfully integrated it into the marketing playbook.

"X" denotes Disney+ Hotstar platform benchmarks

OUTCOME

BRAND
AWARENESS UPLIFT



2.3X

PURCHASE
INTENT UPLIFT



5X

TESTIMONIAL

"With the increasing preference for OTT platforms in India, Connected TV (CTV) has witnessed a huge growth among the consumer base; becoming the go-to-medium for marketers to build the awareness-to-engagement funnel. Being the leading OTT service in the country, Disney+ Hotstar offers a host of opportunities for advertisers to get creative with ad formats and maximise engagement. We launched our 'Term Plan for Homemakers' campaign exclusively on Disney+ Hotstar CTV and this opened up avenues to reach a wider, gender-balanced audience; promoting our ad film's positive and reaffirming message of financially empowering women."

Rahul Talwar, EVP & Chief Marketing Officer, Max Life Insurance

ABOUT

DISNEY+ HOTSTAR

Disney+ Hotstar is India's leading streaming platform that has changed the way Indians watch their entertainment - from their favourite TV shows and movies to sporting extravaganzas. With the widest range of content in India, Disney+ Hotstar offers more than 100,000 hours of TV Shows and Movies in 18 languages and coverage of major global sporting events.

The logo features the word "Disney" in its signature script font, with a blue arc above it. To the right of "Disney" is a plus sign, followed by the word "hotstar" in a lowercase, sans-serif font.

Disney+ hotstar