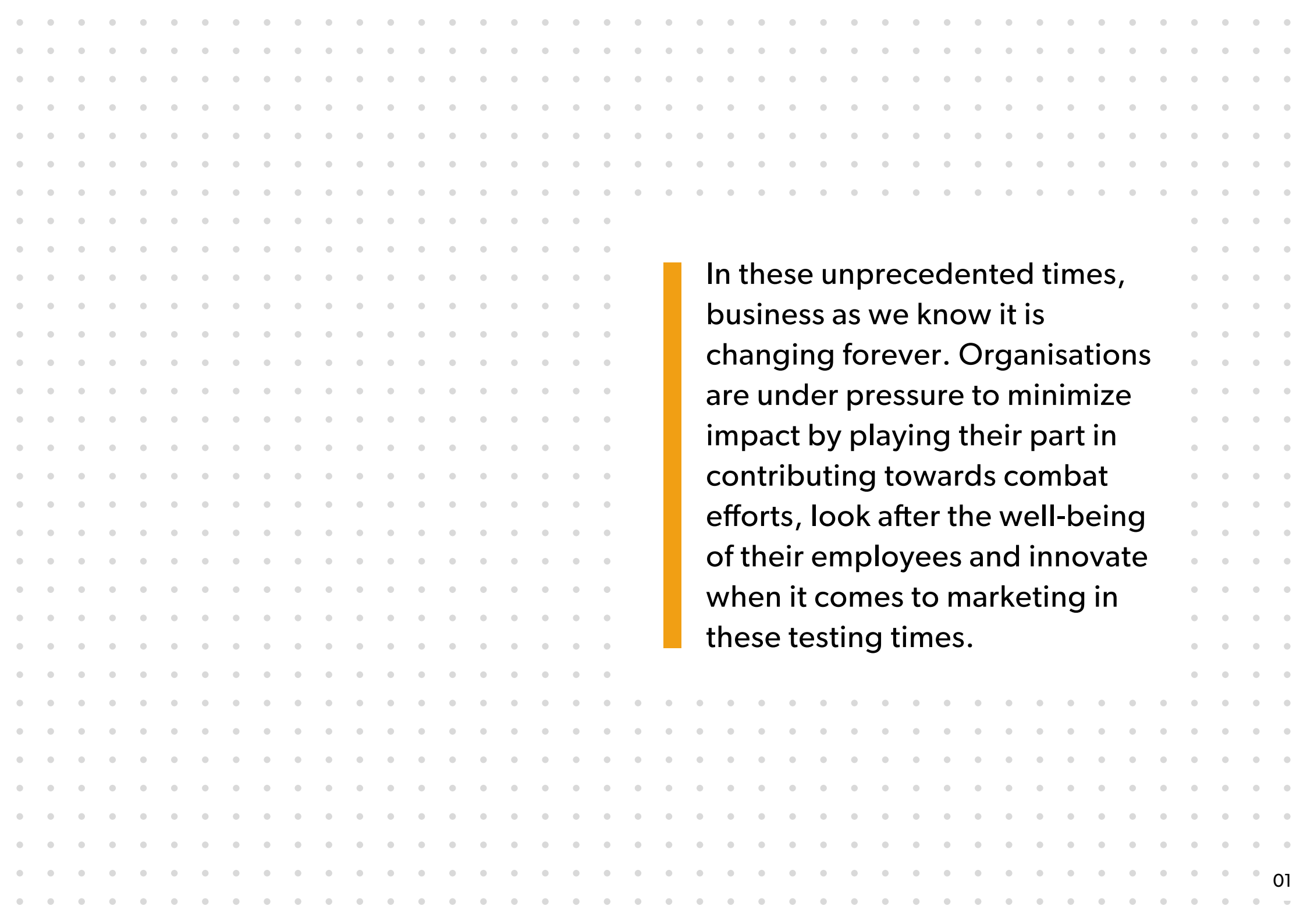



# Marketing in the time of Adversity

Insights &  
Inspirations by





In these unprecedented times, business as we know it is changing forever. Organisations are under pressure to minimize impact by playing their part in contributing towards combat efforts, look after the well-being of their employees and innovate when it comes to marketing in these testing times.



This guide is an effort to help agencies and marketers continue to connect with their consumers in these trying times.

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**01** Platform &  
Industry Trends

**02** Learnings &  
Guidelines

**03** Inspirations from brands  
on Disney+ Hotstar

**01**

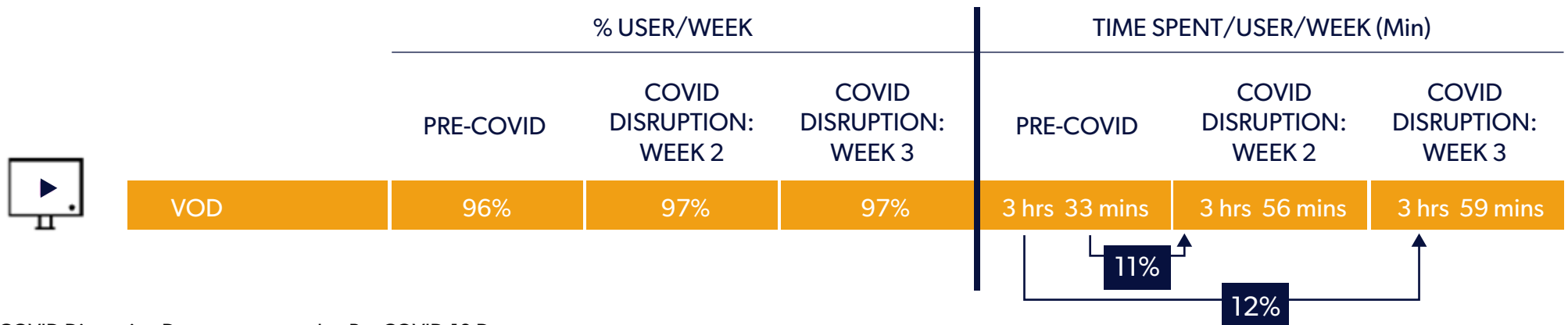


**PLATFORM &  
INDUSTRY TRENDS**

# 4 HOURS WEEKLY ON VOD: THE NEW NORMAL ON SMARTPHONES

People are at home spending even more time than they normally do online – consuming video content, social media and chat applications. Consumers are constantly demanding more entertainment options to keep themselves occupied. What better opportunity can there be for brands' digital campaigns and socially relevant messages?

Users are spending 4 hours on video on demand (VOD), making it a preferred platform for brands to showcase their messaging

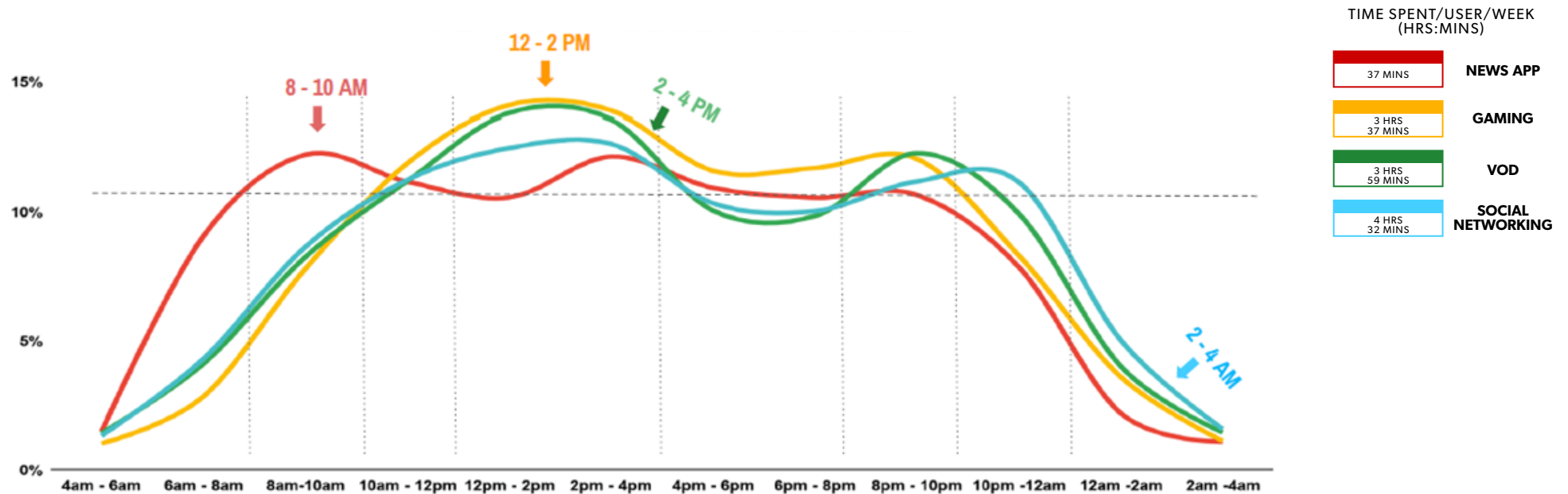


COVID Disruption Data as compared to Pre COVID-19 Data

# NEWS FOR MORNINGS, ENTERTAINMENT FOR ALL OTHER TIMES













As consumers spend more time indoors, all time is emerging as prime time on VOD.

Hourly share of time spent on categories



# INDIA IS WATCHING DISNEY+ HOTSTAR

12 out of the top 15 shows watched on OTT are on Disney+ Hotstar.

1  Money Heist, Netflix	2  Aaj Tak, Disney+ Hotstar	3  Mahabharat, Disney+ Hotstar	4  ABP News, Disney+ Hotstar	5  ABP Ananda, Disney+ Hotstar
6  Bigg Boss, Voot	7  Devon ke Dev..Mahadev, Disney+ Hotstar	8  Panchayat, Prime Video	9  Yeh Rishita Kya Kehlata Hai, Disney+ Hotstar	10  Mission Mangal, Disney+ Hotstar
11  Chichhore, Disney+ Hotstar	12  Savdhaan India- F.I.R., Disney+ Hotstar	13  Angrezi Medium, Disney+ Hotstar	14  How I Met Your Mother, Disney+ Hotstar	15  Housefull 4, Disney+ Hotstar

Based on COVID Week 4, 4th-10th April 2020

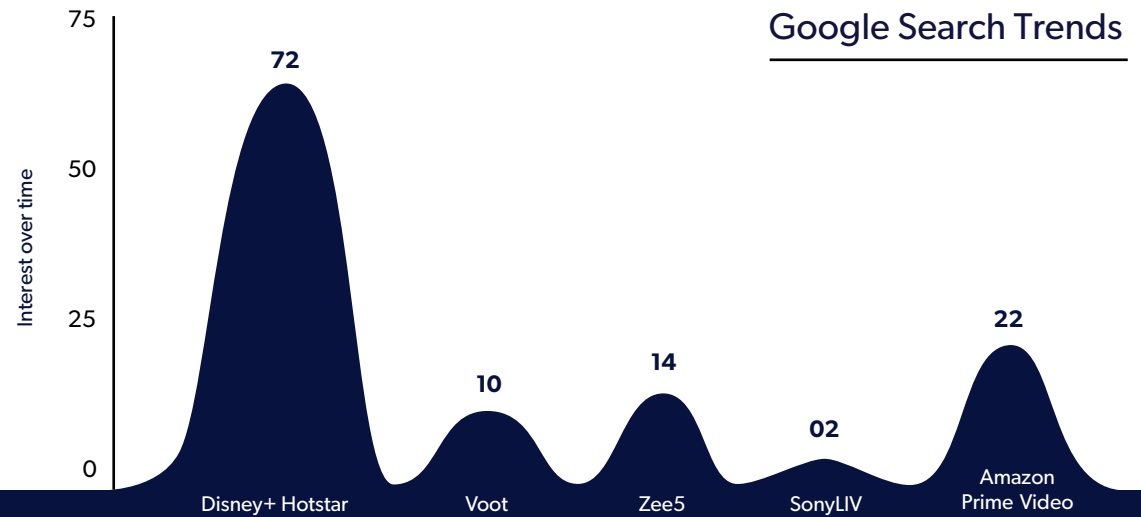
8 out of the top 10 movies watched across OTT are on Disney+ Hotstar.

1  Mission Mangal, Disney+ Hotstar	2  Chichhore, Disney+ Hotstar	3  Angrezi Medium, Disney+ Hotstar	4  Housefull 4, Disney+ Hotstar	5  Arjun, Disney+ Hotstar
6  The Lion King, Disney+ Hotstar	7  Aladdin, Disney+ Hotstar	8  Frozen II, Disney+ Hotstar	9  Good Newzz, Prime Video	10  Shikara, Prime Video

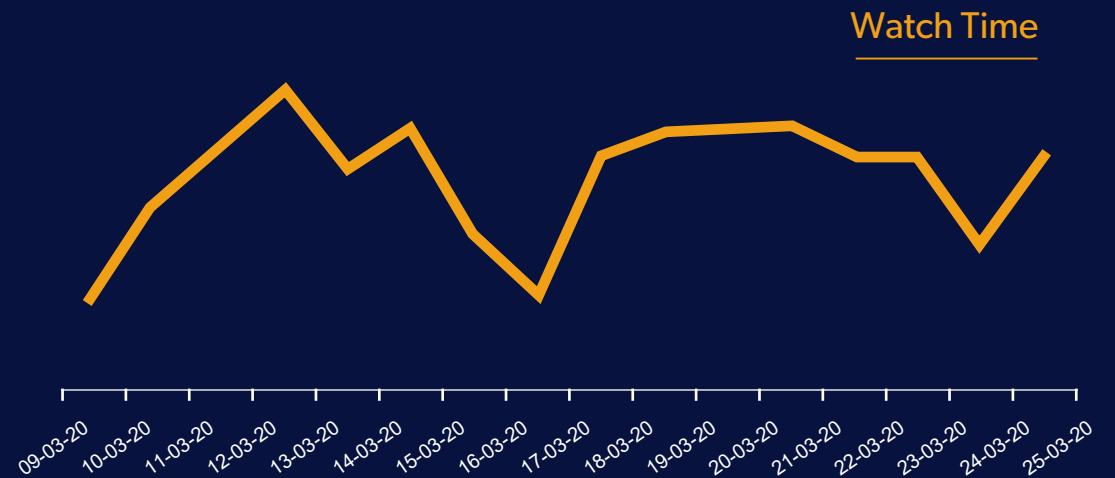
Based on COVID Week 4, 4th-10th April 2020

# DISNEY+ HOTSTAR IS ON TOP OF CONSUMERS' MINDS

Disney+ Hotstar is the most searched OTT platform with 2.6x search volume vs the next biggest platform.



Disney+ Hotstar is seeing an uprise in the time spent and content consumed on the platform. The daily watch time has surged by 11% since mid-March 2020.



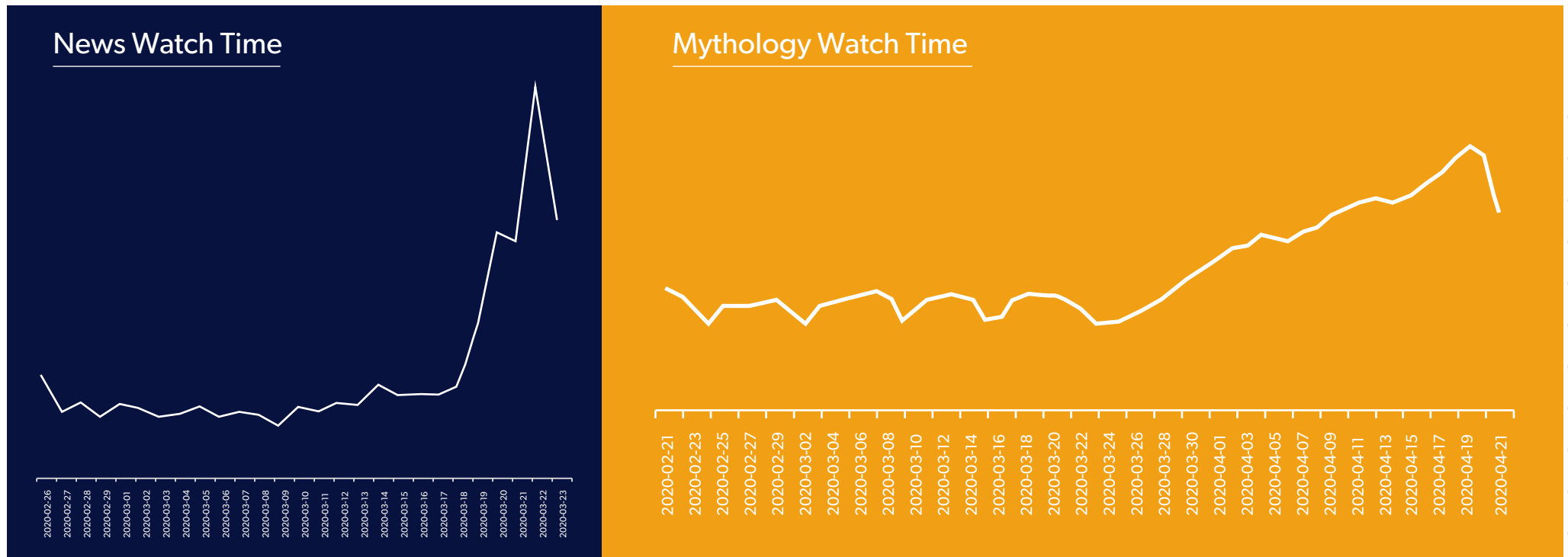
OTT Search Trends  
(Source: Google Trends, 22nd March - 24th April 2020)  
Source - Disney+ Hotstar



# GENRES LEADING THE GAME: NEWS & MYTHOLOGY

- Mythology content has seen an increase of 75% in watch time driven by Mahabharat
- News viewership has grown 8x in terms of watch time and 4x in terms of reach
- Action, Comedy, Drama are key genres which have also seen a spike in consumption

There is a rise in consumption of family-friendly content.

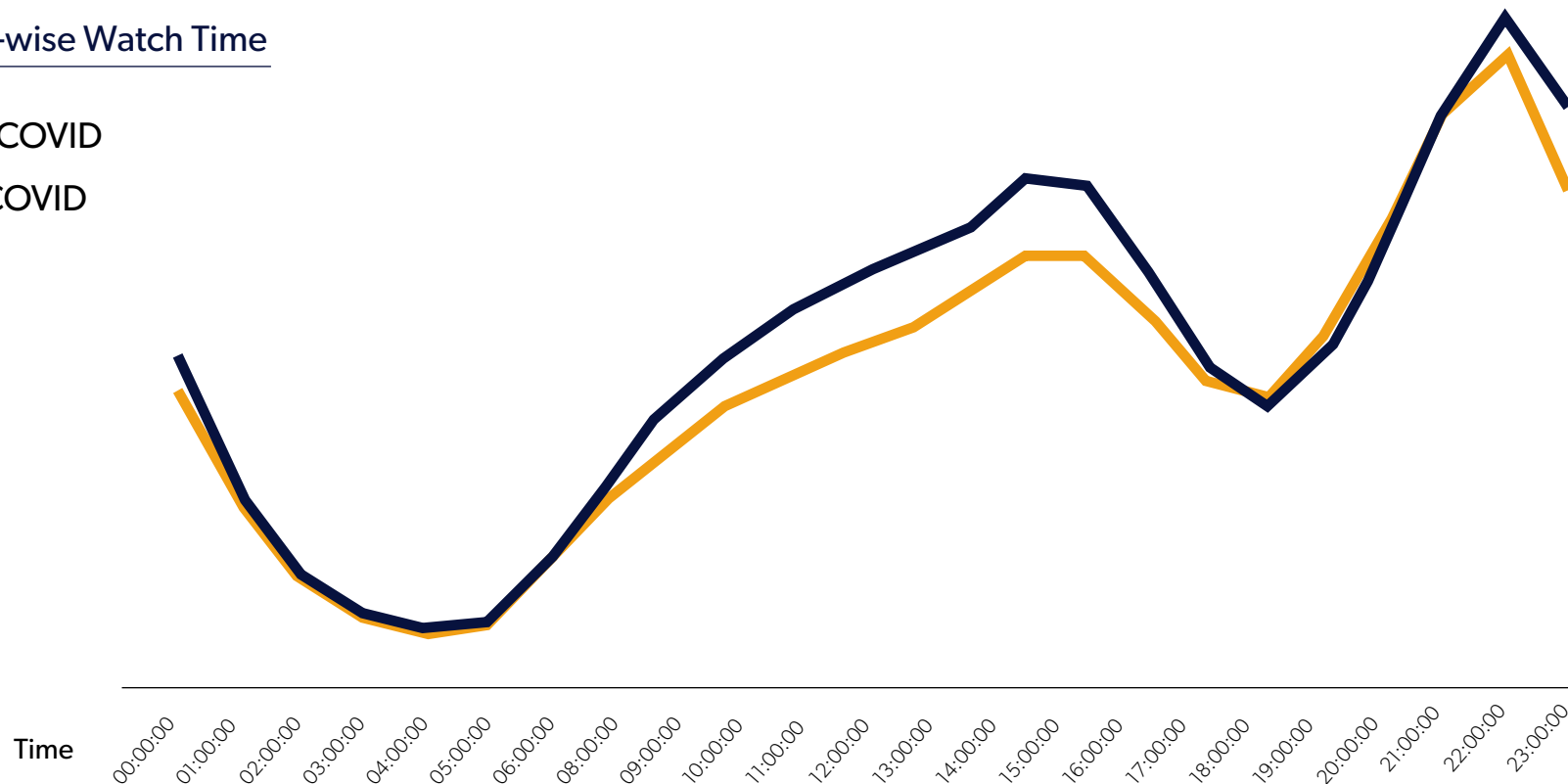


# A NEW PRIME TIME HAS EMERGED

More at-home time has led to a surge in content consumption in the afternoon time-band. People are staying indoors and have uninterrupted viewing time.

Timeband-wise Watch Time

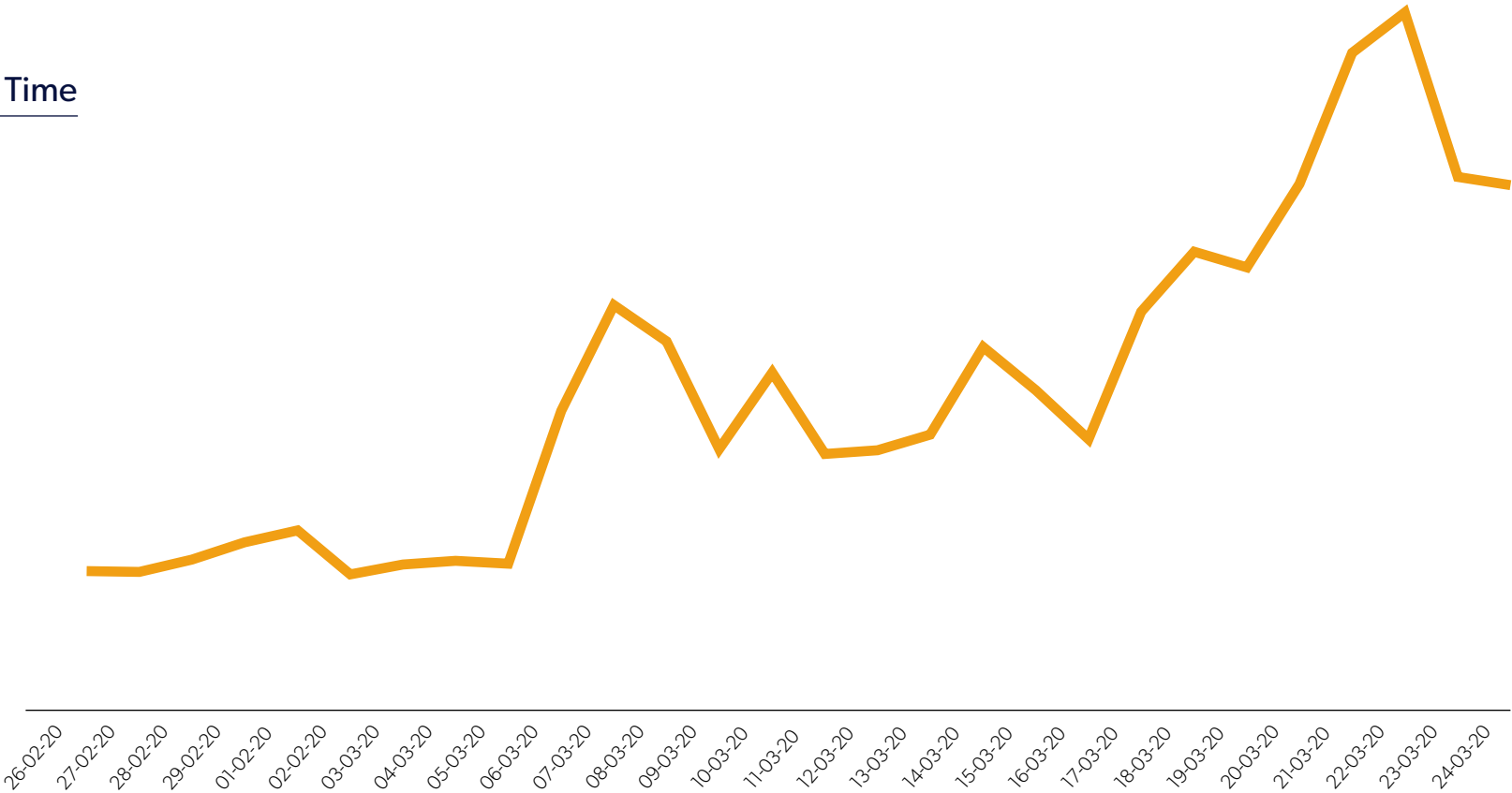
■ Post - COVID  
■ Pre - COVID



# CONNECTED TVs SEE A SPIKE IN GROWTH

Connected TV (CTV) watch time has spiked by 85% since the start of March 2020. The daily reach on CTVs has grown by 60% in the same period.

CTV Watch Time



# SUMMING UP INSIGHTS THAT IMPACT MARKETERS

By virtue of being the biggest OTT platform in the country, consumption and user engagement have seen a huge surge.

Here are the key highlights:

## **OTT = Disney+ Hotstar:**

- Most searched OTT platform, 2.6x search volume vs next biggest platform
- 11% surge in daily watch time
- 80% spike in connected TV watch time, 60% rise in reach
- Majority of top content viewed by India is on Disney+ Hotstar

## **Genres that lead consumption:**

- News viewership has grown 8x in terms of watch time and 4x in terms of reach
- Mythology content has seen an increase of 75% with family-friendly content growing in viewership
- Action, Comedy, Drama are key genres which have also seen a spike in consumption

## **Engaged Audiences:**

- 20 -25% of daily viewers are interacting with the social feed which is 1.6x that of live sports
- Daily engagement of viewers has gone up by 18% to 47 mins/day on entertainment
- Content consumption in the afternoon time-band has shot up by 20%

**02**

**LEARNINGS &  
GUIDELINES**

# BRANDS SHOULD COMMUNICATE NOW, MORE THAN EVER

Consumers are open to brand conversations and are appreciating brands that understand the times we are in. In fact, research shows consumers even approve of business-as-usual advertising.

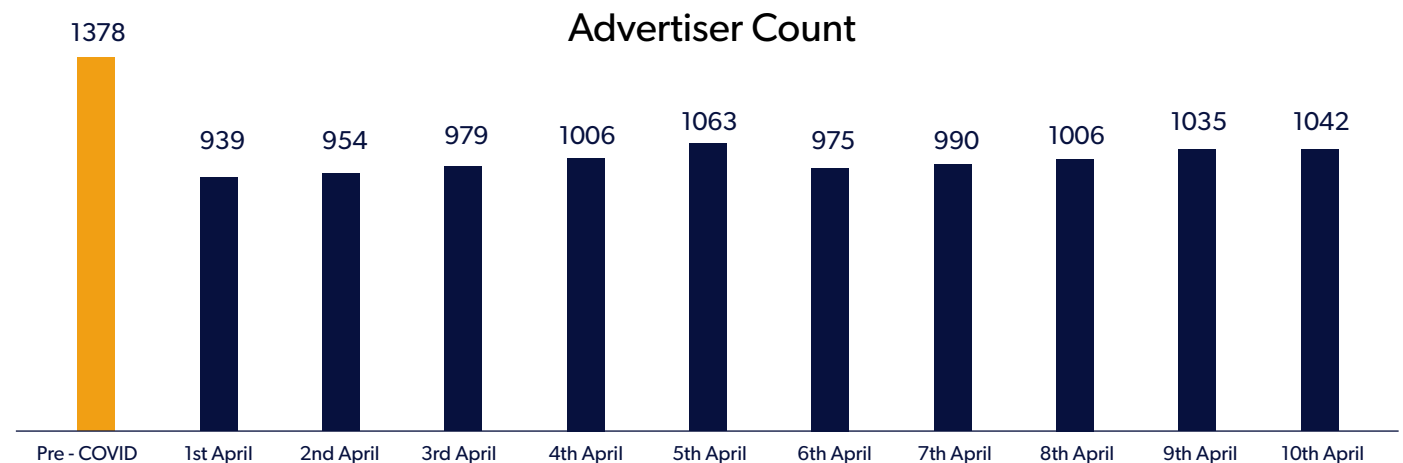


**9 out of 10**  
Approve of brands  
showing solidarity



**65%**  
Approve of "normal"  
advertising

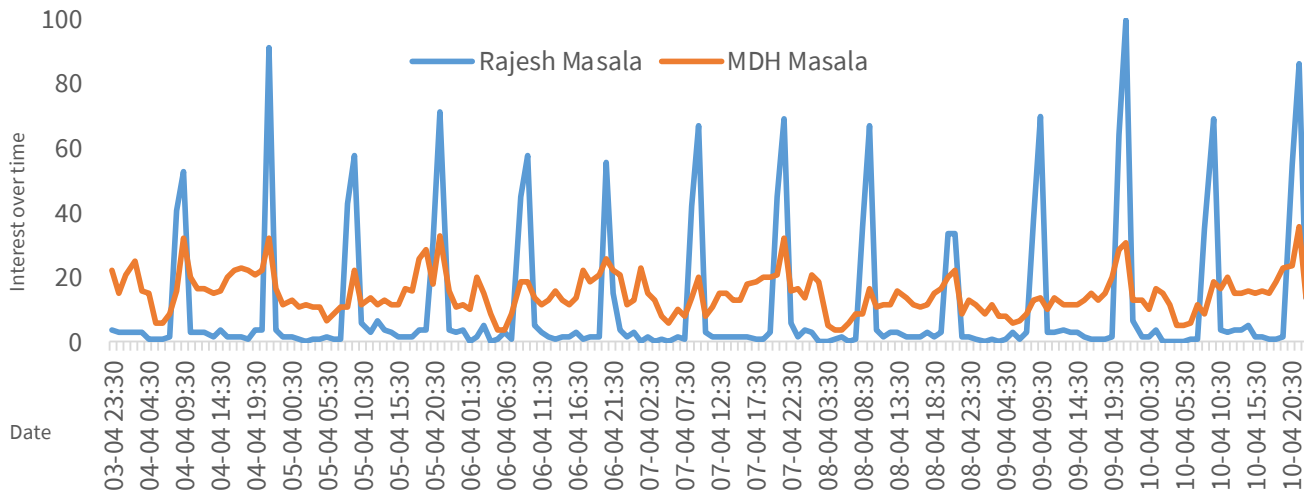
72% advertisers continue to remain active



# CHALLENGER BRANDS ARE CHANGING THE STATUS QUO BY ADVERTISING

Brands that are active now are seeing a direct co-relation between marketing efforts, social chatter and search trends. As seen here, Rajesh Masala has been able to overtake market leader MDH Masala by being active.

## Brands which are advertising outperform market leaders in terms of search interest



## Consumer mentions related to the ads



#21days lockdown  
@Sirineets  
Insights from watching #Ramayan on #Doordarshan  
Amul doodh - desh ka doodh!  
Rajesh masale- desh ka masale!  
Tiranga agarbathi - desh ki Kushboo!  
Ghadi detergent - desh ka detergent!



10:06 AM - Apr 7, 2020 from Anekal, Bangalore, India - Twitter for Android



Rajesh masale  
Rakesh Masale  
Dev darshan agarbatti  
Goldie Masale  
Supreme plastic products  
Zaalim lotion  
Tiranga agarbatti  
Madhusudhan pashu aahar  
Hilton masale...  
Products that we never knew existed #Ramayan

10:07 PM - Apr 9, 2020 - Twitter for iPhone



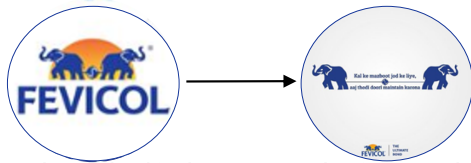
My #Lockdown21 resolution. What is yours?  
I'm going to buy only the following, search for them if they aren't available:  
1. Balaji chips  
2. Amul dark chocolate  
3. Gadi soap  
4. DevDarshan Agarbathi  
5. Rajesh masala  
Can one get more jobless than this? 🙄

7:21 AM - Apr 8, 2020 - Twitter for Android

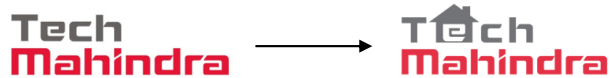
# BRANDS ARE BEING APPRECIATED FOR PUTTING OUT TOPICAL CONTENT

Brands understand that relevance is even more critical at this time.

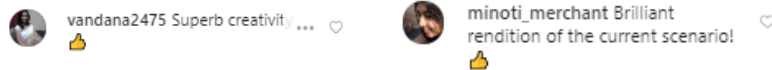
## Creativity of brands in sending out informative messages was appreciated



Fevicol tweaked its logo to emphasize social distancing



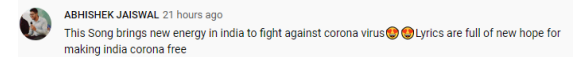
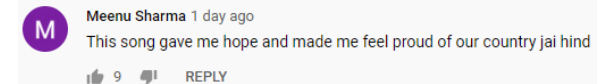
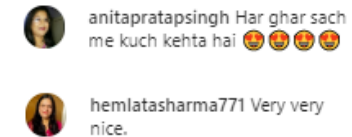
Tech Mahindra updated its logo temporarily to stress on Staying Home



## Brands taking care of small suppliers and upstream value chain also generated positive sentiment



## Positive, uplifting messages by brands stood out for raising the spirits of people



## The sentiment for indigenous brands is particularly high during these troubled times

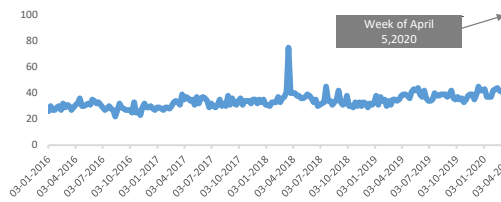




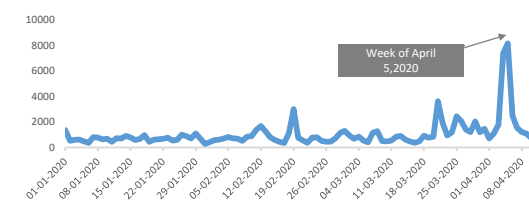
# BRINGING IN NOSTALGIA AND SELFLESSNESS IS HELPING WIN CONSUMERS HEARTS

Amul saw a surge in search and social mentions triggered by its old ads being run during Ramayan.

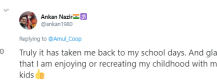
Google Search Index on Amul: India (1st Jan 2016- 10th Apr 2020)



Social Media Mentions on Amul: 1st Jan 2020 – 10th Apr 2020



Viewers associated the ad with old times and where they were when they last saw the ad



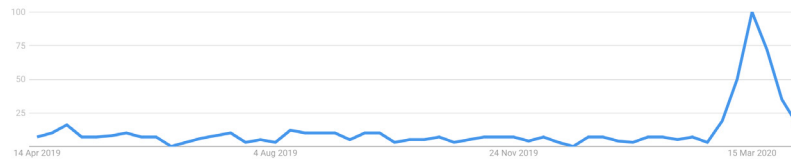
Some viewers thanked the brand for showing the old advertisements with specific appreciation to its quality in terms of content



Specific elements of the advertisements like the actor and the music was highlighted and talked about by viewers.



Lifebuoy witnessed an upswing in searches.



Positive sentiment towards their ad urging citizens to wash hands using any soap; Fans appreciated Lifebuoy's selfless campaign during such an adverse time



People: We're gonna use Lifebuoy.



Fans have also remembered the classic ads of Lifebuoy and associate it with one of the brands with timeless campaigns



Inne mil gaye SARDAR Ji @dijitidosanjh



David Boon (@boovin - Mar 22)



# KEY GUIDELINES FOR EFFECTIVE MESSAGING

## **Keep going:**

When it's dark, you don't turn out the lights. You switch them on. This is no time to step back from your marketing efforts; instead, it's time for action. It's time for brands to recalibrate marketing strategies, modify messaging and make bold choices.

## **Messaging is the ultimate key:**

Brands need to be careful not to come across as opportunistic during these times. Being compassionate and positive in messaging will define their relationship with consumers over the long term.

## **Keep the following criteria in mind:**

- Social relevance: Spreading social awareness, tips to stay safe and healthy
- Nostalgia: Bringing back advertising relevant to the current times
- Topical marketing: People are thinking of little else during the lockdown, so brands are building association by going topical

## **Creatives are not a deterrent:**

You can't shoot content as you normally would. However, brands are refusing to be deterred by this; they're showcasing their creativity through home-shot videos. There is a great opportunity to use influencers to tell brand stories via customised, self-shot videos.

**03**

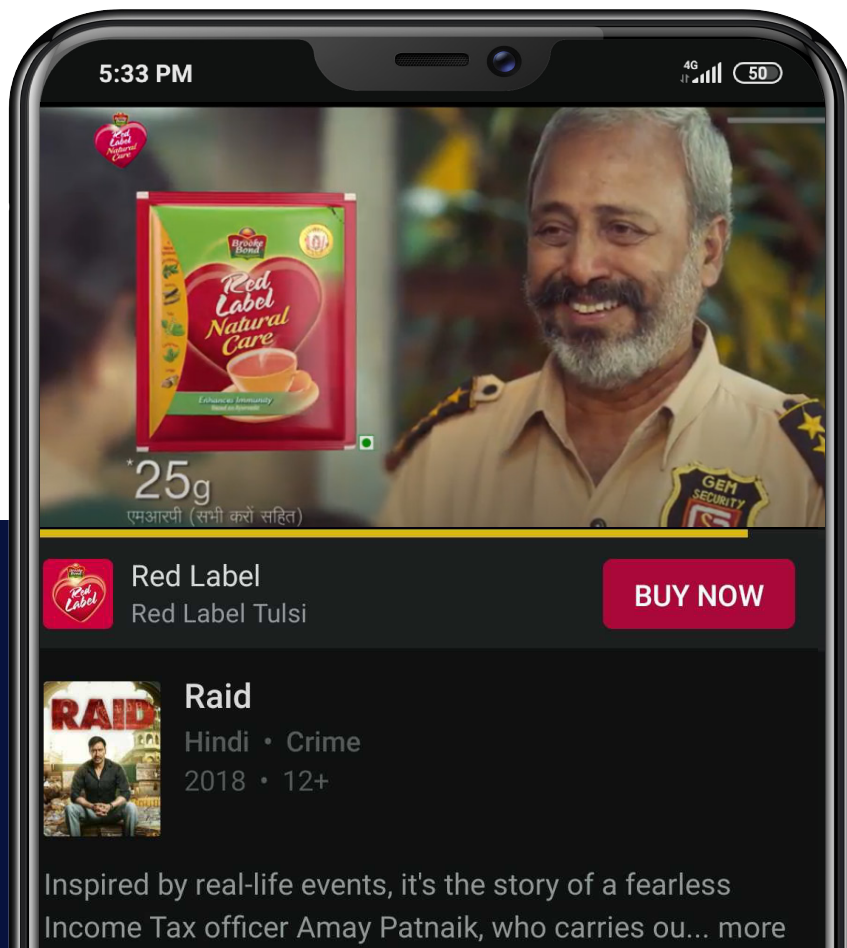
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**INSPIRATIONS  
FROM BRANDS ON  
DISNEY+ HOTSTAR**

# A PERFECT MARRIAGE: BRAND CONNECT AND THE CURRENT TIMES

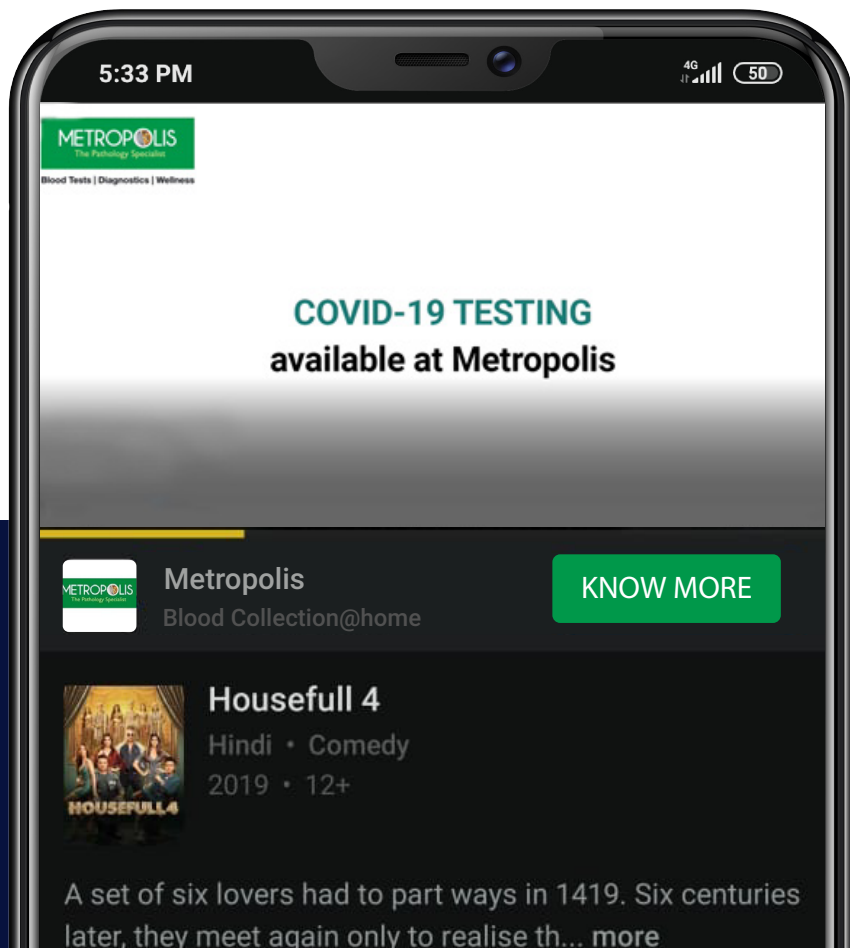
Given the current focus around immunity-building, Red Label has re-introduced its old ad which highlights the immunity-boosting benefit of their Red Label Natural Care range of tea.

Ariel has brought back its #ShareTheLoad ad urging men to share the burden of household chores. This ad is relevant in current times.

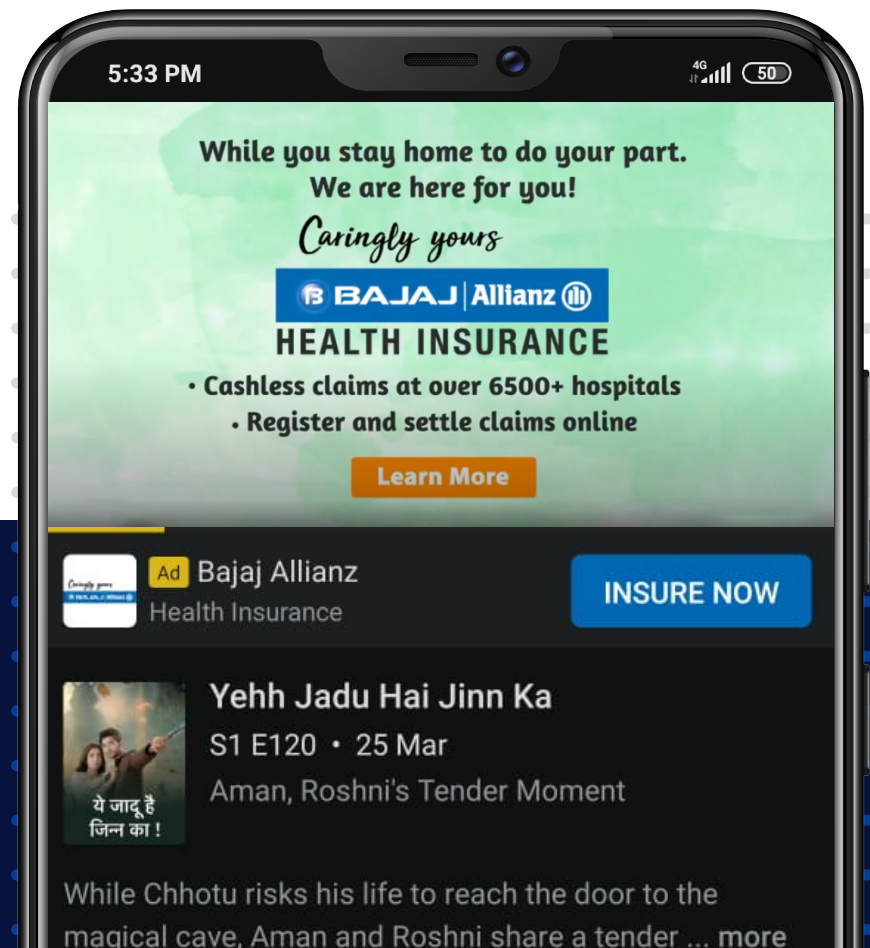


# A BRAND IN NEED IS A FRIEND INDEED

Metropolis is spreading awareness around its COVID-19 testing service, a key offering right now.



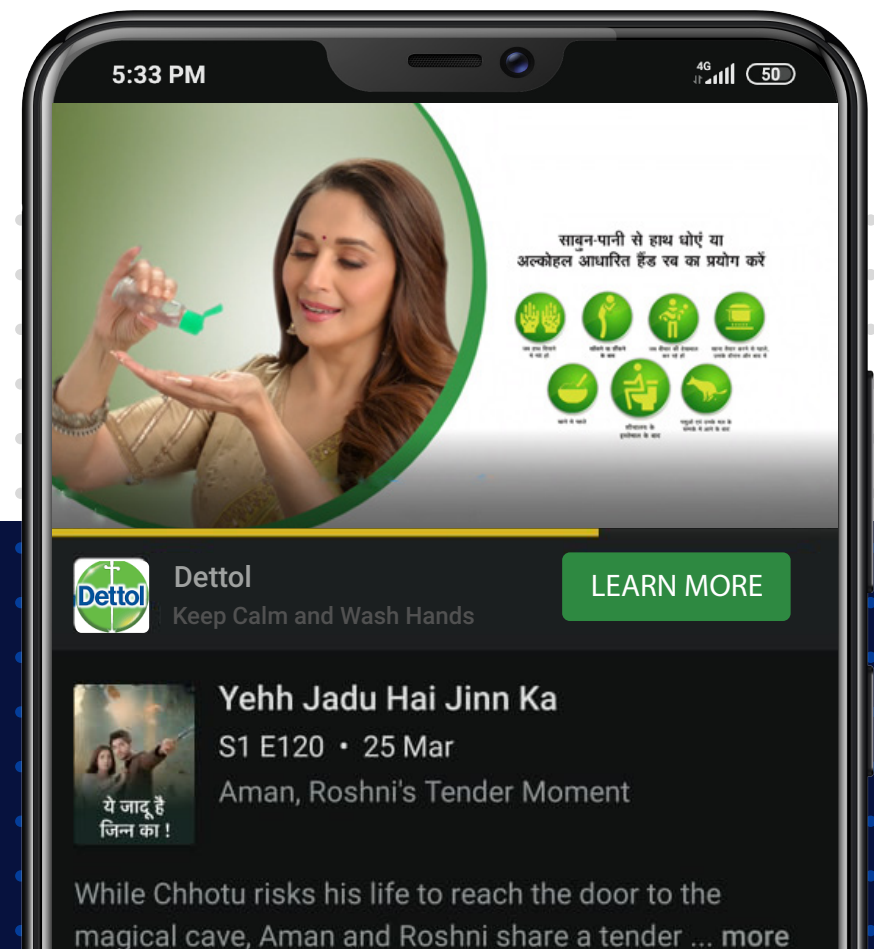
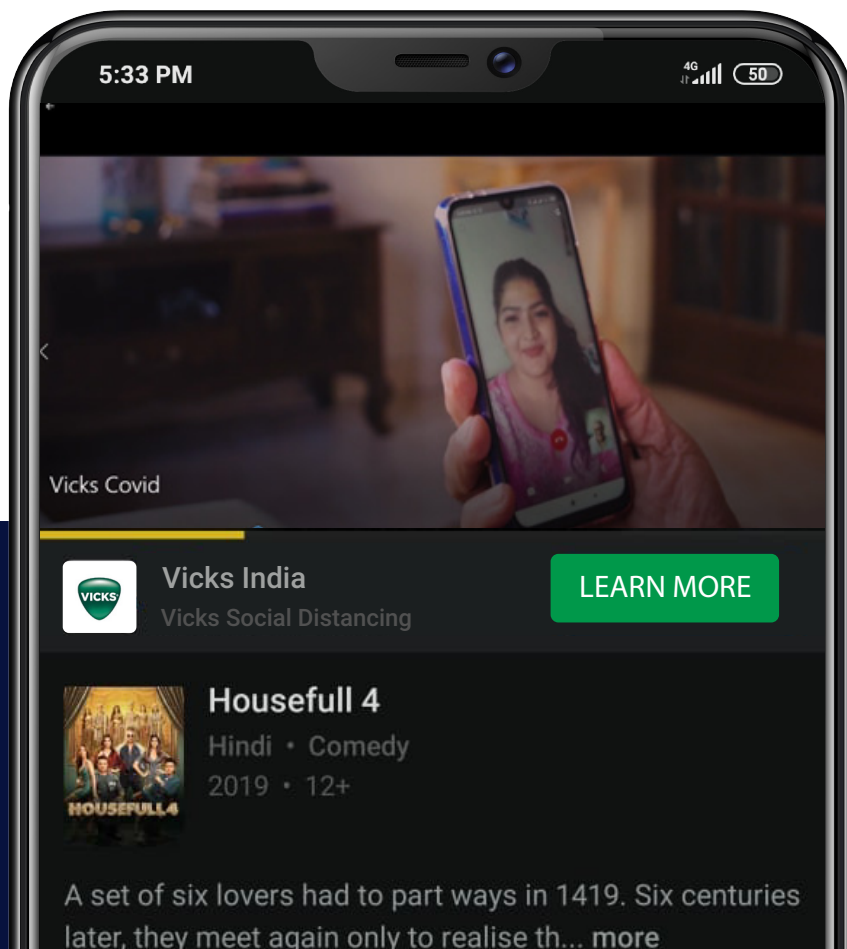
Bajaj Allianz is talking about their cashless medical insurance which is relevant in current times.



# SPREADING AWARENESS: A TACTIC THAT'S NEVER OFF THE MARK

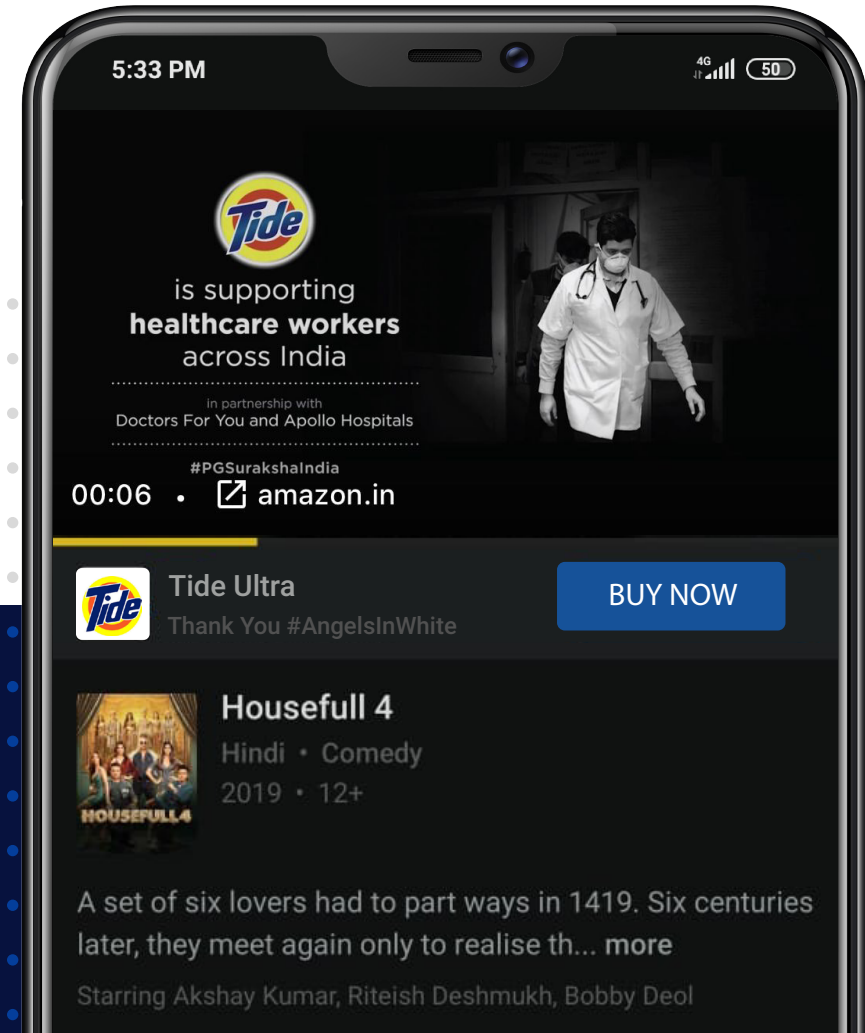
Vicks' topical film reminds us to stay connected with each other while we stay indoors. It ends with the message, #ShowWeCare by staying in touch remotely.

Dettol is spreading awareness around the importance of washing hands regularly with either a soap or a handwash, to stay safe from COVID-19.



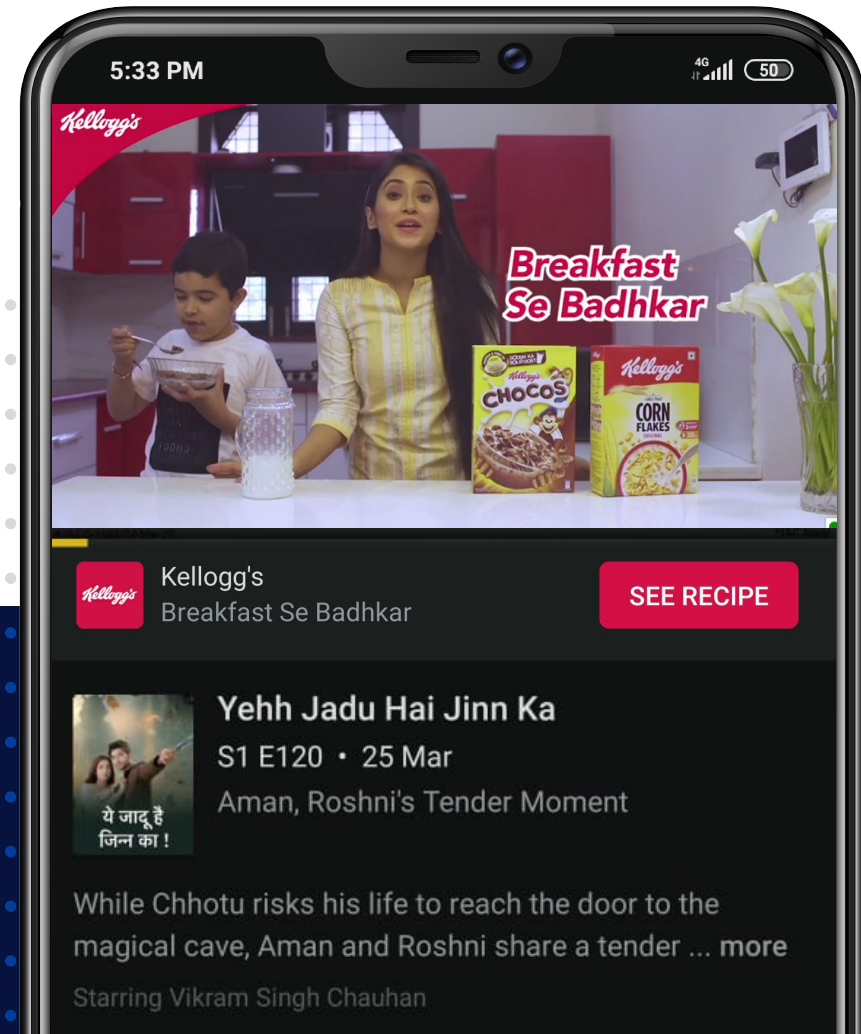
# SHOWING SOLIDARITY GOES A LONG WAY

Tide shows solidarity in the fight against COVID-19 by thanking healthcare workers – referred to as 'Angels in White' – in their topical film.



# BEING INNOVATIVE DURING TRYING TIMES


Kellogg's has partnered with Disney+ Hotstar to share their brand message via customized self-shot videos by influencers.





## **Disney+ Hotstar Ad Sales Initiative**

To encourage the spread of social awareness in this time of crisis, Disney+ Hotstar would like to announce a partnership initiative for brand campaigns with social messaging around COVID-19. For campaigns that have this message, Disney+ Hotstar will contribute 20% of the brand's advertising investment made on its platform. These campaigns will be run on a composite mix of news (upto 10s pre-rolls) and entertainment.



To know more on  
how to plan your campaign,

write to us at

**[advertise@hotstar.com](mailto:advertise@hotstar.com)**