



Entertainment Unlimited

Unlocking Growth: Strategic Insights for the LioCinema & JotStar OTT Merger

A powerful alliance is reshaping how India watches. This Jan-Nov 2024 analysis across 7 core metrics reveals how the reach of LioCinema and the storytelling depth of JotStar can come together to deliver an unmatched viewing journey – setting the stage for the nation's top streaming service.



Subscribers Analysis



Content Analysis



Activity Analysis



Consumption Analysis



Up/Downgrade Analysis



Revenue Analysis

Total Users
44.6K 

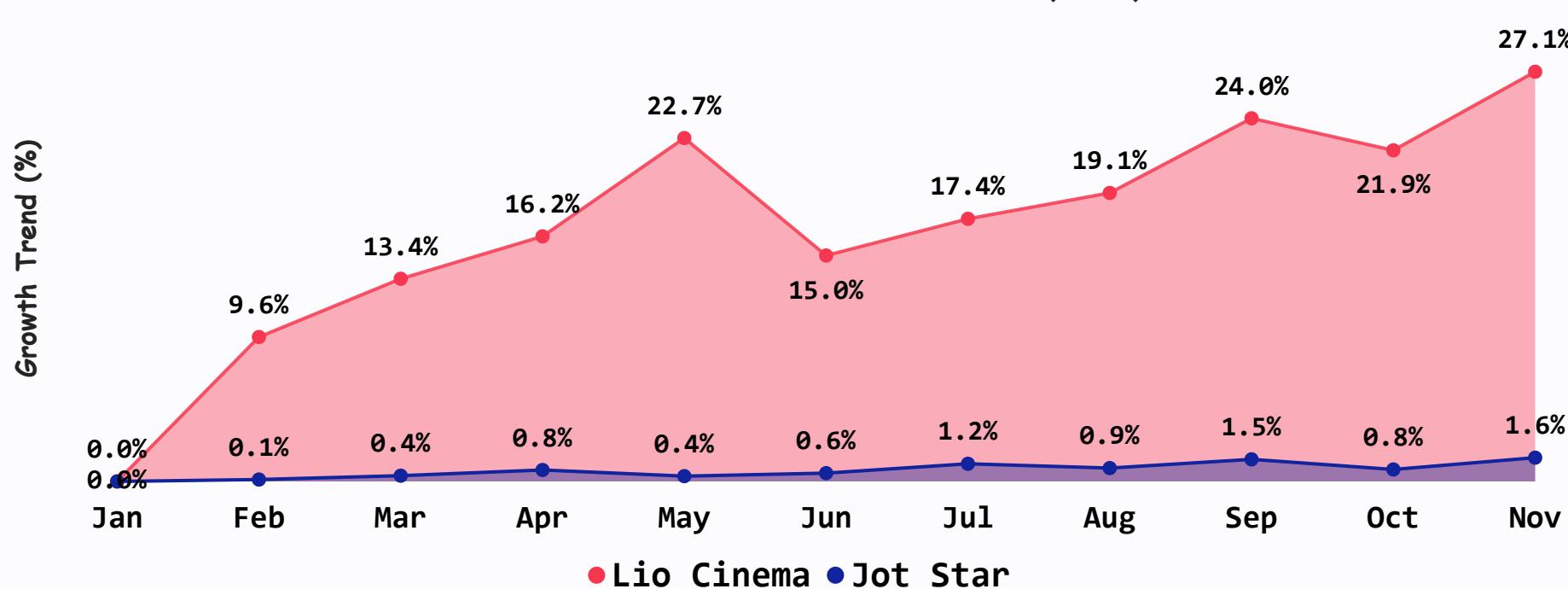
Overall Share %
19.6% 

Overall Users
228.1K 

Total Users
183.4K 

Overall Share %
80.4% 

Subscribers Growth Trends (MOM)

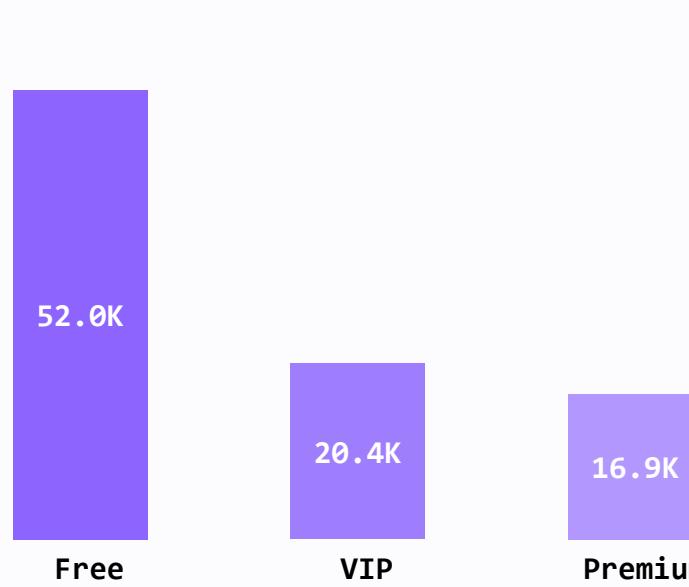


Subscribers Growth By Months

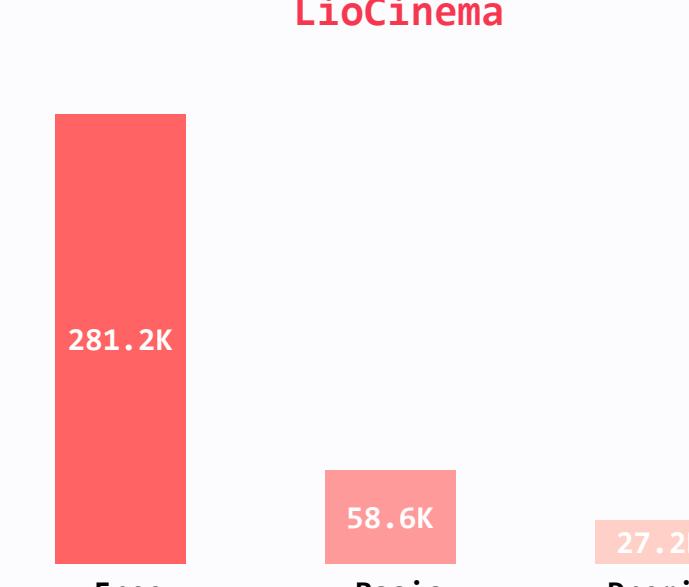
Months	JotStar Users	LioCinema Users	MOM% JotStar	MOM% LioCinema
January	3934	6758	0.0%	0.0%
February	3939	7404	0.1%	9.6%
March	3954	8397	0.4%	13.4%
April	3984	9759	0.8%	16.2%
May	3998	11977	0.4%	22.7%
June	4020	13768	0.6%	15.0%
July	4067	16161	1.2%	17.4%
August	4103	19247	0.9%	19.1%
September	4163	23873	1.5%	24.0%
October	4196	29105	0.8%	21.9%
November	4262	36997	1.6%	27.1%

Total Subscriptions For Each Plan by Platform

JotStar

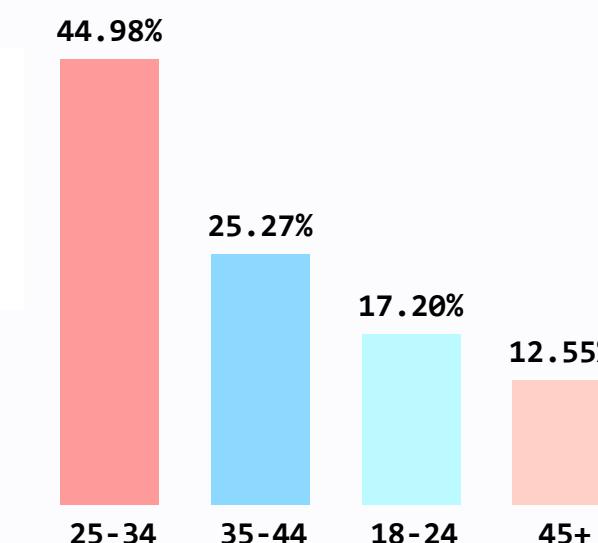


LioCinema

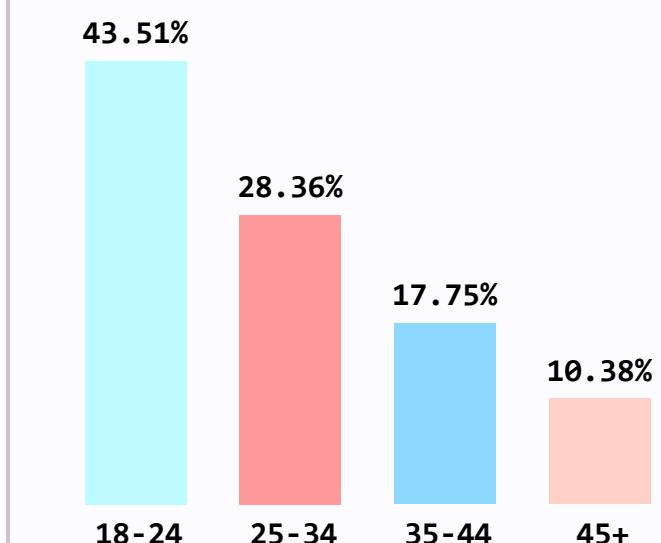


Distribution of Users by Age Group/City Tier

JotStar



LioCinema



Age Group

City Tier

Content
2360

Languages
10

Content Types
3

Genre
12

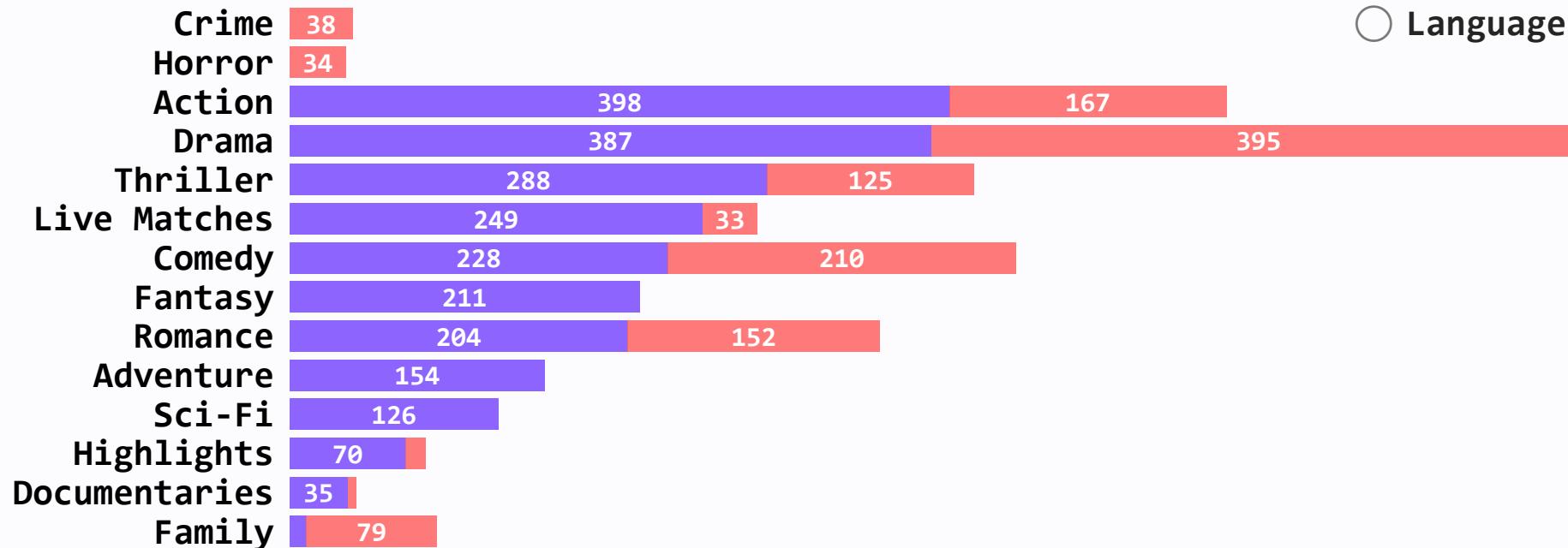
Content
1250

Languages
7

Content Types
3

Genre
11

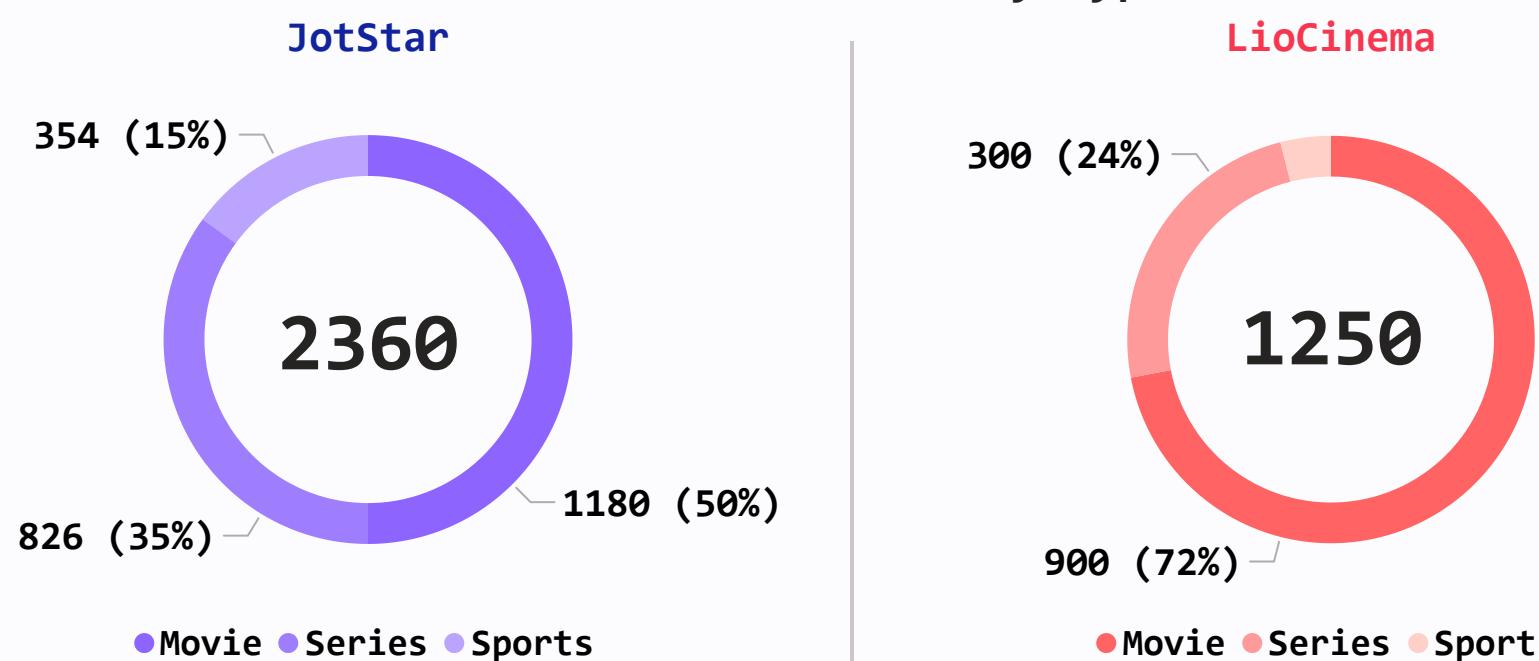
Content Breakdown



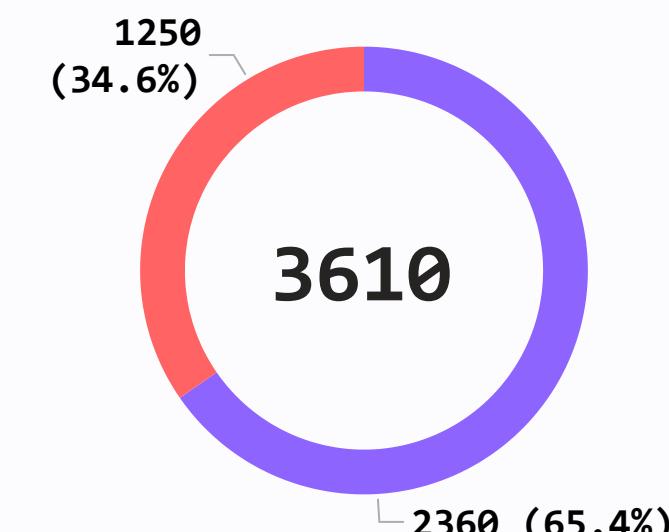
Content Distribution by Language and Content Type

language	LioCinema Content	JotStar Content	Total Content items
Hindi	424	637	1061
English	56	800	856
Telugu	242	244	486
Tamil	221	251	472
Kannada	118	121	239
Malayalam	121	118	239
Marathi	68	74	142
Bengali	0	60	60
Gujarati	0	28	28
Punjabi	0	27	27

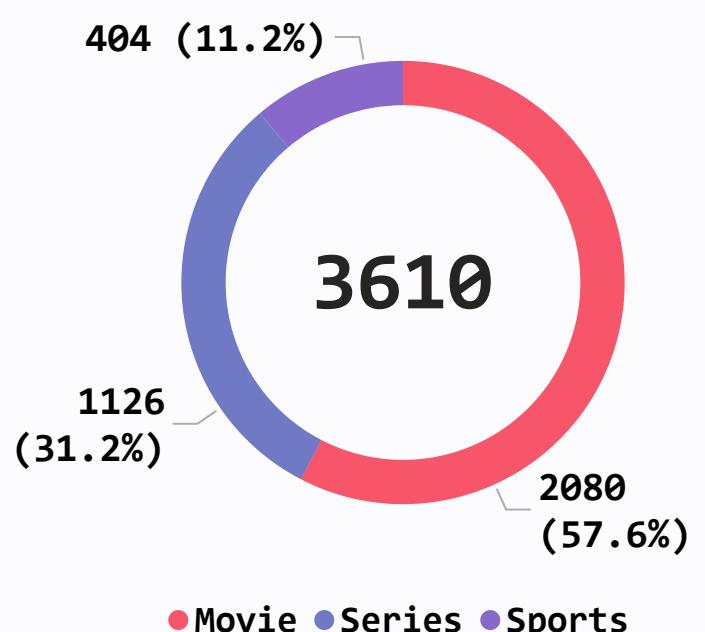
Content Breakdown by Type



Content Share(%) By platform



Content Share(%) By Content Type



Active
38.0K

Active %
85.1%

Inactive
5.6K

Inactive %
12.5%

Active
101.1K

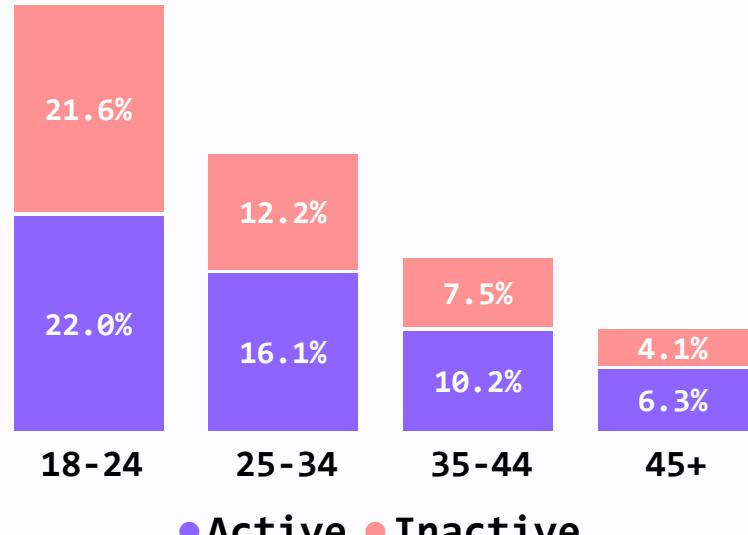
Active%
55.1%

Inactive
72.3K

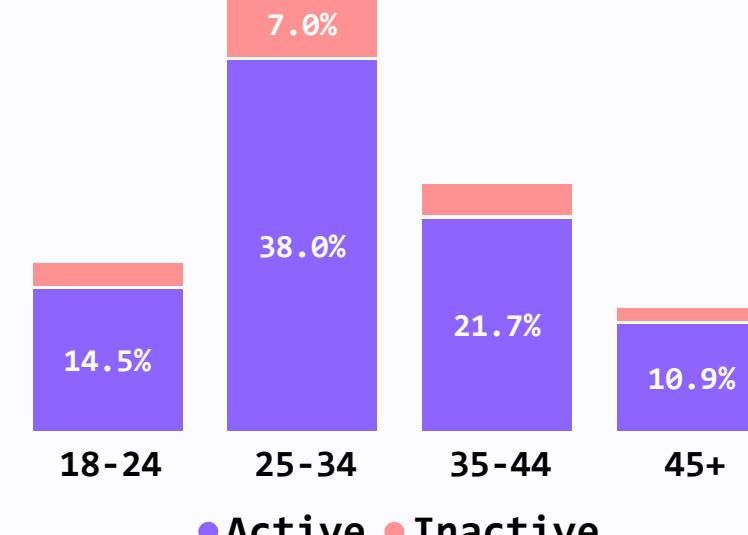
Inactive%
39.4%

Active VS Inactive (%) Users by Age Group

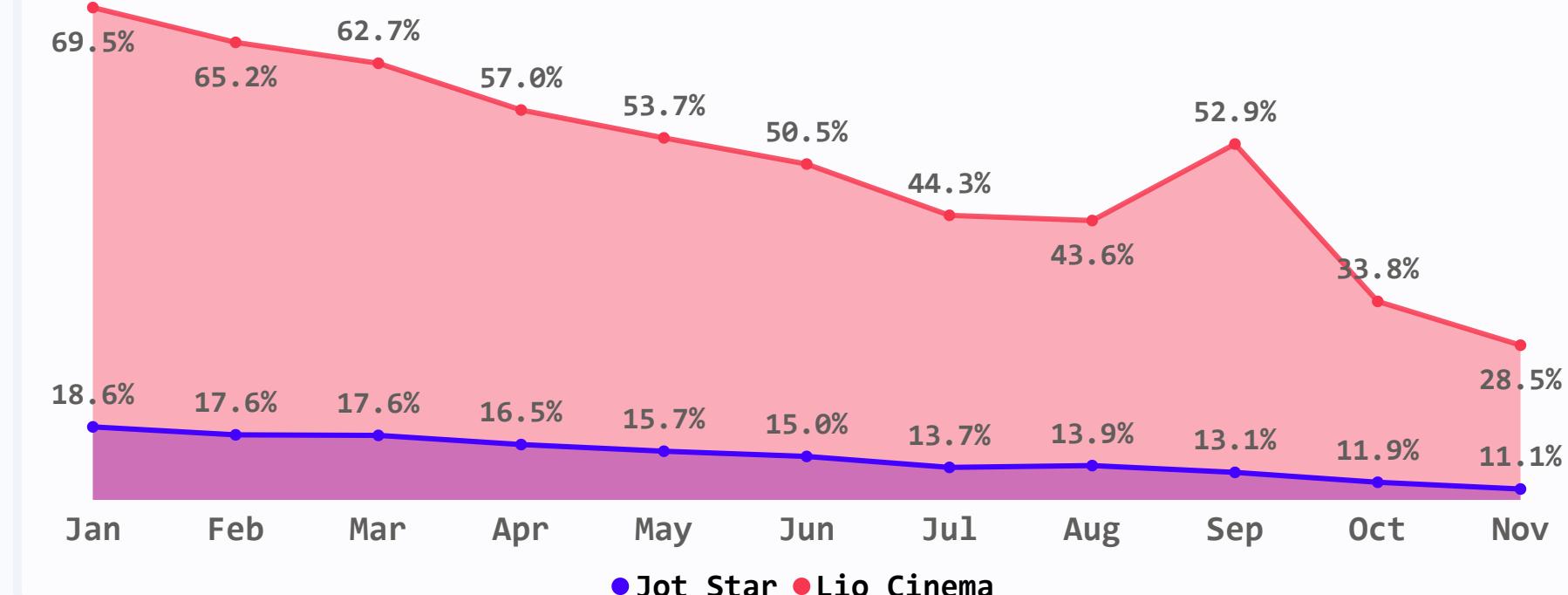
JotStar



LioCinema

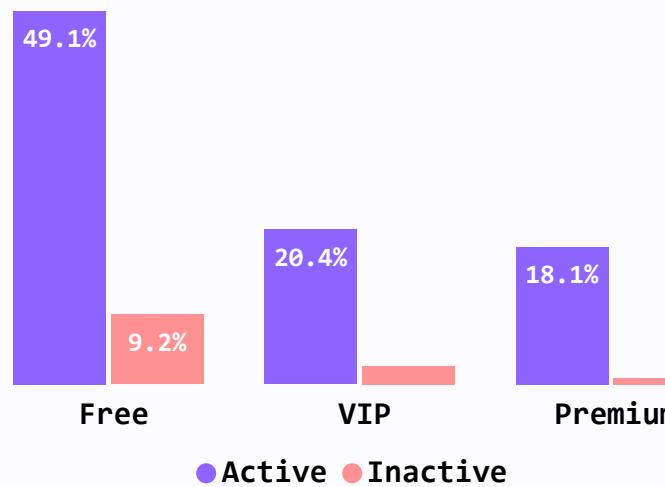


Inactivity Rate(%) By Month

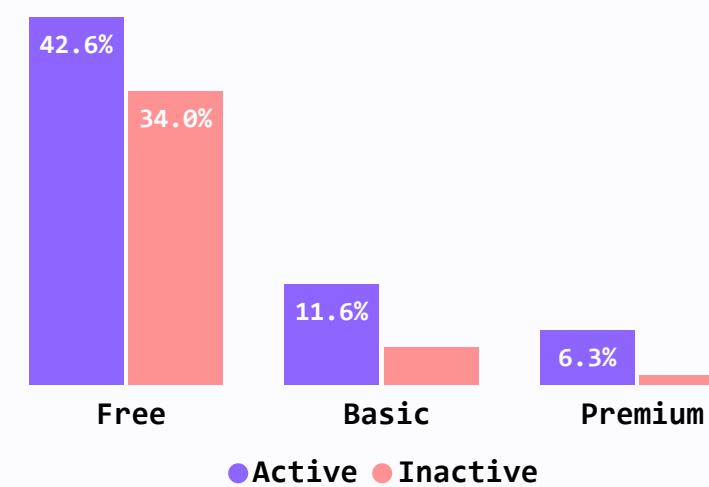


Active VS Inactive Users by subscription Plans (Count)

JotStar

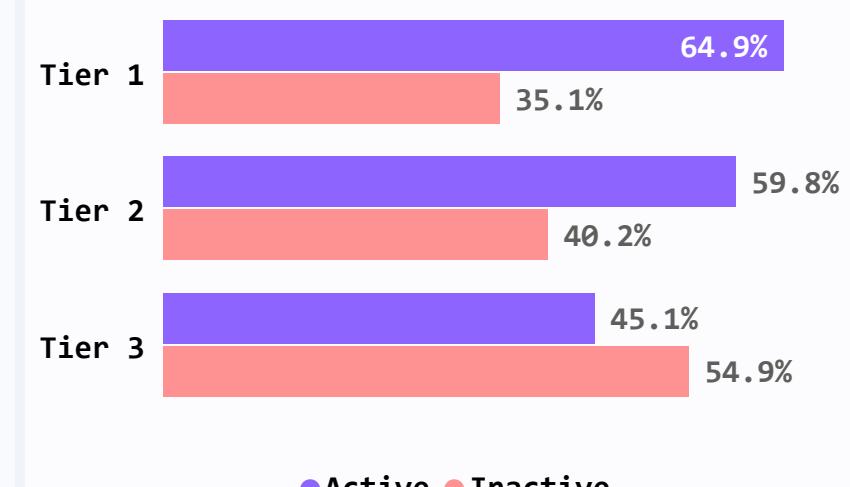


LioCinema

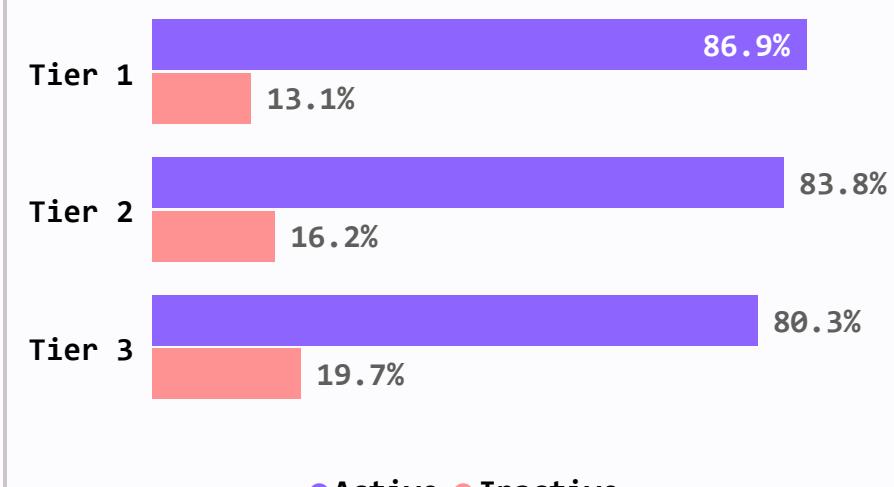


Active Vs Inactive Rate(%) for Each City Tier

JotStar



LioCinema



Total WatchTime

15.69M

AVG WatchTime

351.7

Correlation%

96.2%

Total WatchTime

11.03M

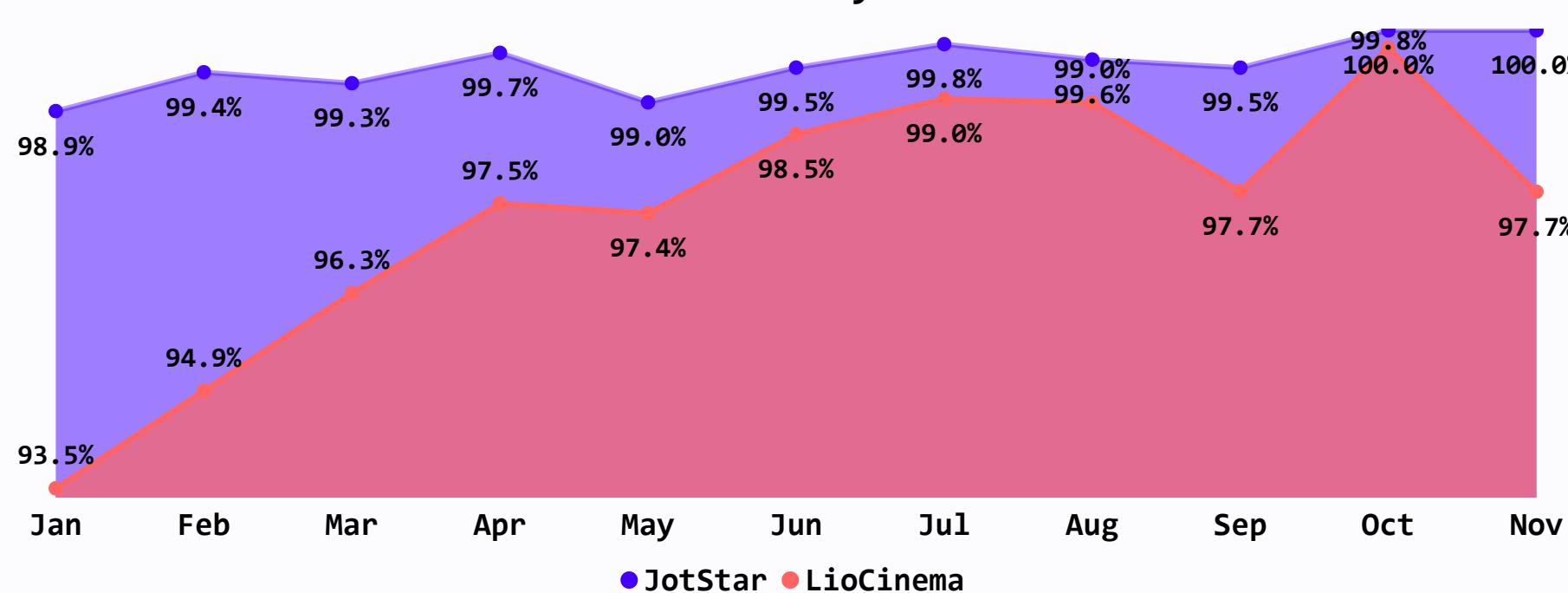
AVG WatchTime

60.1

Correlation%

94.6%

Month Wise Inactivity Correlation %

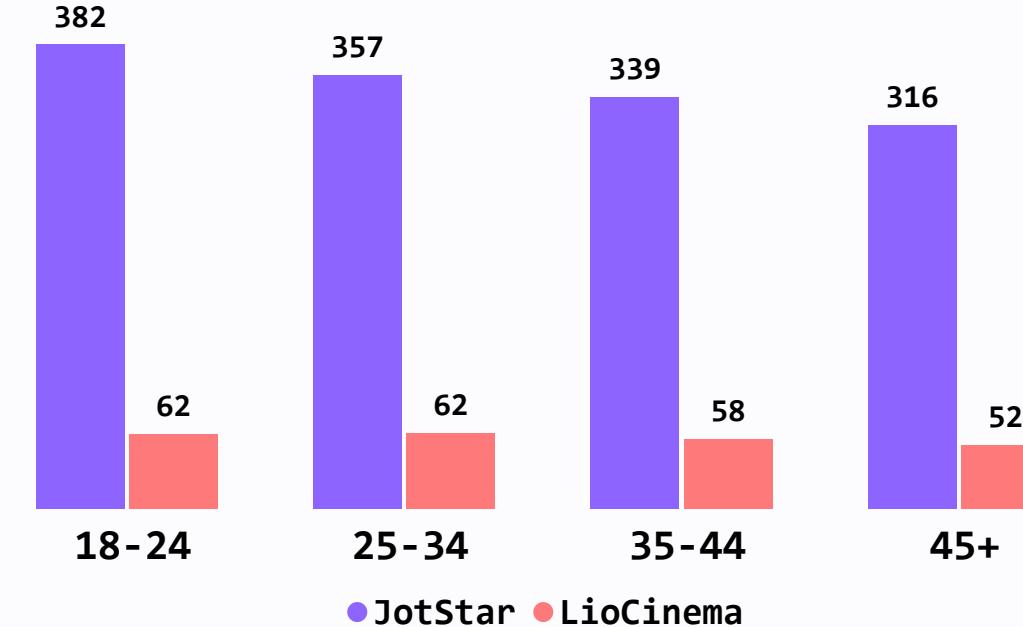


Low Engagement Drop-Off (Inactive Users by Platform)

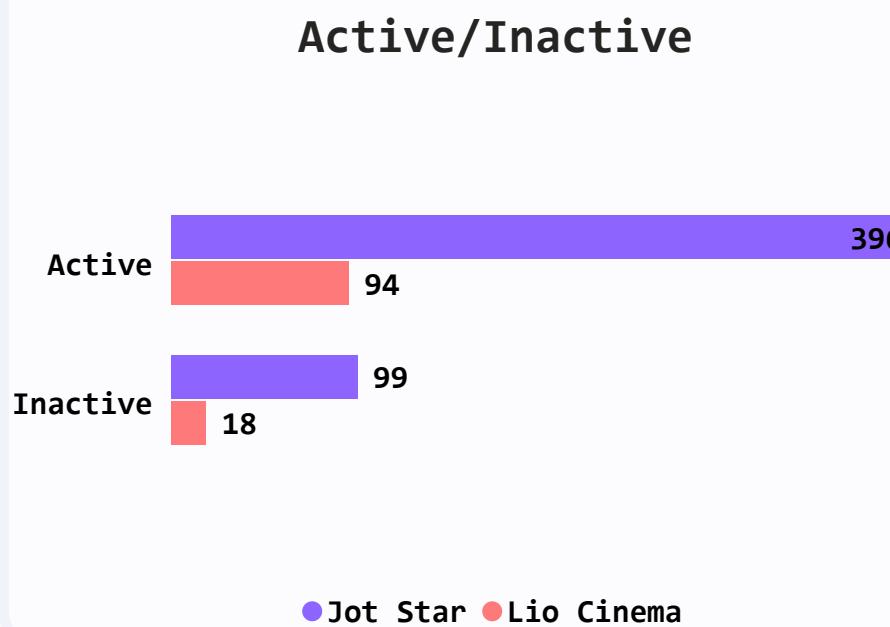
Month	Inactive (WatchTime < Avg)	Total Inactive Users (JotStar)	Inactive (WatchTime < Avg)	Total Inactive Users (LioCinema)
Jan	691.0	699.0	4279.0	4576.0
Feb	669.0	673.0	4478.0	4719.0
Mar	662.0	667.0	4966.0	5158.0
Apr	625.0	627.0	5329.0	5463.0
May	582.0	588.0	6131.0	6294.0
Jun	565.0	568.0	6702.0	6802.0
Jul	509.0	510.0	6945.0	7013.0
Aug	481.0	483.0	8123.0	8207.0
Sep	376.0	378.0	12059.0	12340.0
Oct	312.0	312.0	9726.0	9750.0
Nov	77.0	77.0	1922.0	1967.0
Total	5368.0	5582.0	68356.0	72289.0

Average WatchTime (HRS)

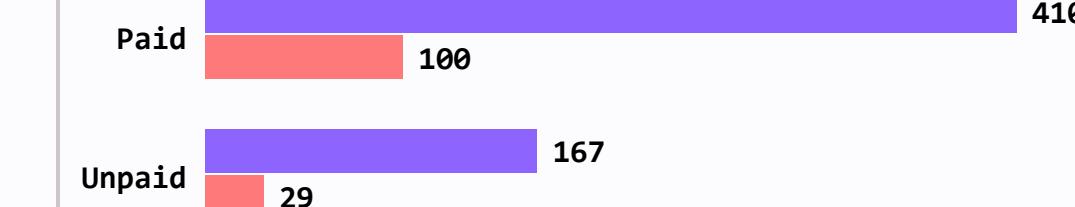
- Age Group
- City Tier
- Device Type



Average Watch Time (HRS) By User Status



Paid/UnPaid



Upgrades
4044

Upgrade %
9.06%

Downgrades
2090

Downgrade %
4.68%

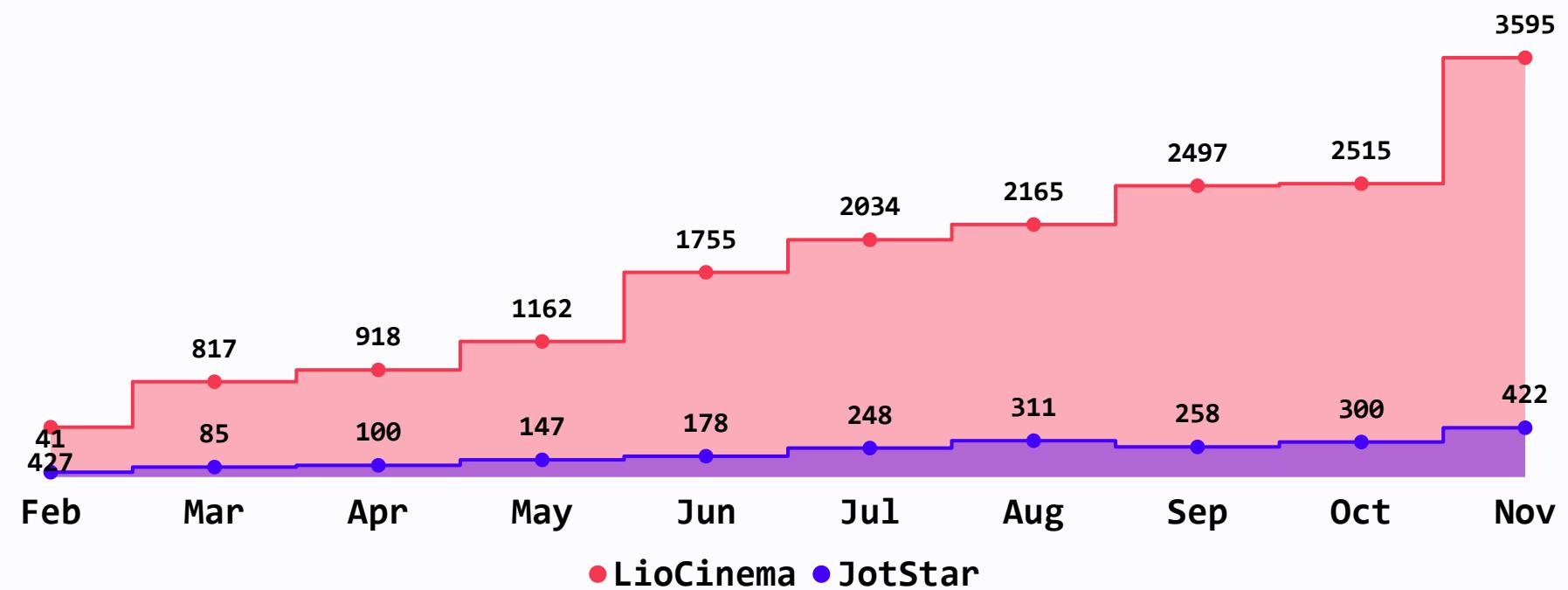
Upgrades
2803

Upgrade %
1.53%

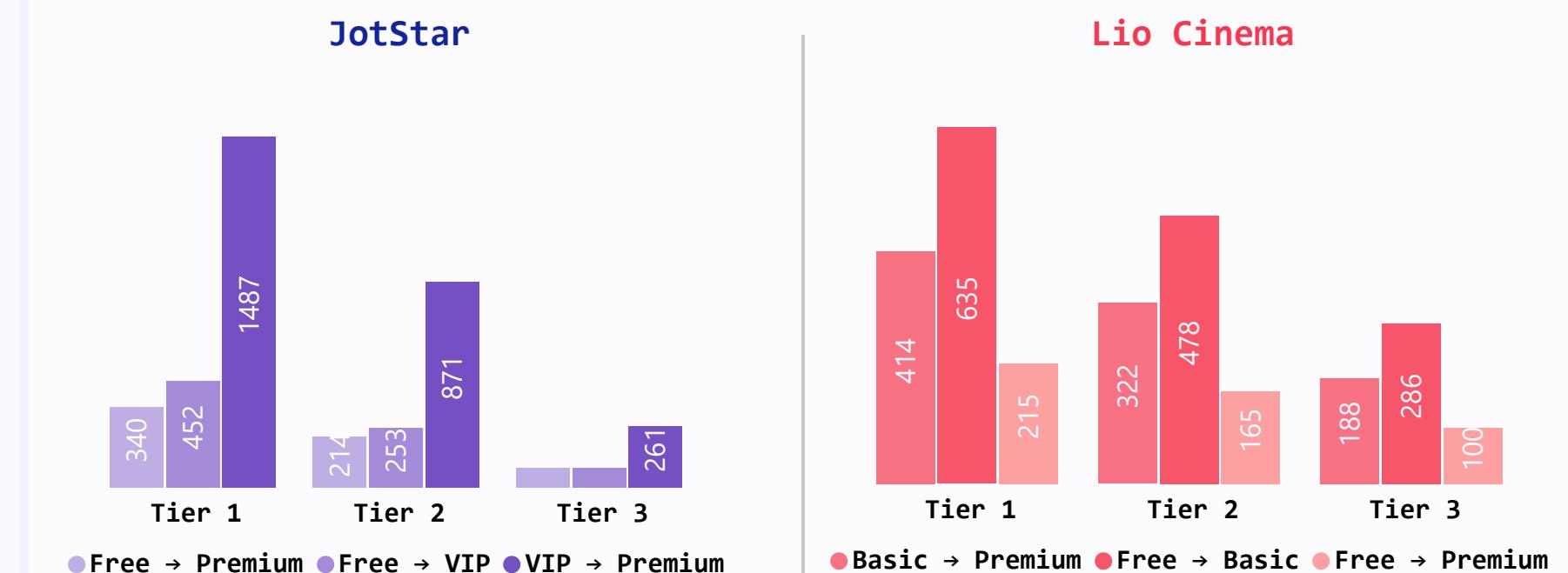
Downgrades
17885

Downgrade %
9.75%

Downgrade Trend By Each Platform

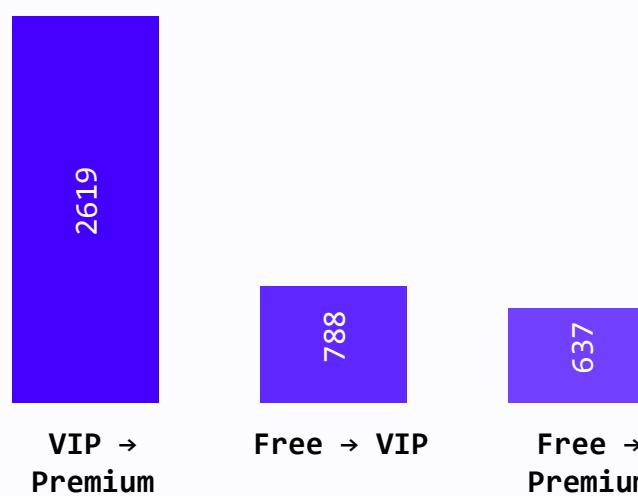


Upgrade Transitions By City Tiers

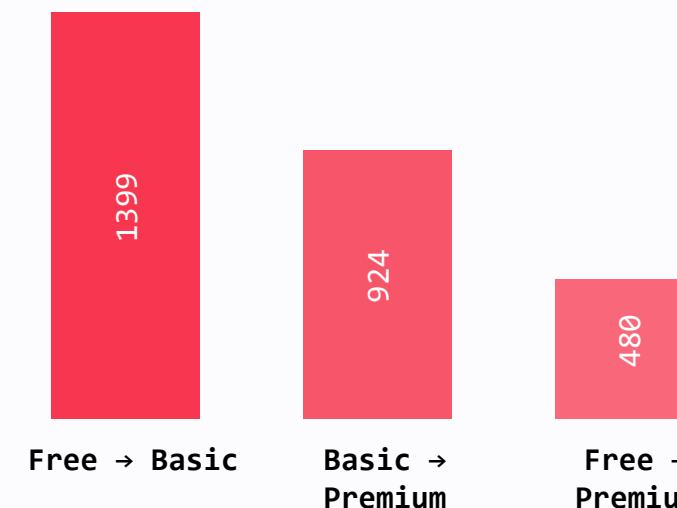


Most Common Upgrade Transitions

JotStar

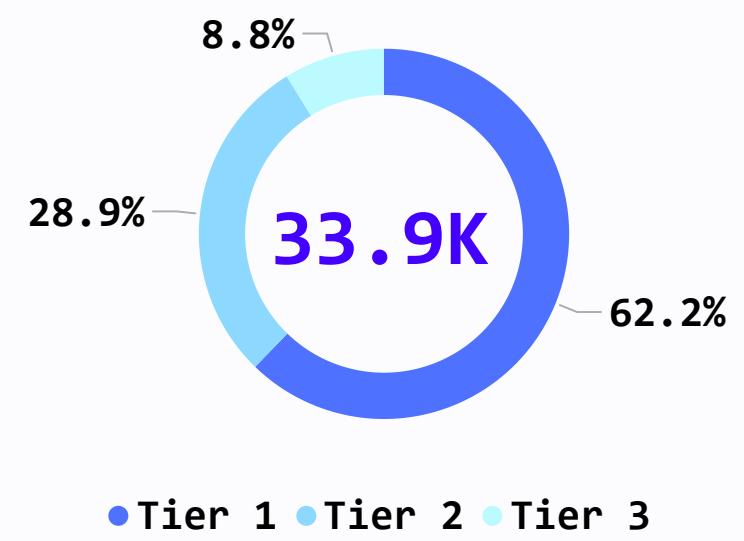


Lio Cinema

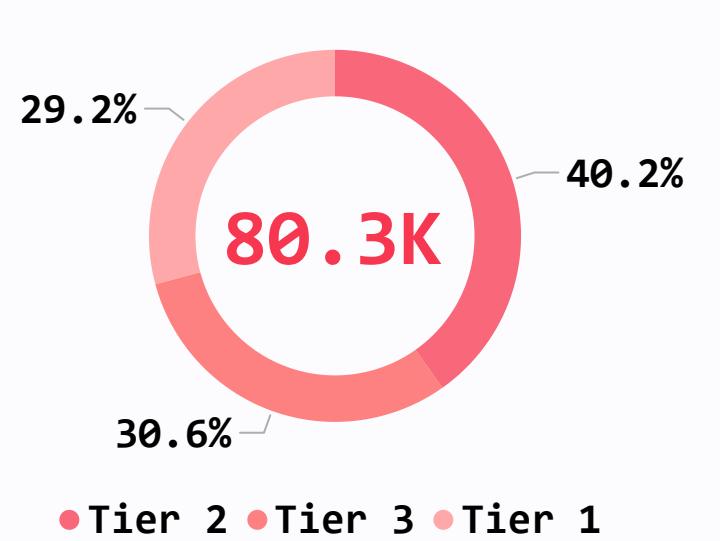


Paid User(%) By City Tier

JotStar



Lio Cinema



Total Revenue
42.1M

First Plan Revenue
36.2M

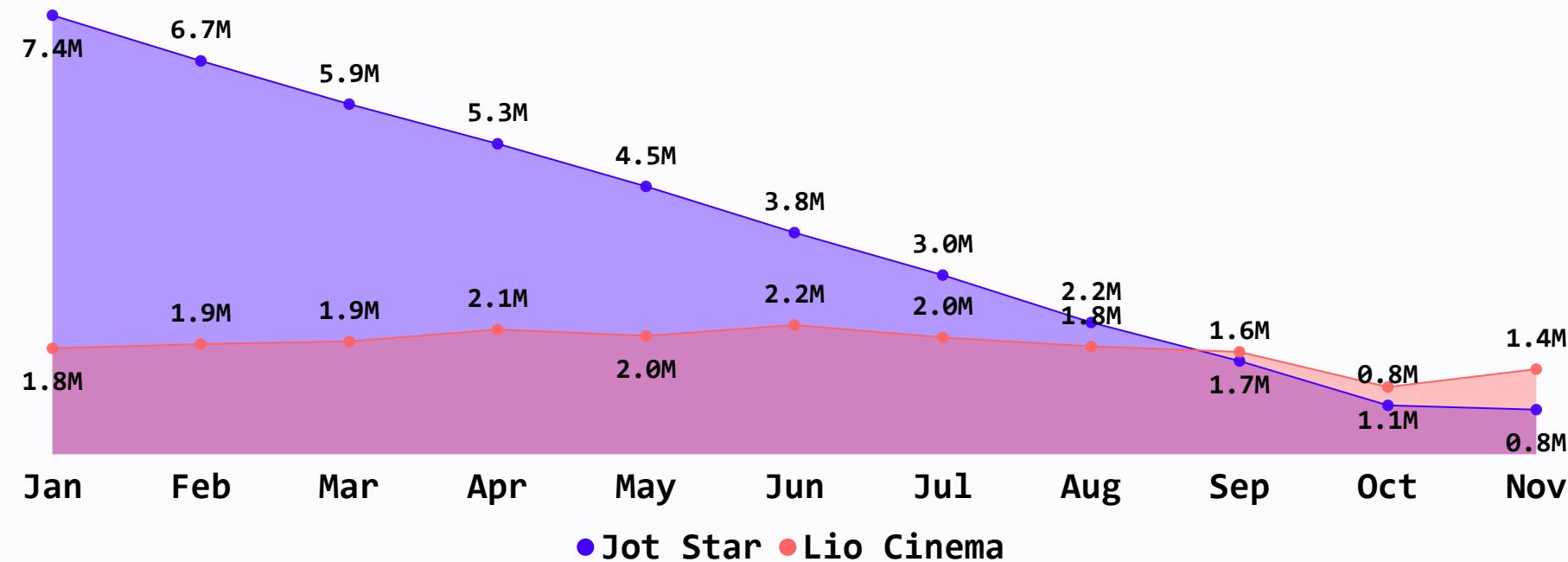
Second Plan Revenue
5.8M

Total Revenue
20.0M

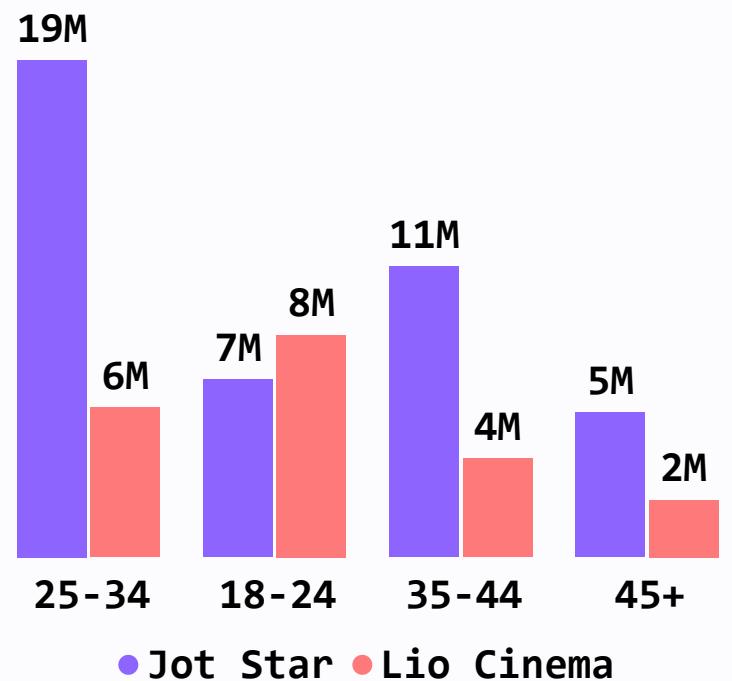
First Plan Revenue
18.7M

Second Plan Revenue
1.4M

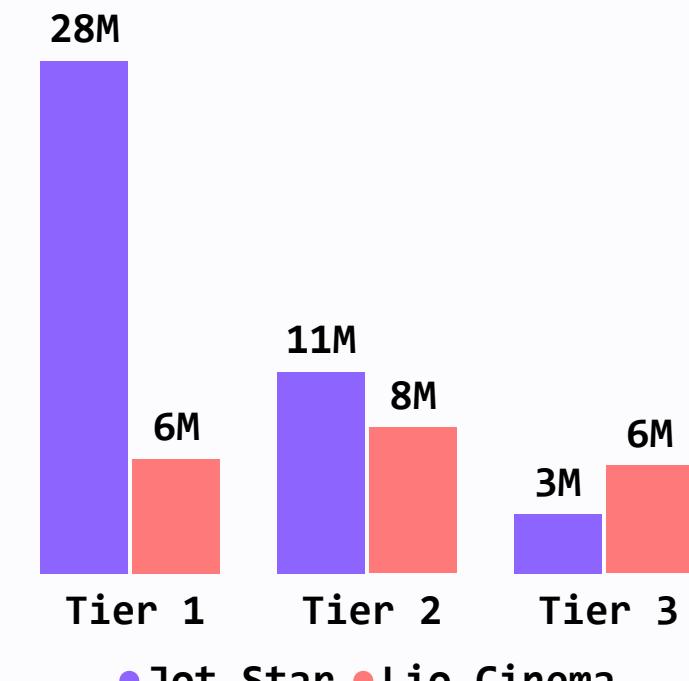
Revenue Trend(MLN) By Month



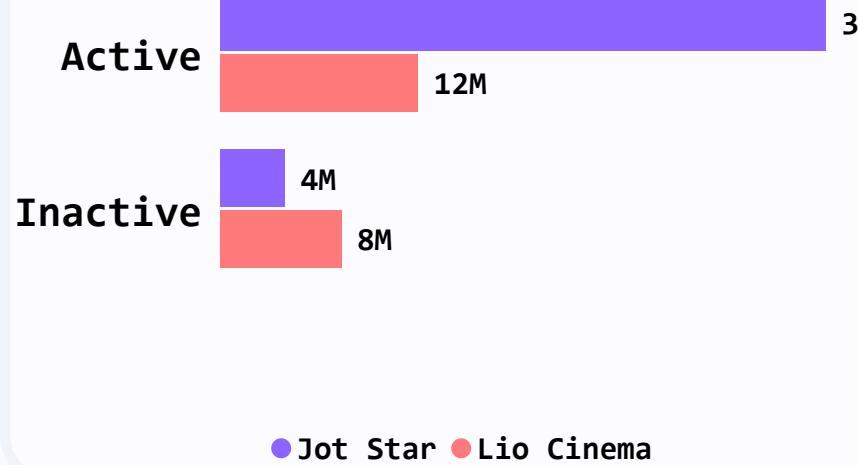
Revenue(MLN) By Age Group



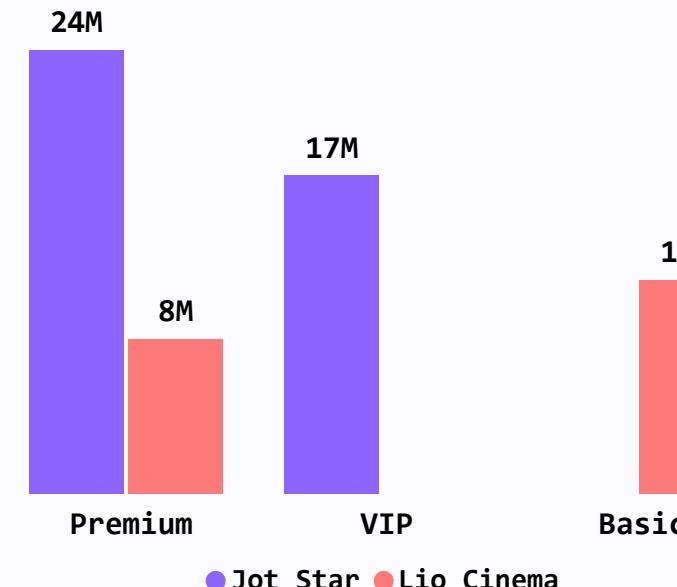
Revenue(MLN) By City Tier



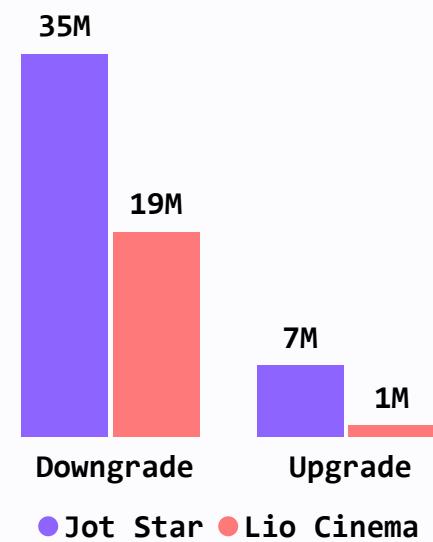
Revenue(MLN) By User Status



Revenue(MLN) By User Status



Revenue(MLN) By Upgraded & Downgraded Users



Revenue & Subscription Warning

- The revenue data from both platforms clearly indicates that customers are downgrading at a rapid rate.
- Despite the rapid growth in the user base, the subscription upgrade rate remains very low.
- To reduce the downgrade rate, OTT platforms need to improve both their content quality and user engagement strategies.