

Product Teardown: JioHotstar



Agenda

This Teardown explores:

Will JioHotstar succeed in solving —
User adoption, user retention &
user engagement issues? 🤔

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Company Overview

How does the merger makes sense for both Jio and Disney?

In Nov 2024, Jio and Disney merged their streaming platforms, **JioCinema** and **Disney+ Hotstar**, to form **JioHotstar** released on 14th Feb 2025, creating a media powerhouse in India's OTT space.

The merger between Reliance Jio and Disney was driven by strategic and financial considerations for both parties and the reasons are as follows:

For Disney -

- They faced challenges in India, including a decline in its subscriber base due to losing streaming rights for IPL matches and HBO content.
- The merger provided Disney with an opportunity to leverage Jio's vast subscriber base and infrastructure.

For Jio -

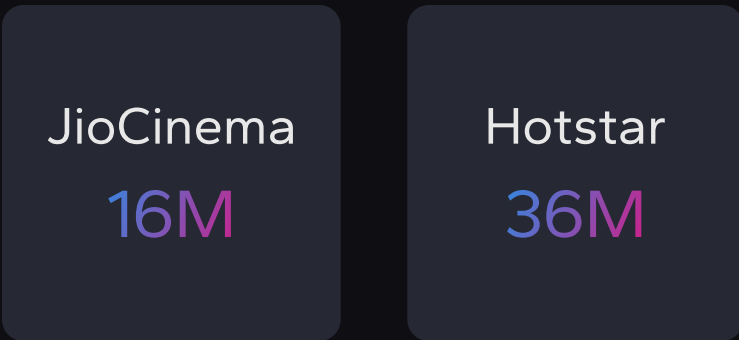
- They aimed to strengthen its position in the Indian media & entertainment sector by combining its resources with Disney's. This merger allows Jio to expand its OTT presence globally while maintaining dominance in India.

Source : [Insidellm.com](https://insidellm.com)

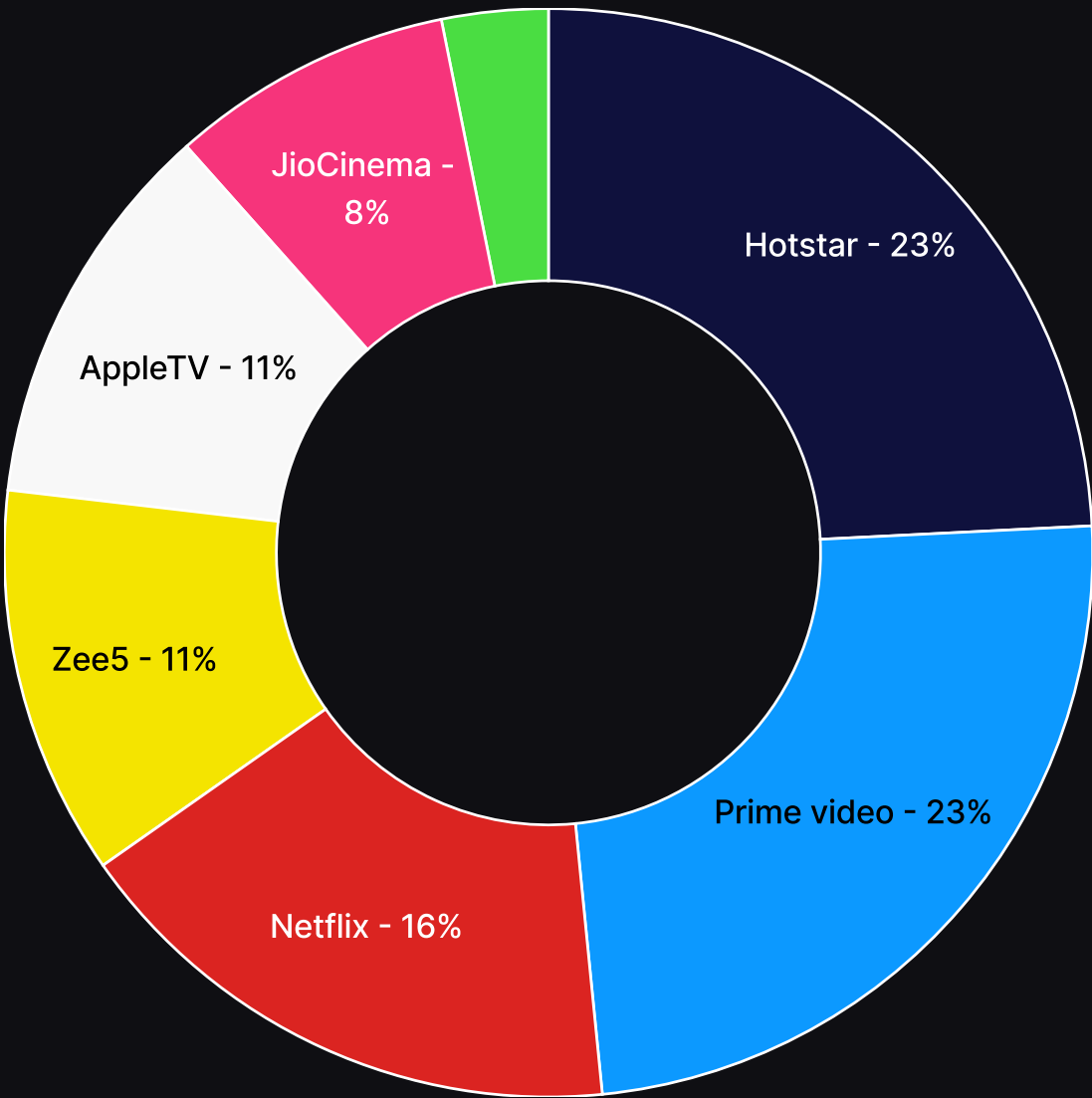
Product Overview



Paid Subscribers
(*as of Sept 2024)



Competitive Landscape



Source: JustWatch
(*as of Dec 2024)

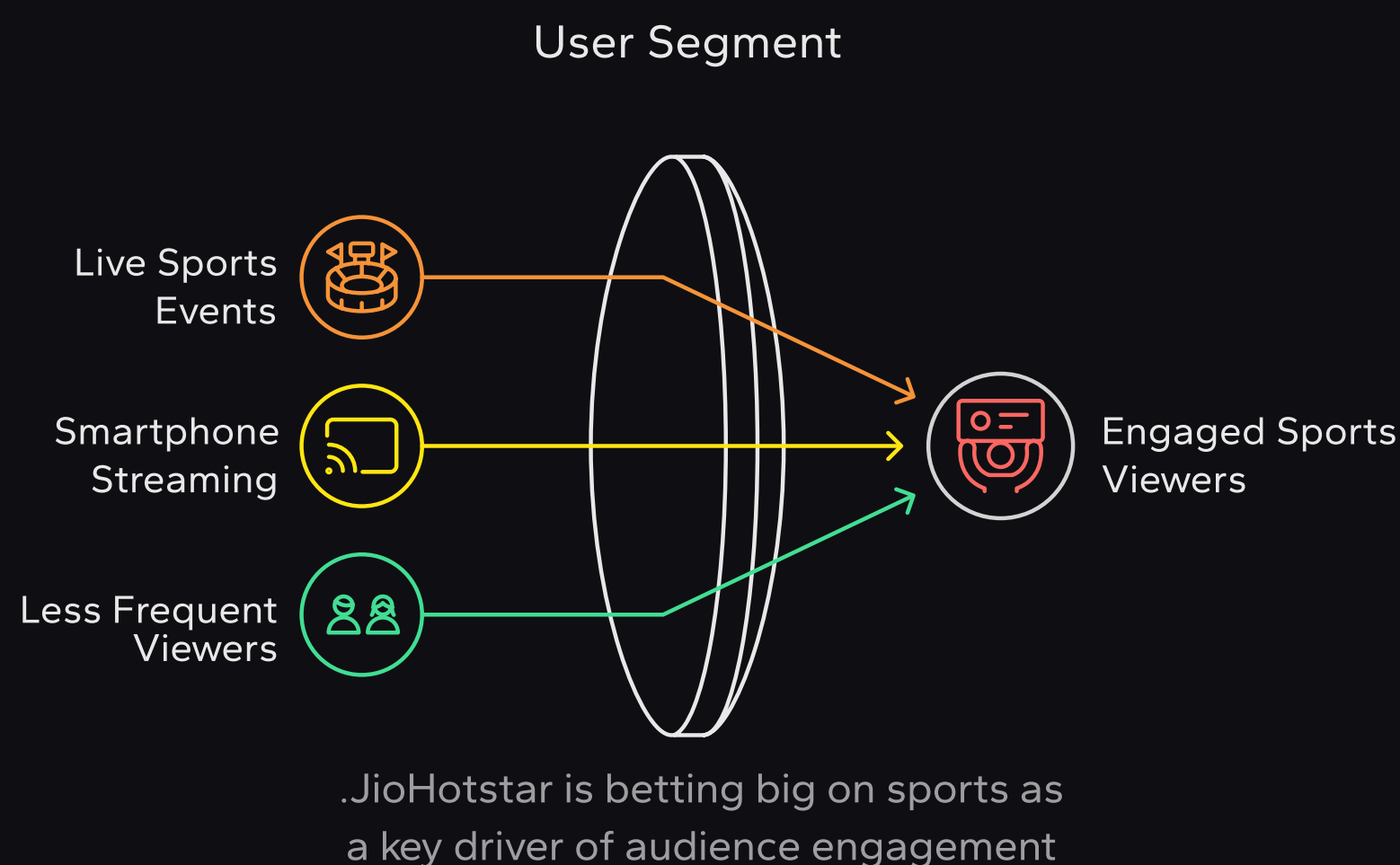
As you can see Hotstar was already a market leader with the merger now JioHotstar would hold the most market share.

What offerings set JioHotstar apart from the competition?

1. By Offering subscription plans starting at INR 149/3Mo (mobile only), a strategy that could disrupt the existing paywall-heavy landscape.
2. It offers features like AI-driven recommendations, 4K streaming, and multi-angle viewing.
3. 1100 Hours of South Indian content to compete on-par with Prime video and Zee5, than with 500 Hours before.



User Persona



The target User segment can be defined here as — “Less frequent watchers who loves watching live sports events and stream them on their smartphones.”



Shubham, 25 Yrs

About Shubham

Profession: Working Professional

Location: Urban & semi-urban India

Device Usage: Primarily smartphones

Internet Connection: Mobile data users (Jio, Airtel or VI)

Goals 🏆

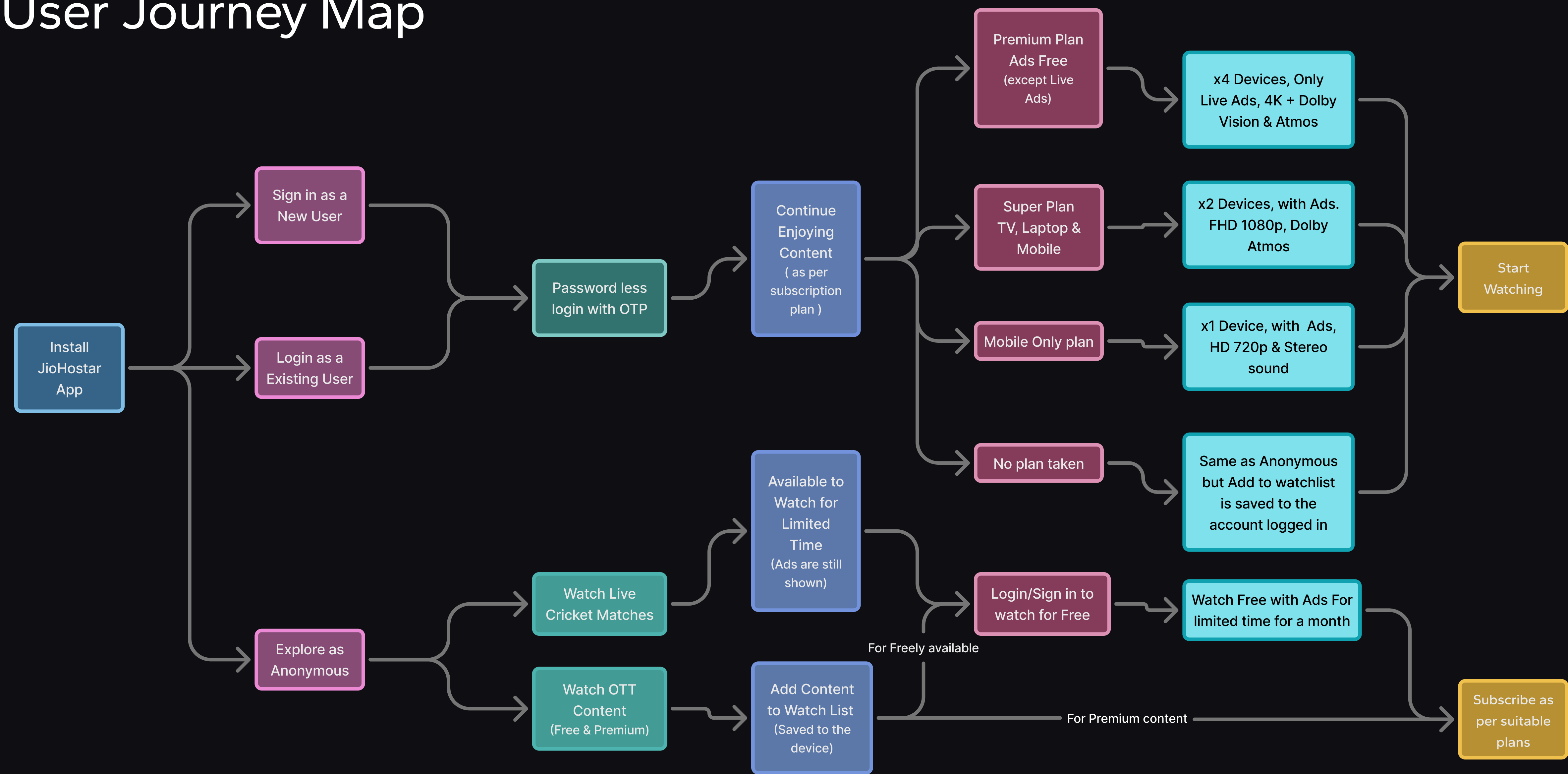
- **Access:** Wants free & easy access to live sports of all kinds.
- **Sports Fan:** Likes talking/discussing facts about the favourite sports over social media or in person.
- **One App:** Wants a single app to watch all sporting events.
- **Subscription Preference:** Prefers taking subscription as a bundle

Pain points 😞

- **Ads:** Frustrated by excessive, unnecessary ads.
- **Lag & buffering:** Especially during peak match times.
- **Commentary Preferences:** Frustration due to no option to switch commentary language audio.
- **Regional Content:** Unavailability of regional content.

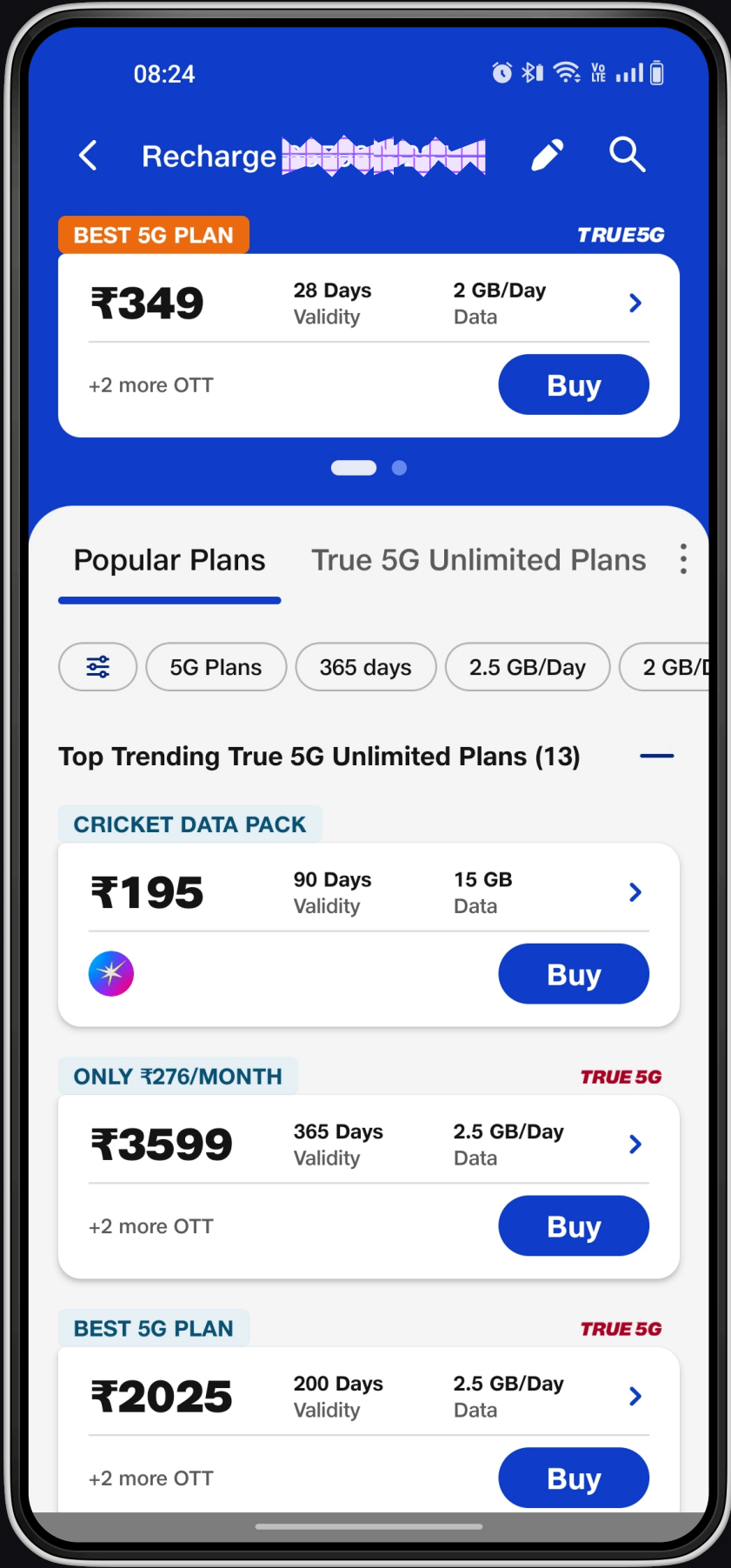
JTBD — “**When I** try to watch live sports matches on my smartphone, **But I** get frustrated when the app gets stuck in the loading screen & sometimes it crashes, quality falling from 720p to 360p, **So please help me** watch the live matches without issues, **So that I** can enjoy them properly.”

User Journey Map

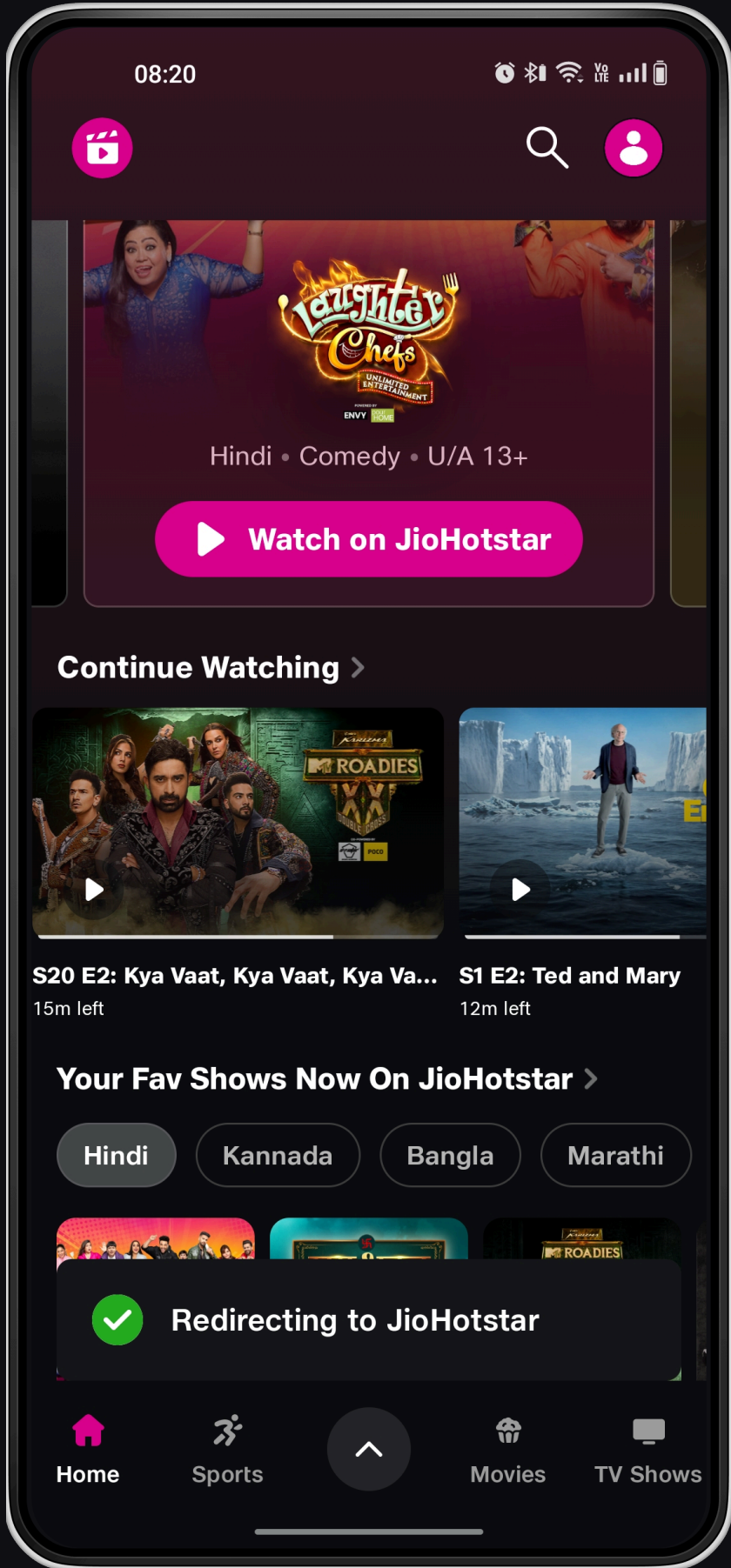


User Journey with Screenshots

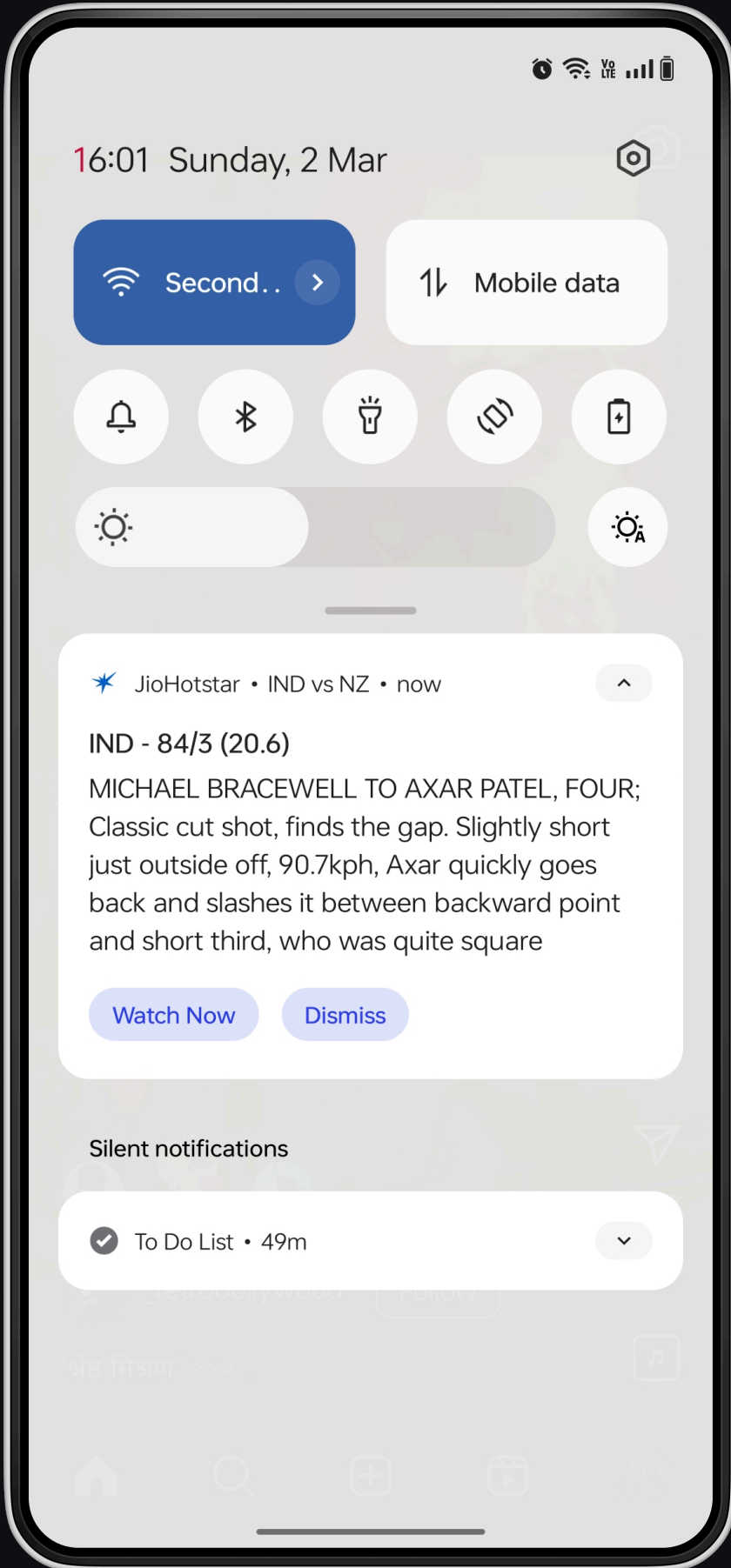
How JioHotstar is helping users **adopt** their new app?



Bundled Recharge - Users opting for any Jio recharge could opt to try JioHotstar.



JioCinema - Existing JioCinema users would get to try JioHotstar with their existing subscription.



Notifications - Notifications about the live matches as score could prompt users to click on it

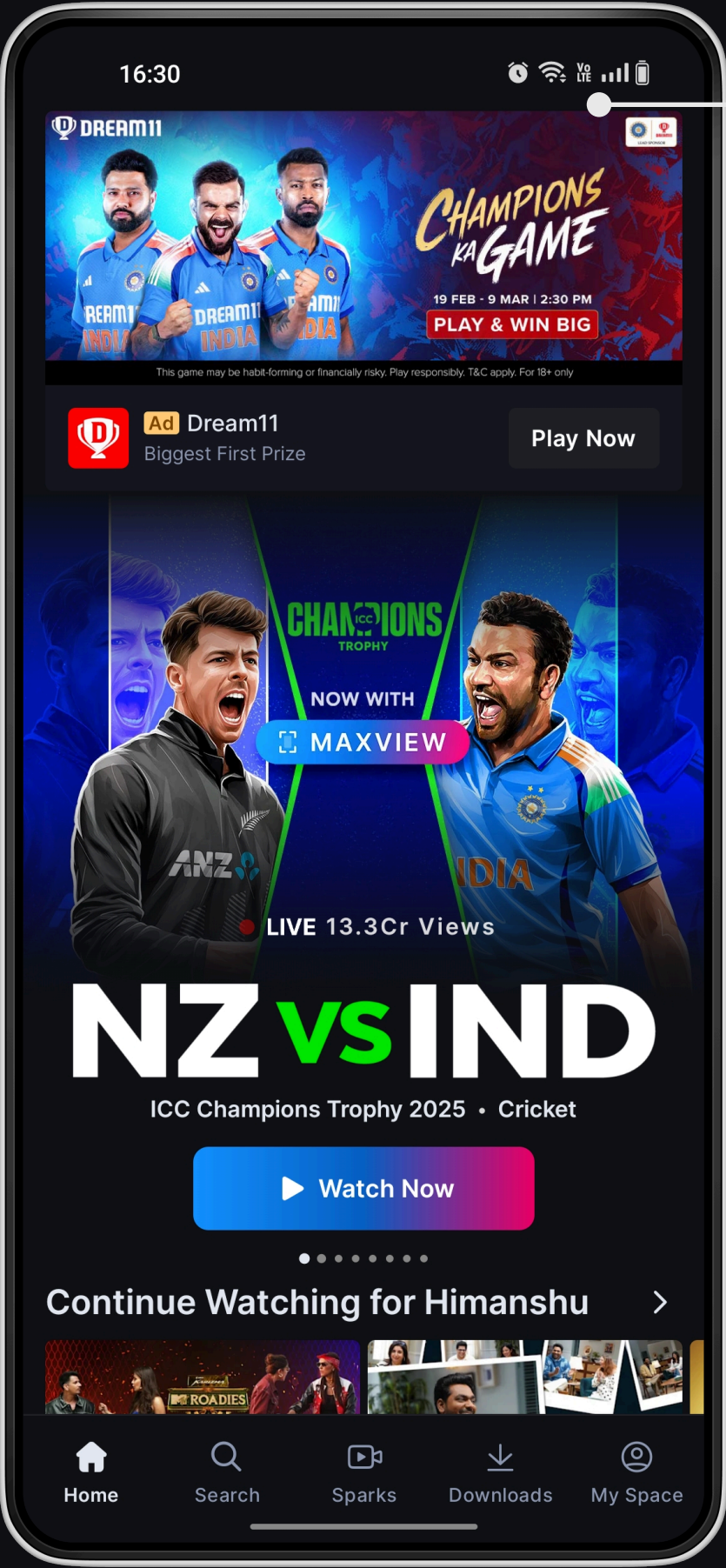


New App - Existing Hotstar users would see the new Updated App and notifications



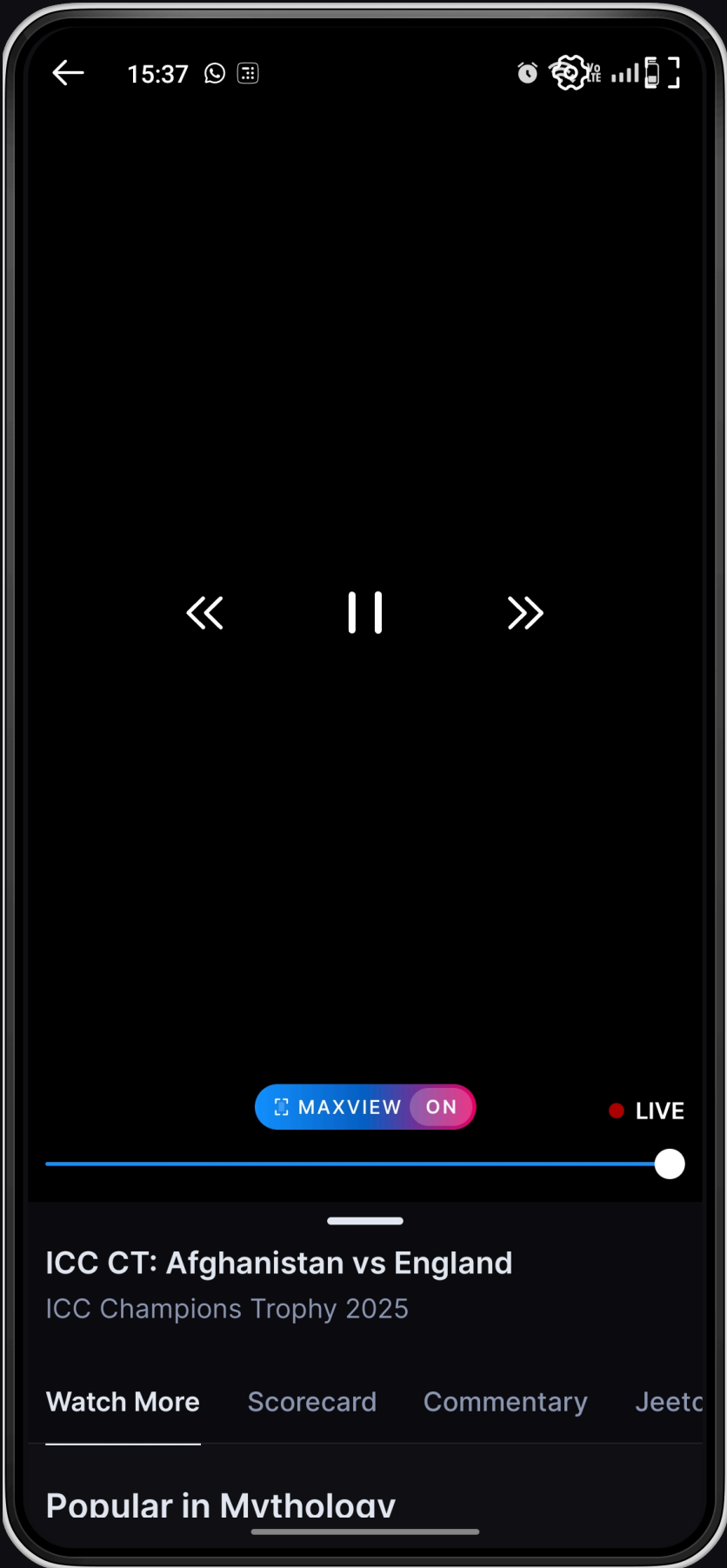
User Journey with Screenshots

How JioHotstar is helping users **engage** with their new app?

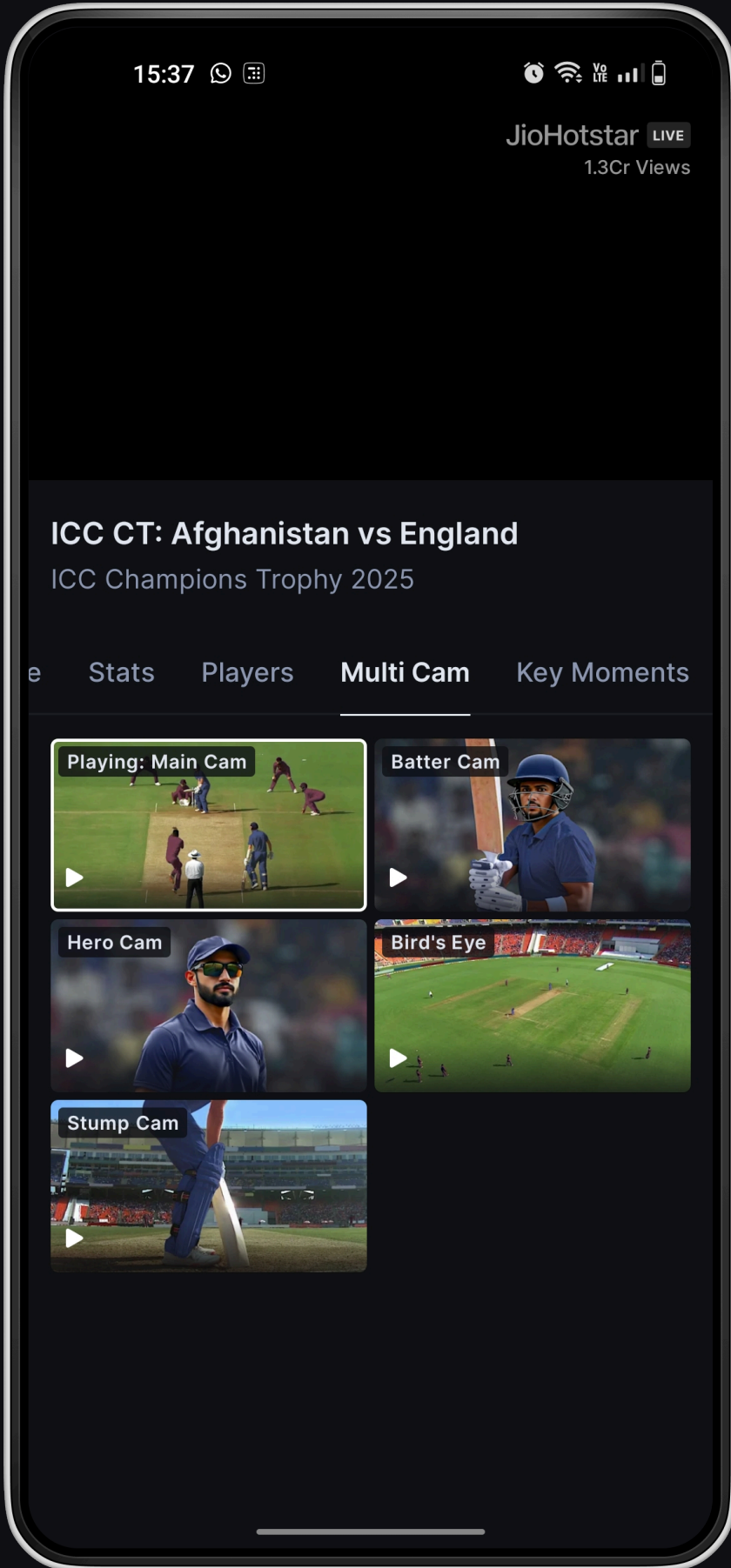


The ad feels inclusive & relevant

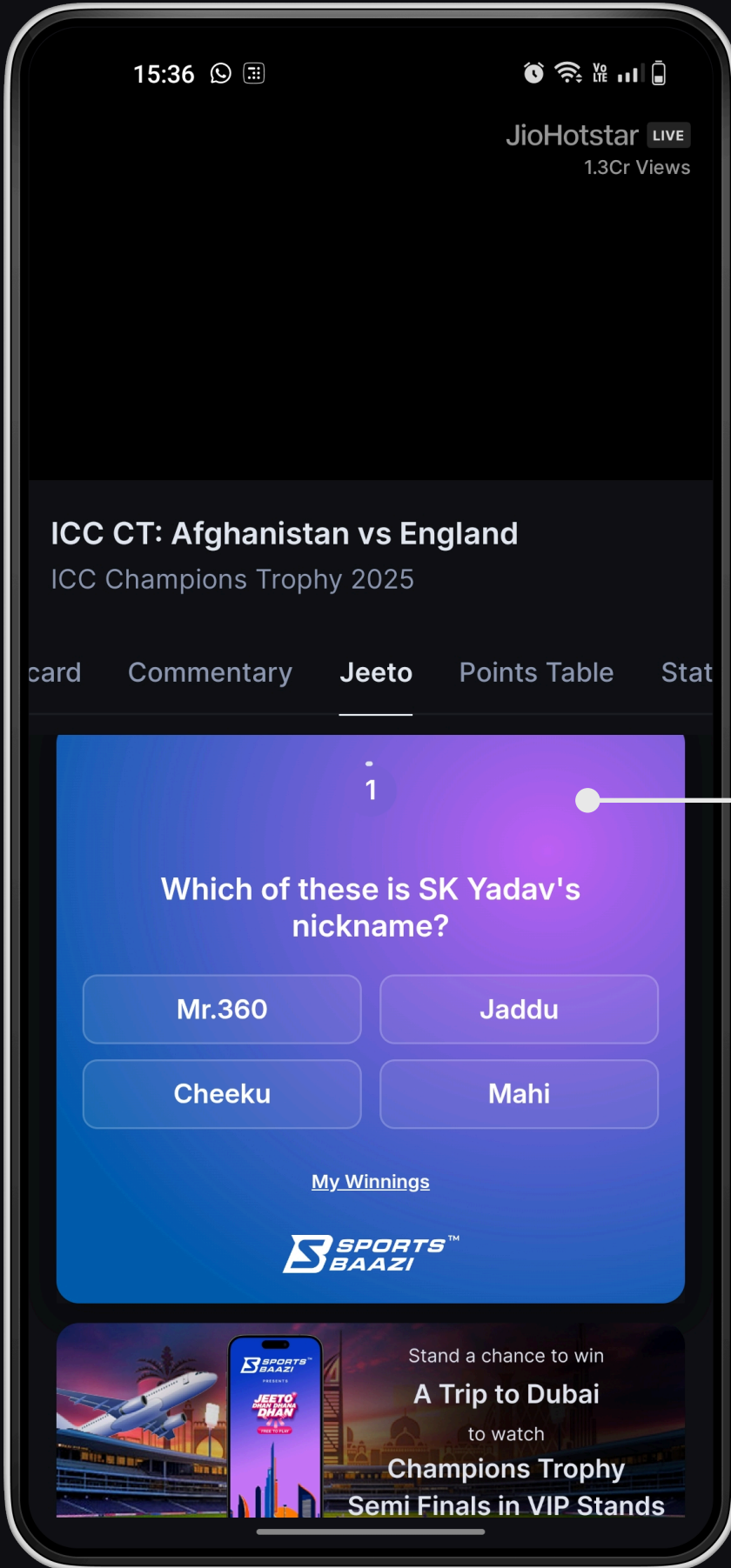
MaxView Mode - The matches are displayed in vertical Portrait Mode which is kind of a new experience of viewing any live sports event.



MaxView Mode - This mode is optimized for their biggest target segment which is Smartphone users.



Multi Cam view - The curious fans of the games can watch the live match from different camera angles



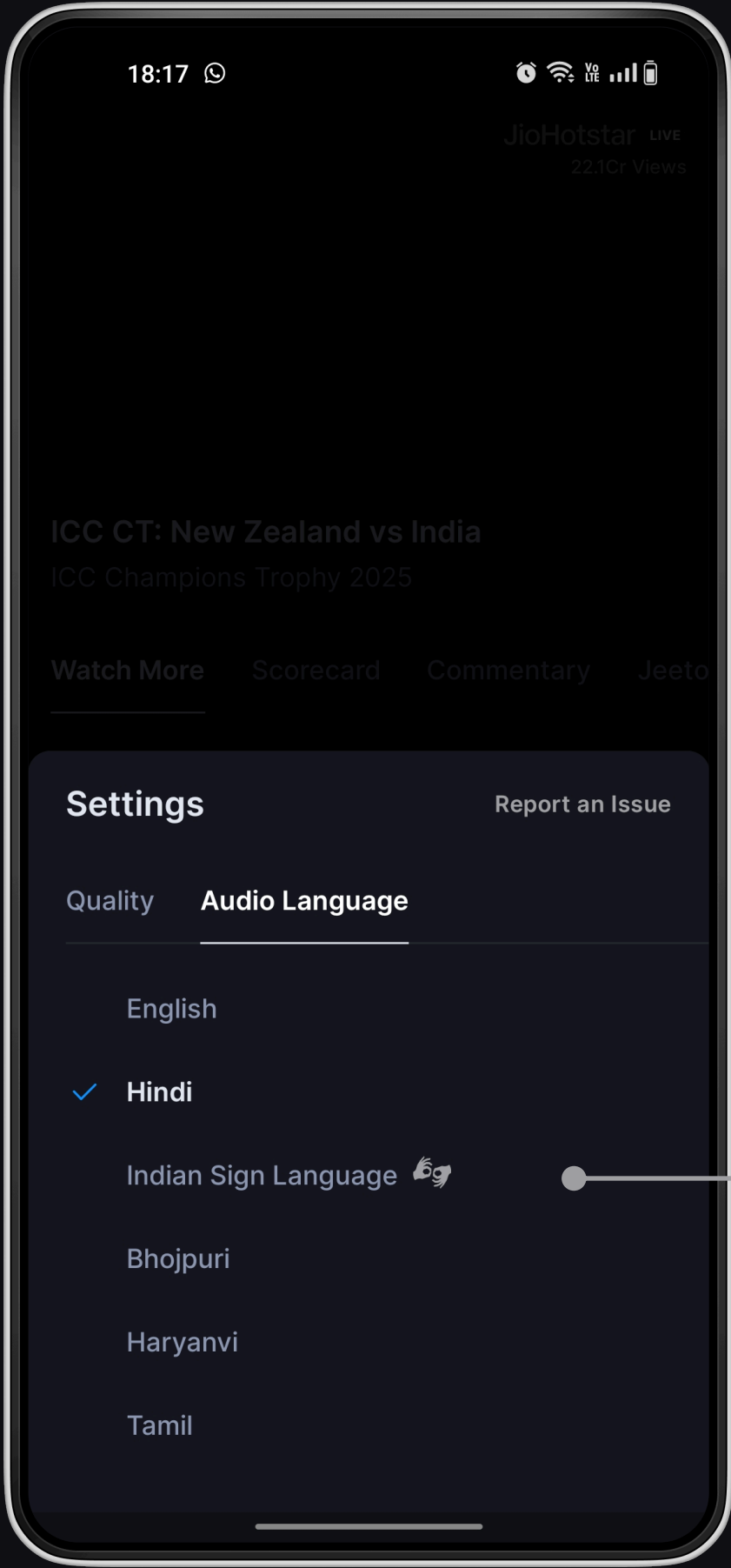
This quick games keeps users engaged.

Mini Games - The live matches are emotions evoking and viewers feel then can predict and excited to feel engaged when not actively watching the match.



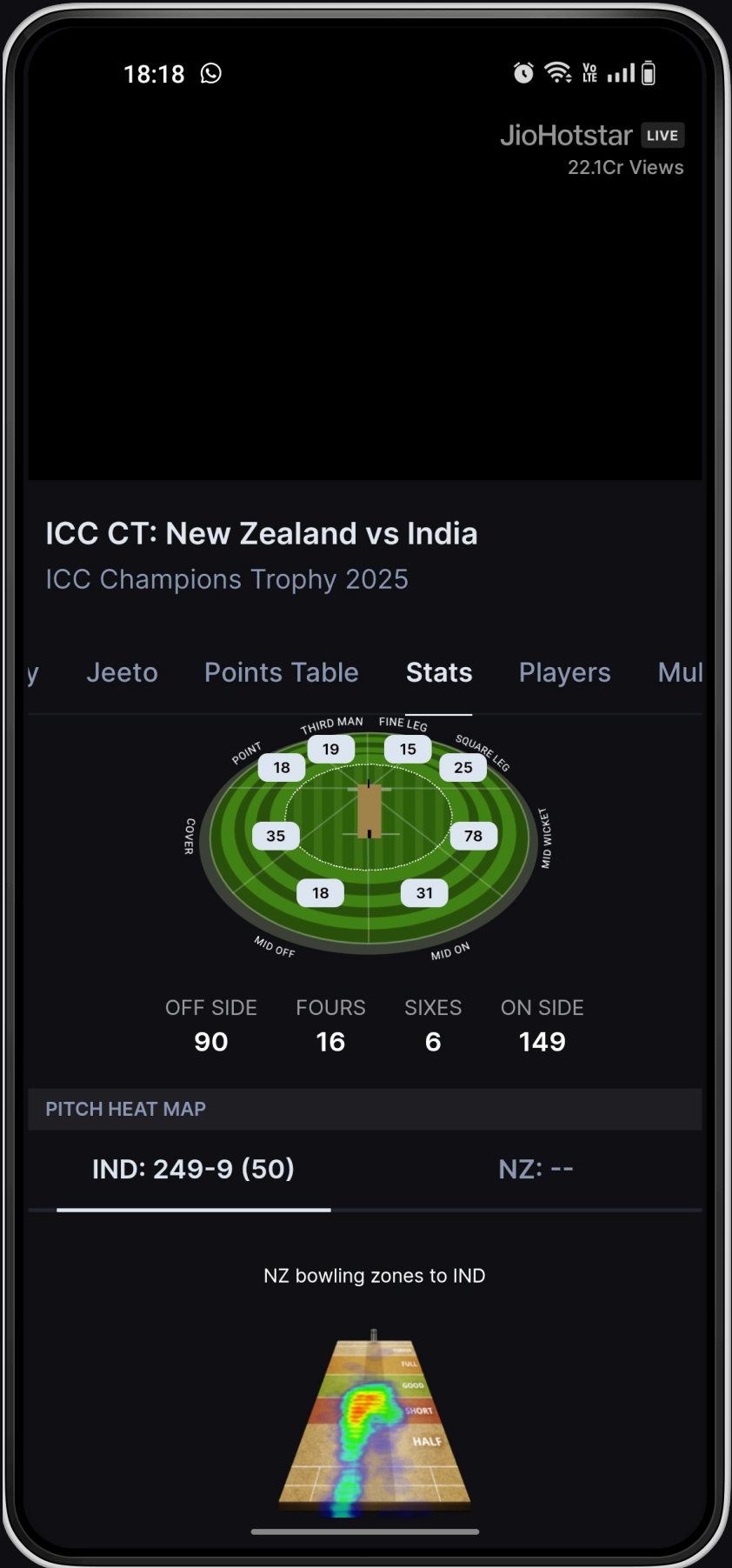
User Journey with Screenshots

How JioHotstar is helping users **engage** with their new app?

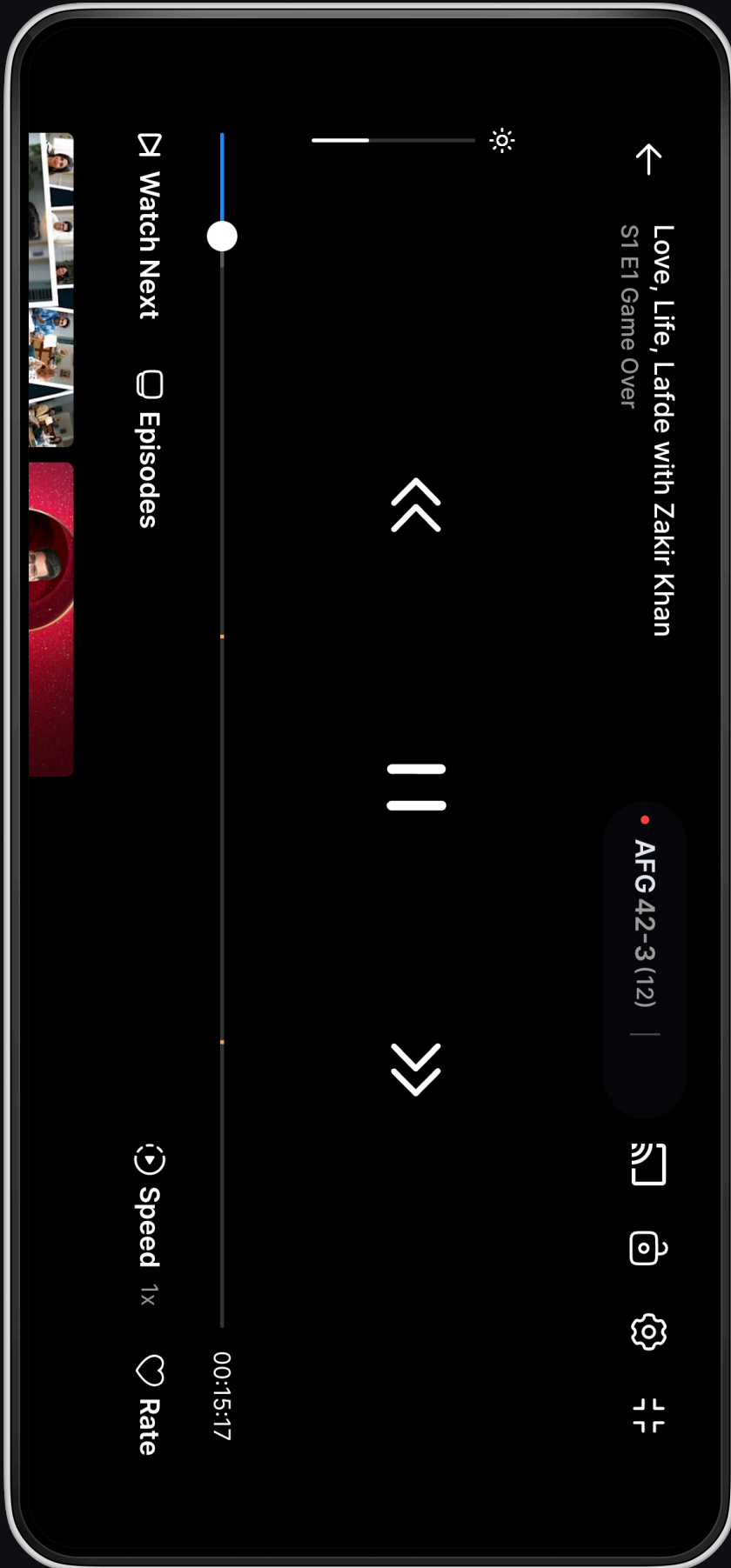


This also helps in retaining the user.

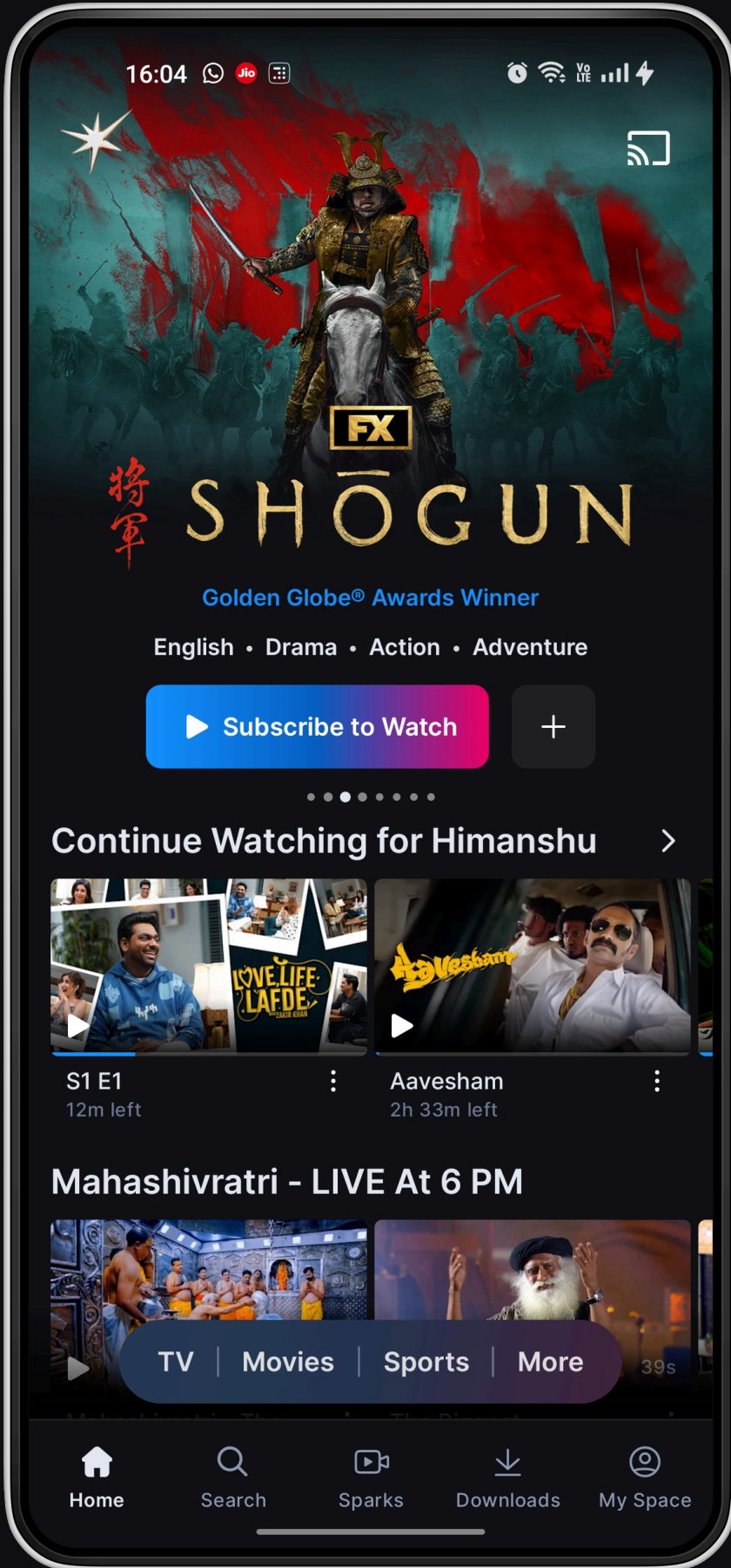
Live Commentary in Multiple Languages - The viewers can opt for various languages available for better viewing experience.



Match Stats - This features is for users who are into stats and want to understand the game at a deeper level.



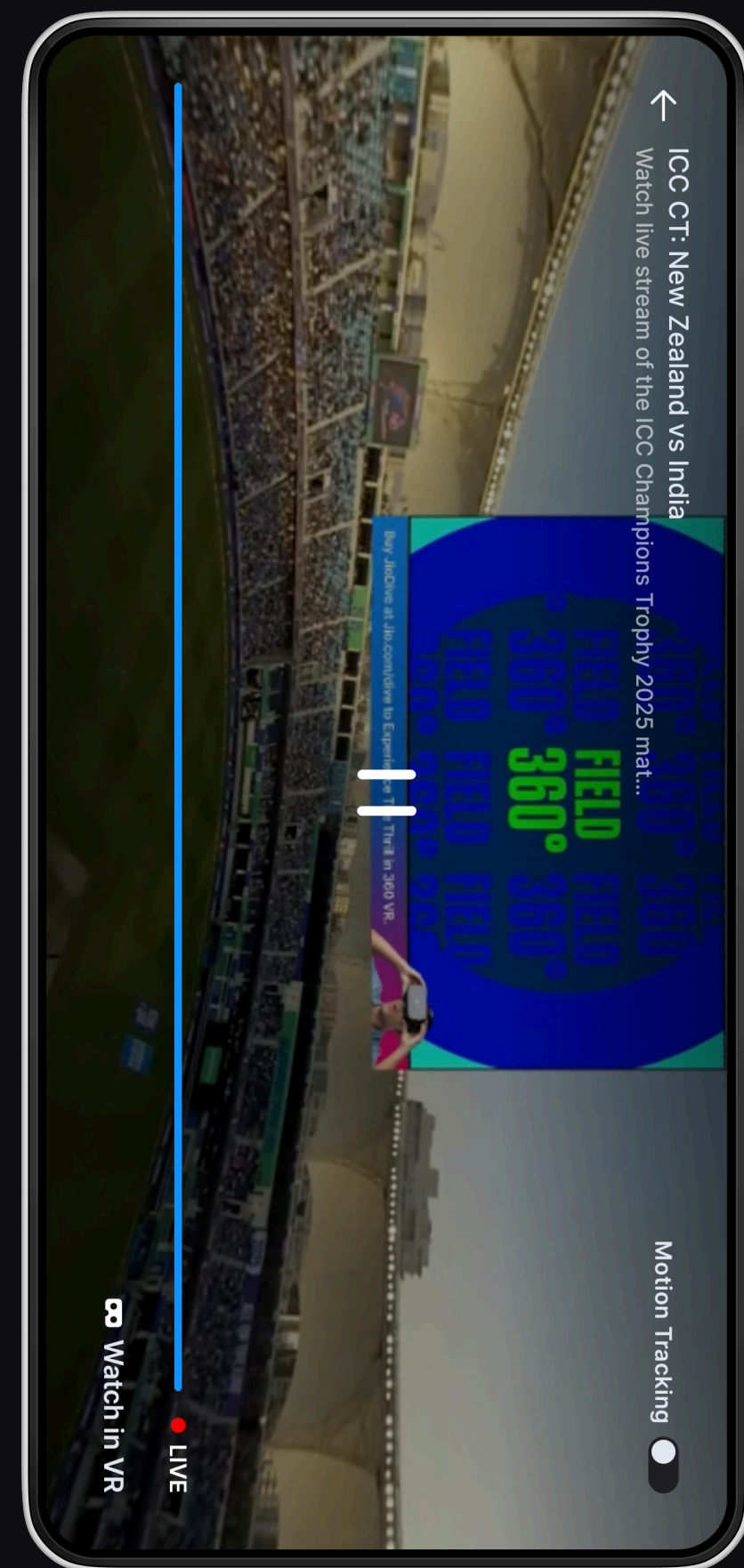
Pinned Score - For the users who are not watching the match, instead other content could still see the live scores.



Exclusive Content & other Live Events - The Content offering would keep the viewer engaged and they are also showing other live events.



Key learnings (UX principles, growth principles, etc)



VR view- The viewers can opt for watching the live match broadcast in a 360°.

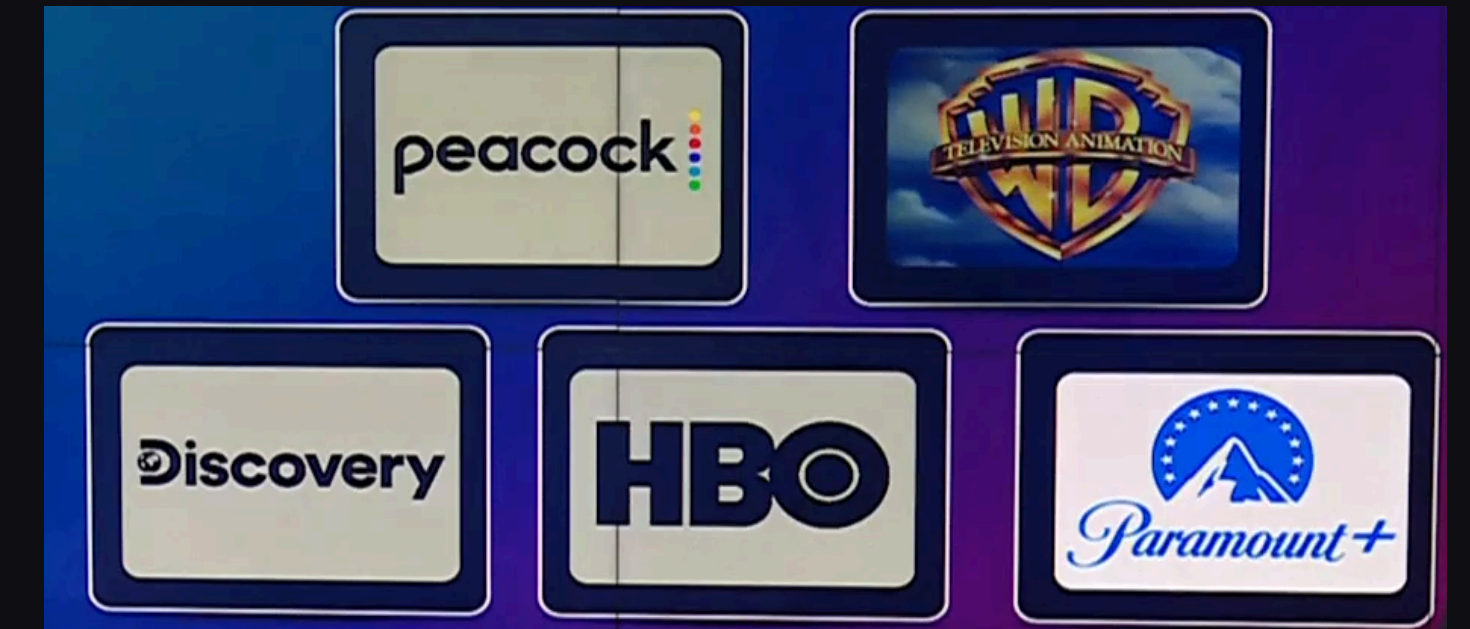
Lets talk about some of the UX choices that we were made and why -

- The detailed match notifications as a live Score card. This visually piques user interest and offer more value to read it and increases the CTR
- The vertical portrait view—MaxView mode offers a new way to watch live matches on a smartphones. This was done as an app first strategy which for a major segment of users solves the problem of watching the match will commuting. And as per the current user behavior this feels more intuitive.
- The Pinned Live ScoreCard is a small addition, but has a great impact this helps user who maybe wants to skips a portion of the match and watch something else but could still know the live score to hop back, which keeps users engaged and connected.

User Retention:

- Introducing features such as Live Match Commentary audio in multiple languages, including Indian Sign Language, serves as a remarkable solution for addressing accessibility challenges. This ensures that everyone can equally relish the matches.
- Additionally, features like— exclusive content from HBO and Peacock, creator-driven shows, and the immersive VR view/360° of the stadium are exceptional offerings that aim to captivate users.

Aggregated Exclusive Content



Conclusive Statement:

They are giving some many viewing features that too in a live broadcast, makes you wonder how is great is the product & the tech to be able to support

that. It feels like the product is justifying their tag line of — **Infinite Possibilities**“

- These enhancements directly contribute to improving the Net Promoter Score (NPS) and the Lifetime Value (LTV) of the product.

Recommendations to improve

Lets talk about some of the areas where JioHotstar are doing well and suggestions to improve in other areas.

- **Discoverability**

JioHotstar is performing satisfactorily in content discovery, featuring excellent thumbnails and distinct sections such as Sparks for exploring shows curated by renowned Creators, Live sports reminders, and more.

Could Improve : Smarter Search & Filters - Let users filter by length (short-form vs. long-form content), release year, cast, or language.

- **Helping Users Decide What to Watch**

The app is doing amazing in helping the watchers decide what content to watch by giving features like— easy to read show descriptions, mute content previews, quick Top 10/ 'What's New' Sections etc.

Could Improve :

1. Creating content on other social media around the Shows that they are creating, producing etc.
2. More Personalized Recommendations sections as per users viewing behavior/pattern.

- **Desirability**

With more Regional & Vernacular Content, Creator Collaborations, and enhanced live sports experience, the app could become the go-to platform for sports.

Could Improve :

1. Due to shortened timelines, the streaming is fast forwarded to 1.04x, and sometimes extreme censorship destroys the viewing experience of the original content and creators.

This results high Churn Rate for whom JioHotstar is spending to get that Aggregated content.

2. Introduce Other sports like F1, MotoGP, Football leagues like LaLiga etc, & could bring Season Passes for Sports only viewers.

- **Immersion** (Bringing the Stadium Experience to Users)

JioHotstar is revolutionizing how fans experience live sports, combining the best of technology, access, and innovation with features like— Multi-cam streaming, AR-powered engagement etc.

Could Improve : The features offering is a lot than any competitor out there, it would be interesting to see whats the feature utilization, to see if JioHotstar is getting ROI on those features or not.

Success Metrics

Category	Key Metrics	Why it matters?
👉 Paid Subscribers Growth	◆ Total Paid Subscribers	✅ Measures premium user adoption.
	◆ Free-to-Paid Conversion Rate	✅ Tracks success in converting free users.
	◆ ARPU (Avg. Revenue Per User)	✅ Ensures premium plans generate value.
👉 Ad Revenue Growth	◆ Ad Impressions & CPM (Cost per 1,000 impressions)	✅ Tracks ad-based revenue efficiency.
	◆ Ad Click-Through Rate (CTR)	✅ Measures engagement with ads.
	◆ Avg. Watch Time (for Free Users)	✅ Longer sessions = More ad views.
👉 Retention & Engagement	◆ Churn Rate (Free & Paid)	✅ Identifies subscription drop-offs.
	◆ DAU/MAU Ratio	✅ Shows user stickiness.
	◆ Watch Completion Rate	✅ Indicates content quality & engagement.

