INDIAN OTT LANDSCAPE
A Survey Report by Vidooly
TVF PLAY
hoichoi
spuul
EROS NOW
voot
airtel
stream
shemaroo me
NETFLIX
PLAY
viu
Sony LIV
ZEE5
SUN NXT
HOOQ
YUPPTV
prime video
INTRODUCTION

The increasing popularity of OTT Platforms in India is no more a secret. While Hotstar, Netflix and Amazon Prime have become established names in the industry, we also have new entrants such as AppleTV+ and Flipkart Videos marking their debut. With 30+ platforms competing to build a subscriber base, they are experimenting with newer ways to please their audience. With the help of big data, platforms are devising ways of personalizing their user experience. Innovations such as voice tags, augmented and virtual reality, 360 degree viewing and blockchain technology are also getting intensely explored. The pace at which the industry is transforming, makes it indispensable for the platforms to evolve continuously.

Other than recognizing consumer’s changing preferences and their need of personalized experiences, brands also realize their price-sensitive nature. This has led to the provision of multiple screens and introduction of cheaper subscription plans by these platforms in order to fit consumers’ pockets.

Undisrupted 4G connectivity has played a major role in enabling the online content consumption, that too, at viewers’ ease. Not only has it made internet accessible but also affordable, thus driving the user-spends towards other means of entertainment - in this case – Video-on-Demand Platforms.

The penetration of internet in rural areas has also soared, resulting in a higher demand of regional content on these platforms.

There’s no second guessing in the fact that the OTT industry is going to be the face of Media & Entertainment Industry in the coming years. According to a research by Allied Market Research on OTT Service Market, the global OTT market shows a promising growth potential, with a CAGR of 16.7% (2018-2015). As compared to the global market, Indian OTT industry is still at its nascent growth stage. However, the high growth in Indian audience consuming video-content makes the subcontinent an OTT market with soaring potential. As predicted by PricewaterhouseCoopers (PwC) in its report titled “Global Entertainment & Media Outlook 2019-2023 (Outlook)”, India's OTT industry is predicted to value at Rs 11,977 cr by 2023.

This rapid growth has provided a golden chance for not only content creators/owners, but also advertisers and brands by giving them more visibility in the digital-consumers’ journey. This in turn is helping the platforms gain considerable revenues and minimize their losses. In this voyage of attaining profitability, it becomes cardinal to understand the industry’s players and the audience they are serving to.

The report covers the dynamics of various OTT platforms in the Indian M&E industry, and summarizes its content library, consumption, revenue models and other important parameters. Further, it also analyses the content strategy of these brands on YouTube, with the help of video analytics and measurement. In the last section, the report compiles the findings obtained through an extensive consumer research, which scrutinizes the consumers’ content preferences and consumption pattern. It presents an in-depth analysis on factors such as subscription behaviour, content and genre types, device used, frequency and occasions of consumption and many more.
SURVEY METHODOLOGY

35+ Questions | 40+ Cities | 4371 Respondents

Themes covered: Content Preferences, Subscription Behaviour & Consumption Habits/Pattern

The questionnaire of the survey comprised of 35+ questions, consisting of single-answer as well as multiple-answer MCQs along with Likert and Demography Questions. There were also comparison questions, where we asked the respondents to make a compulsory choice between 2 options.

The survey was floated online, through the means of social media and email-marketing across a period of 30 days in the month of October 2019. The survey was specifically targeted at OTT users in India.

4371 people completed our survey, which included respondents across varied age-groups and income brackets. Audience from 40+ cities participated in the survey. Out of all, 88% respondents chose to disclose their income, hence the sample size for comparisons where income is one of the parameters is slightly less.

Areas Explored in the Questionnaire:

Subscription Behaviour:

• Understanding the sources of subscription, such as provided by telco, individual self-paid subscriptions, borrowed accounts etc
• Factors affecting the decision of subscription and un-subscription
• Affinity towards DTH/Cable Services
• Subscriber’s age as an OTT User

Content Preferences:

• Type of content/genre/languages preferred
• Liking towards Popular shows or Currently Trending Shows
• Preference of TV Series vs Movies, Short- Episodes vs Long Episodes, Subtitles vs Dubbed Content

Consumption Habits:

• Usage patterns, such as frequency, duration, time and occasions of watching
• OTT consumption a social activity or lone-time activity
• Influence of external factors such as friends, Platform Recommendations and Blogs, on content preferences
EXECUTIVE SUMMARY

Indian population is skewed towards youngsters with an average age of 26.8 years. Internet space is dominated by the audience falling in the same age bracket which in-turn makes OTT platforms dominated by audience in the age-group 24-34 years, which was also validated through Vidooly’s survey. These respondents were found to be equally split between students and employed individuals. While maximum share of subscribers were from Metro cities, respondents from Non-Metro formed the majority share amongst the Non-Subscribers. Overall, the male audience comprised of 69% of the total users (subscribers as well non-subscribers).

While the rate at which subscriptions are rising in Indian OTT industry is phenomenal, there’s still a large untapped market gaining access to the content without paid subscription.

The survey reveals that 65% of the respondents who did not opt for paid subscriptions had access to SVOD platforms.

Audience is gaining access to OTT Content through various sources of subscription. The players are devising different ways to lure consumers – such as tie-ups with Telecom Companies, provision of multiple screens to encourage Pooled-in Subscriptions, Giving limited free content access etc.

~68% respondents were found to have gained subscription through telco services, while ~16% confessed to have opted for pooled-in subscriptions. ~20% of the respondents undertook individual paid subscriptions.

With the rise in income and age (34+ Years) it was observed that people prefer to watch OTT content more on TV rather than on mobile & laptop. It basically depicts that people prefer ease & comfort and want to avoid the hassle of switching on laptop or watch on small mobile screens.

With the increase in age, preference towards watching sports content on OTT increases. Younger age groups are not having that much disposable income to buy premium plans which could be one of the reasons of low preference of Gen Z towards sports content on OTT.
EXECUTIVE SUMMARY

Personal recommendations, which are basically based on the complex algorithms of OTT network, are mostly preferred by daily user.

This is the same audience which ultimately choose yearly subscription plans rather than buying the plans every month.

Freeloading: A cause of concern for OTT Platforms.

The casual password sharing phenomenon is causing the platforms to lose several potential subscribers. Moreover, it is also leading to users’ persona discrepancies due to changing watch behaviour. This circumstance was well-captured in the respondents of the survey. The re-sharing of credentials has created a complex web of viewers accessing the content through single subscription. Out of all the respondents who borrowed log-in credentials from others, 92% ended up forwarding it.

Originals are the new trend in the OTT Segment. The streaming platforms are betting on this emerging trend to capture the attention of the audience. And clearly, the decision is right.

When we asked our respondents to choose between Originals and Shows from Other Productions, 85% of the audience voted for Originals. In fact, 4 in 5 respondents agreed that they enjoy watching OTT Originals on the platforms.
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(Summarizing Content Library, App Downloads, Membership Offers, Revenue Model etc.)

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- Eros Now
- ZEE5
- SonyLIV
- Voot
- ShemarooMe
- TVF Play
- MX Player
- Viu
- Spuul
- Hoichoi
- Adda Times
- HOOQ
- Yupp TV
- NEXGTV
- Sun NXT
- Jio TV
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• Type of Genres

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• Sacred Games Vs Mirzapur

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### JIO CINEMA

Owned By:-
Reliance Industries Limited

### TOTAL JIO USERS

<table>
<thead>
<tr>
<th>Membership Offers</th>
<th>Revenue Model</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Subscription Fee</td>
<td>Free for JIO Users</td>
</tr>
</tbody>
</table>

### CONTENT LIBRARY

- Gujarati
- Telugu
- Punjabi
- Tamil
- English
- Bengali
- Bhojpuri
- Hindi
- Marathi
- Kannada

### DOWNLOADS (GOOGLE PLAY STORE)

50 M+

### Source:

TELECOM REGULATORY AUTHORITY OF INDIA (Sept 18, 2019)
Highlights of Telecom Subscription Data as on 31st July, 2019.
Retrieved from https://trai.gov.in/
https://main.trai.gov.in/sites/default/files/PR_No.74of2019_0.pdf
JIO TV
Owned By:-
Reliance Industries Limited

DOWNLOADS (GOOGLE PLAY STORE)

100M+

TOTAL JIO USERS

339.74 M

REVENUE MODEL
Free for JIO Users

MEMBERSHIP OFFERS
No Subscription Fee

CONTENT LIBRARY
- Live TV
- Sports
- News

Source: TELECOM REGULATORY AUTHORITY OF INDIA. (Sept 18,2019)
Highlights of Telecom Subscription Data as on 31st July, 2019.
Retrieved from https://trai.gov.in/
https://main.trai.gov.in/sites/default/files/PR_No.74of2019_0.pdf
AIRTEL XSTREAM
Owned By:-
Bharti Airtel

TOTAL AIRTTEL
USERS
328.53 M

REVENUE MODEL
Free for Airtel
Users

DOWNLOADS (GOOGLE PLAY STORE)
50 M+

MEMBERSHIP
OFFERS
No Subscription Fee

CONTENT LIBRARY
- News
- Live TV
- TV Shows
- Movies

https://main.trai.gov.in/sites/default/files/PR_No.74of2019_0.pdf
SUBSCRIPTION BEHAVIOUR
UNDERSTANDING CONTENT CONSUMPTION

MOST ACTIVE PROFILE BRACKETS

<table>
<thead>
<tr>
<th></th>
<th>Subscribers</th>
<th>Users but Non-Subscribers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age Group</td>
<td>24 - 34 years</td>
<td>18 - 24 years</td>
</tr>
<tr>
<td>Income</td>
<td>52% (0-4 LPA)</td>
<td>78% (0-4 LPA)</td>
</tr>
<tr>
<td>Employment Status</td>
<td>Employed, Students, Business Owners</td>
<td>Students</td>
</tr>
<tr>
<td>Cities</td>
<td>Metro</td>
<td>Non - Metro</td>
</tr>
<tr>
<td>Gender</td>
<td>69% Male</td>
<td>68% Male</td>
</tr>
</tbody>
</table>
IF NOT OTT THEN WHAT??

REASONS FOR NOT USING OTT PLATFORMS

I do not have time to watch shows/movies regularly | The cost of subscription is high | I do not have much knowledge about them | It's easier for me to access content online | The type of content on these platforms doesn't interest me | I prefer watching the shows and movies on cable | The interface is not user-friendly

45% | 40% | 30% | 25% | 20% | 15% | 10%

What keeps them away from OTT Platforms?

"Time is Money"

For them, the primary inhibitor to trying OTT Platforms is the lack of time, as testified by 45% of the non-users.

Cable TV/DTH and YouTube are the primary sources of Entertainment, as revealed by respondents who did not use any OTT Platforms.

Other Means of Entertainment for Non-OTT Users

1) Cable TV/DTH
2) YouTube
3) TV shows and Movies don't interest me
4) Pirated Websites
THE BIG BOSS(ES) OF OTT!

MOST USED OTT PLATFORMS- As Per Survey

- More than **80%** of the respondents claimed to have used Amazon Prime, Netflix and Hotstar.

- Interestingly, the two leading platforms follow the Subscription-based revenue model.

- Amongst the AVOD/Free Segment, Jio TV/Cinemas is given a close competition by TVFPlay and MXPlayer.

35% Respondents used SonyLIV

32% Respondents used JioTV / Cinemas

SAAS, BAHU AUR SAAZISH?

Who says TV content is ancient? Hotstar, SonyLIV and Jio TV, which have a substantial amount of Television content, feature in the top 5 popular OTTs amongst our respondents.
ANALYSING SOURCES OF SUBSCRIPTION
65% of the users who claimed to not have subscribed to any OTT Platform have access to exclusive subscription-based (SVOD) Platforms.

These stats compelled us to find out what are the various sources through which the audience is gaining access to OTT Platforms.

In the upcoming section, we analyse various sources of subscription:

- Subscription provided by Telecom companies
- Pooled-in Subscriptions
- Individual Subscription
- Borrowed Subscription
- Accessing only Free Content
Get your full copy of Indian OTT Landscape – A Survey Report by Vidooly. Reach us at reports@Vidooly.com for more information.

*All Primary Data generated through online survey and YouTube data generated through API and Vidooly’s tracking mechanism. Only Public YouTube Videos were tracked for YouTube related data.