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OTT (Over-the-Top) Market in India 2021

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Abstracts

Despite disruptions caused by the pandemic, the entertainment and media industry in India is expected to grow, aided by segments such as OTT, internet advertising, videogames, e-sports, and music and podcasts. India's OTT market continues to be one of the fastest-growing markets in the world. The closure of cinemas and theatre halls for over a year because of the pandemic, has further propelled the adoption of video OTT platforms in India. Some of the key players that operate in the market in India are Amazon Prime Video, Disney+ Hotstar, Netflix India, ALTBalaji, and Gaana.com.

Market insights:

The OTT market can be segmented into video and audio OTT. The video OTT market in India was valued at INR 86.98 Bn in FY 2020. It is expected to expand at a compound annual growth rate (CAGR) of ~30.73% during the FY 2022 – FY 2026 period. Original premium content, especially in regional language, is one of the biggest growth drivers and differentiators, because several OTT platforms are vying for consumers' attention. The audio OTT market was valued at INR 44.21 Bn in FY 2021 and is expected to reach INR 99.98 Bn by FY 2026, expanding at a CAGR of ~19.14% during the FY 2022 – FY 2026 period. An increased focus on launching original music is expected to help these platforms acquire new users, which will ultimately result in the expansion of the overall user base.

Segment insights:

The video OTT can be segmented on the basis of revenue models. The major revenue models of video OTT are advertising video on demand (AVOD) and subscription video on demand (SVOD). The AVOD model accounted for the major chunk of the total market revenue (~62.67%) for video OTT players in FY 2021, which is expected to

continue as the leading segment till FY 2026. The SVOD model is growing faster and will contribute more to the total video OTT revenue. The OTT platforms can also be segmented on the basis of the market share of the major players. Hotstar has the maximum share in the video OTT market and Gaana leads in the audio OTT market.

COVID-19 impact analysis:

Amid the nationwide lockdown because of the ongoing coronavirus (COVID-19) pandemic, content consumption and subscriber count on OTT platforms surged. With an increase in viewers' appetite for new content, OTTs are having to step up their efforts and deliver quality entertainment.

In 2020, the total domestic OTT consumption increased from 181 billion minutes to 204 billion minutes. With an increase in customer acquisition during the pandemic, OTT players are compelled to innovate and offer seamless experience in order to cater to the need for content. Some of the key strategies are collaborations with telecoms and the growth of the device ecosystem.

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Contents

CHAPTER 1: EXECUTIVE SUMMARY

CHAPTER 2: SOCIO-ECONOMIC INDICATORS

CHAPTER 3: INTRODUCTION

3.1. Market definition and structure
3.2. On-demand content ecosystem
3.3. Indian media and entertainment industry – overview

CHAPTER 4: REVENUE MODELS

4.1. Revenue models of video OTT platforms
4.2. Revenue models of audio OTT platforms

CHAPTER 5: VIDEO OTT MARKET OVERVIEW

5.1. Current market scenario
5.2. India video OTT market size and growth forecast (FY 2020 -FY 2026e)

CHAPTER 6: VIDEO OTT MARKET SEGMENTATION

6.1. Major video OTT platforms based on customer satisfaction (FY 2020)
6.2. Market share of video OTT platforms based on subscription share (FY 2020)
6.3. Revenue share of video OTT platforms – based on revenue models
- Advertising video on demand (AVOD)
- Subscription video on demand (SVOD)

CHAPTER 7: AUDIO OTT MARKET OVERVIEW

7.1. India audio OTT market size and growth forecast (FY 2020-FY 2026e)
7.2 Current market scenario

CHAPTER 8: AUDIO OTT MARKET SEGMENTATION

8.1. Platform-wise market share (2020)

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CHAPTER 9: COVID-19 IMPACT ASSESSMENT

9.1. Key highlights
9.2. Player-wise impact scenario
9.3. OTT consumption trend influencing technology and infrastructure upgradation

CHAPTER 10: MARKET INFLUENCER

10.1. Key growth drivers of the market
10.2. Key deterrents to the growth of the market

CHAPTER 11: WEBSITE STATISTICS

11.1. Website rankings statistics
11.2. Website engagement statistics
11.3. Total traffic on desktop and mobile web
11.4. Main sources of traffic to website (on desktop)
11.5. Share of top countries in terms of website visits (on desktop)

CHAPTER 12: COMPETITIVE LANDSCAPE

12.1. Amazon Prime Video
Company information
Business description
Products/services
Key people
Financial snapshot
* Similar information covered for all other companies on best effort basis
12.2. ALT Digital Media Entertainment Limited (ALTBalaji)
12.3. Disney+ Hotstar
12.4. Eros Now
12.5. Gamma Gaana Ltd. (Gaana)
12.6. Hoichoi Technologies (Hoichoi)
12.7. MX Player
12.8. Netflix Entertainment Services India LLP (Netflix India)
12.9. SonyLIV
12.10. Saavn Media Pvt Ltd. (JioSaavn)
12.11. Voot
12.12. Zee5

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CHAPTER 13: RECENT DEVELOPMENTS

13.1. Recent developments

CHAPTER 14: APPENDIX

14.1. Research methodology
14.2. About Netscribes
14.3. Disclaimer

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