

India OTT Video Services Market By Streaming Type (Video-on-Demand, Live), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

India OTT Video Services Market was valued at USD 8.94 Billion in 2024 and is expected to reach USD 23.88 Billion by 2030 with a CAGR of 17.79% during the forecast period. The India OTT video services market has experienced rapid growth, driven by increasing internet penetration, affordable data plans, and a surge in smartphone usage. The market is fueled by demand for diverse content, including movies, web series, and live sports events, catering to various age groups and preferences. Major players such as Netflix, Amazon Prime Video, Disney+ Hotstar, and regional platforms are competing to capture a larger market share through strategic partnerships, localized content, and subscription-based models.

Key Market Drivers

Increasing Internet Penetration and Affordable Data Plans

One of the key drivers propelling the growth of the OTT video services market in India is the widespread increase in internet penetration and the availability of affordable data plans. India, with its vast geographical expanse, has seen an exponential rise in internet users, with over 886 million people using the internet in 2024. India, with its vast geographical expanse, has seen an exponential rise in internet users, with over 800 million people using the internet in 2024. The advent of affordable 4G and 5G services, coupled with low-cost smartphones, has made online video content accessible to a large portion of the population, including rural and semi-urban regions. Telecom giants such as Jio, Airtel, and Vodafone have played a pivotal role in reducing the cost of data, offering unlimited data packages at competitive prices, making it easier for consumers to stream OTT content without worrying about hefty internet bills. This has democratized

access to video services, allowing viewers from different socioeconomic backgrounds to enjoy a wide variety of content at any time, further fueling the OTT sector's growth.

Key Market Challenges

Content Piracy

One of the significant challenges faced by the OTT video services market in India is content piracy. Piracy has been a persistent issue in the Indian entertainment industry, where illegal streaming platforms and websites make copyrighted content available without authorization, often for free. This illegal distribution of content significantly impacts the revenue potential of legitimate OTT platforms, as many consumers choose to access pirated content instead of paying for subscriptions. While OTT players invest heavily in creating high-quality, original, and exclusive content, pirated versions of these shows and movies often circulate widely, depriving platforms of revenue and hurting content creators. The challenge of piracy is compounded by the widespread use of apps and websites that bypass digital rights management (DRM) protections, making it easier for consumers to access pirated content. While the government and OTT platforms are working on stricter regulations and digital enforcement, the problem of piracy continues to be a serious concern, affecting market growth and profitability.

Intense Competition and Fragmented Market

The OTT video services market in India is highly competitive and fragmented, which poses a significant challenge for platforms trying to establish a dominant market share. The entry of global players such as Netflix, Amazon Prime Video, and Disney+ Hotstar has increased competition with local platforms like ZEE5, MX Player, and ALTBalaji, all vying for the same audience. The sheer number of OTT platforms offering a wide variety of content at different price points creates a saturated market where consumers have an overwhelming array of choices. This intense competition makes it difficult for platforms to differentiate themselves and capture consumer attention. Furthermore, many OTT services offer subscription-based models, free content with ads, or hybrid models, adding to the market complexity. While some platforms focus on exclusive content or niche audiences, others are broadening their content libraries to cater to a larger demographic. As a result, new and existing players often find it challenging to stand out or maintain subscriber loyalty. The market's fragmentation also means that platforms must continually innovate, invest in original content, and provide value to retain subscribers, which leads to high operational costs and financial pressures.

Internet Infrastructure and Data Costs in Rural Areas

While urban areas have seen significant growth in OTT consumption, rural India presents a distinct set of challenges for the OTT market. The internet infrastructure in rural areas, though improving, still lags behind urban regions, which limits the accessibility and quality of streaming services. A significant portion of India's population resides in rural and semi-urban areas, where access to high-speed internet is inconsistent or unavailable. Additionally, while data costs have reduced substantially, the affordability of high-speed internet remains an issue for many rural consumers. Poor internet connectivity leads to buffering, lower-quality video streaming, and interruptions in service, which negatively affect the overall user experience and discourage OTT usage in these regions. For platforms aiming to expand their user base, reaching rural consumers and offering them a seamless streaming experience remains a significant hurdle. As OTT companies continue to look for growth in these underserved markets, investments in better infrastructure, affordable data plans, and optimized content for low-bandwidth connections are essential but also come with high costs. This challenge in rural areas could hinder the overall growth potential of the OTT video services market in India.

Key Market Trends

Increase in Subscription-Based Models

A prominent trend in India's OTT video services market is the rise in subscription-based models. As platforms look for sustainable revenue streams, subscription-based services have gained popularity among both consumers and OTT players. The success of platforms like Netflix, Amazon Prime Video, and Disney+ Hotstar, which offer ad-free content with premium features for a subscription fee, has sparked a shift from ad-supported models to subscription-based models. In 2024, the Indian OTT market is witnessing an increase in the number of paid subscribers, with the number of subscription-based OTT users estimated to reach over 200 million by the end of the year. This growth is fueled by the expanding middle-class population and the increasing disposable income of Indian consumers, especially in urban centers. Subscription-based models not only offer better revenue opportunities but also encourage platforms to invest in high-quality, exclusive content, thereby attracting and retaining a loyal customer base. Moreover, the trend toward regional content offerings in local languages is also playing a role, with many viewers preferring to pay for platforms that cater to their specific cultural preferences and entertainment needs.

Key Market Players

Novi Digital Entertainment Pvt Ltd

Amazon Development Center India Pvt Ltd

Netflix Entertainment Services India LLP

Zee Entertainment Enterprises Limited

Sony Pictures Networks India Pvt Ltd

Reliance Jio Infocomm Limited

Times Group

Eros International plc

ALT Digital Media Entertainment Limited

Viacom18 Media Pvt. Ltd.

Report Scope:

In this report, the India OTT Video Services Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

India OTT Video Services Market, By Streaming Type:

Video-on-Demand

Live

India OTT Video Services Market, By Region:

North

South

East

West

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the India OTT Video Services Market.

Available Customizations:

India OTT Video Services Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. INTRODUCTION

- 1.1. Market Overview
- 1.2. Key Highlights of the Report
- 1.3. Market Coverage
- 1.4. Market Segments Covered
- 1.5. Research Tenure Considered

2. RESEARCH METHODOLOGY

- 2.1. Methodology Landscape
- 2.2. Objective of the Study
- 2.3. Baseline Methodology
- 2.4. Formulation of the Scope
- 2.5. Assumptions and Limitations
- 2.6. Sources of Research
- 2.7. Approach for the Market Study
- 2.8. Methodology Followed for Calculation of Market Size & Market Shares
- 2.9. Forecasting Methodology

3. EXECUTIVE SUMMARY

- 3.1. Market Overview
- 3.2. Market Forecast
- 3.3. Key Regions
- 3.4. Key Segments

4. INDIA OTT VIDEO SERVICES MARKET OUTLOOK

- 4.1. Market Size & Forecast
 - 4.1.1. By Value
- 4.2. Market Share & Forecast
 - 4.2.1. By Streaming Type Market Share Analysis (Video-on-Demand, Live)
 - 4.2.2. By Regional Market Share Analysis
 - 4.2.2.1. North Market Share Analysis
 - 4.2.2.2. South Market Share Analysis
 - 4.2.2.3. East Market Share Analysis

- 4.2.2.4. West Market Share Analysis
- 4.2.3. By Top 5 Companies Market Share Analysis, Others (2024)
- 4.3. India OTT Video Services Market Mapping & Opportunity Assessment
 - 4.3.1. By Streaming Type Market Mapping & Opportunity Assessment
 - 4.3.2. By Region Market Mapping & Opportunity Assessment

5. NORTH INDIA OTT VIDEO SERVICES MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Streaming Type Market Share Analysis

6. SOUTH INDIA OTT VIDEO SERVICES MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Streaming Type Market Share Analysis

7. WEST INDIA OTT VIDEO SERVICES MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Streaming Type Market Share Analysis

8. EAST INDIA OTT VIDEO SERVICES MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Streaming Type Market Share Analysis

9. MARKET DYNAMICS

- 9.1. Drivers
- 9.2. Challenges

10. MARKET TRENDS & DEVELOPMENTS

11. SWOT ANALYSIS

- 11.1. Strength
- 11.2. Weakness
- 11.3. Opportunity
- 11.4. Threat

12. POLICY & REGULATORY LANDSCAPE

13. INDIA ECONOMIC PROFILE

14. COMPETITIVE LANDSCAPE

14.1. Company Profiles

14.1.1. Novi Digital Entertainment Pvt Ltd

- 14.1.1.1. Company Details
- 14.1.1.2. Products & Services
- 14.1.1.3. Financials (As Per Availability)
- 14.1.1.4. Key Market Focus & Geographical Presence
- 14.1.1.5. Recent Developments
- 14.1.1.6. Key Management Personnel

14.1.2. Amazon Development Center India Pvt Ltd

- 14.1.2.1. Company Details
- 14.1.2.2. Products & Services
- 14.1.2.3. Financials (As Per Availability)
- 14.1.2.4. Key Market Focus & Geographical Presence
- 14.1.2.5. Recent Developments
- 14.1.2.6. Key Management Personnel

14.1.3. Netflix Entertainment Services India LLP

- 14.1.3.1. Company Details
- 14.1.3.2. Products & Services
- 14.1.3.3. Financials (As Per Availability)
- 14.1.3.4. Key Market Focus & Geographical Presence
- 14.1.3.5. Recent Developments
- 14.1.3.6. Key Management Personnel

14.1.4. Zee Entertainment Enterprises Limited

- 14.1.4.1. Company Details

- 14.1.4.2. Products & Services
- 14.1.4.3. Financials (As Per Availability)
- 14.1.4.4. Key Market Focus & Geographical Presence
- 14.1.4.5. Recent Developments
- 14.1.4.6. Key Management Personnel
- 14.1.5. Sony Pictures Networks India Pvt Ltd
 - 14.1.5.1. Company Details
 - 14.1.5.2. Products & Services
 - 14.1.5.3. Financials (As Per Availability)
 - 14.1.5.4. Key Market Focus & Geographical Presence
 - 14.1.5.5. Recent Developments
 - 14.1.5.6. Key Management Personnel
- 14.1.6. Reliance Jio Infocomm Limited
 - 14.1.6.1. Company Details
 - 14.1.6.2. Products & Services
 - 14.1.6.3. Financials (As Per Availability)
 - 14.1.6.4. Key Market Focus & Geographical Presence
 - 14.1.6.5. Recent Developments
 - 14.1.6.6. Key Management Personnel
- 14.1.7. Times Group
 - 14.1.7.1. Company Details
 - 14.1.7.2. Products & Services
 - 14.1.7.3. Financials (As Per Availability)
 - 14.1.7.4. Key Market Focus & Geographical Presence
 - 14.1.7.5. Recent Developments
 - 14.1.7.6. Key Management Personnel
- 14.1.8. Eros International plc
 - 14.1.8.1. Company Details
 - 14.1.8.2. Products & Services
 - 14.1.8.3. Financials (As Per Availability)
 - 14.1.8.4. Key Market Focus & Geographical Presence
 - 14.1.8.5. Recent Developments
 - 14.1.8.6. Key Management Personnel
- 14.1.9. ALT Digital Media Entertainment Limited
 - 14.1.9.1. Company Details
 - 14.1.9.2. Products & Services
 - 14.1.9.3. Financials (As Per Availability)
 - 14.1.9.4. Key Market Focus & Geographical Presence
 - 14.1.9.5. Recent Developments

- 14.1.9.6. Key Management Personnel
- 14.1.10. Viacom18 Media Pvt. Ltd.
 - 14.1.10.1. Company Details
 - 14.1.10.2. Products & Services
 - 14.1.10.3. Financials (As Per Availability)
 - 14.1.10.4. Key Market Focus & Geographical Presence
 - 14.1.10.5. Recent Developments
 - 14.1.10.6. Key Management Personnel

15. STRATEGIC RECOMMENDATIONS

- 15.1. Key Focus Areas
- 15.2. Target Streaming Type

16. ABOUT US & DISCLAIMER

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