

OTT PLATFORMS IN INDIA: A COMPREHENSIVE SURVEY AND ANALYSIS

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ABSTRACT

The creation, distribution, and consumption of information have all undergone radical change in India because to the rise of over-the-top (OTT) platforms. The OTT ecosystem in India is thoroughly surveyed and analysed in this research, which also looks at the major actors, content dynamics, technology developments, and socioeconomic effects. The report starts by charting the development of over-the-top (OTT) platforms in India and highlights the driving forces behind it, including rising internet penetration, rapidly declining smartphone prices, and shifting consumer preferences among technologically savvy consumers. In order to gain market share, the major OTT companies employed various techniques, which are examined in this research along with the competitive environment that resulted. The Over-the-Top (OTT) market in India is examined in-depth in this study, with a particular emphasis on five main platforms: Netflix, Amazon Prime Video, Disney+ Hotstar, SonyLIV, and Zee5. The paper includes a thorough survey and comparative analysis, delving into the technology advancements, market dynamics, content strategy, and platform evolution that determine each platform's distinct place in the Indian streaming ecosystem. The research also covers the obstacles that these platforms must overcome, including as piracy prevention, data privacy issues, and regulatory compliance. Each platform's methods for overcoming these obstacles are assessed, providing a thorough understanding of how resilient they are in the Indian market.

Keywords: OTT Platforms, Comprehensive Study, Netflix, Amazon Prime.

Introduction

The entertainment business has seen a paradigm change with the introduction of Over-the-Top (OTT) platforms, which have revolutionised the creation, distribution, and consumption of content. The quick development of digital technology and the broad accessibility of high-speed internet have pushed over-the-top (OTT) platforms to the forefront of the media environment. This shift is especially significant in the Indian context, where a vibrant and varied market is seeing an unheard-of increase in the consumption of digital material. This paper, titled "OTT Platforms in India: A Comprehensive Survey and Analysis," aims to delve deep into the intricacies of the OTT ecosystem within the Indian subcontinent. As the country witnesses a digital revolution, marked by an ever-expanding internet user base and an increasing preference for on-the-go content consumption, the study seeks to provide a thorough

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exploration of the key factors influencing the growth and impact of OTT platforms in India. The comprehensive survey encompasses a holistic view of the landscape, from the inception and growth of major platforms to the nuances of their content strategies, technological innovations, and the socio-economic repercussions on the entertainment industry and society. The analysis is not merely a quantitative examination of market trends; it's an endeavour to understand the qualitative aspects that make the Indian OTT landscape unique and influential on a global scale. The relevance of such a study lies in the pivotal role that OTT platforms play in shaping the future of entertainment in India. By critically evaluating the strategies adopted by major players and comparing their approaches, this research aims to offer insights that are not only academically valuable but also hold practical implications for industry stakeholders, policymakers, and content creators. As we embark on this journey through the world of Indian OTT platforms, the goal is to unravel the layers of innovation, challenges, and socio-cultural dynamics that define this dynamic industry. In doing so, we aim to contribute to a nuanced understanding of the present state and future trajectory of OTT platforms, examining how they are redefining the entertainment landscape in the second-most populous country in the world.

Profile of OTT Platforms in India

With BigFlix, OTT platforms made their debut in India. BigFlix, which Reliance Entertainment introduced in 2008, was India's first over-the-top platform. Eventually, with the introduction of Zed TV and Sony Liv in 2013, OTT began to flourish in India. 2015 saw the entry of Disney Hotstar into the OTT market. Since its debut, Disney Hotstar has gained more viewers. It is currently one of the most popular OTT platforms. Afterwards, Netflix started offering its services in India at the start of 2016 and started to compete with sites like Disney+Hotstar and Amazon Prime Video.

Here are the Profile of Some selected Streaming Giants in India:

- **Netflix:** A worldwide streaming behemoth, Netflix made a splash when it first entered the Indian market and immediately became well-known thanks to its enormous collection of local and foreign content. The platform prioritises top-notch original content across all genres.
- **Amazon Prime Video:** This offering combines additional Prime advantages with its streaming service. Its catalogue of material is varied and includes unique foreign content, Bollywood and regional films, as well as original shows.
- **Disney+ Hotstar:** Acquired by Disney, Hotstar is a significant player that provides a variety of original content, TV series, films, and live sports. It serves a broad clientele, including fans of sports.
- **Sonyliv:** Movies, original material, and live TV channels are all available on this platform, which is owned by Sony Pictures Networks India. It heavily emphasises Sony Network series and sports material.
- **ZEE5:** A division of Zed Entertainment Enterprises, Zee5 provides a wide variety of programming in several Indian languages. TV programmes, films, original productions, and only-available local entertainment are all included.
- **Eros Now:** An Indian over-the-top (OTT) platform called Eros Now was founded in 2012. Eros International is the owner and operator of it. Its main office is in Mumbai. Users are able to watch as many films, TV series, Eros Originals, and songs as they like. There are 155 million active users and 18.8 million paying users on the network. According to statistics, there will be 26.2 million members in 2020, a 65% increase from the previous year. The Eros Now Subscription Offers are quite compelling, with subscribers able to receive discounts of up to 60%. Due to the epidemic, which kept people at home, revenue growth of 57.3% was recorded in 2020. During this time, people's use of digital devices increased significantly.
- **Alt Balaji:** An Indian subscription over-the-top platform is called ALTBalaji. Balaji Telefilms Ltd. owns it. The year of its introduction was 2017. In order to produce original OTT content, the firm ventured into the digital entertainment space. There are reportedly 34 million paying members on the site. In FY20, ALT Balaji's income increased by INR 20 crore.
- **Voot:** Voot is owned by Viacom 18 network. This is the whole name of an Indian over-the-top (OTT) platform that has been around since 2016. Its main office is in Mumbai. Watching the favourite TV show and films was never so simple. It claims to have 100 million monthly active users.

Flexibility of OTT Service Usage

People choose OTT platforms over television channels because they are more convenient and user-friendly than television channels. The consumer world moves quickly, and time is of the essence. If OTT platforms offer ease in terms of banking, shopping, planning trips, scheduling events, and other areas, then they be a really beneficial platform. Ongoing research is being done to reduce the amount of time needed to navigate this platform. This facility will aid customers with the purpose of solving more work in less time.

Thus, it is evident that the comfort and ease that an OTT platform offers is a primary driving force behind its adoption. Marketers should constantly concentrate on the intended user base and goal of the OTT platform or app. The OTT platform brand should endeavour to enable these facilities and inform the target group once it has a good understanding of the target group and why they are using this OTT platform or app.

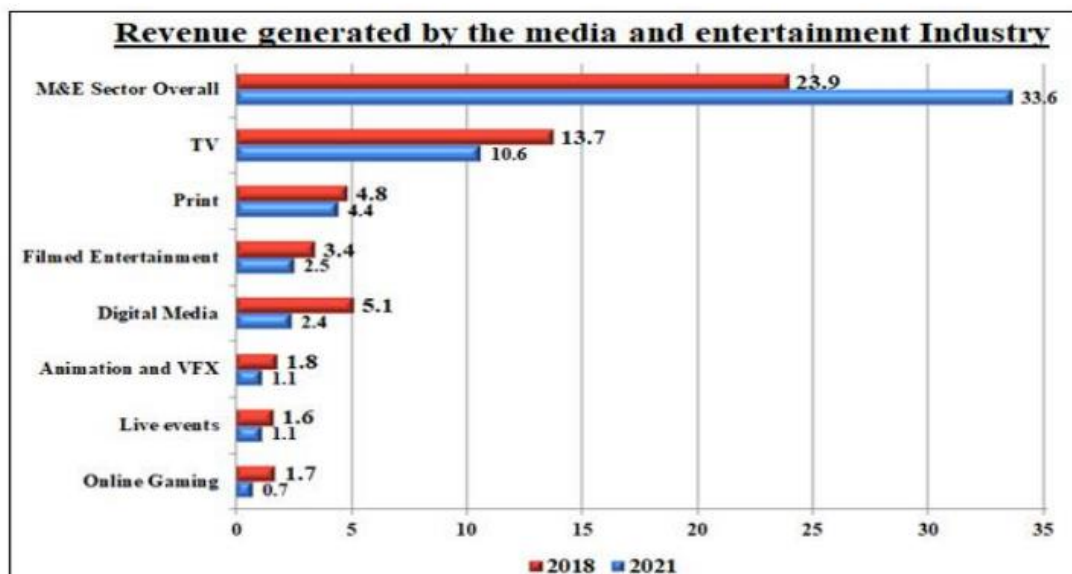
India’s Top 10 OTT Platforms

Sl. No	Name of the OTT	Launching OTT platform	OTT Subscribers	Current OTT Subscribers
1	Disney Hotstar	2015	26.8 million	300 million
2	Amazon Prime Video	2016	22.2 million	200 million
3	Netflix	2007	6.1 million	222 million
4	Aha	2020	1.5 million	1.5 million
5	Voot	2016	1 million	1.5 million
6	ALT Balaji	2017	3.8 million	34 million
7	Sony Liv	2013	18.2 million	32.7 million
8	Zee5	2018	21.2 million	48.11 million
9	Sun NXT	2017	20 million	21.2 million
10	Eros Now	2019	18 million	211.5 million

Source: <https://indianonlineseller.com/top-10-ott-platforms-in-india>

Income from the Entertainment and Media Industries

The entire media and entertainment industry is expected to increase in value from 23 billion to 33 billion US dollars. The TV industry is expected to rise from \$10 billion to \$13 billion between 2018 and 2021. From 2018 to 2021, the print IT sector's revenue is expected to increase from \$4.4 billion to \$4.8 billion. From 2018 to 2021, the income from film entertainment will rise from 2.5 billion to 3.5 billion dollars. Revenue in the digital media sector is expected to increase from \$2.4-5 billion. From 2018 to 2021, the animation and visual effects industry will generate 1.8 billion dollars in revenue, up from 1.1 billion dollars in 2018. Revenue from the live events sector is expected to increase from 1.1 billion to 1.6 billion dollars.



Cost and Accessibility of Over-the-Top (OTT) Services

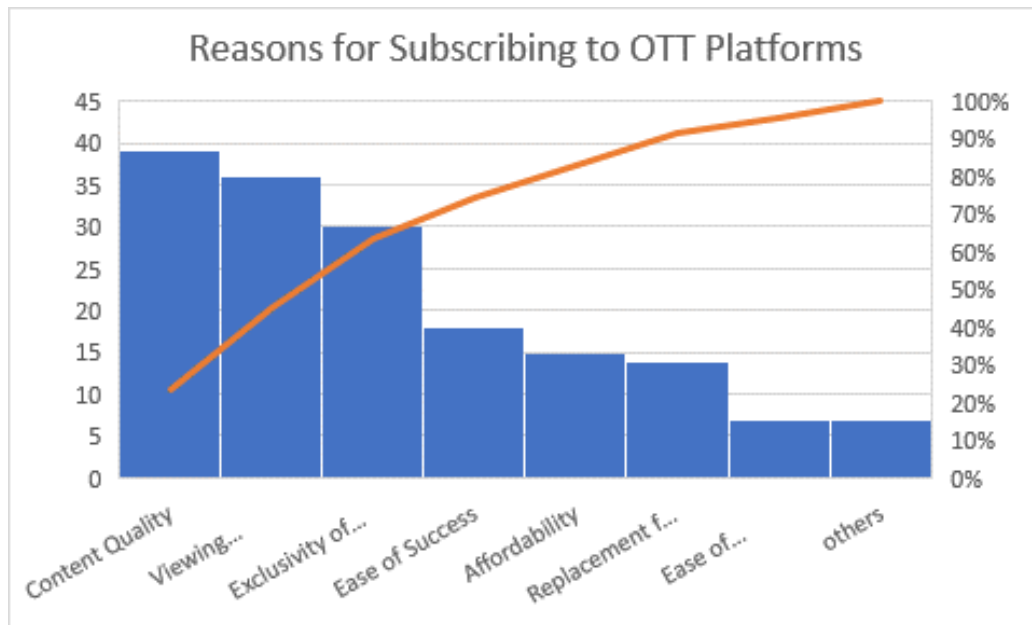
The main issue facing OTT video platforms in a country like India is that most consumers still prefer free content or limited-time free periods offered by the brand or platform. The idea of a paid membership is still unpopular in the industry. In an attempt to win over customers, many over-the-top (OTT) platforms that compete with other companies end up providing premium content for free, which causes them to lose money. Customers who switch from watching television to over-the-top (OTT) content will not only be able to watch what they want, when they want, and for less money than they would pay for traditional television. Additionally, consumers began to believe that paying for television was more expensive than using an OTT platform. Television has thousands of Consumers are aware that over-the-top (OTT) platforms are neither complementary nor a replacement for television services. The demand for television platforms will eventually start to decline gradually.

It has been noted that the subscription plans offered by OTT operators in India are reasonably priced. For example, Netflix charges 500 rupees per month for its mobile plan, while customers pay 199 rupees for an all-mobile subscription. The monthly cost for an Amazon Prime Video subscription is 129 rupees. Rupees a month for Hotstar VIP subscription planners. Sony LIV monthly subscription OTP plan costs rupees 99 only, whereas ZED Five monthly subscription plan costs just rupees 99. The current monthly membership plan for Eros costs 49 rupees. It cost 34 rupees to subscribe to the Alt Balaji e plan.

Subscription Plans of Key OTT Players		
Player	Monthly Plan (INR)	Yearly Plan (INR)
Netflix	500	NA
Netflix (Mobile Only)	199	NA
Amazon Prime Video	129	999
Hotstar VIP	199	365
Hotstar	299	999
Zee5	99	999
Sony LIV	99	499
Eros Now	49	470
Alt Balaji	34*	300
Hoichoi	NA	499
Viu	50	599

Factors Driving the OTT Platform's Rise in India

The demand for OTT video services among young people is being driven by the ease of use and availability of exclusive and original material, particularly regional content, by OTT video service providers upon membership. Furthermore, Indian customers are starting to pay membership fees on OTT platforms instead of only using the free OTT video services, indicating a shift in their thinking.



Factors Affecting the Inclination to Adopt OTT Platforms

Globally, more and more people are consuming media in digital formats. Customers may now access the media content of their choice—be it entertainment, information, or social interaction—anytime, anywhere, thanks to the proliferation of devices enabling digital media and the acceleration of internet access. India has witnessed a sharp rise in media consumption, with a notable shift from conventional to new (digital) media. The conventional wisdom that maintains the television as the primary source of entertainment is being challenged by the emergence of digital media players like Netflix, Amazon prime, Disney+Hotstar, Zee 5, Alt Balaji, etc among others. Globally, more and more people are consuming media in digital formats. The ability to access media material of one's choosing, whether it is information, entertainment, or social interaction, is now offered to consumers by the rise in the number of devices supporting digital media and the speed at which internet access is growing. In the US, media consumption has skyrocketed and seen a notable shift from new (digital) media to conventional media. The growth of digital media players such as Netflix, Amazon prime, Disney+Hotstar, Zee 5, Alt Balaji, etc. are undermining the historically maintained primacy of television as the major entertainment hub. Mobile smartphones are becoming the most popular way to consume internet media among digital gadgets. Over the past five years, there has been an unparalleled surge in the smartphone industry. Customers are finding it simpler to obtain music and video material as a result of the rise in mobile devices. The media distribution and consumption channels have been and now are being disrupted by the internet. Global data consumption has increased due to improved networks, coverage, and cutting-edge technology (3G, 4G, and LTE). Worldwide consumption of digital media is driven by audio and video for a while now, the majority of internet bandwidth usage worldwide has been made up of audio and video traffic. In recent years, there has been an evolution in the devices used to access digital material, expanding the range of platforms available to users for streaming audio and video content.

Content on the OTT Platform

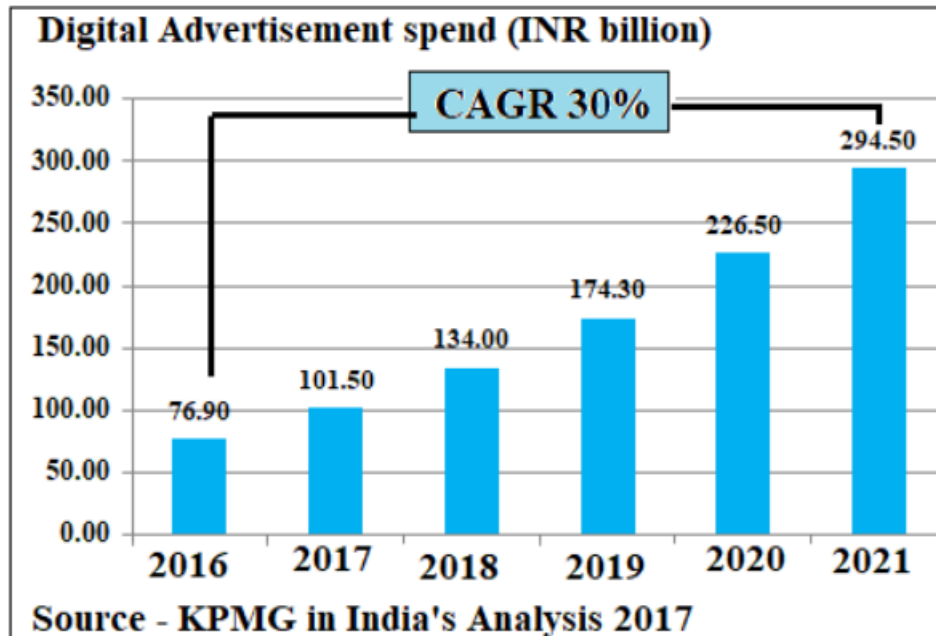
When it comes to generating interest in an audience, content is paramount. "No matter how convenient a platform is, if the content is poor, the audience will not be inclined to subscribe." After being introduced to it, this is the type of material that originally drew users to OTT platforms. Therefore, it is crucial to add relevant and engaging information to these sites. Modern, engaging, and enjoyable to interact with material is required. To encourage users to interact with the material and become active, creative visual effects and graphic interfaces may be used. Given the fierce rivalry between these platforms, it follows that other marketing components won't be able to popularise the platform if the content isn't interesting. To establish a connection with the audience, the company must offer appealing content and genre. Customers use a variety of platforms and are quite picky. The contemporariness of the content is something that brand managers and platform developers need to concentrate on so that

there are repeat viewings of the platform. This may happen when the audience, the content, and the OTT platform's theme all work together to effectively engage with one another.

This procedure will guarantee that customer connectivity on these platforms is at its best in the crowded OTT platform market.

The Amount Spent on Digital Advertising in (INR Billion Rupees)

According to KPMG's analysis 2017 study, the amount spent on digital advertisements in India would rise from 76.9 billion rupees to 294 million rupees between 2016 and 2021.



Increase in Media and Entertainment (M&E) Sector Revenue

When it comes to conventional media, such as TV, print media, and radio, consumer tastes are clearly shifting in favour of digital media consumption. Compared to conventional media, people are using digital media more often throughout the day. The amount of time individuals spend on digital media has significantly increased over the previous four years, according to data from the US and the UK. Global advertising expenditures have undergone a paradigm shift as a result of the growing popularity of digital media. Following the evolving trend, marketers are spending a larger portion of their money on digital channels. It is anticipated that the share of advertising expenditure allocated to digital media would rise from 21% in 2010 to 28% in 2015. By 2020, it is anticipated to increase to 36%. The primary source of this growth is the cannibalization of conventional print and media advertising.

Covid-19 and Rise of OTT in India

In addition to hurting businesses and the economy, the lockdown imposed during the COVID-19 epidemic also changed people's behavioural habits. Owing to extra advantages such on-demand services and accessibility, consumers' abrupt shift in social activities has caused the form of entertainment to shift from traditional television or movie theatres to video streaming services. The number of customers of pay-per-view and video-streaming services is expected to increase exponentially in countries like China and India. Reputable content streaming firm Netflix revealed in March 2018 that it will be adding 100 million Indian consumers to its current global subscription base of 125 million. In 2018, the worldwide over-the-top (OTT) business brought in \$129.3 billion, and by 2026, revenue is expected to reach \$438.5 billion, according to Research Dive research. Some OTT platforms are currently offering longer free periods in an attempt to recruit subscribers following the COVID-19 pandemic and capture a significant portion of the viewership. Because of this increased preference for OTT platforms throughout the crisis, an increase in overall revenue from digital subscriptions is anticipated.

Challenges towards OTT Platforms in India

- In India, the absence of a thorough legal framework for over-the-top (OTT) services has created confusion and raised concerns around compliance and content restriction. The government was thinking about putting regulations in place to control what was posted on digital media.
- OTT services frequently deal with issues pertaining to content regulation, including discussions over what constitutes appropriate watching. A recurring problem has been striking a balance between artistic independence and society and cultural sensitivity.
- Concerns over the security and privacy of user data on OTT platforms arose as a result of the growing dependence on data-driven services. Resolving these issues is essential to preserving consumer confidence.
- In India, there is fierce competition among domestic and foreign businesses seeking market share in the over-the-top (OTT) arena. In the midst of tremendous rivalry, maintaining a faithful user base is a constant problem.
- Although subscription-based business models are becoming more and more common, gaining and keeping paying customers can be difficult. A major problem in the Indian market is determining the appropriate pricing strategy due to its variety, which includes a wide range of discretionary income levels.
- OTT platforms have to make costly and logistically difficult investments in the creation and acquisition of content in a variety of languages and genres in order to satisfy the different linguistic and cultural tastes of their user base.
- Unauthorised content distribution continues to be a major problem for OTT services. In addition to decreasing income, piracy stunts the expansion of legitimate streaming businesses.

Conclusion

The flexibility of mobility offered by these OTT platforms is a major contributing reason to their rise. Therefore, mobility is a key component for OTT brands. If the customer has the freedom and flexibility to watch anything anyplace, they are willing to pay higher costs. Indian customers' attitudes are shifting, and instead of only using free OTT video services, they are now paying subscription fees on OTT platforms. Different pricing tactics, such as penetration pricing and strategic pricing, are being adopted by OTT companies. Trials are one of the strategies that OTT players employ to turn transient consumers into long-term customers. For ease of use and account sharing, OTT players provide different accounts and a range of viewers per subscription. With the use of sachet packs, OTT platforms have been offering a broad variety of access for a few days to weeks at a time. In addition to hurting businesses and the economy, the lockdown imposed during the COVID-19 epidemic also changed people's behavioural habits. People are advised to remain inside their homes during lockdowns, leaving them with little other choice except to watch television and use digital music players. Owing to extra advantages like on-demand services and accessibility, the abrupt shift in consumers' social activities has caused the form of entertainment to shift from traditional television or movie theatres to video streaming services. It is anticipated that nations like China and India would see an exponential increase in the number of consumers who stream material through pay-per-view and video streaming services. OTT players' expansion in India during the blockade demonstrates the future potential of OTT gamers. The main elements encouraging the expansion of OTT platforms in India include comfort, mobility, COVID-19 lockdown, good content on the platform, and availability of material in regional languages.

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