



PRESS PLAY

INDIA'S OTT STORY
GOES GLOBAL



In association with

RollingStone
MEDIA



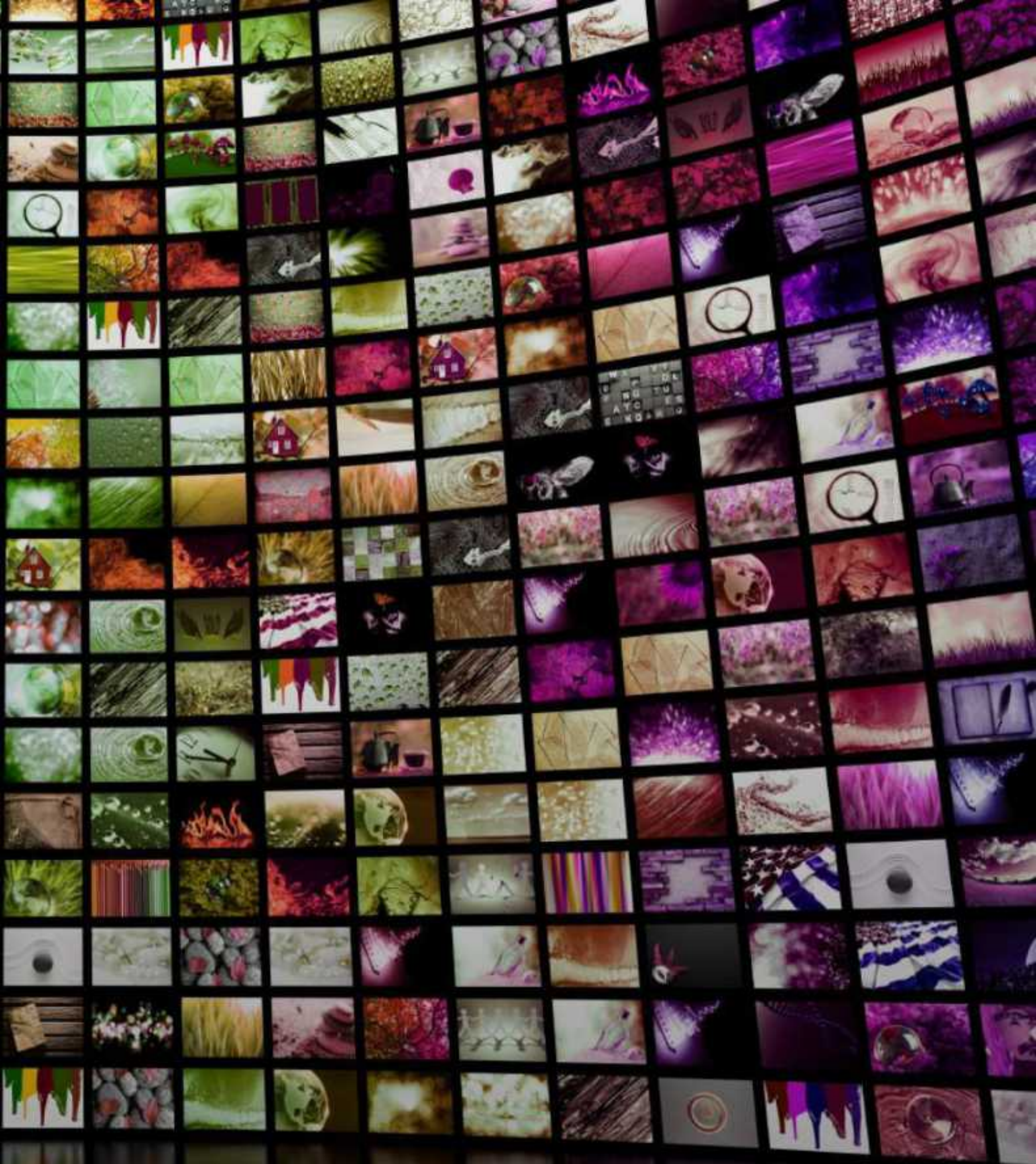


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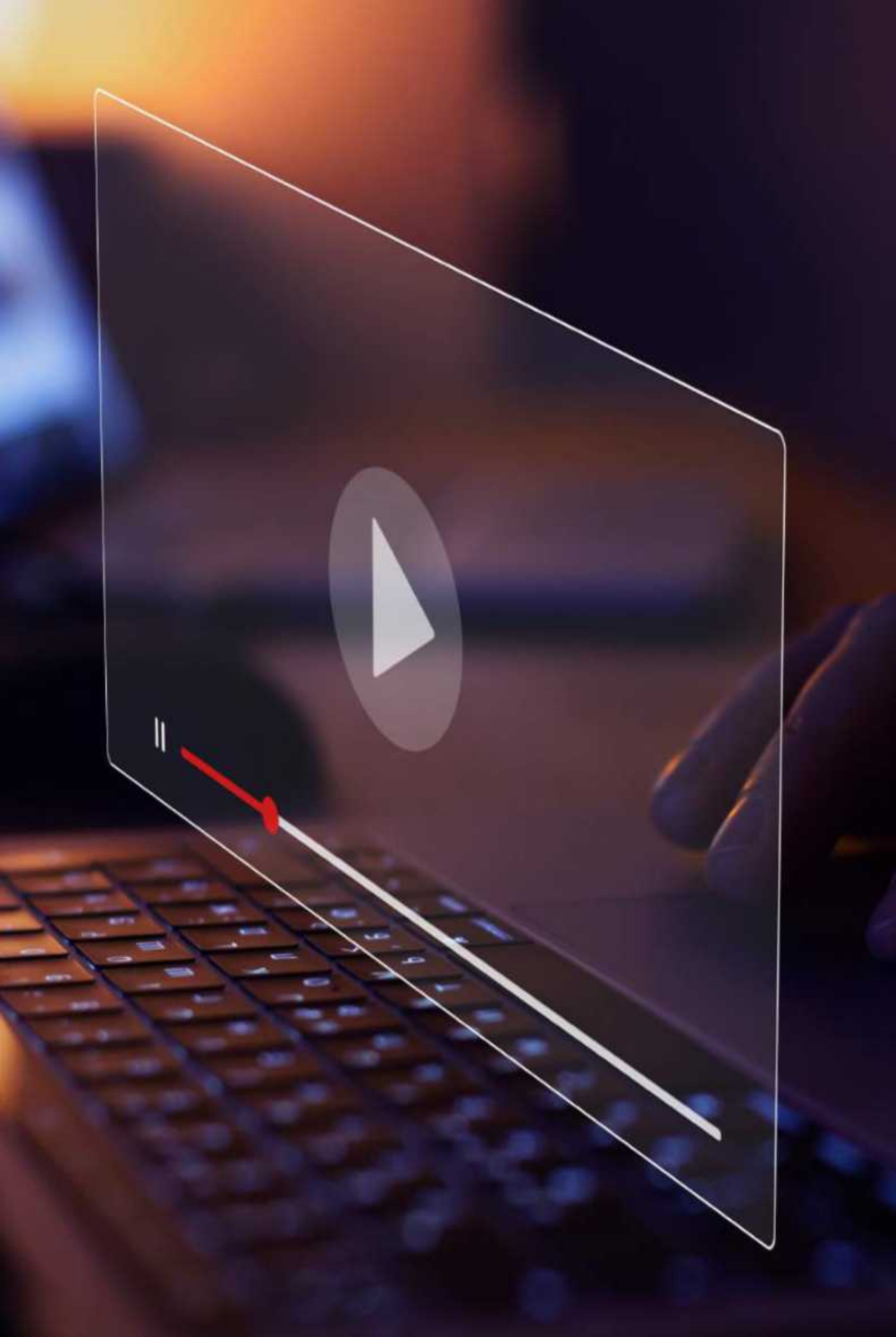
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CURTAIN RAISER: OTT IN INDIA

FROM STREAM TO SURGE

Welcome to the golden age of storytelling; streamed, subtitled and supercharged.

It did not start with a blockbuster. It started with a buffer.

A blurry screen. A spinning circle.

A nation adjusting to its first few seconds of video on a mobile device.

Rewind to a little over a decade ago, India's digital audiences were discovering that entertainment could travel through thin air and land in their hands. The first few OTT shows were not marketed with megastars or mounted on massive budgets. They were quiet, experimental, scrappy, created by those who believed in the power of the internet.

And then, the disruption happened.

Suddenly, a show in a regional dialect outperformed primetime TRPs.

A platform with no satellite signal outshined movie theatre footfall.

A Web series explored stories of unheard voices, fractured systems and untold truths and suddenly, India was watching more than just fiction.

India's OTT revolution was not just streamed. It was sparked.

What followed was a decade of digital storytelling unlike anything the country had seen. Stories leapt off devices and into culture. Viewers evolved from passive watchers to active curators. And India, a diverse, multilingual, and always-online nation, became the **largest playground for content experimentation on the planet.**

From 5G to AI, from subtitling to super-apps, OTT in India has become a cultural force and economic engine, shaping how we connect, consume and communicate.

This report is not a look back. It's a deep dive into **a medium that is remaking the message, and a market that is leading the world.** Because this is no longer just content. This is the new currency of influence, identity and imagination.

In just over a decade, OTT in India has transformed from a niche digital experiment into a full-blown cultural force.

This is not just growth, it's a genre shift in how India entertains, educates and engages.

From ₹1,000 crore in 2012 to a projected ₹30,000+ crore industry today, OTT has outpaced traditional formats, onboarding new audiences, new formats and a bold new voice.

Think of it as a digital Kumbh Mela, where languages, regions and genres collide. A melting pot of cultures, where hyperlocal meets global, and a Bhojpuri web series can trend in Berlin while an indie Tamil thriller wins hearts in Toronto. Its OTT tourism; 365 days a year, infinite destinations, all accessible with a tap.

At the centre of this shift is a powerful phenomenon: **cross-border syncretism**. Audiences are not just watching, they are travelling through content, exploring new dialects, decoding new cultures and redefining what it means to be both Indian and global at once.



Navneet Sehgal
(Retd. IAS)

Chairman, Prasar Bharati

Today's OTT platforms not only entertain but foster empathy, shape cultural perspectives and bridge marginalisation with authentic and relatable stories. OTT can be a powerful catalyst for social inclusion amplifying diverse voices and narratives from grassroots.

As national broadcaster Prasar Bharati's Waves OTT is bringing clean family content to reach all sections of society with its free and diverse content stack for all age groups, eclectic tastes, and in multiple regional languages of the country.



**Gaurav Dwivedi (IAS)**

Chief Executive Officer, Prasar Bharati

In an era where content flows across borders and screens, the role of public service broadcaster is more vital than ever, not just to inform and educate, but to represent, preserve and empower. With WAVES OTT, Prasar Bharati is building more than a digital platform, we are shaping a public square for the digital age. One that bridges Bharat and India, legacy and innovation, access and aspiration. Our vision is rooted in inclusion: content in 22+ languages, stories from every corner of the country and an open window to India's civilizational heritage, cultural diversity and democratic spirit. As global platforms scale with algorithms, WAVES scales with purpose, ensuring that the voices of every Indian, from the most remote village to the global diaspora, find space, visibility and respect in the digital future. This is not just nation-building through broadcasting, it is nation-presence through storytelling.



FROM NICHE TO NATION: THE GROWTH STORY

In 2012, India's OTT industry was valued at just around **₹1,000 crore (~USD 150 million)**. In 2025, the market is estimated to exceed **₹30,000 crore (~USD 3.6 billion)**, according to industry reports. A **30x growth** in just over a decade. India is now one of the fastest-growing OTT markets globally. It is expected to overtake mature markets like South Korea, Germany and Australia by 2027 in both user base and revenue.

India's digital leap powered this ascent. With over 825 million internet users (TRAI, 2024) and one of the lowest mobile data rates globally (**₹10/GB compared to the global average of ₹100/GB**), video content has become the largest consumer of internet bandwidth in the country, accounting for nearly 75% of all data consumption.

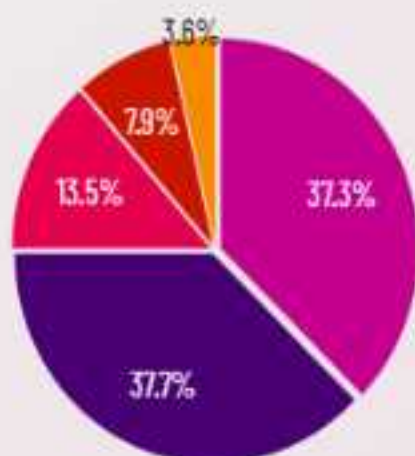


Mr. Sameer Nair

Chief Executive Officer,
Applause Entertainment

OTT has collapsed boundaries of geography, language, and even imagination. Today, a story created in one corner of the world can move hearts across continents. This seamless access has broadened our choices and given us a vast canvas of engaging entertainment, allowing us to explore perspectives and narratives we never thought possible. In that sense, streaming isn't just a medium - it's a movement. And its greatest impact lies not in scale, but in the shared human experience it enables.

Viewer Considerations when subscribing to an OTT



Insight

More than **75% of Viewers** feel that exclusive content at affordable pricing is the most significant factor that influences their decision to subscribe to an OTT platform.

- Affordable Pricing
- Exclusive Content
- User Experience & Ease of Use
- Family/Friends' Recommendation
- Other

NOT JUST GROWTH - IT'S A GENRE SHIFT



Mr. David Unger

CEO, Artists International Association

We are at a pivotal moment in the history of global storytelling, where technology, talent and culture are converging to create a borderless entertainment landscape. Today, a story born in Lagos can premiere in Los Angeles, a script from Mumbai can spark conversations in Munich and a performance in Seoul can redefine stardom in São Paulo. Streaming platforms have opened not just new markets, but new mindsets, audiences are no longer asking where a story comes from, but whether it moves them, reflects them, surprises them. We are seeing the rise of a truly global creative economy; where content is capital, storytelling is soft power and authenticity is the new universal currency. The future of entertainment will not be owned by any one geography, it will be shaped by collaboration, cultural truth and the courage to break the mould.



OTT in India is not just growing, its transforming. It has broken free from the shackles of television's language silos and film's distribution bottlenecks. Today, its a parallel cinema, a second screen to prime time, a launchpad for regional voices and a playground for creative experimentation. In the digital age of streaming entertainment, The Amazon Web Services (AWS) serves as a crucial cloud infrastructure provider in India's media landscape. With its committed investment of US\$12.7 billion in India by 2030, including significant cloud infrastructure development across Mumbai and Hyderabad

regions, AWS provides the technological foundation for content delivery and streaming services.

Through its global network of 450+ edge locations and robust cloud services, AWS enables OTT platforms to deliver content to India's growing base of over 550 million OTT users. The company's continued expansion of cloud infrastructure in India, including its recent announcement of an additional \$8.3 billion investment in the Mumbai region, demonstrates its commitment to supporting the country's digital media transformation.

From gritty crime thrillers in Marathi to nostalgia-driven docuseries in Assamese and even mythological epics reimagined in high definition, OTT has given India a **democratic, diverse and direct-to-consumer medium**. Stories no longer need stars; they need resonance.

OTT viewership is now measured in habits, not hours. According to a latest report, **the average OTT viewer in urban India:**

-  Subscribes to **2.4 platforms**
-  Spends around **70 minutes daily** Streaming content
-  Increasingly seeks **Original, local & binge-worthy formats**

**Nina Walsh**

Global Leader,
Industry Business
Development,
Media &
Entertainment,
Games & Sports,
Amazon Web
Services (AWS)

AWS has revolutionised the media and entertainment industry by providing scalable, cost-effective, and innovative cloud solutions that empower companies to create, deliver, and personalise high-quality content for global audiences, enabling real-time engagement, data-driven insights, and rapid adaptation in a fast-evolving digital landscape.



INDIA: THE GREAT CONTENT CONFLUENCE

Think of OTT in India as a digital Kumbh Mela. Genres, languages, themes and regions co-exist and collide. An indie Tamil thriller can win over hearts in Toronto. A Punjabi comedy can go viral in Melbourne. OTT has made cultural exports accessible and domestic diversity visible.

This cultural fluidity is best captured in the rising trend of **cross-border syncretism**, where Indian viewers are embracing Korean dramas and Spanish thrillers, while global audiences are discovering Indian folktales, true-crime stories and biopics with ease through subtitles.



Amish Tripathi

Author

Mythology is not just about gods and demons, it's about the values, struggles and questions that define a civilization. When Indian epics like the Shiva Trilogy are picked up for screen adaptations, it's a sign that our stories are finding a universal heartbeat.

Globally, audiences have engaged deeply with narratives like *The Young Pope*, an introspective look at faith and power and *Conclave*, a timely story about the secretive process of choosing a new Pope, which feels especially relevant today as the Vatican prepares for another transition.

OTT TOURISM: ALWAYS ON, ALWAYS ACCESSIBLE

Gone are the days of scheduled programming. OTT is **365-day tourism for the imagination**, accessible via smartphones, smart TVs and now even through public Wi-Fi kiosks and affordable dongles. With offline downloads, data-saving modes and vernacular UI features, it has become the primary window to entertainment for many first-time digital users.

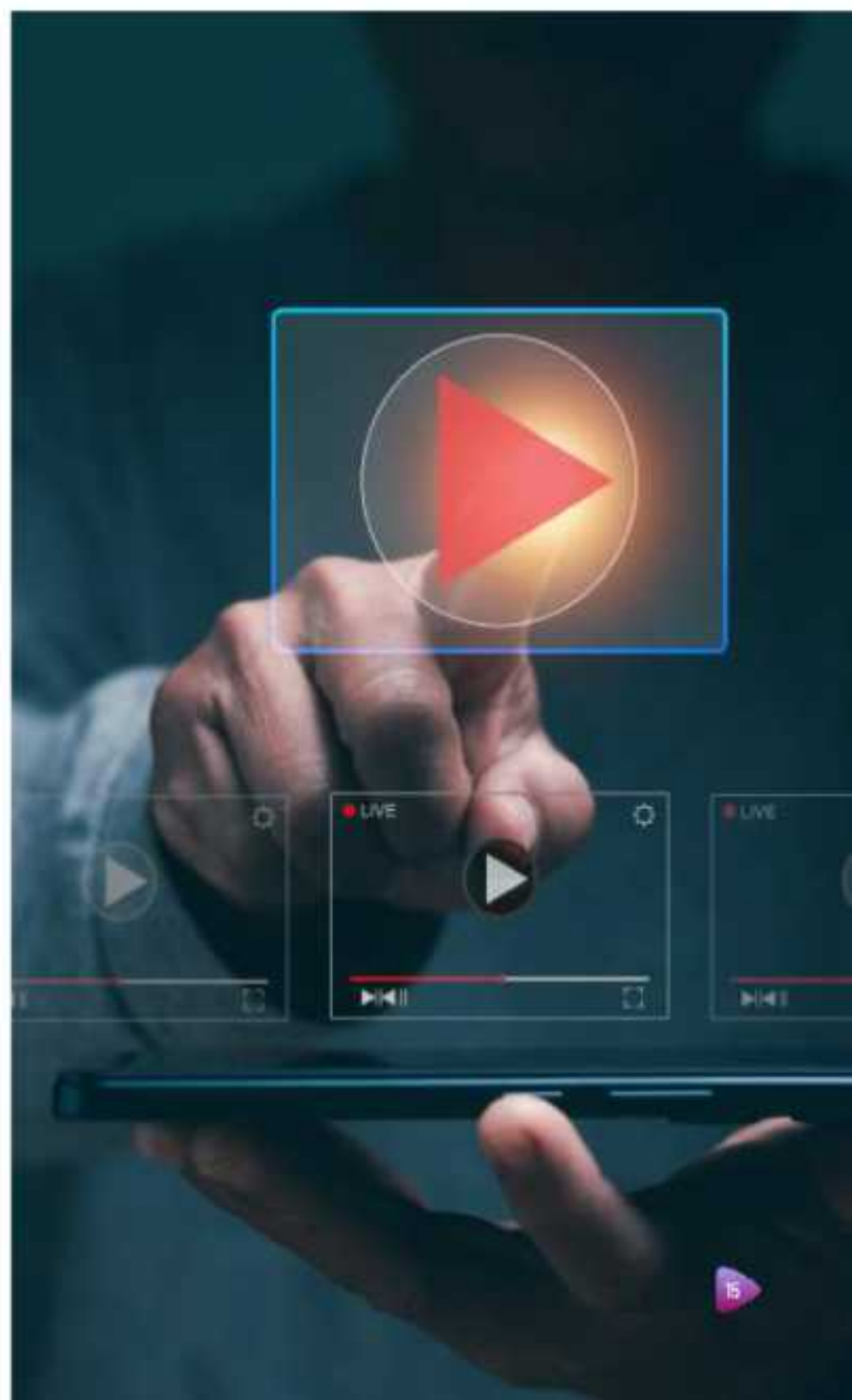
A latest report states that **over 50% of OTT consumption now comes from non-metro cities**, with Tier 2 and Tier 3 regions leading in watch-time growth.

The "Bharat audience" is not just catching up, its setting the pace

WHERE WE ARE NOW

OTT in India is no longer just a digital format, its a **cultural infrastructure**, shaping discourse, lifestyle and even policymaking. It is as much about content as it is about access, identity and aspiration.

We stand at the cusp of an entertainment epoch, where the medium is as powerful as the message and where India is not just watching, but rewriting the rules of engagement.



RISE OF INDIA'S OTT INDUSTRY



India's OTT journey is not just a success story, it's a digital revolution scripted in real-time.

A decade ago, video-on-demand in India was an urban luxury. Today, it is a mass phenomenon.



OTT audience has exploded to over **550 million unique users by 2024**. This means that nearly two out of every five Indians are now active OTT consumers, a growth rate among the fastest in the world.



Amala Akkinen

Director, Annapurna College of Film and Media

India's media and entertainment sector is emerging as a creative employment engine, expected to generate over 20 lakh jobs by 2030. From storytellers, content creators, animators and VFX artists to narrative designers and virtual production specialists, the trained talent landscape must expand beyond metros into Tier 2 and 3 cities. At Annapurna College, we have a universal filmmaking approach to nurture regional voices.

AI-enabled teaching and learning tools fast-track our courses to provide hands-on training and film practice. Employability is high considering the application of storytelling skills and technical crews now deliver value across brands and media, besides the traditional Film, TV, and OTT platforms. With the right attitude and opportunity to train, and there is no stopping our youth!

A PERFECT STORM OF CATALYSTS

This unprecedented surge did not happen in isolation. It was the result of a confluence of structural, technological and social shifts that together fuelled a new digital media economy.



Smartphone Penetration

India currently has over **750 million smartphone users**, up from 155 million in 2014. These devices have become personal theatres, especially for young and rural viewers.



Data Democratization

India offers some of the world's most affordable mobile data, priced at just ₹10-12 per GB, compared to ₹100 or more globally. This affordability triggered a data revolution, making streaming accessible to millions.



COVID-19 as a Catalyst

The pandemic years (2020-2022) forced a seismic shift in consumption habits. With cinemas shut and live events paused, OTT became the default mode of entertainment. During lockdowns, OTT viewership **jumped by 30-40% across platforms** and these habits persisted post-pandemic.



FROM CITIES TO SMALL TOWNS: A GEOGRAPHY REDEFINED

The OTT wave is no longer confined to metropolitan areas. **Tier 2 and Tier 3 cities now account for over 55% of India's total OTT user base**, with consumption growth rates higher than those in urban centres.

In states like Uttar Pradesh, Bihar, Odisha and Madhya Pradesh, regional content is outperforming mainstream Bollywood titles. Platforms are investing heavily in Bhojpuri, Marathi, Gujarati, Kannada, and Tamil content to capitalize on this emerging demand frontier.



Sajan Raj Kurup

Founder, CreativeLand Studios

The beauty of India's stories lies in their contradictions: sacred yet subversive, rooted yet restless. What we are seeing now is not just content travelling beyond borders but culture being reimagined through new lenses. When a Bhojpuri folk song finds listeners in Berlin or a mythological tale finds itself on the red carpet at Cannes, you realize that Indian storytelling is no longer regional. It's universal with a pulse. Having built narratives for global brands and created original content through CreativeLand Studios, I have seen firsthand how Indian themes are not just being accepted but are being celebrated worldwide.

NUMBERS THAT DEFINE THE MOMENTUM



Total OTT Revenue in India is projected to reach **₹31,800 crore (~USD 3.8 billion)** by 2025, growing at a CAGR of 14%.



Average daily watch time per user on OTT platforms has increased to **70-90 minutes**, with peak consumption occurring between 9 pm and midnight.



Paid subscribers are expected to surpass **125 million** by the end of 2024, although free and ad-supported models still dominate in rural regions.



Video content accounts for over **75%** of all mobile internet data consumption in India.

THE PLATFORM ECONOMY

As demand surged, so did the number of players. Over **40 OTT platforms** now operate in India, ranging from global giants to regional specialists and India's public sector broadcaster's platform. This intense competition has created a content-first environment, where success hinges not just on catalogue size, but on relevance, personalization and cultural intimacy.

In this platform economy, data analytics, AI-driven recommendations and vernacular UX/UI design are just as important as scripts and star casts.

FROM PASSIVE VIEWERSHIP TO PERSONALIZED STREAMING

Unlike traditional media, OTT does not just broadcast, it listens. Platforms now analyze millions of data points every day: what users skip, rewatch, binge or abandon. This has led to the rise of **micro-targeted storytelling**, with shorter formats, local themes and interactive interfaces.

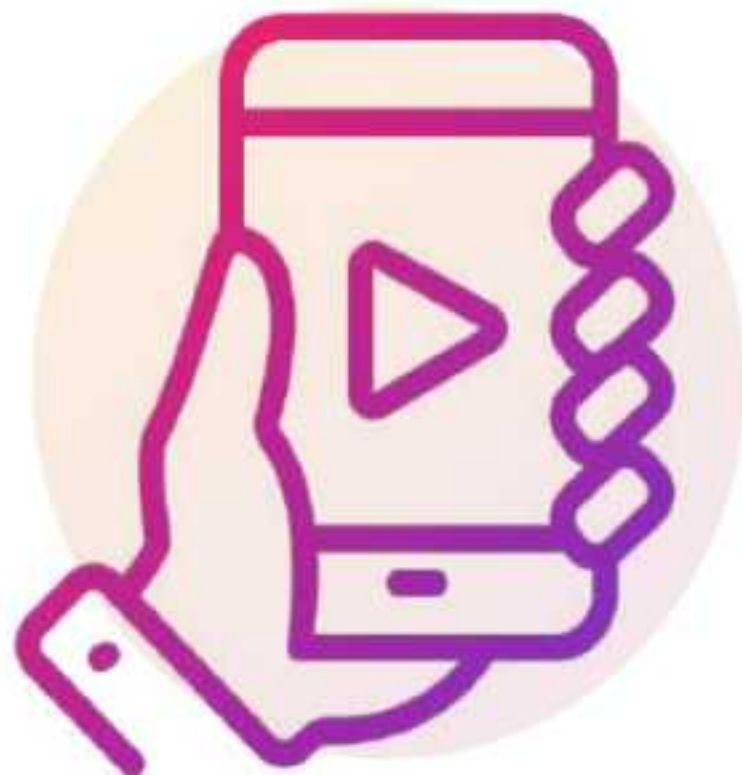
This is not just entertainment. Its content strategy engineered to align with viewer attention, mood and context.

The background of the slide is a blurred photograph of a crowd of people. A large, semi-transparent number "3" is overlaid on the right side of the image. In the center-left, there is a silhouette of a person with curly hair, seen from the back, looking towards the crowd.

SHIFT IN CONSUMER BEHAVIOUR AND CONTENT CONSUMPTION

The way India watches content has undergone a dramatic transformation.

Gone are the days of appointment viewing and family TV hours. In the new media landscape, content is personal, portable and precision-driven. Today's Indian viewer is no longer a passive spectator; they are **an active curator**, navigating content across screens, genres and languages with a swipe, a scroll or a voice command.



ON-DEMAND AND ON-THE-GO: THE MOBILE-FIRST REVOLUTION

India's content consumption is now defined by the "**mobile-first, digital-native**" audience. **Over 90% of OTT consumption in India happens on smartphones.** With the average Indian spending over **1.5 hours daily on their phone**, OTT has seamlessly integrated into daily routines, from breakfast streaming to late-night bingeing.

Mobile accessibility has transformed content into a snack-sized experience, with short-form videos, webisodes, mini-series and regional reels exploding in popularity, particularly among Gen Z and Millennials.



THE RISE OF VERNACULAR CONTENT AND CULTURAL CURIOSITY

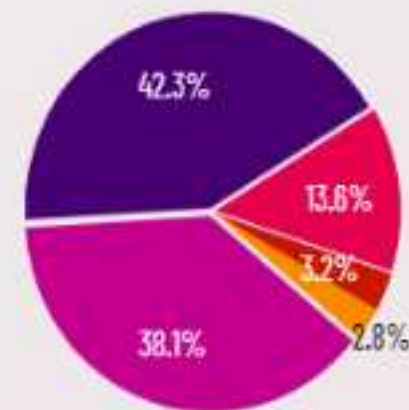
The single biggest shift? Language.

While Hindi still holds a large share, it is no longer the sole medium of entertainment. Regional and non-Hindi content consumption has grown by **over 210% between 2020 and 2023**. Tamil, Telugu, Bengali, Marathi and Bhojpuri content are finding not just loyal viewership but passionate fan bases.

Furthermore, users are increasingly watching content in languages other than their native one, thanks to subtitling, dubbing and UI localization. This reflects a new cultural curiosity, a desire to explore stories beyond linguistic boundaries.

Importance of Regional Language Content

Very Important Important Neutral
Less Important Not Important



Insight

Over **80% of viewers** feel that the availability of regional and local language content moulds their preference to subscribe to an OTT.



Vishnu Mohta

Co-Founder, HaiChoi

The rise of regional Indian narratives on global OTT platforms is a testament to the broader cultural shift we're witnessing, where diversity is not just celebrated but embraced. These stories are giving a platform to fresh talent and presenting narratives like never before. Traditionally, content was often seen through a language lens, but now, creativity and innovative storytelling from various parts of the country have resonated with global audiences. With the advent of OTT, content is now universally accessible, and viewers are eager to explore and accept stories in multiple languages. Today, content is no longer confined to audiences of a single language; it has the power to reach and engage a global audience, breaking down geographical and linguistic barriers.

ALGORITHMIC TASTES: PERSONALISATION AS THE NEW PROGRAMMING

Streaming platforms, to an extent, have replaced programming heads with **machine learning models**. Algorithms now study a viewer's behaviour down to the detail, including what they watch, when they pause, how fast they skip intros and what genre they binge after work.

This hyper-personalisation means that no two viewer feeds are the same. AI-driven recommendation engines are responsible for up to 80% of viewing decisions on major OTT platforms.

This has led to what we call "**format fluidity**," where users are not loyal to a genre or length, but to mood, theme and relatability. A viewer might follow a regional sitcom in the morning, a Korean drama in the afternoon and a political documentary by night, all tailored seamlessly by the algorithm.

BINGE CULTURE AND CHANGING WATCH PATTERNS

Binge-watching is no longer a weekend indulgence, it's a habit. Sixty-seven percent of OTT users in India prefer to binge-watch entire seasons rather than wait for episodic drops.

Interestingly, while weekends still see peak consumption, weekday late nights (9:30 PM–12:30 AM) have emerged as **the prime time for OTT viewing**, especially among working professionals in Tier 1 and Tier 2 cities.

INTERACTIVE, SOCIAL AND IMMERSIVE CONTENT IS GAINING GROUND

New-age audiences also crave control and a sense of immersion. Interactive content, choose-your-ending narratives and even gamified story formats are being explored.

Moreover, content consumption is becoming **socially contagious**; trending shows often spike in views due to WhatsApp forwards, meme culture, and Instagram Reels, creating viral word-of-mouth in real-time.



MAJOR PLAYERS:

A DIVERSE CAST
OF CHARACTERS

India's OTT arena is a bustling stage where global giants, nimble startups and regional champions compete, collaborate and co-create.



This dynamic mix of players is precisely what gives the Indian OTT ecosystem its edge, it's not just crowded; it's vibrant, experimental and constantly evolving.



Nicolas Granatino

Executive Chairman, Tara Gaming

With The Age of Bhaarat, we are not just launching a video game—we are laying the foundation for a vast, interconnected Bhaarat Universe that can inspire and engage across mediums. This transmedia approach allows us to build a deeply immersive experience that evolves across formats within the rich narratives of Indic heritage.

India is also home to some of the most extraordinary creative talent in the world, and our 'Create in India' mission is central to this vision. We are building a platform where storytellers, artists, and technologists can come together to craft interactive experiences that resonate with both gamers and cinema-goers globally. This is just the beginning.



GLOBAL TITANS: BRINGING SCALE AND PRESTIGE

The entry of international players into India has brought significant production capacity, global best practices and cutting-edge technology. These platforms invest billions annually in India, experimenting with local originals and dubbing international hits for Indian audiences.

Their presence has:



Elevated Production Standards



Increased content diversity



Raised consumer expectations on UI/UX and personalisation

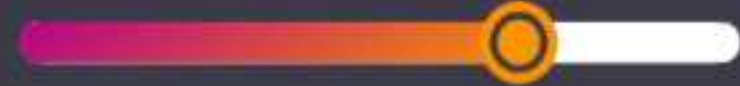
However, global players face stiff competition from local taste and pricing sensitivities. In India, **scale does not just come from premium subscribers; it comes from cultural relevance and accessibility.**



William Pfeiffer

Executive Chairman & Co-Founder, GlobalGate

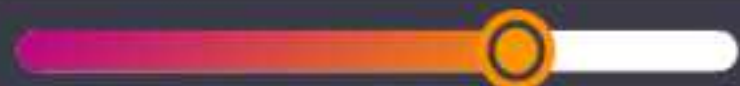
The next global breakout story won't come from a single geography, it will rise from local roots with global relevance. At Globalgate, we invest in local-language content that resonate deeply within their markets and travel far beyond them. In the OTT era, where platforms need constant, diverse and scalable content, culturally authentic storytelling is a strategic asset. Language is no longer a barrier, it's a multiplier. For platforms seeking growth in competitive markets, local content is not just desirable, its indispensable.



Richard Nicholas

CFO & COO, Ridley Scott

In today's media landscape, platforms need stories that can travel fast, without compromising on quality. At Ridley Scott Creative Group, we are evolving production models that combine cinematic scale with speed and adaptability. From high-concept narratives to high-efficiency branded formats, our approach is rooted in creative precision and operational excellence. As OTT platforms scale across markets, our focus is on delivering world-class storytelling at the pace and flexibility this new era demands.



HOMEGROWN HEROES: WINNING WITH CULTURAL INTIMACY

India's homegrown OTT platforms have turned familiarity into their biggest superpower. They understand local festivals, dialects, humour and habits and have used this insight to craft stories that resonate deeply.

These platforms have found success by:



Prioritising regional content (Tamil, Telugu, Bengali, Marathi and more)



Partnering with local production houses and talent



Offering pricing models tailored for Indian wallets, including sachet subscriptions and mobile-only plans

According to a report, **domestic over-the-top (OTT) services** account for nearly 60% of the total viewership share in India, with a **particularly strong presence** in Tier 2 and Tier 3 cities.

REGIONAL TRAILBLAZERS: LANGUAGE AS A LAUNCHPAD

The third and most exciting category is the rise of **regional OTT platforms** that cater exclusively to a specific language or cultural identity. These players are not playing catch-up; they are setting the pace.

By producing hyperlocal web series, adapting folklore and theatre into digital formats and hosting live events in local languages, these platforms are expanding the definition of mainstream.

Many of these regional platforms are experiencing high engagement rates and growing faster than their national counterparts in specific regions. Platforms focused solely on regional content expanded their subscriber base by over 75% year-over-year in states such as Andhra Pradesh, Maharashtra and West Bengal.



**Shamani Joshi**

Executive Editor, Rolling Stone India

India's entertainment industry has long been dominated by a privileged few, with industry insiders keeping a tight grip on who gets seen, heard, and funded. This ecosystem made it hard for actors, writers, and directors without legacy connections, especially those from smaller towns or marginalized communities, to find roles they can sink their teeth into. The OTT boom has dismantled these gatekeeping structures and given actors like Pankaj Tripathi, Jaideep Ahlawat, and Shefali Shah the chance to reinvent themselves and gain the kind of recognition they were often denied in mainstream cinema. And it's not just the big names—regional talent like Paoli Dam and Roshan Mathew have also had their moment, reaching a much wider audience than before.

This has empowered a new wave of actors and entertainers to take on roles that break free from stereotypical tropes, offering deeper, more nuanced explorations of character. In this new era of layered storytelling, women are no longer relegated to item numbers or one-dimensional love interests, but are playing characters with agency and complexity. Take the case of Samantha Ruth Prabhu's Raji, a Sri Lankan Tamil resistance fighter who plays the antagonist in *The Family Man 2*, or Sushmita Sen's mother-turned-mob-boss character navigating moral dilemmas in *Aarya*. These performances show the evolution of female characters that push boundaries and sidestep more typical portrayals. Meanwhile, LGBTQ+ narratives that were once relegated to caricatures or punchlines are now being handled with greater empathy and sensitivity. While shows like *Made in Heaven* portray LGBTQ+ characters without defining them just by their sexuality, *Rainbow Rishta* takes it a step further by diving into how LGBTQ+ identities intersect with love, family, and societal pressure.

OTT music has opened the door to a new medium beyond the traditional music industry, giving independent artists a platform to make their mark. Shows like *Mismatched* and *Bandish Bandits* feature music that is central to the storyline, allowing emerging composers to gain recognition without relying on heavy commercial backing. Unlike the mainstream industry, OTT platforms monetize through subscriptions and ad revenues, with tracks also gaining traction on streaming platforms like Spotify, where artists can earn revenue through plays, even without support from major label.

GOVERNMENT AND PUBLIC SERVICE OTT: FILLING THE PUBLIC GOOD GAP

India's public service broadcasting has entered the OTT era through **WAVES**, the digital platform by **Prasar Bharati**. As the country's only public service OTT, WAVES is dedicated to delivering educational, archival, cultural and governance-related content. It plays a vital role in ensuring equitable access to quality information and entertainment, especially for audiences in rural and underserved regions. Through collaborations with various ministries, state governments and educational institutions, WAVES offers purposeful, inclusive content that goes beyond mainstream entertainment.

THE NET EFFECT: A HYPERCOMPETITIVE, HYPERCREATIVE MARKET

This diversity has created a **hypercompetitive market**, prompting platforms to continually innovate in content formats, pricing, technology and engagement strategies.

More than 40 OTT platforms operate in India today, but they are not just competing for viewers; they are also fighting for attention, relevance and time.

As a result, viewers are spoilt for choice and the content quality bar keeps rising.

OTT AS A DEMOCRATISING FORCE FOR CONTENT VIEWING

OTT has done for entertainment what highways did for travel: it has connected the disconnected, flattened the playing field and brought the world a little closer to every screen.

OTT has done for entertainment what highways did for travel: it has connected the disconnected, flattened the playing field and brought the world a little closer to every screen. In India, it has emerged not just as a mode of content delivery, but as a **social leveller**; transcending geography, language, class and ideology.



GEOGRAPHY IS NO LONGER A BARRIER

With a smartphone and a data plan, a viewer in a remote village in Odisha has the same access to content as someone in South Mumbai. This **removal of physical and economic gatekeeping** has made OTT the most accessible form of entertainment in India today.

According to a study, over **55% of OTT consumption now originates from non-metro and rural areas, driven by increased internet penetration, the affordability of mobile devices and the shift toward vernacular content.** Platforms are actively investing in regional infrastructure and even public Wi-Fi kiosks and low-data streaming options are enabling access where cable TV could not reach.



Nitin Chandra

National Award-winning Director and Producer

When I started my journey as a film maker back in 2008, I travelled my state Bihar and found out that India is rich with diverse stories, beliefs and voices, each telling unique stories. As a filmmaker working with Bihar's languages, I've been inspired by its heritage and folktales.

Bringing these genuine, real stories to the mainstream isn't just about showing different languages; it's about sharing the genuine emotions and themes like love, struggle, and hope that people can relate to. These stories offer new insights while staying true to their roots.

Non-Hindi cinema has gained recognition not only in India but globally in the last half a century or more, showing a shift in how audiences appreciate films. People now look for authenticity and can connect with stories beyond language differences. This trend is great for a filmmaker like me who is allowed to share my stories and culture, imbued in it to a larger audience through Waves OTT. I call "Waves OTT", as homecoming of Indian Stories, for the people, of the people and by the people. This inclusive movement preserves ancient languages Maithili, Awadhi, Bhojpuri, Magahi, Santhali, etc and traditions and gives pride to those once underrepresented. As these stories become more mainstream, they enrich our national cinema with more depth and variety.

LANGUAGE: THE BRIDGE, NOT THE BARRIER

India's linguistic diversity, often perceived as a challenge to traditional media fragmentation, has become a **competitive advantage** in OTT.

Thanks to AI-powered dubbing, multilingual subtitling and interface localisation, viewers can comfortably watch content in languages they do not speak.

From Tamil thrillers being streamed in Kolkata to Malayalam dramas gaining fan clubs in Delhi, **language-neutral storytelling** is thriving.



Nearly 60% viewers watch content outside their native language



Regional content viewership has grown by more than 200% in the last three years

This has transformed storytelling into a **shared national experience**, where culture-specific stories are accessible and relatable to diverse audiences.

CROSS-BORDER STORYTELLING AND CULTURAL REMIXING

OTT has also blurred international boundaries. Global platforms make it easy for Indian audiences to access K-dramas, Spanish thrillers, or Turkish romances, while Indian mythology, folklore and modern narratives are being discovered in foreign markets, thanks to subtitles, dubbing, and growing diaspora interest.

This **cross-border syncretism** has led to what many call the "**OTT Tourism**", a globally localised content diet that is shaping not just entertainment, but fashion, music and even slang.

OTT platforms are facilitating a **two-way cultural exchange**, where creators borrow, blend and build on global influences while retaining local authenticity.



CONTENT THAT MIRRORS ALL OF INDIA

Unlike mainstream TV and cinema, which often skew toward urban, elite storylines, OTT has opened the floodgates for **previously underrepresented voices**, including rural lives, women-centric narratives, LGBTQIA+ stories, and more.

Creators from smaller towns and diverse backgrounds now have direct-to-digital platforms to share their work. Indie productions, docu-series and short films are finding real audiences and critical acclaim, often without large budgets or big-name talent.

The **creator economy on OTT** is truly inclusive; anyone with a story and a smartphone can enter the fray.



Aditi Shrivastava

Co-Founder, Pocket Aces

OTT has scaled is the depth and diversity of storytelling now possible. It is clear that people don't just want to be entertained anymore, they're connecting with content that feels honest, challenges how they see the world, and speaks to real experiences.

Relying on OTT, even mainstream cinema has tried to push the envelope through socially driven stories such as Lapata Ladies, Article 370 or 12th fail. Making such films comes with high stakes, and OTT has offered a downside protection option to be able to take such bets in theaters. What makes OTT especially powerful is not just the freedom to tell bold stories, but the frequency with which they can be told. Today, content from every corner of the country is shaping perspectives—often quietly, but consistently. A film like The Great Indian Kitchen, for instance, may have emerged from a regional space, but its impact was national, and it was adapted to different cultural contexts. Sometimes, the most powerful thing a story can do is just make someone pause and see things a little differently. OTT is letting that happen more often and in ways that stick.

FROM ENTERTAINMENT TO EMPOWERMENT

At its best, OTT becomes more than just viewing; it becomes a means of gaining insight and **understanding**.

As viewers engage with stories from diverse regions, religions, social classes and ideologies, entertainment subtly becomes a tool for promoting empathy and broadening perspectives.

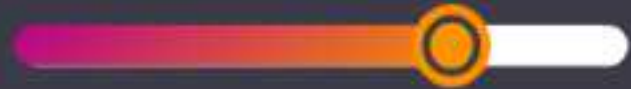
This is how OTT has evolved into a **democratic space**, where every kind of India and Indian can find their voice and see themselves reflected on screen.



Mahima Kaul

Director,
Public Policy,
Netflix India

True leadership lies in recognizing that authenticity matters; not just in the stories we bring on our service, but also in people behind the camera. Inclusion is very important to Netflix not just in the kind of content but also in our workforce. Bringing voices that were once overlooked and makes space for stories that feel lived, not manufactured.



REWRITING THE RULES OF REPRESENTATION

The democratizing power of OTT platforms lies not just in what they show, but in *who* they let speak and *how*. While the rise of regional stories and hyperlocal content has expanded the viewing universe, the revolution is happening in another corner, **where women are no longer just characters, but creators, decision-makers and narrative architects.**

For far too long, the media and entertainment industry has been shaped by the lens that was dominated by male perspectives. This is not necessarily out of malice, but a byproduct of what psychologists call **affinity bias**: we tend to choose stories that reflect our own worldview. And when the majority of greenlighting decisions are made by men, we end up with a content pipeline that is unintentionally exclusionary.

What this means is simple: **stories that do not look like theirs, rarely make it through.**

But OTT changed the game.

With its open infrastructure, platform neutrality and low barrier to entry, streaming has created space for a new generation of storytellers and **women are finally stepping into the frame, both in front of and behind the camera.**

More women in commissioning roles, as producers, directors and showrunners means the stories being told are *richer, deeper and far more inclusive*. Not as a check-box exercise, but because the lived experience of women brings **new textures to narrative choices**: different protagonists, unexpected themes and a more honest emotional core.

Films like *Lapata Ladies*, *Delhi Crime*, *Aarya* and *Kicking Balls* (on WAVES OTT) are not exceptions. They are signs of a **creative realignment**. These stories do not just have women in lead roles, they are **shaped by women's voices**, grounded in empathy and unafraid to show women as complex, flawed and powerful.

OTT has also smashed the tired tropes, the coy damsel, the hypersexualized item girl, the sacrificial mother. In their place? Rural girls chasing football dreams. Female cops navigating trauma. Mothers turning into Political bosses. Fashion designers, scientists, gang leaders, whistleblowers and warriors.

From *Bombay Begums* to *Masaba Masaba*, streaming has finally allowed women to be *real*; messy, ambitious, rebellious, funny, broken, bold. The "good girl" stereotype has given way to authentic portrayals of **multi-dimensional women who own their chaos.**

And this change is not just cultural, it's commercial.

When stories are more representative, **audiences feel seen** and engagement deepens. Inclusion is not a soft value, it's a **sharp business move** in a saturated market. In fact, some of the most-watched, critically acclaimed and globally exported Indian shows today are female-driven. This is the economics of gender at play; **diverse teams build better stories and better stories drive wider markets.**

OTT has succeeded where social reformers struggled, by quietly shifting the center of gravity in Indian storytelling. It has not only democratized access to content but **rebalanced the authorship of stories themselves.**

True democratization is not about flooding every home with content. It's about making sure every home can find a reflection of themselves in what they watch.

Representation is not a side note in this revolution, it's the script.



Guneet Monga

Oscar Winner, Producer and Filmmaker

OTT platforms have opened up a world where women are not just central to stories, but are also leading them, creating them and producing them. Seeing more women stepping into boardrooms, writers' rooms and behind the camera is heartening. Stories shape societies and platforms like WAVES provide the space where voices from the margins, especially of women and girls, can truly be heard, like never before. Whether it's young girls kicking a football in rural India in a documentary like 'Kicking Balls' or women breaking taboos with documentary like 'Period: End of Sentence', these narratives are no longer waiting to be discovered, they are being watched, shared and celebrated globally. This moment in digital entertainment is not just about content, it's about representation and the change it inspires. And I believe we are just getting started.

The background of the entire page is a photograph of a hand holding a smartphone, with a large, semi-transparent number "6" overlaid on the right side. The image has a red-to-pink gradient overlay.

FILLING THE CONTENT GAP:

THE WAVES OTT

In an OTT universe driven by entertainment, Waves OTT is doing something revolutionary: it is filling the silence; the silence of forgotten archives, underserved audiences, underrepresented languages and unheard narratives.



Launched by **Prasar Bharati**, India's public service broadcaster, Waves OTT stands apart as the nation's only **public-interest-first digital platform**, rooted in **cultural preservation, civic engagement and digital inclusion**. While most platforms chase eyeballs, Waves chases **impact**, reviving lost legacies, making government programs accessible and celebrating India's civilizational knowledge through a modern lens.



Sh. Gaurav Dwivedi

Chief Executive Officer, Prasar Bharati

The launch of WAVES OTT marks a transformative moment in Prasar Bharati's digital journey, a platform that not only looks ahead but also safeguards India's audiovisual heritage. Our goal is to digitize and preserve archival content, while creating a future-ready infrastructure that serves citizens across geographies and generations. We have partnered with technology leaders to ensure scalability, accessibility and cost efficiency. AWS brings global experience and offers media solutions that align with our needs. This collaboration supports our effort to stream 28 Doordarshan regional channels, offer a unified digital library and expand reach across 170 countries. It is a step toward making India's public media more inclusive, modern and globally accessible, while staying rooted in its core values of trust, diversity and service

A BRIDGE BETWEEN BHARAT AND INDIA

At its core, Waves is designed to close the content gap between the digitally privileged and the digitally invisible. It does this by:



Collaborating with **central and state ministries** to host official campaigns, government documentaries and much more.



Partnering with **regional Doordarshan Kendras** to digitise folk traditions, local theatre and cultural festivals that rarely make it to mainstream screens.



Showcasing **educational, archival and heritage content**, from classical dance to climate action

It is not just an app. It's an ecosystem where governance meets creativity and where every Indian can find a piece of themselves, be it in their dialect, their history or their aspirations.

DEMOCRATISING DISCOVERY & ACCESS

Waves is not just broadcasting to the public, it is **inviting the public to participate**. With an intuitive interface in multiple languages, low-bandwidth compatibility and regional curations, it ensures access for the most remote, marginalised and offline populations.

The platform is also working with **BharatNet and rural entrepreneurs** to enable last-mile OTT access in underserved areas. It is, in essence, **India's most inclusive content pipeline**.



BEYOND ENTERTAINMENT: A UNIVERSE UNDER ONE ROOF

Waves is not limited to video alone; it is designed as a **complete digital ecosystem**. It offers:



E-books and digital libraries for lifelong learners



Games and interactive experiences that entertain and educate



Audio stories, podcasts and archival radio content for immersive, on-the-go experiences



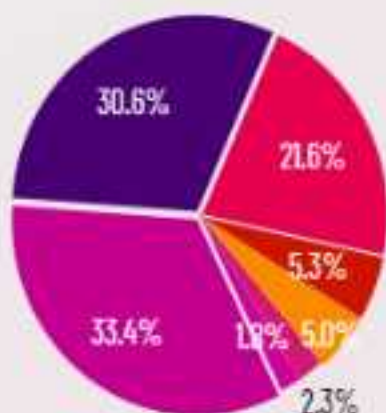
Integrated e-commerce through ONDC, allowing users to discover and shop Indian crafts, government publications and local goods, directly from the app.



Live TV channels and event broadcasts for real-time engagement

In doing so, Waves becomes more than a streaming service; it becomes a platform for digital empowerment, knowledge discovery and economic participation.

Diverse Content Consumption Patterns



Insight

The inclusion of gaming and AVGC content is on the rise, as **more than 30% of viewers** feel that gaming and AGVC should be integral part of the offerings from an OTT.

● Movies ● Gaming/AVGC ● TV Shows ● Documentaries ● Sports ● News ● Others

WHERE PURPOSE BECOMES PROGRAMMING

The content on Waves is not shaped by TRPs, it is shaped by India's evolving needs. Whether it is youth-focused skilling modules, health awareness series or spiritual programming from across cultures, every piece serves a social, cultural or educational goal.

It also becomes a digital stage for **unsung creators, documentary filmmakers and local storytellers**, offering them a platform where commercial pressures do not silence their artistic voice.

A NEW GENRE: NATION-BUILDING THROUGH STREAMING

Waves OTT is defining a new genre altogether: **nation-building through streaming**. In an era of viral trends and algorithmic content loops, it reminds us that the digital space can be a public square, not just a marketplace.

It is not here to compete. It is here to **complete** the story of Indian OTT, by giving space to what was missing, what was ignored and what deserves to be remembered.



**Nilaya Varma**

Group CEO, Primus Partners

Delighted to release this report at the WAVES Summit, alongside icons from the Hollywood and Bollywood industry; an inspiring convergence of creative vision, cultural power and global ambition.

The WAVES Summit marks a defining moment in India's creative economy where policy, platforms, people and purpose converge. OTT is no longer just a medium for entertainment; it is a force multiplier across industries; generating employment, inspiring grassroots expression and indigenous identity and also shaping cultural diplomacy. We are witnessing the emergence of a \$30+ billion ecosystem that not only reflects India's diversity but also positions it as a global powerhouse in storytelling and digital soft power.

The future of OTT is borderless and format-fluid and this is being powered by AI, rooted in regional voices and inclusive by design. As India looks to create over 20 lakh jobs in the media-tech and AVGC sectors, the opportunity is not just economic but transformational. The next leap will come from platforms that champion accessibility, creators that challenge conventions and policies that align innovation with inclusion.

I deeply welcome the conceptualisation of the WAVES Summit as a platform that does not just showcase India's creative ambition, but sets the stage for it. It reflects the kind of thinking we need: where culture meets code, commerce fuels inclusion and India leads not by following global trends, but by setting them. If the last decade was about digital reach, the next will be about redefining what it means to lead in a world where imagination is infrastructure.

**Charu Malhotra**

Co-Founder and MD, Primus Partners

The WAVES Summit comes at a time when the very meaning of influence is being redefined; no longer confined to stardom or screens, but rooted in relatability, voice and digital proximity. OTT has rewritten not just the map of content delivery but the mindset of the Indian viewer. From short-form reels to immersive docu-series on topics that were left out by big screens. We are seeing audiences move from consumption to curation and creators move from anonymity to authority.

What excites me most is how this ecosystem is reshaping identity at scale, especially for young creators, women and those from non-metro geographies. Representation is no longer aspirational; it's actionable. Platforms are no longer gatekeepers, they are gateways. When a tribal folktale goes viral or a homemaker from a remote village builds a fanbase through storytelling, it's not just digital inclusion, it's cultural rebalancing.

At the heart of this shift lies rise of rooted narratives. Powered by technology and driven by human insight, regional storytelling is not just 'niche' anymore, it's the new mainstream. And when paired with responsible platform design, algorithmic transparency and gender-aware commissioning, OTT can become one of the most powerful levers of inclusive progress.

I am proud to launch this report at the WAVES Summit, a platform that does not just reflect India's creative future, but helps shape it through collaboration, insight and intention.

By bringing together creators, policymakers, technologists and cultural thinkers, the WAVES Summit is laying the foundation for a future where India's media is not only innovative, but deeply human, inclusive and imaginative.

AGGREGATORS

OTT'S ONE-STOP
SUPER APP MOMENT

In India's rapidly expanding Over-The-Top (OTT) landscape, aggregators are emerging as pivotal platforms that consolidate multiple streaming services into a single interface.



This integration provides users with streamlined access to diverse content, while also offering platforms enhanced distribution channels.



Syed Raza

General Manager, Vodafone Idea Limited

Today, 70% of India's internet users are beyond metros. But here's the plot twist: Tier 3 towns aren't just 'markets'—they're cultural ecosystems hungry for stories in THEIR voice. Imagine a farmer in Bihar binge-watching a sci-fi series dubbed in Bhojpuri. Or a grandmother in Kerala creating YouTube Shorts in Malayalam that go viral in the Gulf. This is where partnerships with telecom giants will rewrite the rules—bundling hyper-local content with ₹299/month 5G packs, turning every kirana store into an OTT subscription hub.

The next 100 million subscribers won't ask for 'content'—they'll demand cultural mirrors and we need to enable it as telco!!

THE EXPANDING OTT LANDSCAPE OF INDIA



User Base Growth

As of 2024, India had over **500 million active OTT users**, reflecting a penetration rate of approximately 34% of the population.



Market Valuation

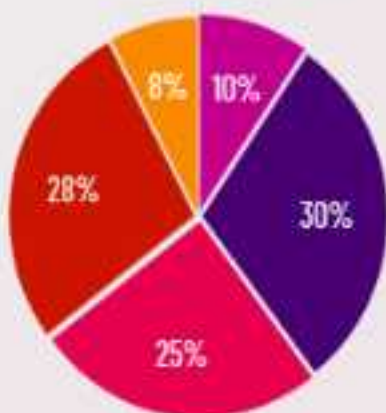
The Indian OTT market is projected to reach **\$4.49 billion in revenue by 2025**, with an anticipated annual growth rate (CAGR) of 7.18% from 2025 to 2029.



Platform Proliferation

The country is home to **over 40 OTT platforms**, comprising both domestic and international players, resulting in a fragmented subscription landscape.

Subscriptions per subscriber



Insight

More than **80% of viewers** have subscribed to 2 or more OTT platforms in India.

● One ● Two ● Three ● Four or More ● No, I use free services

THE ROLE OF AGGREGATORS

OTT aggregators serve as centralized hubs that amalgamate content from various streaming services, offering users a unified subscription model.

This approach addresses several challenges:



Cost Efficiency

With individual OTT subscriptions ranging from ₹99 to ₹1,499 per month, aggregators present bundled packages that are more economical. For example, Tata Play Binge offers access to 30+ OTT apps starting at ₹199 per month.



Simplified Access

Users benefit from a single login and interface, eliminating the need to navigate multiple platforms.

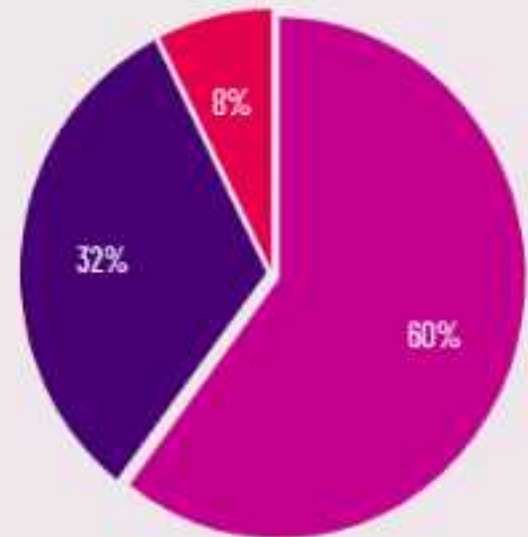


Diverse Content Portfolio

Aggregators provide a broad spectrum of content, catering to varied linguistic and regional preferences.

Is OTT Aggregation the new viewer preference?

- Prefer single aggregator to access multiple OTTs
- Prefer subscribing to multiple OTT platforms
- No preference



Insight

More than **60% of viewers** prefer to subscribe to a single aggregator platform over multiple OTT subscriptions.



BENEFITS FOR STAKEHOLDERS

FOR USERS



Affordability

Bundled subscriptions reduce the cumulative cost of accessing multiple platforms.



Convenience

A unified interface streamlines content discovery and viewing experiences.

FOR OTT PLATFORMS



Extended Reach

Aggregators facilitate access to a broader audience, including users who may be hesitant to subscribe to multiple individual services.



Enhanced Visibility

Being part of an aggregator increases a platform's exposure amidst intense competition.

MARKET DYNAMICS AND FUTURE OUTLOOK

The Indian OTT market is characterized by a low Average Revenue Per User (ARPU), with figures around ₹1,290 annually. This economic landscape makes the aggregator model particularly appealing, as it aligns with consumer preferences for cost-effective solutions.

Furthermore, with regional content gaining traction, over 50% of OTT content consumption is in regional languages and aggregators that offer diverse linguistic content are poised for growth.

As the Indian OTT ecosystem continues to evolve, aggregators are poised to play a crucial role in shaping consumption patterns, offering a balanced proposition of affordability, convenience and diversity to users, while enabling platforms to expand their market footprint in a competitive environment.

A background image featuring a large, professional studio microphone on the left and two large, circular speakers on the right, all rendered in a monochromatic red and pink color scheme. The microphone is a dynamic, ribbed model, and the speakers have a distinctive three-hole design.

LANGUAGE IS THE NEW CHANNEL

In India's diverse linguistic landscape, Over-The-Top (OTT) platforms are increasingly recognizing that multilingual content is not just an option but a necessity.

The shift towards regional languages is reshaping the OTT industry, driven by consumer demand and technological advancements.

SURGING DEMAND FOR REGIONAL CONTENT



Dominant Consumption Patterns

Regional language content accounts for approximately 60% of OTT consumption in India. Telugu leads with 15%, followed by Tamil at 13%, Malayalam at 8% and Bengali at 7%.



Projected Growth

The share of regional language usage on OTT platforms is expected to surpass 50% of total time spent by 2025, overtaking Hindi, which currently accounts for 45%.

STRATEGIC INVESTMENTS BY OTT PLATFORMS

To cater to this burgeoning audience, platforms are making significant investments:



Original Regional Productions

Platforms like **Aha** (Telugu), **Hoichoi** (Bengali) and **Sun NXT** (South Indian languages) are producing high-quality, native content featuring local actors and culturally resonant narratives.



AI-Driven Localisations

Utilizing artificial intelligence, platforms are enhancing **content accessibility through real-time translations, dubbing and captioning**, breaking language barriers and making content more inclusive.



Collaborations for Content Expansion

JioCinema has partnered with **regional content providers like Sun NXT and Hoichoi** to enrich its regional offerings.



Waves OTT

Giving voice to **regional stories**. Waves, the OTT platform by Prasar Bharati, is **actively investing in multilingual and regionally focused programming**. It offers live channels and video-on-demand in more than 22 Indian languages, with curated content from **Doordarshan Kendras** across the country, including cultural programs, documentaries and state government content that reflect regional identities. This approach not only **democratizes access** to public content but also positions Waves as a **powerful cultural archive and contemporary regional voice**.

TECHNOLOGICAL INNOVATIONS IN DUBBING

Advancements in AI are revolutionizing content localization:



AI-Powered Dubbing

Amazon Prime Video has introduced AI-aided dubbing for select titles, aiming to enhance accessibility and viewership across different linguistic demographics.



YouTube's Auto-Dubbing Feature

YouTube has expanded its AI-powered auto-dubbing to numerous channels, facilitating content reach across diverse language speakers.

MARKET IMPLICATIONS

The emphasis on regional languages is not merely a trend but a strategic imperative:



Revenue Projections

The Indian OTT market is projected to reach \$4.49 billion in revenue by 2025, with regional content playing a pivotal role in this growth.



Investment in Regional Platforms

Platforms like Stage, focusing on hyperlocal content, are attracting significant investments, reflecting the market's confidence in regional language content as a growth driver.



Syed Raza

General Manager,
Vodafone Idea Ltd.

By 2026, your OTT app will be a shapeshifter. It'll use ambient data (humidity levels, cricket scores, even your Uber route) to predict mood-based content. Imagine serving a rom-com trailer during Delhi's monsoon traffic, but switching to a gritty crime drama when it detects your home with Wi-Fi. But the real magic? AI is the great democratiser. Tools that let a Tamil scriptwriter make a show for Punjab without a ₹500 crore budget. Real-time dubbing where Shah Rukh Khan's voice morphs into flawless Chhattisgarhi. This isn't disruption—it's creation at the speed of culture.

CONTENT CURATION:

THE RISE OF THE NICHE STAR

In India's rapidly expanding Over-The-Top (OTT) landscape, the paradigm is shifting from mass appeal to personalized value.

Artificial Intelligence (AI)-driven recommendation engines are at the forefront of this transformation, spotlighting niche creators and offering audiences a curated blend of indie gems alongside blockbuster originals.



THE POWER OF AI IN CONTENT DISCOVERY

AI algorithms analyze user behaviour, preferences and viewing histories to deliver personalized content recommendations. This not only enhances user engagement but also democratizes content visibility:



Personalized Recommendations

Platforms utilize advanced AI and machine learning to tailor content suggestions, resulting in increased user satisfaction and longer viewing durations.



Projected Growth

By understanding individual user preferences, AI enables platforms to promote content from independent and regional creators, diversifying the content landscape and providing opportunities beyond mainstream productions.

IMPACT ON INDIA'S OTT MARKET

The integration of AI-driven curation has significant implications:



Enhanced User Engagement

Personalized content recommendations lead to higher user retention rates, as viewers are more likely to engage with content that aligns with their interests.



Support for the Creator Economy

The Indian government's \$1 billion fund to support content creators underscores the growing importance of the creator economy. This initiative aims to help creators improve their skills and expand to global markets, reflecting the potential of user-generated content, which is expected to reach \$1.1 billion by 2027.



Diverse Content Consumption

With regional language content accounting for around 70-75% of total content consumption in India, AI-driven curation ensures that users discover and engage with a wide array of content, including regional and niche productions.

CHALLENGES AND CONSIDERATIONS

While AI-driven curation offers numerous benefits, it also presents challenges:



Data Privacy

The extensive data collection required for personalized recommendations raises concerns about user privacy and data security.



Algorithmic Bias

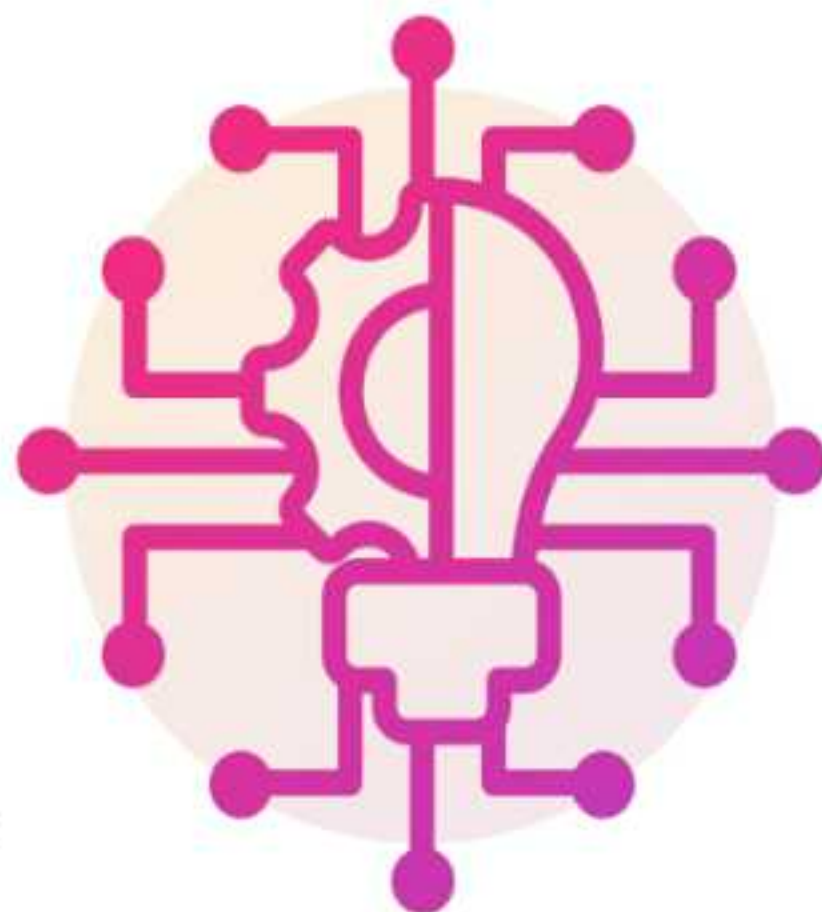
Ensuring that AI algorithms do not perpetuate biases is crucial to provide fair and diverse content recommendations.



INNOVATION NATION: TECH BEHIND THE STREAM

In India's rapidly evolving Over-The-Top (OTT) landscape, technological advancements are not merely supporting the streaming experience, they are defining it.

The seamless delivery of content is orchestrated through a sophisticated interplay of cloud infrastructure, 5G networks, artificial intelligence (AI) and edge computing.



CLOUD INFRASTRUCTURE: THE BACKBONE OF STREAMING

Cloud computing offers OTT platforms scalability and flexibility, enabling them to manage vast content libraries and efficiently accommodate fluctuating user demands. Major providers, such as Amazon Web Services (AWS) and others, have enhanced their capabilities to deliver low-latency, high-performance visual processing services, which are crucial for providing high-definition and ultra-high-definition (UHD) content.



**Sandeep Dutta**

President, AWS India and South Asia

At AWS, we believe that technology does not just power platforms, it accelerates innovation. India's OTT journey is a living example of how cloud, data and AI can transform content into culture and platforms with purpose-led eco-systems. We are proud to support a generation of creators, studios and broadcasters who are pushing the boundaries of scale, personalisation and accessibility. Whether its real-time streaming in remote corners of the country or AI-powered recommendations in multiple languages, the cloud is quietly enabling a revolution, one that is regional in reach, but global in ambition. The WAVES Summit captures the spirit of this digital transformation. It brings together the disruptors, the storytellers and the technologists who are building the future of entertainment; faster, smarter and more inclusive than ever before. We are excited to be part of this journey where technology amplifies creativity and infrastructure becomes the foundation of India's creative evolution.

AWS has a long-term commitment to India and in May 2023, announced plans to invest US\$12.7 billion in India by 2030 into its local cloud infrastructure. Between 2016-2022, AWS invested US \$3.71 billion USD in India. This brings AWS's total investment in India to INR 1,36,500 crores (US \$16.4 billion) by 2030. AWS's planned investment will contribute US \$23.3 billion to India's GDP by 2030, and support approximately 131,700 full-time jobs annually at local businesses.

In November 2022, AWS launched its second region in India (Hyderabad) with a planned investment of more than INR 36,300 crores (US \$4.4 billion) by 2030.

In 2025, AWS announced plans to invest \$8.3 billion into cloud infrastructure in the AWS Asia-Pacific (Mumbai) Region in Maharashtra, to further expand cloud computing capacity in India. This investment is estimated to contribute \$15.3 billion to India's gross domestic product (GDP) and support more than 81,300 full-time jobs annually in the local data centre supply chain by 2030. The \$8.3 billion investment is part of AWS's previously announced \$12.7 billion investment in cloud infrastructure in India by 2030 to meet growing customer demand for cloud services across the country.

5G NETWORKS: ACCELERATING CONTENT DELIVERY

The rollout of 5G technology has revolutionized content delivery with its high-speed, low-latency capabilities. This advancement is particularly significant for live streaming events, such as cricket matches, where minimal delay is critical. The enhanced bandwidth and reduced latency of 5G networks facilitate smoother streaming experiences, even in high-demand scenarios.

The growing penetration of OTT streaming and online gaming in tier-2 and tier-3 locations, along with the adoption of 5G and the increasing use of AI, is driving demand for data centres beyond major cities.



ARTIFICIAL INTELLIGENCE: PERSONALIZING USER EXPERIENCES

AI plays a pivotal role in enhancing user engagement on OTT platforms through personalized content recommendations. By analyzing user behaviour, viewing history and preferences, AI algorithms can predict and suggest content tailored to individual tastes. This personalization not only improves user satisfaction but also increases content consumption.

Companies utilize machine learning models and computer vision to deliver real-time, context-aware recommendations, ensuring that users discover content that aligns with their interests and preferences.



EDGE COMPUTING: BRINGING CONTENT CLOSER TO USERS

Edge computing involves processing data closer to the end-user, reducing latency and enhancing the streaming experience. By deploying servers at strategic locations, OTT platforms can deliver content more efficiently, minimizing buffering and improving load times. This approach is especially beneficial in a geographically diverse country like India, where network conditions can vary significantly.

Multiple companies, in India, are booming that leverage edge computing to optimize content delivery for OTT platforms, ensuring a smooth viewing experience for users worldwide.



ULTRA-LOW LATENCY STREAMING: ENHANCING LIVE EXPERIENCES

Achieving ultra-low latency is crucial for live streaming applications, such as sports events and interactive broadcasts. Technologies like WebRTC enable sub-second latency, providing viewers with real-time access to live content. This immediacy is vital for maintaining viewer engagement and delivering a competitive streaming service.

The convergence of cloud infrastructure, 5G networks, AI and edge computing is not only supporting India's OTT platforms but also actively shaping the user experience. As these technologies continue to evolve, they promise to deliver even more immersive and personalized streaming experiences to audiences nationwide.

AWS-POWERED OTT:

CLOUD, AI &
PERSONALISATION
IN ACTION

In the digital age of infinite scrolls and vanishing attention spans, how content is delivered is just as crucial as what is delivered.

For India's OTT platforms, scalability, speed and personalization are not optional; they are mission-critical. At the heart of this transformation lies Amazon Web Services (AWS), which silently powers the future of streaming.



SCALING SEAMLESSLY ACROSS BHARAT AND INDIA

India's OTT audience surpassed 550 million unique users in 2024, spanning metros, small towns and rural interiors. Serving this diverse population with real-time, high-quality video content requires infrastructure that is both **scalable and responsive**.

AWS provides a **cloud-first backbone** for leading OTT platforms, offering elastic compute capabilities that automatically adjust to spikes in demand, be it a live cricket final, a breaking news bulletin, or the launch of a blockbuster series. Its **Amazon EC2 instances and Auto Scaling Groups** ensure platforms run smoothly even when millions log in simultaneously.

According to AWS India, its clients have seen:



Upto 70% faster go-to-market
for new releases



Upto 40% lower infrastructure costs
due to dynamic scaling



99.99% uptime
using multi-region deployments
and high availability zones

EDGE COMPUTING AND THE CDN REVOLUTION

One of AWS's most powerful weapons in delivering high-quality streams to every corner of India is its **Content Delivery Network (CDN) - Amazon CloudFront**.

With over **450 edge locations globally and multiple Indian nodes** (including in Mumbai, Delhi, Hyderabad and Chennai), CloudFront minimises latency by delivering content from servers closest to the user.



Buffer-free playback
even in low-bandwidth areas



Upto 50% faster
Load times for videos



Seamless delivery for
High-definition (HD)
and 4K content

This edge-powered model is particularly valuable in Tier 2 and Tier 3 towns, where last-mile connectivity can be patchy, but viewer expectations are sky-high.



Pankaj Gupta

Country Leader, Public Sector, AWS India and South Asia

At AWS, we see India's OTT evolution as a beacon for what is possible when cutting-edge technology meets cultural ambition. From empowering hyperlocal storytelling to enabling seamless scalability for national and global audiences, our cloud solutions are designed to adapt, learn and grow with the industry's dynamic pace. As the demand for immersive, multilingual and interactive experiences rises, we are enabling creators and platforms with the digital muscle to dream bigger, whether through AI-enhanced workflows or resilient streaming infrastructure. The WAVES Summit reflects this momentum as a space where innovation is not only being showcased but accelerated. We are proud to support India's creative leap.



FORTRESS STREAMING: SECURITY AND COMPLIANCE AT SCALE

Piracy is a multi-billion-dollar problem for digital content and OTT platforms are constantly under threat.

AWS offers an enterprise-grade security framework designed to protect against a range of threats, from content leaks to cyberattacks.

Features like:



AWS Shield and Web Application Firewall (WAF)
to block DDoS and malware attacks



Secure Video Packaging & Encryption
(HLS/DASH with DRM support)



Compliance Certifications
(ISO 27001, GDPR, MeitY, and more) help OTT platforms to fortify their content, to comply with Indian and global regulations, and to build user trust.

In 2023, OTT platforms on AWS in India **reported a 40% reduction in security breaches** and **faster compliance rollouts** for new government data norms.



WHERE CLOUD MEETS THE MIND: AI-POWERED PERSONALIZATION

What keeps users coming back is not just content, its **how well the platform understands them**. AWS's suite of AI and ML services, including **Amazon Personalize, SageMaker and Rekognition**, helps platforms decode viewer behaviour with precision.

These tools can:



Track watch history, genre preferences, viewing time and mood signals



Personalize homepages and thumbnails in real-time



Generate predictive insights to recommend what users want before they even search for it

This is not just binge-watching, its **intelligently curated digital companionship**, crafted by algorithms trained on billions of data points and constantly learning.

According to AWS case studies, for platforms using Amazon Personalize:



Click-through rates improved by 35%



Content discovery time reduced by upto 50%
increasing engagement and retention



**Devroop Dhar**

CEO, Primus Partners

The WAVES Summit is a forward-looking message to the world that India's digital economy is being architected not in isolation, but through deep convergence of infrastructure, innovation, inclusion and intent.

OTT intersects multiple national priorities: digital public infrastructure, regional innovation, job creation, skilling, cloud adoption and data-driven governance. This ecosystem is not just about entertainment, its about enabling India to lead the next wave of digital transformation across sectors.

We are now building more than platforms, we are building public-facing, high-impact systems that demand not just content agility but architectural resilience, regulatory foresight and citizen-centric design. From BharatNet to AI-led personalisation and from multilingual UX to embedded commerce, India's OTT landscape is a testbed for scalable, inclusive innovation.

The real opportunity lies in designing for the last mile and architecting for the future, where technology infrastructure, policy thinking and user trust co-evolve. The WAVES Summit reflects that ambition. It is not just a celebration of media, its a signal of how India is building capacity, capability and confidence to lead globally, while remaining deeply local in spirit.

This report provides insight into how India's OTT evolution is shaping the broader contours of our digital and economic future.



MONETISATION MODELS:

THE BUSINESS OF BINGEING

As audiences binge, platforms brainstorm; how do you turn streams into revenue without breaking viewer trust or burning out wallets? That is the billion-dollar question driving India's OTT business models.

Monetising content in India is not a one-size-fits-all game. It's a strategic balancing act that spans affordability, access and user psychology. With over **550 million OTT users**, ranging from metro-based premium subscribers to rural freemium explorers, India has become the world's most complex and creative OTT market.



Mr. Sameer Nair

CEO, Applause Entertainment

OTT monetisation is evolving into a dynamic ecosystem, blending SVOD, AVOD, and hybrid models to capitalise on the bingeing culture.

The fusion of theatrical and streaming platforms is reshaping content valuation, creating multiple profit pathways. As audience demands shift, the challenge is balancing seamless viewing experiences with sustainable business growth.



AVOD: THE BACKBONE OF INDIA'S OTT ECONOMY

Ad-supported Video on Demand (AVoD) remains **India's largest revenue generator by user volume**. With most users reluctant to pay upfront, free content supported by targeted advertising is the go-to model, especially in Tier 2 and Tier 3 regions.

According to Latest Reports:



AVoD platforms in India earned over **₹6,300 crore (~USD 750 million)** in ad revenues in 2023



Contributing to nearly **55% of the overall OTT revenue pie**

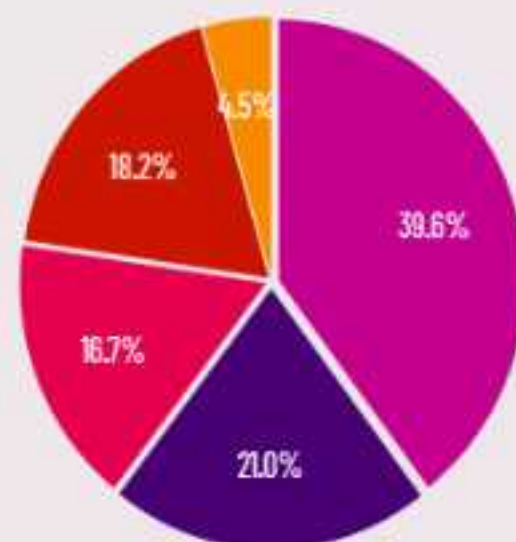


Reaching over **350 million monthly active users**

Programmatic advertising, shoppable ads and AI-powered targeting are making ads smarter and less intrusive, while delivering strong ROI for brands.

Viewers' Openness to watching Content with Ads

Very Comfortable
Neutral
Very Comfortable
Comfortable
Uncomfortable



Insight

More than **60% of the viewers** are comfortable watching Ads in the content, if the content is of good quality and available for free.



SVOD: PREMIUM CONTENT FOR PREMIUM AUDIENCES

Subscription Video on Demand (SVoD) is growing steadily, albeit from a smaller base. This model attracts urban, upper-income users who want:



Ad-free viewing



Early access to blockbuster releases



Exclusive originals



Multi-device compatibility

India had approximately **125 million paid SVoD subscriptions** as of 2024. However, a key factor is that many users subscribe temporarily and then drop off, resulting in high churn rates.

To combat this, platforms are:



Offering **monthly mobile-only packs** as low as ₹29



Partnering with telecom operators on **Bundle Deals (data + OTT)**



Introducing **Family Sharing Plans** to increase retention



HYBRID FREMIUM MODELS: BEST OF BOTH WORLDS

Freemium models, where some content is free with ads and premium content is behind a paywall, have become the sweet spot for many platforms.

This approach helps onboard new users with free content and gradually converts them into paying subscribers through curated experiences.

Waves OTT, operates on a unique public-service-first model, offering a vast library of cultural, educational and heritage content entirely free to users.

At the same time, it provides optional paid plans with enhanced features and premium access, ensuring that the platform remains inclusive yet scalable, accessible yet aspirational.

TVOD: A SMALL BUT PREMIUM NICHE

Transactional Video on Demand (TVoD), where users pay per view, is still niche in India, but works well for:



Big-ticket movie premieres



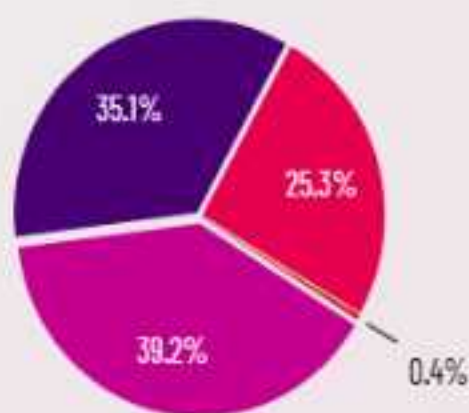
Regional cinema fans



Sports pay-per-view events

While it represents less than **5% of total OTT revenues**, TVoD offers **high ARPU (Average Revenue Per User)** and is often used during festival seasons and high-anticipation film releases.

Monetisation Models: Mix & Match



Insight

More than **40% of viewers** want OTTs to have a hybrid monetisation model, followed by AVoD (35%) and SVoD (25%) models.

● Hybrid ● SVOD ● AVOD ● TVOD

EMERGING MODELS: WALLETS, REWARDS & WEB3

Some platforms are now experimenting with:



Micro-payments and in-app wallets

where users pay tiny amounts for short-term or episodic content



Ad-rewarded models

where users watch ads to earn credits



Early-stage Blockchain and Web3 integrations, especially for creators

to monetise directly from niche fanbases

Although still in its early stages, these models reflect the next wave of monetization **innovation**, built for the hyper-personal and mobile-first Indian viewer.



THE CORE CHALLENGE MONETISE WITHOUT LOSING THE MAGIC

In a price-sensitive market like India, platforms walk a tightrope; **how to extract value without pushing users away**. Too many ads, aggressive paywalls or expensive tiers can drive churn. Too much free content can hurt margins.

The winners will be those who strike the right balance: **personalisation without intrusion, pricing without exclusion and monetization without friction**.

AD TECH MEETS CONTENT CRAFT

In the OTT world,
advertising is no longer
a commercial break,
its part of the narrative.

The rise of AI, real-time analytics and
interactive technologies has turned ads
from interruptions into experiences.

And India, with its mobile-first audience and
data-rich environment, is becoming a global
testbed for ad tech innovation.



FROM PASSIVE TO PERSONAL: THE RISE OF AI-POWERED ADS

Gone are the days of one-size-fits-all ads.
Today's OTT platforms are **machine-learning-
driven, constantly analysing viewer
behaviour, watch history, location, device
type, language preference and even the
time of day to serve hyper-personalised ads.**

These are not just more innovative ads, they
are **emotionally timed, context-aware and
non-intrusive**, often blending into the
viewing experience with native relevance.

According to a latest report,
**platforms using AI-driven ad
engines have seen:**



Uplifts of 2-3x
in ad engagement rates



Over 40% lesser
ad-skipping



Upto 60% higher
*click-through rates on
interactive ad formats*

PROGRAMMATIC ADVERTISING: PRECISION AT SCALE

India's OTT industry is adopting **programmatic ad buying** in a significant way, where AI automatically determines which ad to show, to whom, and at what cost, all within milliseconds.

This makes advertising scalable and precise, especially for large campaigns. Programmatic ads now account for over **75% of digital video ad spending in India**.

Real-time bidding, dynamic ad insertion and user profiling help advertisers reach millions efficiently, while OTT platforms optimise their inventory based on performance data.

SHOPPABLE AND INTERACTIVE ADS: THE NEXT FRONTIER

OTT ads are evolving from watchable to clickable. **Shoppable ads** allow users to tap on products directly from the screen, converting interest into instant commerce.

Platforms are already piloting:



**Click-to-buy
product
placements**
during shows



**Voice-controlled
advertisements**
*with smart TV
integrations*



**Swipe-based
mobile ads**
*leading to ONDC-powered
checkout flows*

According to a Report, OTT-integrated commerce is expected to be a **₹5,000+ crore opportunity by 2026**, as audiences shift from viewing to interacting.



GEO-TARGETED AND REGIONAL MESSAGING

OTT platforms know not just what you are watching, but where you are watching. This has enabled **geo-targeted ads**, where brands can run location-specific campaigns tailored to local languages, festivals or events.

A user in Jaipur might see a completely different ad lineup than someone in Guwahati, even on the same show. This **hyperlocal targeting** is delivering a higher ROI and brand recall, especially for the FMCG, automotive and retail sectors.

FROM MAD MEN TO MATH MEN: STORYTELLING MEETS STRATEGY

The OTT ad landscape is where **content craft meets code**. Today's ad campaigns are not just built by creative directors, but co-engineered with data scientists, media planners and machine learning algorithms.

The result? **Emotionally resonant, data-driven storytelling** that doesn't just sell products but builds relationships.



The background of the entire page is a faded, reddish-pink image of a person wearing a VR headset and holding a controller, standing in a virtual environment that appears to be a city street with buildings and a car.

BEYOND THE BOX:

GAMING, AVGC AND INTERACTIVE REALMS

Entertainment today is
no longer a one-way
experience.

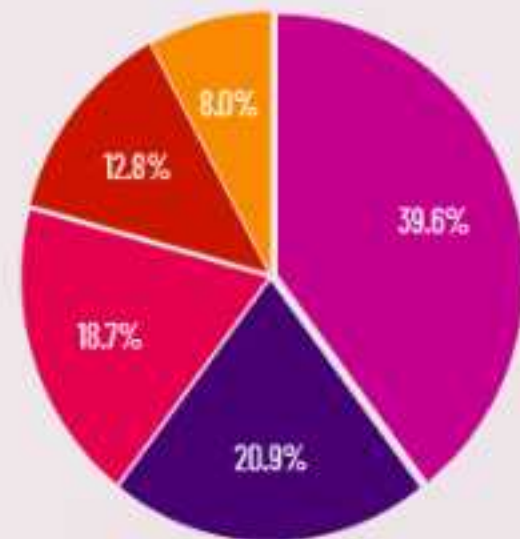
Its immersive, interactive
and increasingly gamified.

As digital natives demand more than just
passive storytelling, OTT platforms are
expanding their universes into the vibrant
worlds of **gaming and AVGC (Animation,
Visual Effects, Gaming, and Comics)**,
creating an exciting hybrid that merges
content with control.

India is at the forefront of this convergence,
with its **youth-heavy demographic, surging
digital adoption** and a booming AVGC
industry backed by policy and innovation.

What viewers want in addition
to video content

Very Likely Likely Neutral
Unlikely Very Unlikely



Insight

More than **60% of OTT viewers**
want to access books, audiobooks
and other form of content beyond
Video content in their OTT apps.



THE GAMIFICATION OF STORYTELLING

OTT platforms are now crafting experiences that enable viewers to **become participants**.

Interactive episodes, gamified learning and choose-your-own-path storylines are gaining traction, especially among Gen Z and Gen Alpha audiences. This evolution turns storytelling into a collaborative journey, **viewers are not just watching; they are influencing the outcome.**

Indian platforms are experimenting with:



Interactive Quizzes

woven into plotlines



Content that changes

based on viewer choices



Knowledge-based challenges

tied to real-world rewards

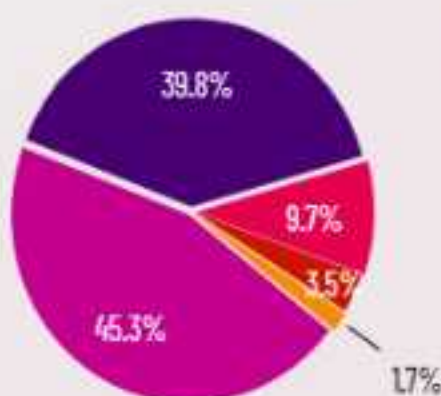
AVGC: INDIA'S NEW CREATIVE ENGINE BACKED BY POLICY MOMENTUM

Recognising the immense potential of the AVGC sector to generate jobs and drive exports, the **Government of India has initiated a structured push** to support its growth. The Ministry of Information & Broadcasting established the **AVGC Promotion Task Force**, which recommended:

-  **A National AVGC Mission**
-  **Regional Centres of Excellence**
for skill development
-  **Specialised Academic Curricula**
to encourage talent
-  **Incentives for International Co-productions and IP creation**



Increasing Appetite for Gaming and AVGC



Insight

More than **95% of the viewers** agree that they would be keen to explore gaming and AVGC content on their OTT apps.

● Strongly agree
 ● Agree
 ● Neutral
 ● Disagree
 ● Strongly disagree

With over **4 lakh professionals** already employed and expectations to **double this number by 2025**, AVGC is no longer a niche, its becoming the **creative backbone of India's digital economy**.

OTT platforms are primary beneficiaries, leveraging AVGC for:



Animated Mythological and Folk Content



VFX-heavy Thrillers and Sci-Fi shows



Motion Comics, stylised formats and experimental content

CREATING THE CREATIVE ECONOMY: NEW-AGE JOBS IN AVGC AND OTT

This creative boom is not just changing what we watch, its reshaping how we work. As AVGC blends into the DNA of OTT, a new class of careers is emerging at the intersection of technology, artistry and digital storytelling.

According to the AVGC Task Force and NASSCOM, the sector is expected to generate over **20 lakh direct and indirect jobs** within the next decade. These roles extend far beyond traditional animation studios; they are now sprouting across OTT platforms, production houses, gaming startups, edtech firms, content agencies and beyond.



Sandeep Marwah

President, Asian Academy of Film and Television (AAFT)

OTT platforms have significantly contributed to job creation across various sectors in the entertainment industry. With the surge in demand for diverse content, these platforms have opened opportunities for writers, directors, actors, editors, and technicians. Beyond creative roles, they've also boosted employment in marketing, IT, analytics, and customer support. Regional content production further expands job prospects in local languages, fostering inclusive growth. As OTT platforms continue to grow, they play a key role in reshaping media careers and driving economic activity.

We are witnessing the rise of an ecosystem where **storytellers meet software engineers**, where **creative thinkers collaborate with motion designers** and where India's next generation of digital creators are finding fertile ground.

Even beyond the screen, there is a rising demand for specialists in production pipelines, AI-powered creative tools, localisation experts and cross-platform asset managers.

This job boom will not be restricted to Mumbai or Bengaluru. With government plans to set up **regional AVGC hubs and Centres of Excellence**, Tier 2 and Tier 3 cities, from Indore to Kochi, are being nurtured as future creative clusters, making the industry truly pan-Indian.

This is not just the rise of a new job sector, it's the birth of a **creative economy**, where storytelling becomes a career path and India positions itself not just as a content consumer, but a **global content creator**.

Some of the most exciting and in-demand roles include:



Storyboard Artists & Concept Designers

who sketch earliest visions of a story



3D/2D Animators & VFX Artists,

now indispensable in both live-action OTT and animated content



Motion Graphic Designers,

increasingly essential for promos, intros and in-show transitions



Game Designers & Developers,

building immersive OTT-native game experiences



Narrative Designers & Interactive Writers,

shaping choose-your-path formats and gamified learning shows



Virtual Production Specialists,

utilizing real-time engines and green screen technology to reduce production costs & time



Voice Artists & Dubbing Directors

especially as multilingual OTT content gains popularity across regions



Digital Puppeteers & Motion Capture Technicians,

adding realism to animated characters and hybrid formats

WAVES OTT: BRINGING GAMES & INTERACTIVITY TO PUBLIC MEDIA

Waves OTT is pioneering the integration of **games and interactive formats** within a public service framework. With a growing catalogue of culturally rooted games, knowledge-based puzzles and interactive storytelling modules, it is **reimagining what engagement looks like in the content space**.

This is incredibly impactful for youth in underserved areas, where interactive content can inspire learning, digital literacy and creativity, all while entertaining.



FROM VIEWERS TO PARTICIPANTS: THE FUTURE IS IMMERSIVE

OTT platforms are no longer just broadcasting; they are **inviting participation**. Whether it is:



Competing in trivia
during a live game show



Earning rewards through
watch-and-play formats



Unlocking AR filters and
bonus content

Over **45% of OTT viewers aged 18–24** in India engage with at least one form of gamified or interactive content every week. The message is clear: **future storytelling will be two-way, responsive and co-created.**

OTT AS SOCIAL CATALYST

OTT is not just reshaping how we watch, its redefining what we talk about, who gets heard and how we engage with social realities.

What began as an entertainment revolution is now transforming into a **social awakening**, with platforms acting as catalysts for change, empathy and collective introspection.

In a country as complex and diverse as India, where mainstream media often plays it safe, OTT has emerged as the **boldest voice in the room**, amplifying issues that matter and **giving space to stories once silenced**.

OTT has scaled is the depth and diversity of storytelling now possible. It is clear that people don't just want to be entertained anymore, they're connecting with content that feels honest, challenges how they see the world, and speaks to real experiences.



Vaibhav Modi

Founder, Victor Tango Entertainment

Streaming services transcend mediums like TV and theatres in bringing about social change by:

- bringing messaging, accountability and need for diversity to the mainstream
- Asking tough questions through new creative voices and creating opportunities for new talent
- Changing narrative styles and introducing characters less represented so far, such as LGBTQ individuals, protagonists from different regions and ethnicities.
- Presenting a nuanced understanding and acceptance of issues pertaining to gender dynamics, caste, climate and generational differences
- OTT also funnels organically into social media, leading to discussions and debates that help challenge problematic stereotypes and reshape the collective opinion of the audience.

GIVING VOICE TO THE MARGINS

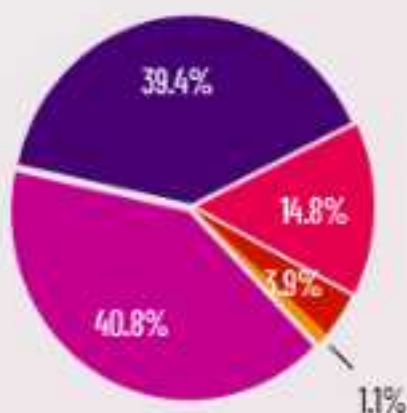
OTT platforms have become a lifeline for stories from the fringes. Regional dialects, queer identities, caste-based narratives, tribal folklore and working-class perspectives, once considered “unmarketable”, now find audiences across geographies and age groups.

Series and films that explore **struggles of marginal sections, LGBTQIA+ journeys, women-led narratives and religious pluralism** are gaining traction, not only in metropolitan areas but also in semi-urban and rural markets.

According to a report, over **30% of top-performing OTT originals in India** last year revolved around socially relevant themes, many led by first-time writers, independent filmmakers and regional production houses.



OTT as Social Catalyst



Insight

More than **85% of viewers** believe that in today's digital world, OTT is the best source to promote social good through promotions and campaigns.

● Strongly agree ● Agree ● Neutral ● Disagree ● Strongly Disagree

A SPACE FOR TOUGH CONVERSATIONS

While television often avoids topics deemed "controversial," OTT has stepped in as a **safe space for difficult dialogues**.

Whether it's exploring:



Mental health through the lens of lived experience



The nuances of **gender identity and expression**



Climate change through regional impacts



Real-world consequences of **misinformation**

OTT enables **long-form, nuanced storytelling** that encourages empathy rather than sensationalism.

These platforms provide creators the **freedom to be fearless**, backed by diverse content policies, flexible formats and increasingly open-minded audiences.

FROM BINGE-WATCHING TO BELONGING

The emotional intimacy of OTT, often watched alone or in small groups, allows for deeper connection. Viewers are not only entertained; they are also challenged, moved and often inspired to take action.

Campaigns and content-based movements have emerged from OTT shows, sparking discussions in colleges, communities and even policymaking circles. OTT, in this sense, becomes not just a screen, but a **mirror and a megaphone**.



CULTURAL PRESERVATION AND INCLUSIVITY

OTT is also serving as an archive and amplifier of India's diverse heritage. Documentaries on disappearing languages, series based on regional myths and biopics on unsung heroes are ensuring that **cultural memory is preserved**, digitized and passed on to the next generation.

At the same time, platforms are increasingly adopting inclusive casting, multilingual subtitles and accessible UX features to reach users across ability and language divides, further reinforcing OTT's role as a platform for the public good.

ENTERTAINMENT WITH A CONSCIENCE

In an age of algorithms and virality, it's heartening to see that **impact and integrity can still trend**.

OTT platforms are proving that content can be both engaging and enlightening, dramatic and democratic.

This is the quiet power of streaming, its not just what we watch. Its what we begin to care about after watching.



WHAT LIES AHEAD

India's OTT story has not peaked, it has just hit "Next Episode."

What we are witnessing is not just the end of one streaming decade, but the **dawn of a digital storytelling renaissance**, one where entertainment fuses with technology, culture, commerce and identity in unimaginable ways.

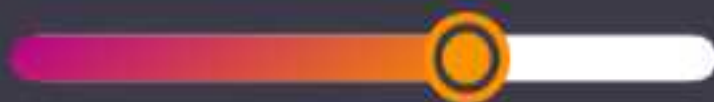
If the past decade was about disruption, the next will be about **redefinition**.



Mr. Sameer Nair

Chief Executive Officer,
Applause Entertainment

OTT monetisation is evolving into a dynamic ecosystem, blending SVOD, AVOD, and hybrid models to capitalise on the bingeing culture. The fusion of theatrical and streaming platforms is reshaping content valuation, creating multiple profit pathways. As audience demands shift, the challenge is balancing seamless viewing experiences with sustainable business growth.



FROM PLAYLIST TO LIFELINES

Tomorrow's OTT platforms will not only serve as content providers, but they will also be **cultural ecosystems**, seamlessly blending entertainment with daily life.

We can expect:



Live TV merging with social feeds



Games woven into storytelling arcs



News blending into fiction



Shopping sparked by scenes



Content that does not just reflect reality, but reacts to it

This will be **OTT without borders, formats or genres**, where you can watch, play, learn, listen and buy, all from a single tap.



THE RISE OF THE EVERYWHERE AUDIENCE

India's next 300 million OTT users will not come from metros, they will come from villages, towns and Tier 2/3 cities.

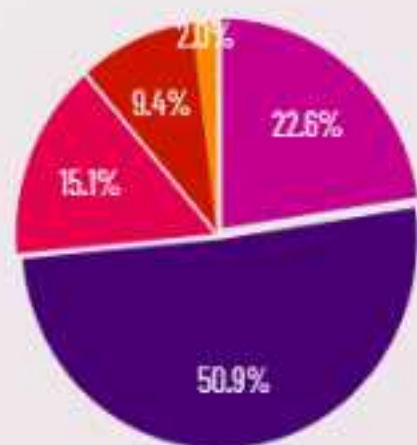
These users are multilingual, mobile-first and culturally diverse. They crave hyperlocal content, micro-moment formats and frictionless access.

According to projections, **rural India is expected to drive over 60% of new OTT adoption** in the next five years. The future will be spoken in dialects and subtitled in six languages.

Mass entertainment will no longer be monolithic; it will be **mosaic**.



Market Accelerators in the next five years



Insight

More than **51% of respondents** feel that OTTs will have rural India as a significant user base in the next five years.

- Significant Growth in Urban Areas
- Expansion in International Markets
- Piracy is a major Roadblock

- Significant Growth in Rural Areas
- Stagnation due to Competition



AI AS STORYTELLER, EDITOR, DISTRIBUTOR

Artificial Intelligence is no longer behind the curtain, its stepping into the director's chair. From automated dubbing and smart thumbnails to generative scripts and synthetic actors, AI is poised to revolutionise both creation and consumption. Imagine:



Stories that evolve with your mood



Characters that respond to your choices



Content that writes itself while you watch

It is no longer fiction, **it's the next feature.**

INDIA, THE GLOBAL STORY FACTORY

As regional stories travel across continents and Indian creators embrace global formats, the country is on track to become a **content superpower**. Tamil noir, Bengali thrillers, Telugu mythology, and Marathi slice-of-life dramas are no longer just regional; they are **international**.

With cost-efficient production, a deep talent pool and state-backed AVGC innovation, India is scripting stories that **resonate worldwide**.

WAVES OTT AND THE PUBLIC-FIRST FUTURE

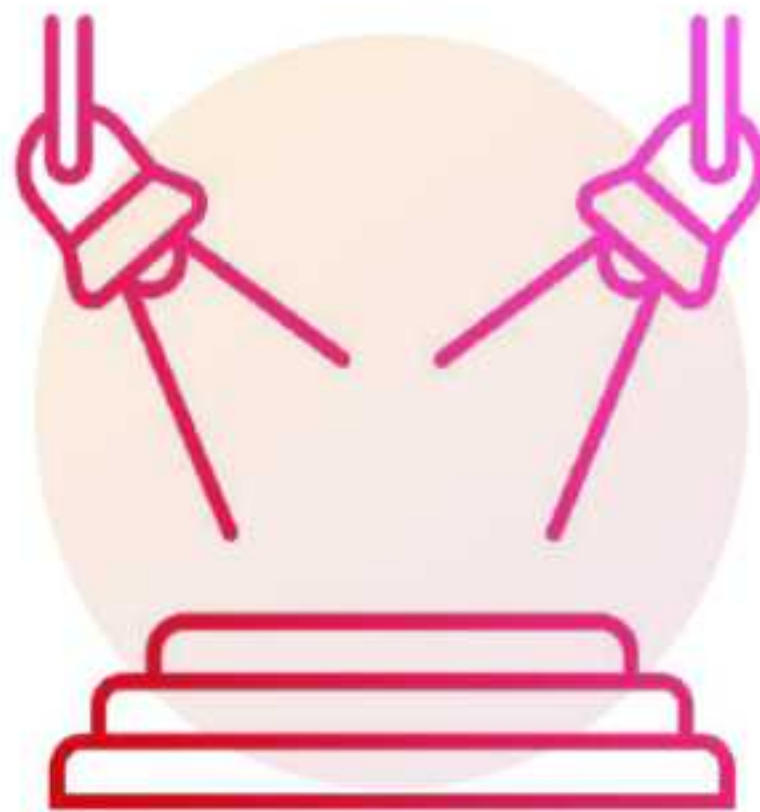
The next phase of OTT will not just entertain; it will educate, empower, **and elevate**. Platforms like Waves OTT are showing the way forward, blending games, e-books, public interest content and governance programming into a seamless digital experience. This is not just streaming, it is **nation-building through narratives**.

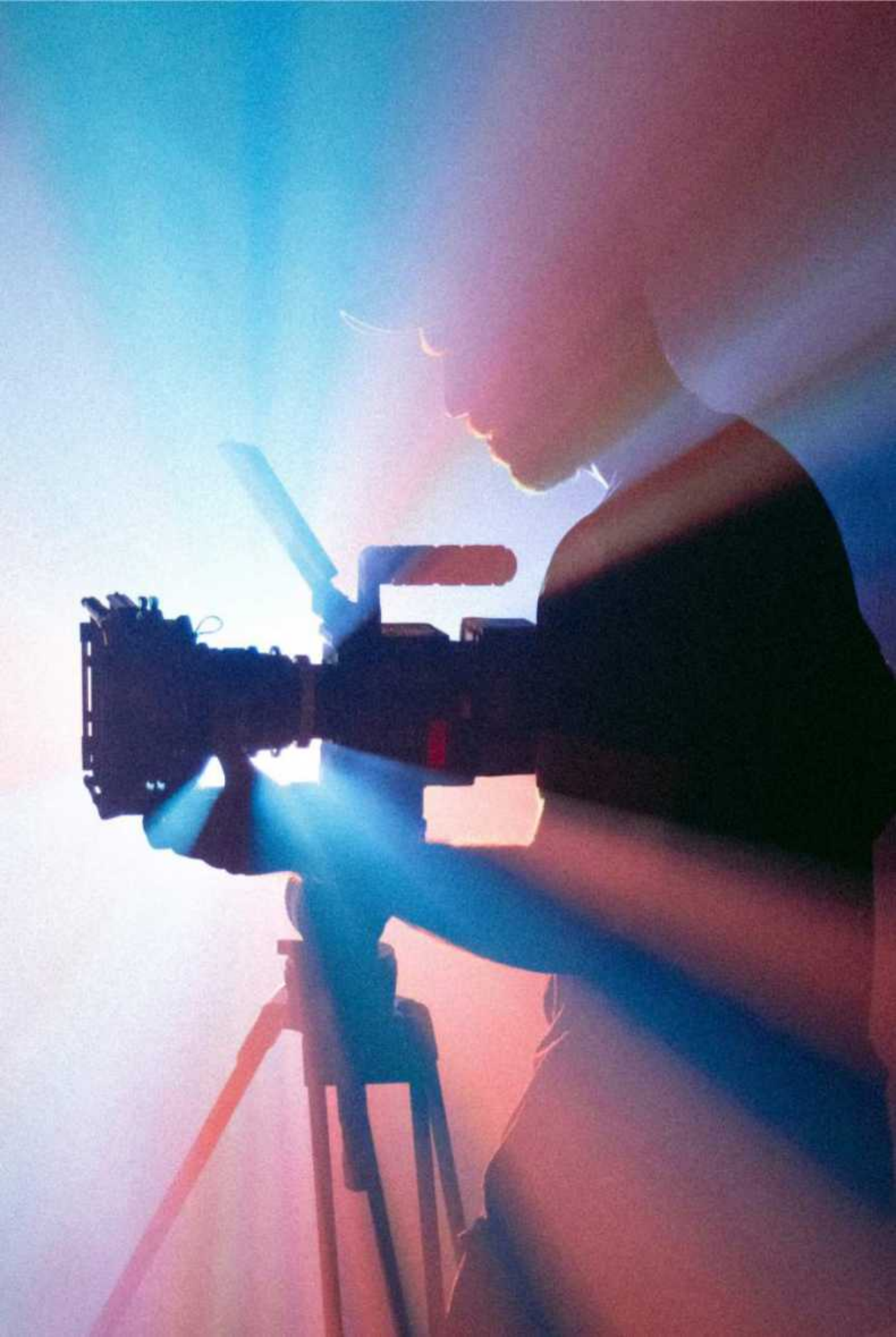
THIS IS JUST THE TEASER

What lies ahead for Indian OTT is neither linear nor predictable. It's a constantly evolving, shape-shifting multiverse, where culture, tech and imagination collide.

The best stories have yet to be told. The most immersive formats have yet to be invented. And the next digital icons are just one idea away.

What we have seen is only the teaser.
The real binge begins now.





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