

Audience research report

Micro dramas: The India story

February 2026

Research design

Phase 1

Qualitative research

Online depth interviews
among micro drama
audiences in India **(50 nos.)**



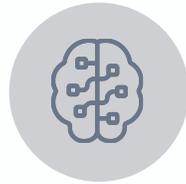
Phase 2

Quantitative research

Computer-assisted personal
interviews **(CAPI)** among
micro drama audiences in
India **(2,000 nos.)**

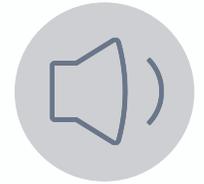
Who qualifies as a micro drama audience?

Must be watching micro dramas, for at least



**1 hour per week/
4 hours per month**

Must be using



UPI for payments

Qualitative research

Methodology and demographic design



Criteria and sample size

50 Online depth Interviews among regular micro drama audiences in India



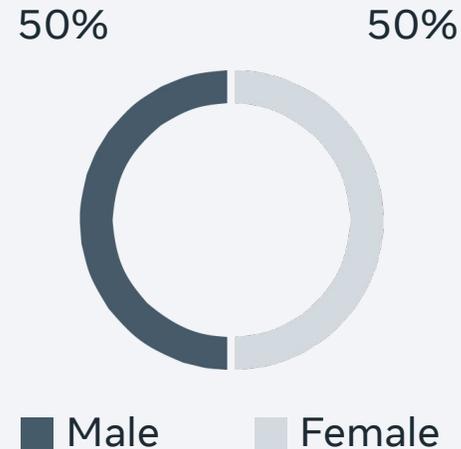
Markets

(Metros: 12, Mini Metros: 10, Small Towns 18, Rural: 10)

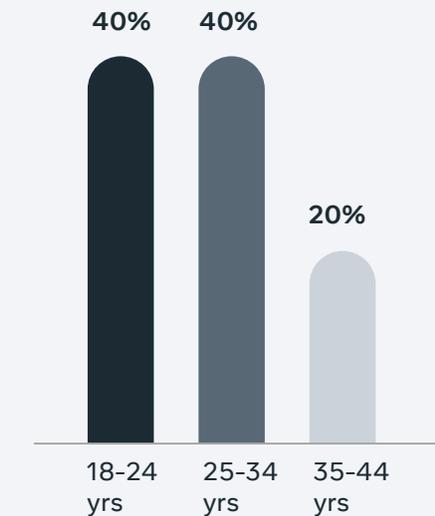
Maharashtra	Madhya Pradesh
Gujarat	Rajasthan
Delhi NCR	West Bengal
Uttar Pradesh	Tamil Nadu
Bihar	AP-Telangana
Punjab, incl. Chandigarh	Karnataka



Gender



Age



Quantitative research

Methodology and demographic design



Criteria and sample size

2,000 Computer assisted personal interviews (CAPI) among regular micro drama audiences in India



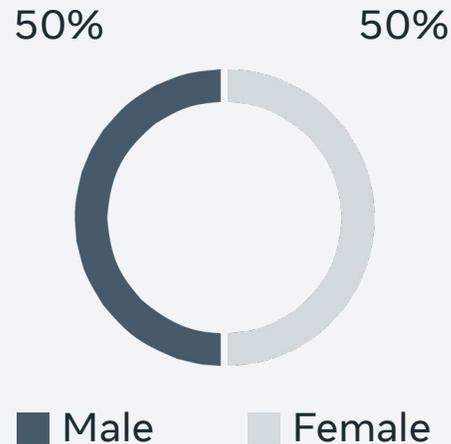
Markets

(Metros: 25%, Mini Metros: 20%, Small Towns 35%, Rural: 20%)

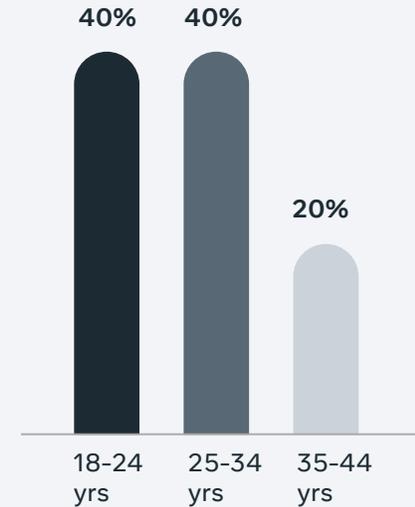
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Gender



Age



Report sections



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induction**



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vs. short videos
on social media**



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and payments**



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07
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03
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Category induction

Category induction

Section contents



Micro dramas is a relatively new category in the **Indian media and entertainment ecosystem**, with audiences at different stages of the consumer lifecycle



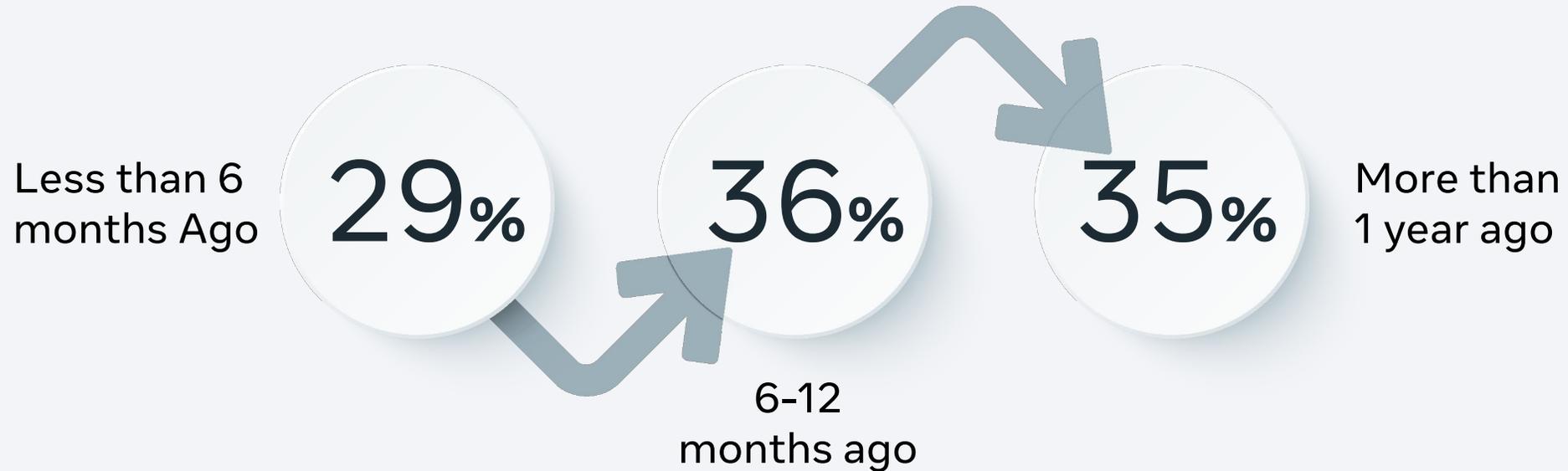
Therefore, it is imperative to understand **how audiences are getting inducted into the category**, and what **terminologies and norms** are getting developed for the category at this early stage



This section explores and maps the **typical viewer journey** for the audiences of the category, at this early stage of its evolution

Initiation into micro dramas category

When did consumers start getting exposed to micro dramas in India?



Exposure to micro dramas is largely a recent phenomenon. **65% audiences** have discovered the category **within the last one year**. This indicates a category where consumer norms and habits are still being formed, rather than being fully established.

“Micro drama” is not a consumer term yet

PASS-TIME VIDEOS SHORT DRAMA
2-3 MINUTE EPISODES MINI SERIES
BILLIONAIRE STORIES **SHORT STORIES**
MINI EPISODES **REELS**
TV SERIAL REELS SERIAL-TYPE STORY SHORT VIDEOS
DRAMA SUSPENSE STORY
DAILY STORY SERIALS STORY REELS
SHORT STORY VIDEOS

Words consumers use to describe the format

Short story videos kehte hain hum toh. micro drama yeh shabd pehle nahin sun tha (Dewas, Female, 25–34 yrs.)

Hum inhe short dramas keh kar bulate hain. Kyunki inn shows mein aam taur par drama hota hai aur ekdum short mein dikhate hain (Delhi, Male, 25–34 yrs.)

I call it a short story videos, not a micro drama (Chennai, Female, 18–24 yrs.)

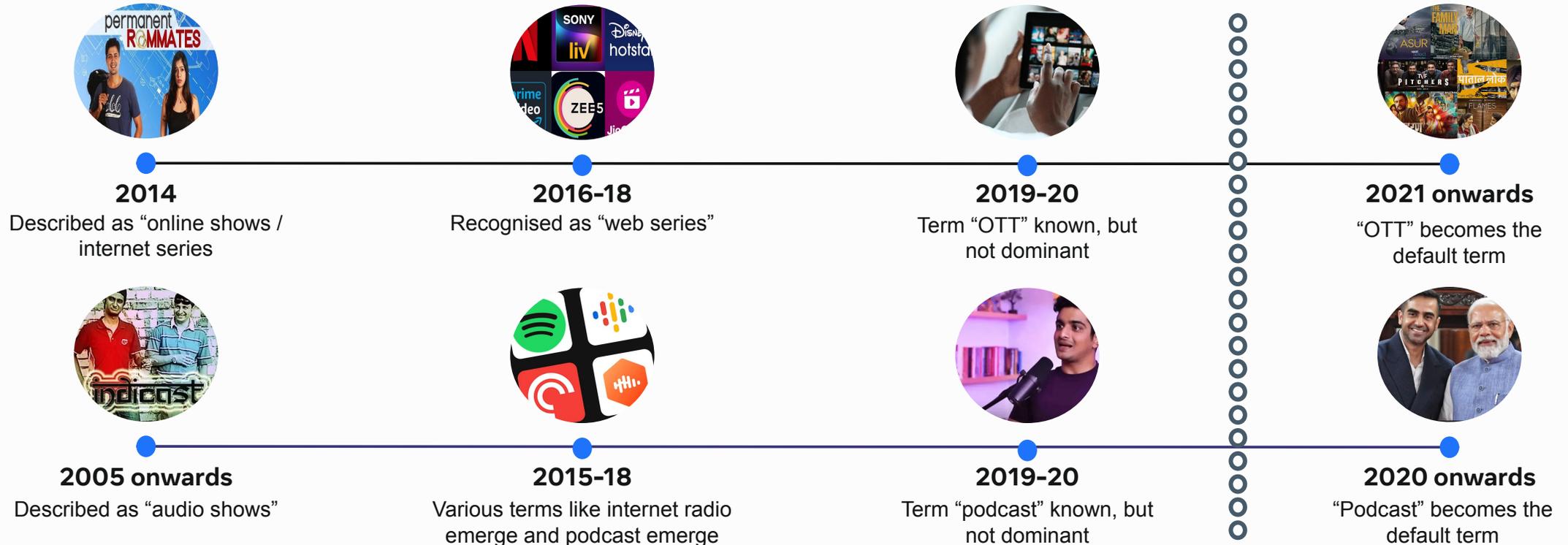
Micro sounds like a scientific word (Chennai, Male, 18–24 yrs.)

I don't think of names. I just watch what comes. I think of it as reels with stories and characters (Bangalore, Male, 18–24 yrs.)

The term ‘micro dramas’ is not part of the consumer lexicon currently, even among heavy viewers of the category. Phrases like ‘short story videos’ or ‘short dramas’ are used far more commonly to describe the format.

Lack of terminology is a common early-stage feature across formats

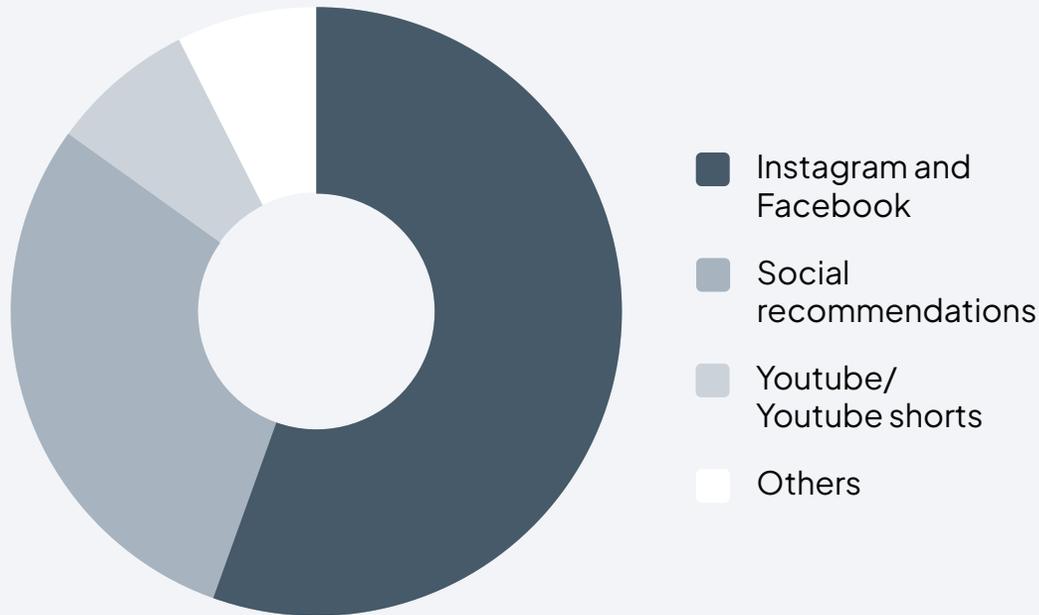
COVID-19



The micro drama category is at a stage where the category name has not yet crystallised in the mind’s of the audiences. This presents an opportunity to integrate simpler and intuitive words like ‘short’ and ‘story’ into the lexicon.

Medium of discovery

How do consumers come to know about micro dramas first?



89%

of the audience discovered the category through social media (Meta and YouTube)

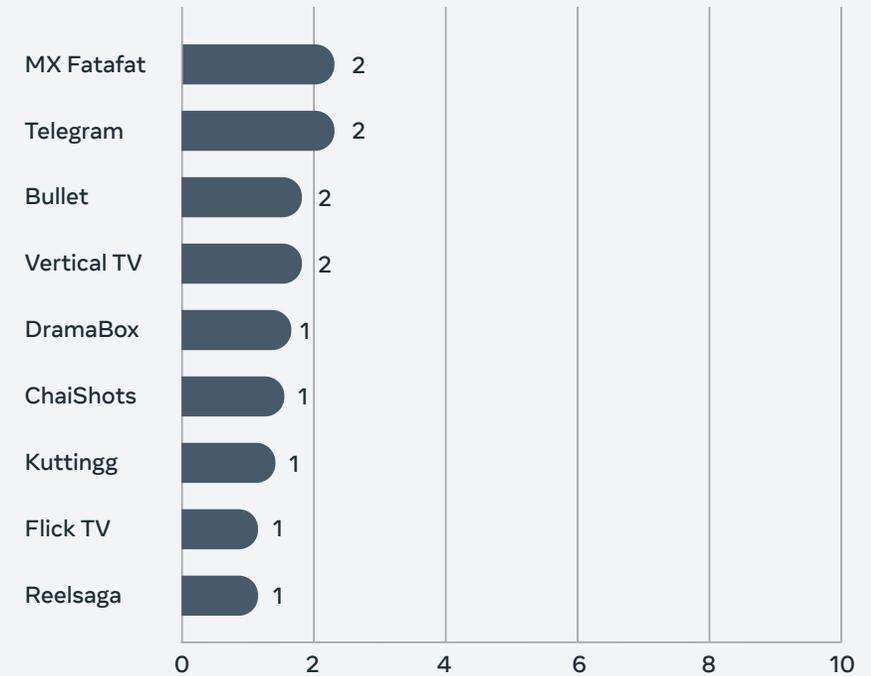
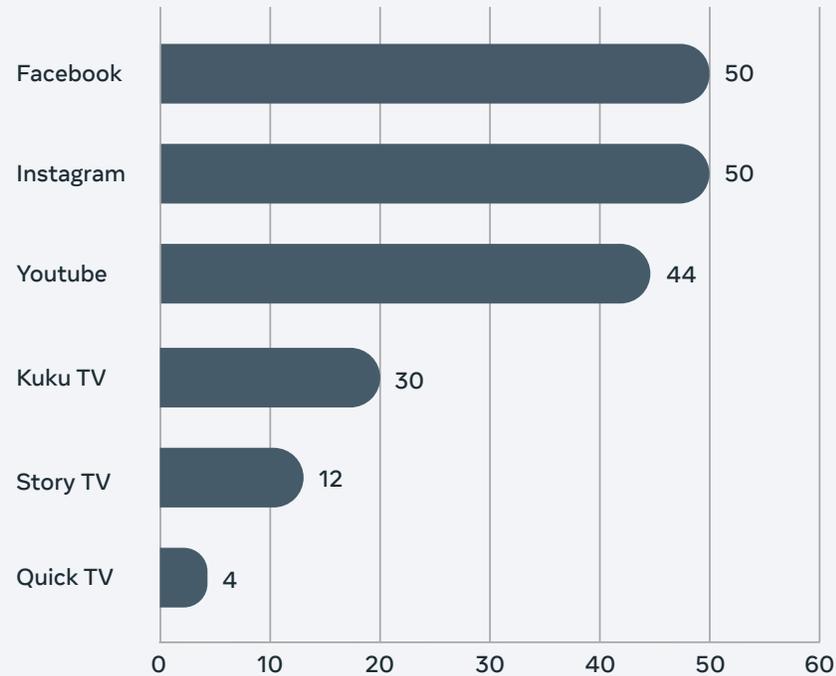
5%

of the audience discovered the category through social recommendations (friends and family)

Currently in India, micro dramas are **discovered almost entirely through social media (89%)**.

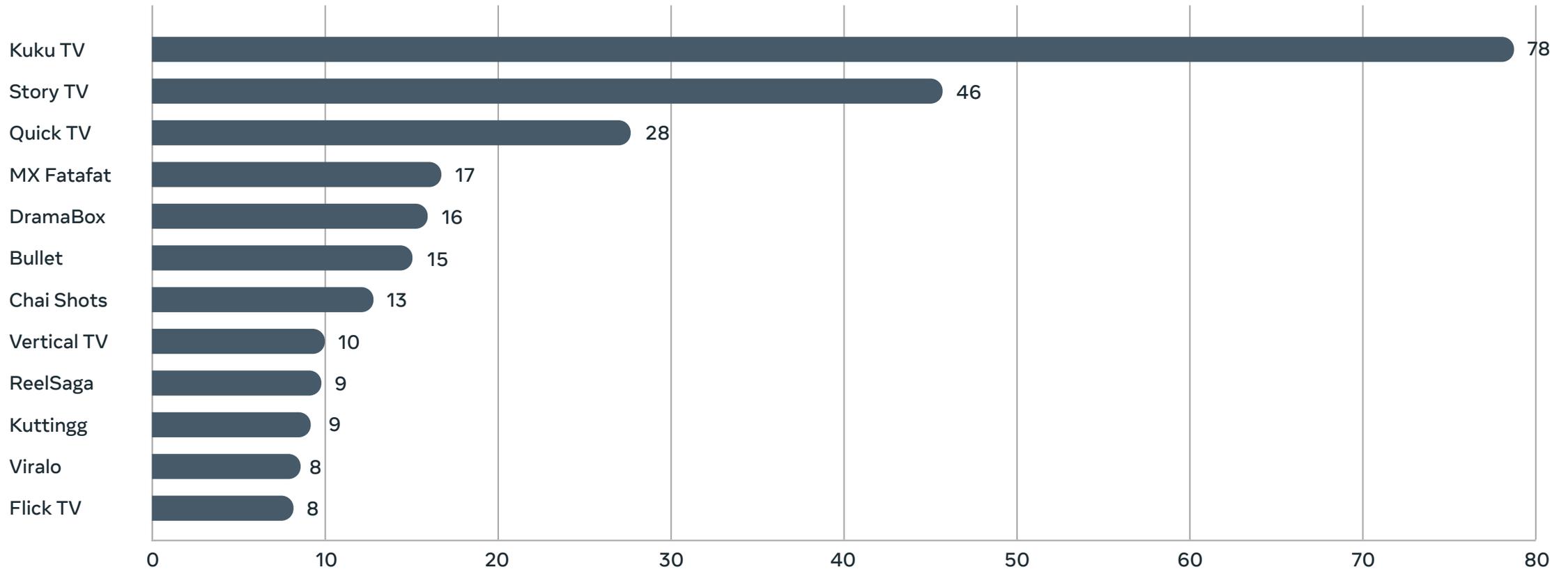
Low incidence of social recommendation driving category exploration (at only 5%) hints at a potential challenge.

Unaided awareness of micro drama platforms(%)



When asked to name micro drama apps, users predominantly named social media platforms (Facebook and Instagram) and YouTube, highlighting that the distinction between the medium of discovery and the final destination has not established very well at this stage.

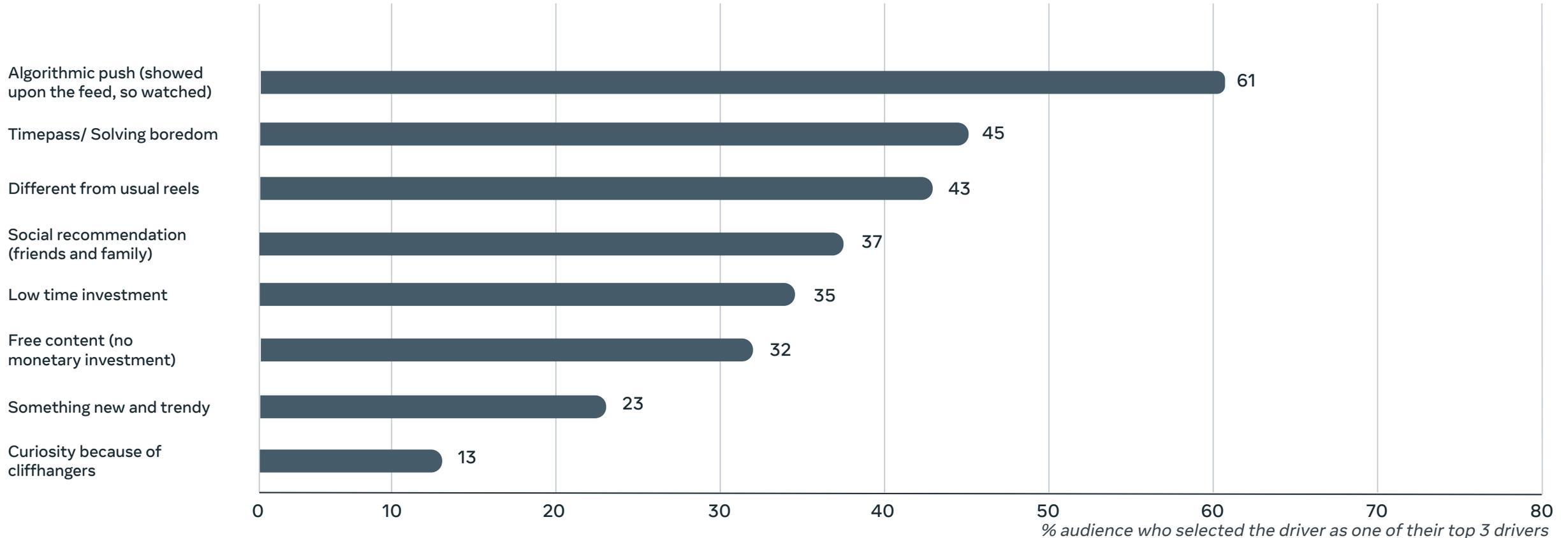
Total (Unaided+Aided) awareness of micro drama platforms



Only three micro drama platforms have 20%+ awareness. This lack of awareness, in turn, creates trust deficit related to app download and payments, and emerges as a key barrier for monetization, as seen later in the subscriptions section.

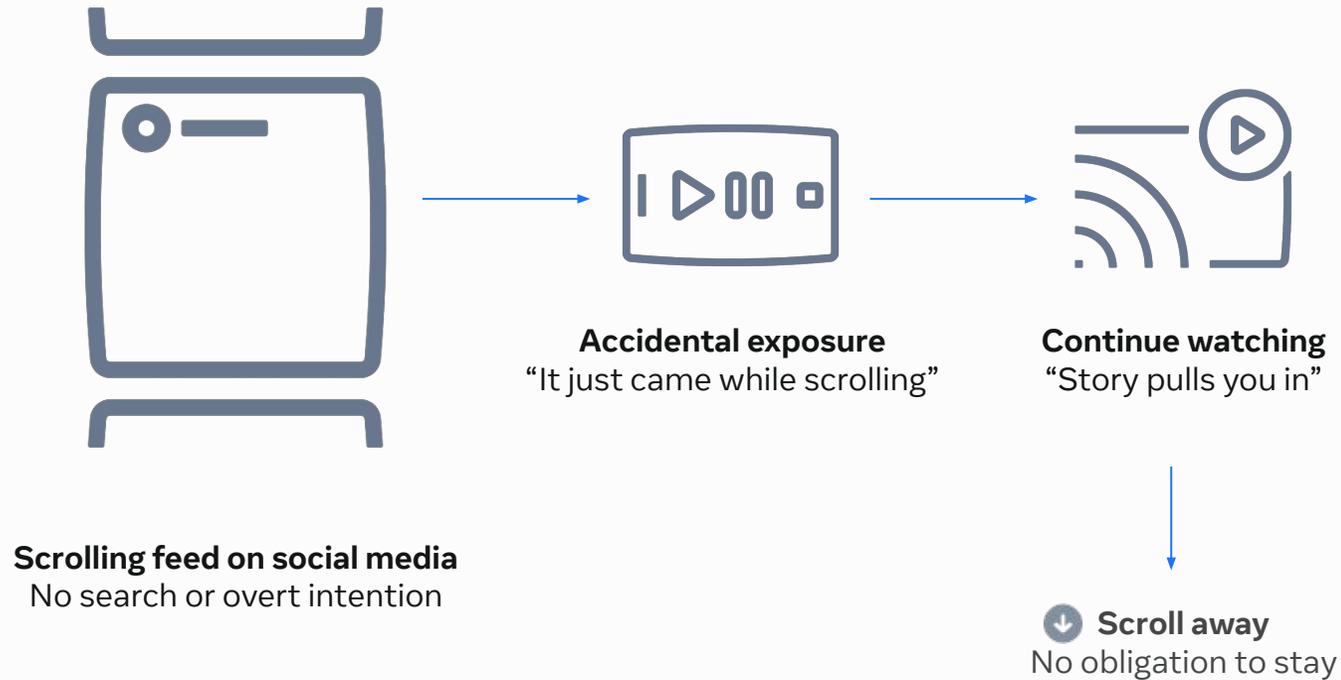
Category induction drivers

What attracted audiences to micro dramas at the start of their category journey?



Induction drivers were largely driven by algorithmic push on social media platforms, where the micro drama format got noticed for its distinctive fast-paced, story-led format, differentiating it from the usual reels.

Discovery is algorithm-led, not intent-led



Bas **scroll karte-karte** aa gaya aur interesting laga dekhne mein (Ahmedabad, Female, 35-44 yrs.)

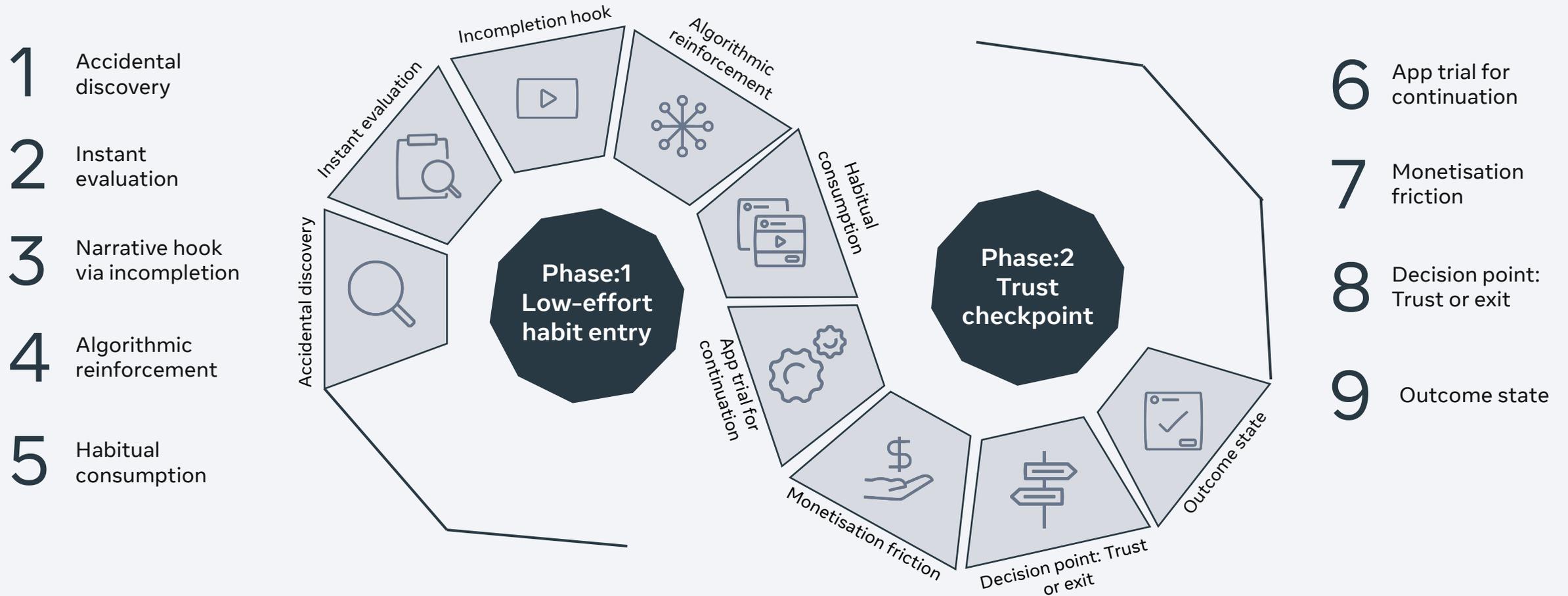
Yeh **Instagram feed** mein baar-baar aata rehta hai par main koi show pasand aata hai tabhi main continue karti hoon (Bareilly, Female, 35-44 yrs.)

I saw it while **scrolling** and then clicked because it looked interesting (Mumbai, Male, 18-24 yrs.)

I **didn't search for it**, it just **came on my feed**. In fact, most of the times when I see it. It's mainly because some ads came and then I continue watching it (Lucknow, Female, 25-34 yrs.)

The algorithm-led discovery sets the foundation for how the format is consumed. **Accidental exposure** eventually leads to **habit**, and much later in their viewer journey, audiences encounter clear points of evaluation around trust and payment in their viewer journey.

Typical viewer journey mapping



Phase 1: Low-effort habit entry

Accidental discovery

- ▶ Appears while scrolling feeds
- ▶ Mostly seen as reels or ads
- ▶ Majorly passive and algorithm-led, not searched

Instant evaluation

- ▶ Decision made in first 10-30 seconds
- ▶ Hook, clarity, emotion aid decision making
- ▶ No patience for buildup

Incompletion hook

- ▶ Episodes end mid-conflict
- ▶ Plots are withheld, tension paused
- ▶ Stopping feels 'unfinished'

Algorithmic reinforcement

- ▶ Similar content shown repeatedly
- ▶ Format becomes familiar fast
- ▶ Exposure increases without effort

Habitual consumption

- ▶ Default filler for idle moments
- ▶ Watched in breaks, travel, pre-sleep
- ▶ Frequent, light, unplanned

What triggers entry?

Should I stay or scroll?

Why do I continue watching?

Why do I keep coming back?

Why do I become more regular?

In Phase 1, micro dramas enter the consumers daily life quietly, through curiosity, repetition, and low-effort habit formation.

Phase 2: Trust checkpoint

App trial for continuation

- ▶ High consumption, low attachment
- ▶ Stories remembered, platforms forgotten
- ▶ App trial is driven by narrative curiosity

How do I continue?

Monetisation friction

- ▶ Paywalls or subscriptions appear
- ▶ Anxiety replaces enjoyment
- ▶ High acceptance for ads to watch instead of payment

Is this worth paying for?

Decision point-trust or exit

- ▶ Some accept ads or small payments
- ▶ Many uninstall and return to free feeds
- ▶ Decision driven by trust, not content quality

Do I trust this platform?

Outcome state

- ▶ Similar content shown repeatedly
- ▶ Format becomes familiar fast
- ▶ Exposure increases without effort

What does it finally become?

Phase 2 is where audiences have to evaluate the format's value proposition. Habit alone is no longer enough, and trust mainly determines whether sampling converts into commitment. As a result, many audiences do not graduate from Phase 1 to Phase 2: A category challenge that has been explored later in this report.



Viewing behaviour

Viewing behaviour

Section contents



Micro dramas are an early-stage category, where **viewing behavior is evolving rapidly**, making it important to understand how consumers are engaging with the format



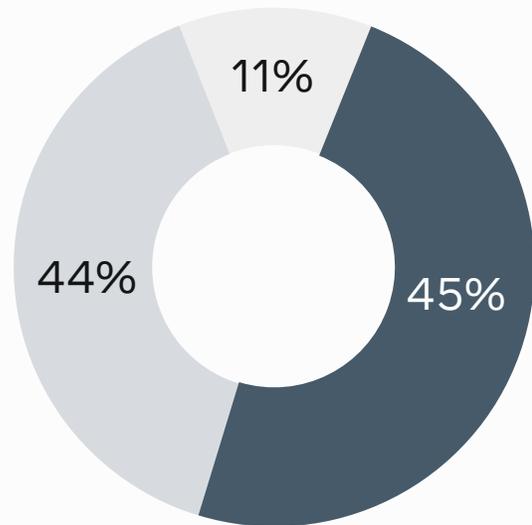
Understanding patterns such as time spent, session length, time of consumption, and place of consumption helps **reveal how deeply the format has integrated into media routines**



This section maps these behavioral patterns, covering when, where, and how micro dramas are consumed, including accompaniment, context of viewing, and various consumption life stages

Time spent viewing micro dramas

Per week



1-2 hours 3-4 hours 5+hours



0.5
Hours
per day



3.5
Hours
per week

Note: Time spent measures are based on audience recall

Among viewers of micro dramas, the **median weekly time spent** is about **3.5 hours**, translating to approximately **30 minutes per day**.

Viewing sessions, not episodes, are the primary unit of consumption

Viewers **do not think episode-by-episode**; they watch based on available time

A single session usually includes several episodes watched back-to-back, without the number of episodes being registered

Session length matters more than episode length, for understanding engagement

Start and stop decisions mirror scrolling behaviour, not narrative structure

Unlike streaming platforms, design and monetisation should optimise for sessions, not episodes

Usually, I **don't remember how many episodes** I watch at a time. Maybe around 5-10 episodes. I generally watch for 30-35 mins at one time

Mumbai | Female | 25-34 yrs.

Ek episode dekh ke nahin rukte. Agar story achhi ho, toh **continuously chalta rehta hai**. Pata nahin chalta kitne episodes dekh liye

Vadodara | Male | 35-44 yrs.

Mood aur free time pe depend karta hai, episodes pe nahin

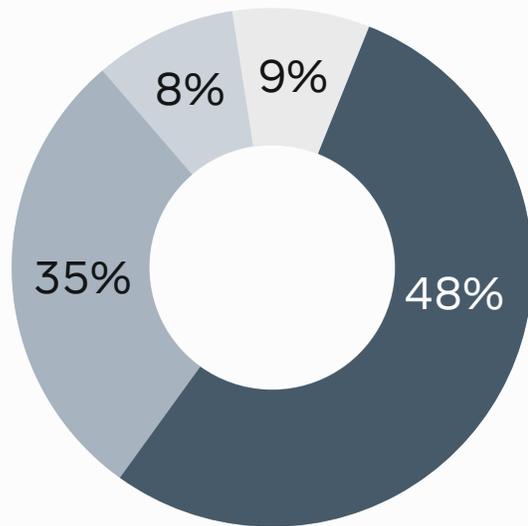
Delhi | Female | 25-34 yrs.

Sometimes I watch for five minutes, sometimes for half an hour. It depends on **how much free time** I have

Bangalore | Male | 25-34 yrs.

Average session length

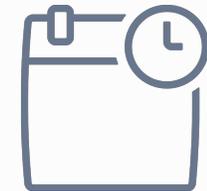
Per week



■ 1-15 min ■ 15-30 min ■ 30-60 min ■ More than 1 hour



0.5
Hours
per session

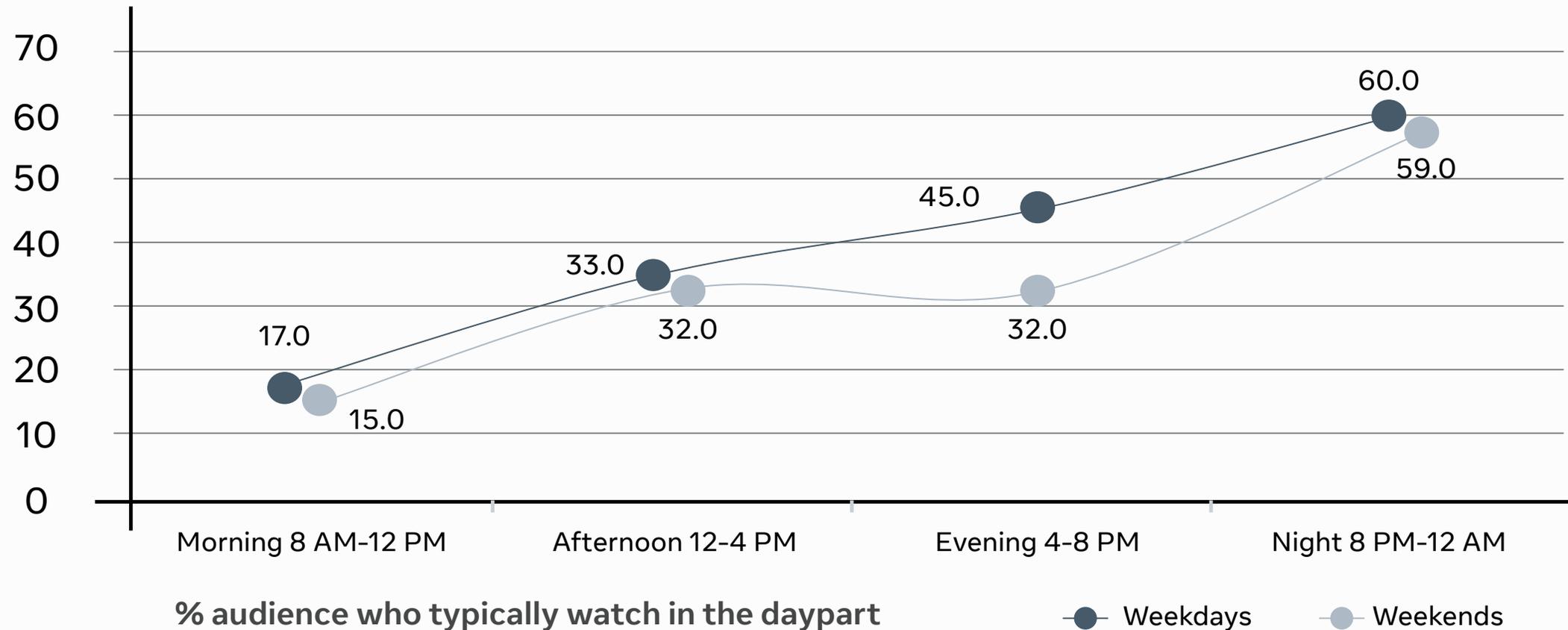


7-8
Sessions
per week

Note: Time spent measures are based on audience recall

Viewing time is broken into **relatively short, repeatable sessions**, with a median session length of around 30 minutes. When viewed alongside weekly time spent, this translates to 7-8 sessions per week, indicating frequent but **light engagement rather than extended immersion**.

Daypart-wise consumption (%)



Night clearly emerges as the peak consumption window across both weekdays and weekends, suggesting that micro-dramas are **most strongly embedded in end-of-day, private viewing time.**

Daytime consumption is snackable and low-commitment

Across **daytime dayparts**, micro dramas are largely consumed between activities and chores, acting as low-effort fillers rather than appointment viewing

Morning commute



This is something I watch when I don't have much time. Like when I am travelling to work

Mumbai | Female | 25-34 yrs.



Work break



This is something I watch in between work or at a time I am resting. Movies and web-series need proper time

Gurgaon | Female | 35-44 yrs.



Coffee/ Rest



Yeh serials main mostly jab kuch time pass karne ko nahin hai tab dekhta hoon. Ya kabhi kuch break mil gaya tab

Bareilly | Male | 35-44 yrs.

Night time is the window for private, personal viewing

At night, micro dramas move beyond casual viewing. With greater privacy and fewer interruptions, viewers spend more time and engage more deeply, often continuing from feed discovery into longer viewing sessions



Why night fits routine?

Bedtime viewing habit

Main zyaadatar yeh sote samay dekhta hu, kyuki tab pura concentration ke saath kuch dekhna ka mann nahin karta hai aur time bhi kam lagta hai

Fathua | Male | 25-34 yrs.



Why night feels safe?

Privacy within households

Raat ko jaise Instagram scroll karta hoon, waise hi yeh bhi dekhta hoon. Tab hi time milta hai kyunki main akela rehta hoon, koi disturb karne wala nahi hota hai

Mumbai | Male | 25-34 yrs.



Why night deepens engagement ?

Longer, Uninterrupted viewing

Raat ko ek episode dekhna shuru karta hoon, phir pata hi nahi chalta kitne dekh liye. Time milta hai toh bas chalta rehta hai, par yeh din mein ho nahi paata

Ahmedabad | Male | 25-34 yrs.

Place of consumption

Where are micro dramas consumed?

Home



96%

Commute



50%

Workplace



10%

% audience who consume regularly in each place/environment

Consumption during commute is higher than that for long-form streaming content (37% in The Ormax SVOD audience report: 2024), reflective of the category advantage of low time investment.

Accompaniment: (Most likely scenario, when watching at home)

Who are micro dramas consumed with?

Alone



90%

Friends or siblings



4%

Entire family



4%

Spouse/Partner



2%

Micro drama viewing is **overwhelmingly solitary**, with 90% audiences watching solo, compared to only 43% for long-form OTT content (The Ormax SVOD audience report: 2024), where co-viewing has been boosted by the rise of connected TV.

As a result, the **solo viewing proposition becomes a category differentiator for micro dramas**, whereby edgy and provocative content can be served to audiences without concerns about co-viewing appropriateness.

Micro dramas are consumed in private, not groups

The format is built for solo attention and stays socially invisible

Micro dramas

Personal screen + personal time + low legitimacy

Consumed privately

Fast twists, zero pause, continuous attention

Viewed at one's own pace

Breaks, commute, pre-sleep, in-between moments

Mobile viewing

Single screen, single viewer, personal space

Low legitimacy

Not socially respectable or acceptable to watch openly

Discreet themes

Awkward to watch with family or elders

Ye aisa content hai jo main akele hi dekhta hoon. Sabke saath baith kar dekhne ka mood nahin hota
Jaipur, Male, 25-34 yrs

Bas thoda free time mila toh dekh leti hoon jaise travel mein, break mein, ya sone se pehle
Mumbai, Female, 25-34 yrs

Phone pe dekhti hoon toh kisi ko pata bhi nahin chalta main kya dekh raha hoon
Patna, Female, 18-24 yrs

Family ke saamne aisa drama thoda awkward hota hai, isliye main akele hi dekhta hoon
Indore, Male, 25-34 yrs

Iske baare mein kisi se baat karne ka mann nahin karta, bas dekh ke chhod deta hoon
Noida, Male, 25-34 yrs

Micro dramas create ‘me-time’ within shared households

They don't replace reels/shorts. They add a layer of story to them

Then: Shared TV story



TV pe sab saath mein dekhna padta hai. Phone pe apna drama apne time pe dekh sakte hain.
Jaipur, Female, 18-24 yrs

‘Story’ moves from TV to the phone



Now: Personal mobile story



Reels mein story nahin hoti, bas clips hote hain. Micro-drama mein poora serial jaisa feel aata hai aur interesting bhi hota hai
Indore, Male, 18-24 yrs

Sometimes I can't switch on TV, so I watch this on my phone. It has good stories
Bangalore, Female, 18-24 yrs

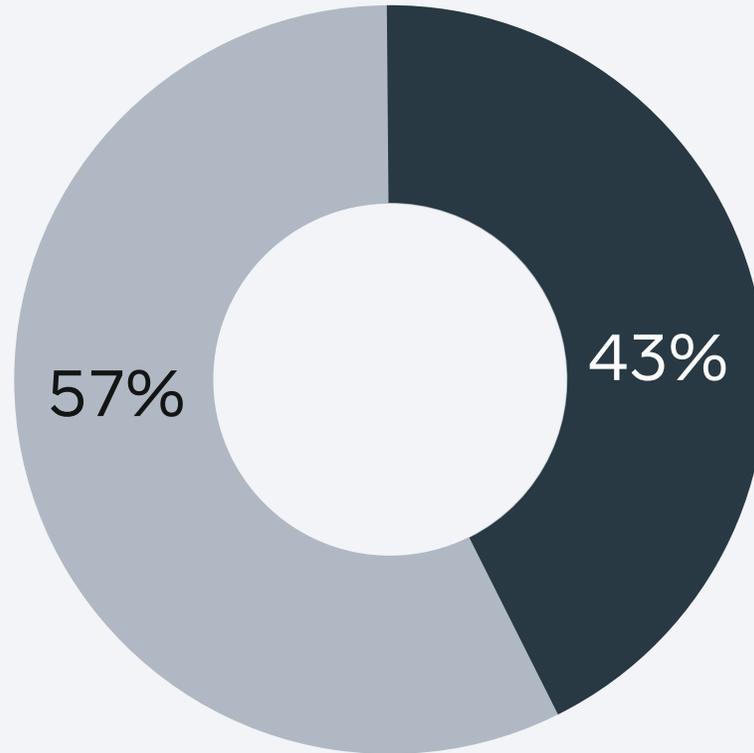
Micro dramas recreate the ‘TV story habit’ on a personal screen, giving viewers ‘me-time’ with a story (which is absent in social media content), inside shared households.

Viewing context

Ambient



Consumed alongside scrolling, chores, or downtime, without full attention



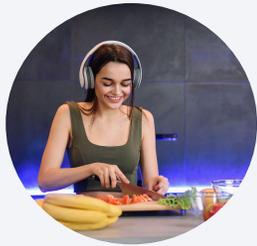
Lean - in



Viewer watches with intent and attention, tracking plot and being emotionally involved

Micro drama viewing splits into two clear engagement modes. About **43%** of viewers watch with **full attention (lean in)**, while a larger **57%** engage in a more relaxed, **multitasking-friendly manner (ambient/ lean back)**.

Micro dramas can function as ambient content



At home, while I am cooking. I put on an episode and then keep listening to it while cooking
Coimbatore, Female, 35-44 yrs



Most of the times while I am driving to work, I start a show and keep watching and listening while driving
Velupuram, Male, 25-34 yrs



Mein is se mostly suntan hu. Kyuki dekhno ko time nahin milta hai kaam ke beech mai
Delhi, Male, 35-44 yrs



Listening replaces watching

Earphones enable story consumption without screen attention



Fits into task-heavy moments

Work, travel, chores where video isn't possible

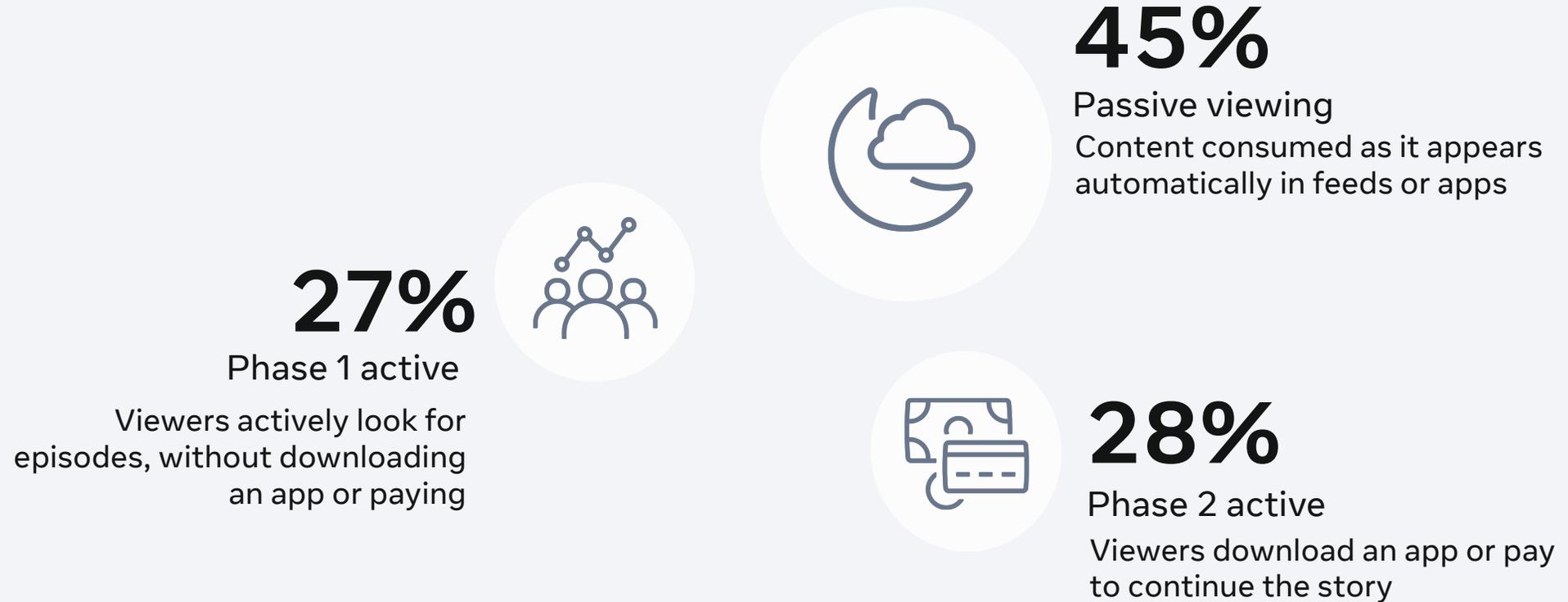


Expands usage beyond active viewing

The story continues even when the screen doesn't

Consumption stage

What stage of adoption are micro drama consumers in?



Micro drama viewing splits into two clear engagement modes. About **43%** of viewers watch with **full attention (lean in)**, while a larger **57%** engage in a more relaxed, **multitasking-friendly manner (ambient/ lean back)**.



Audience segmentation

Viewer segmentation

Section contents



As seen in viewing behavior section, while micro dramas reach a wide audience, **not all viewers engage with the format in the same way** or to the same extent



Classifying viewers based on their **level and style of engagement** helps distinguish between casual exposure, regular viewing, and deeper story-led involvement



This section segments **micro drama audiences** using **behavioral measures**, and profiles how each segment differs in viewing patterns, discovery, and willingness to go deeper into the category

Viewer segmentation

Three behavioral factors used to segment audiences based on engagement

Viewing context

Lean in viewing vs. Ambient viewing



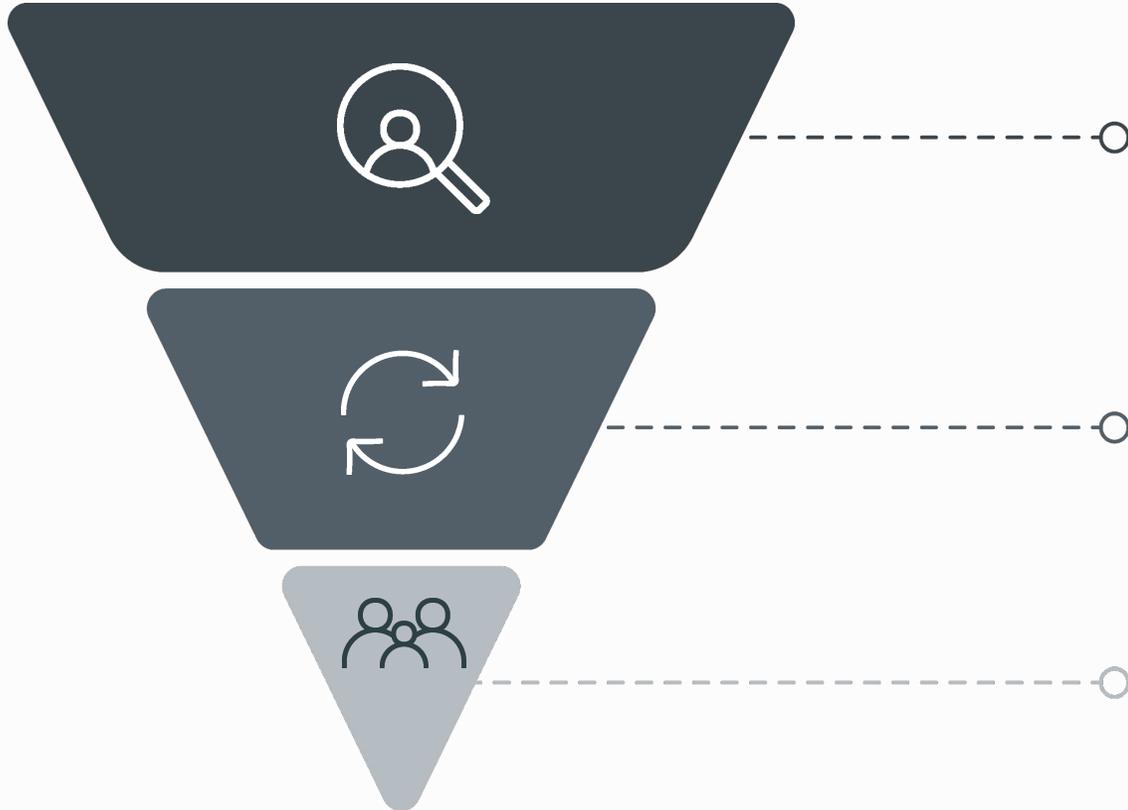
Consumption stage

Passive, Phase 1 active, Phase 2 active

Time spent

Viewer segmentation

Three viewer segments based on how micro dramas are consumed



39%

Incidental viewers

Low-effort, feed-led viewers who consume micro-dramas passively, with limited time and no active seeking

43%

Intent-building viewers

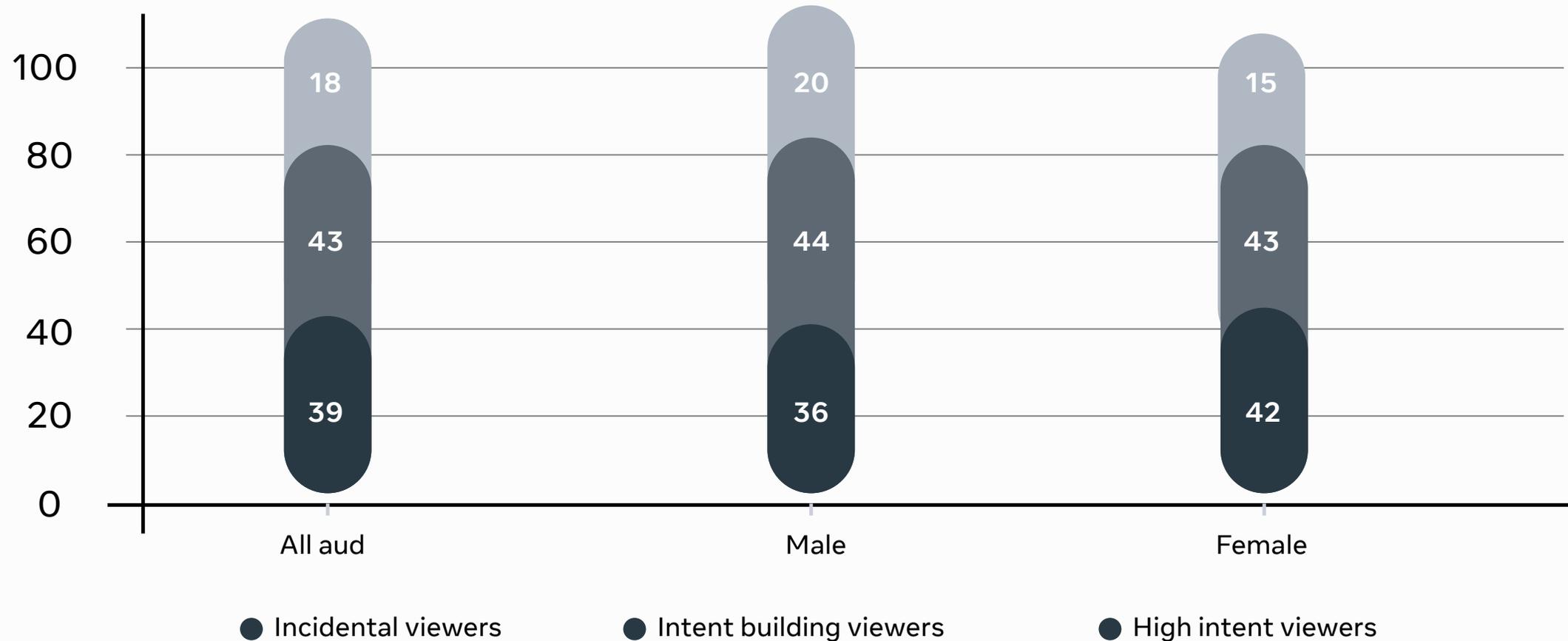
More deliberate viewers who start seeking episodes, spend more time, and show early signs of habit formation

18%

High-Intent viewers

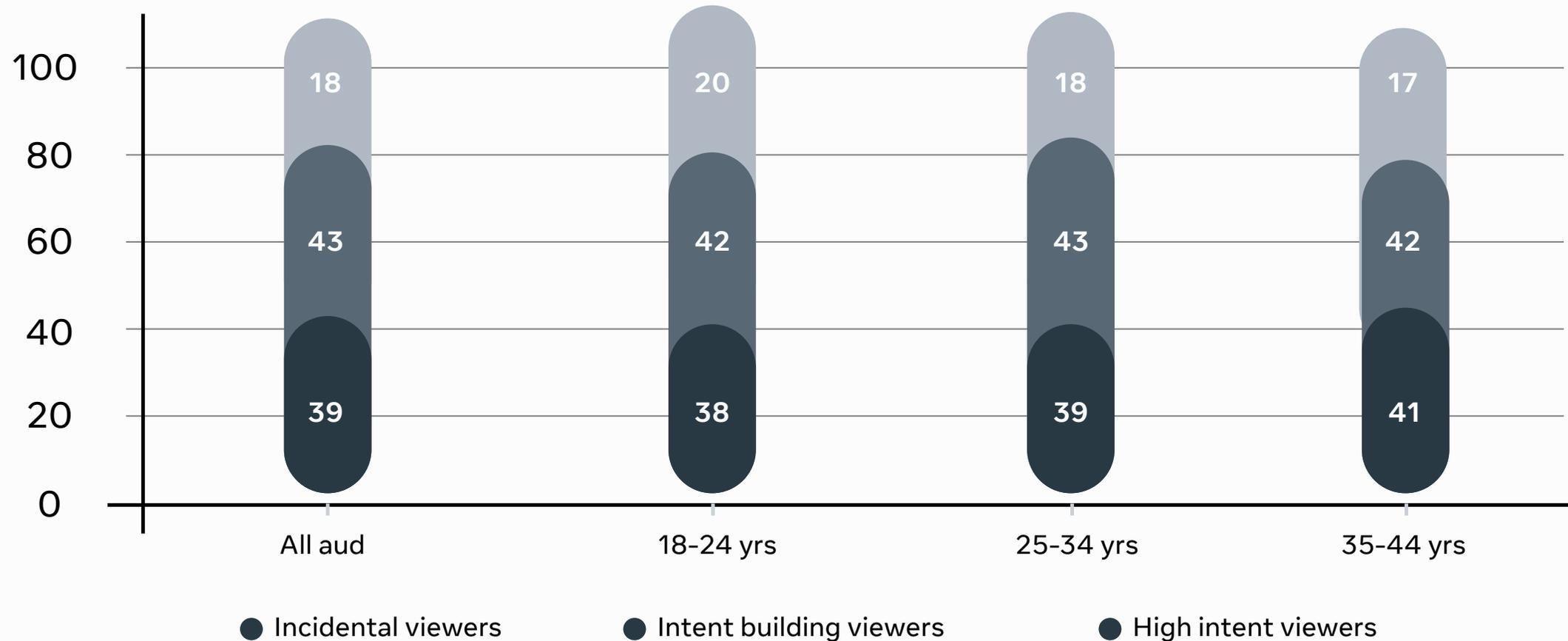
Highly engaged viewers who actively seek content, spend the most time, and are most likely to pay

Segment sizes by gender (%)



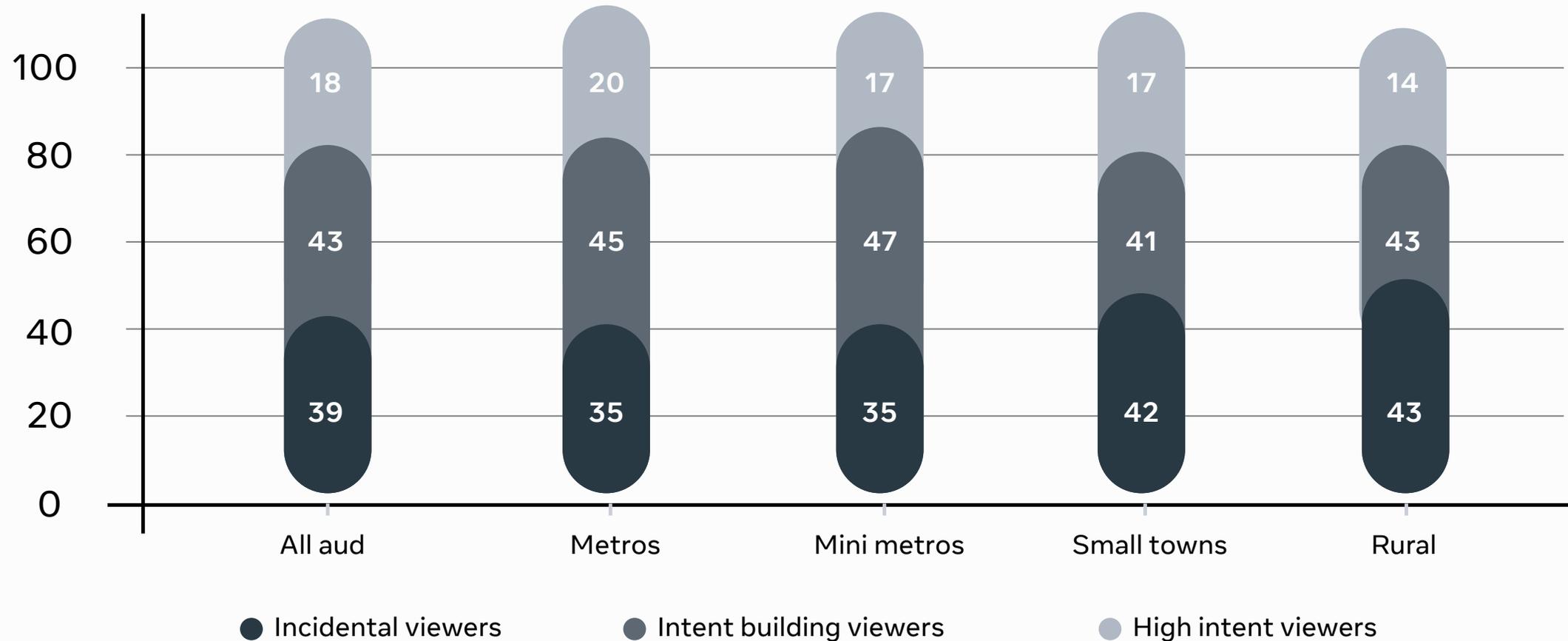
Lower funnel conversion for female audience is reflective of their relatively lower control over technology and payments.

Segment sizes by age (%)



Younger audiences witness marginally better funnel conversion than older audiences. The absence of sharp contrast in segment sizes by gender or age is reflective of the inclusive nature of the category.

Segment sizes pop strata (%)



Like most new categories, the more urban audiences (Metros and mini metros) show higher funnel conversion than small town and rural audiences.

Viewer segments

Incidental viewers
(39%)

Who they are

- Largely passive viewers who encounter micro dramas accidentally on social feeds

How they watch

- Very short, fragmented sessions driven by spare moments
- Rarely search or follow stories or remember titles

How they think

- Treat micro dramas like any other feed content
- Low emotional or time investment, no sense of commitment

What they need to move forward

- Strong first 10-20 seconds
- Clear premise and instant payoff to stop the scroll

Viewer segments

Intent building viewers
(43%)

Who they are

- ▶ The largest segment, sitting between casual and committed viewing
- ▶ Marginally stronger presence in Metros and Mini Metros

How they watch

- ▶ Start seeking missing episodes or story continuations
- ▶ Sessions are longer and more frequent, often spanning multiple episodes

How they think

- ▶ Growing attachment to stories and characters
- ▶ Still cautious, but beginning to form viewing habits

What they need to move forward

- ▶ Easy continuation across episodes
- ▶ Better discovery and fewer friction points while watching

Viewer segments

High intent viewers
(18%)

Who they are

- ▶ Smaller but most valuable segment
- ▶ Skews marginally male, younger and urban, consistent with paid user profile

How they watch

- ▶ Actively search for stories and episodes
- ▶ Watch in longer, more focused sessions

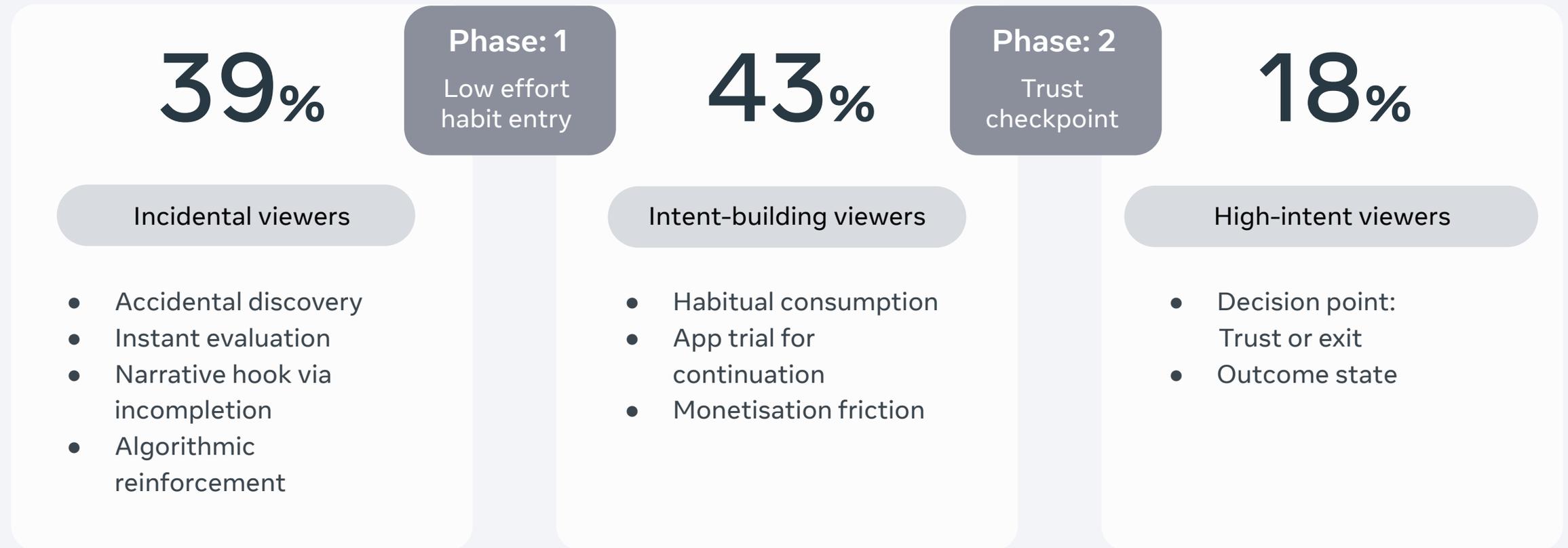
How they think

- ▶ Treat micro dramas as a distinct entertainment option
- ▶ More forgiving of ads or payments if the story delivers

What they need to move forward

- ▶ Trust in platforms and payment systems
- ▶ Consistent storytelling quality and clear value for money

Mapping viewer segments to the stages of the typical viewer journey



The category currently sees **strong entry into low-effort viewing**, but a **narrowing** as viewers encounter **trust and monetisation barriers** (explained later in detail), making progression beyond intent-building the key growth challenge.



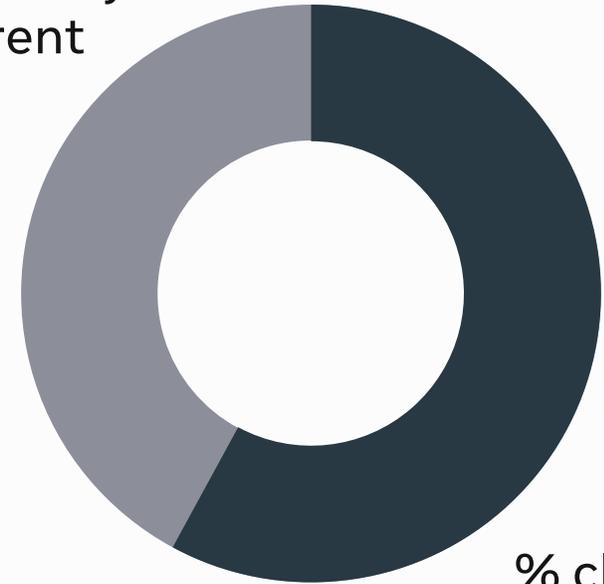
Micro dramas vs short videos on social media

Micro drama vs short form content on social media



Audiences were asked whether micro dramas felt meaningfully different from the short-form social content they watch

% not very different

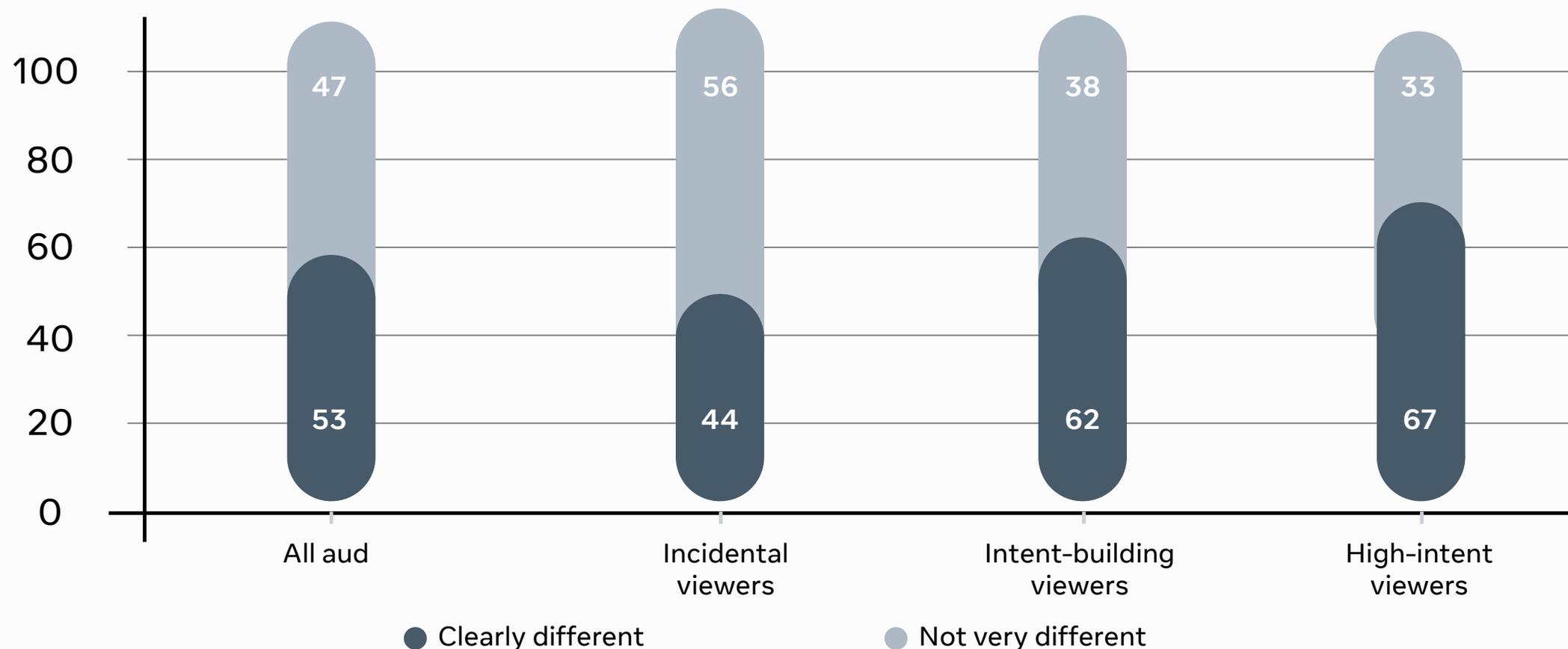


% clearly different

Perceptions of micro-dramas remain mixed, with nearly half the audience (**47%**) viewing the format as similar to short-form social media content. This reflects the category's early stage of evolution, even as a majority still recognise it as distinct from conventional reels primarily due to its narrative-led structure.

Micro drama vs Short form content on social media

By viewer segments



As engagement deepens, viewers increasingly see micro dramas as distinct from regular social media videos, suggesting that differentiation is a function of usage and involvement, and not just exposure.

Micro drama vs Short form content on social media



Similarity with social media

- Discovery through scrolling
- No active search or intent
- Consumed on mobile phones
- Solo-viewing, filling up gaps between tasks

Differences with social media

- Presence of story
- Emotional continuity across episodes
- Low incidence of sharing with friends and family
- Most content is not user generated



Reels optimise for **endless novelty**.
micro dramas optimise for **short-term narrative continuity**.

The presence of story (that too in a compressed form) is the core format distinguisher and benefit of the micro dramas format.
However, the absence of social currency and recommendations, can emerge as a barrier to scaling.

Compressed storytelling is the core format benefit

Emotional payoff before attention drops



Micro dramas reach conflict, tension, or revelation quickly, catering to short attention windows, and eliminating the fear of “wasted time”

Agar interesting lagta hai toh main aage dekhti hoon, warna bas scroll.

Gaya, Female, 18–24 yrs.

Zyada wait nahin karna padta, jaldi pata chal jata hai story achhi hai ya nahin.

Indore, Male, 18–24 yrs.

Micro-commitments, not long arcs



Each episode functions as a self-contained test. Viewers reassess interest constantly instead of committing to a long arc upfront like movies or web series

After every episode, I can decide if I feel like continuing and the watch unlike movies where I have to take out time to watch. Here it doesn't feel like a big deal.

Chennai, Female, 18–24 yrs.

Movie jaise nahin hai ki ek baar start kiya toh finish karna hi pade.

Bhopal, Male, 25–34 yrs.

Compressed storytelling is the core format benefit

Aligns with
fragmented viewing



Short, compressed arcs fit naturally into breaks, night-time scrolling, travel, or chores

A lot of times I just continue watching a story from where I left, every time I get any free time

Vijaywada, Male, 25-34 yrs.

Ek hi baar mein story samajh aa jaati hai, phir itna sochna nahin padta

Surat, Female, 25-34 yrs.

Enables fast
decision making



Viewers can quickly decide to continue, switch, or exit without regret

In less time, you understand the whole situation. That's why it feels interesting and also doesn't waste my time.

Vadodara, Female, 25-34 yrs.

Compressed storytelling shifts the control to the viewer.
The payoff is quick, and exit is always an option.

Low-stakes consumption makes disengagement instant and guilt-free

Feels easy to enter and even easier to abandon

Zero friction exit group

Minimal time investment

2-3 minutes doesn't create a sense of obligation

Entry is casual, Not intentional

2-3 minutes doesn't create a sense of obligation

Every episode is a trial

2-3 minutes doesn't create a sense of obligation

Private viewing removes accountability

2-3 minutes doesn't create a sense of obligation

Emotions sampling, not loyalty

2-3 minutes doesn't create a sense of obligation

How viewers explain their exit

Agar jo story chal rahi hai aur agar woh interesting lagi tabhi main aage badhti hoon, warna koi point nahin hai aage badhne ka

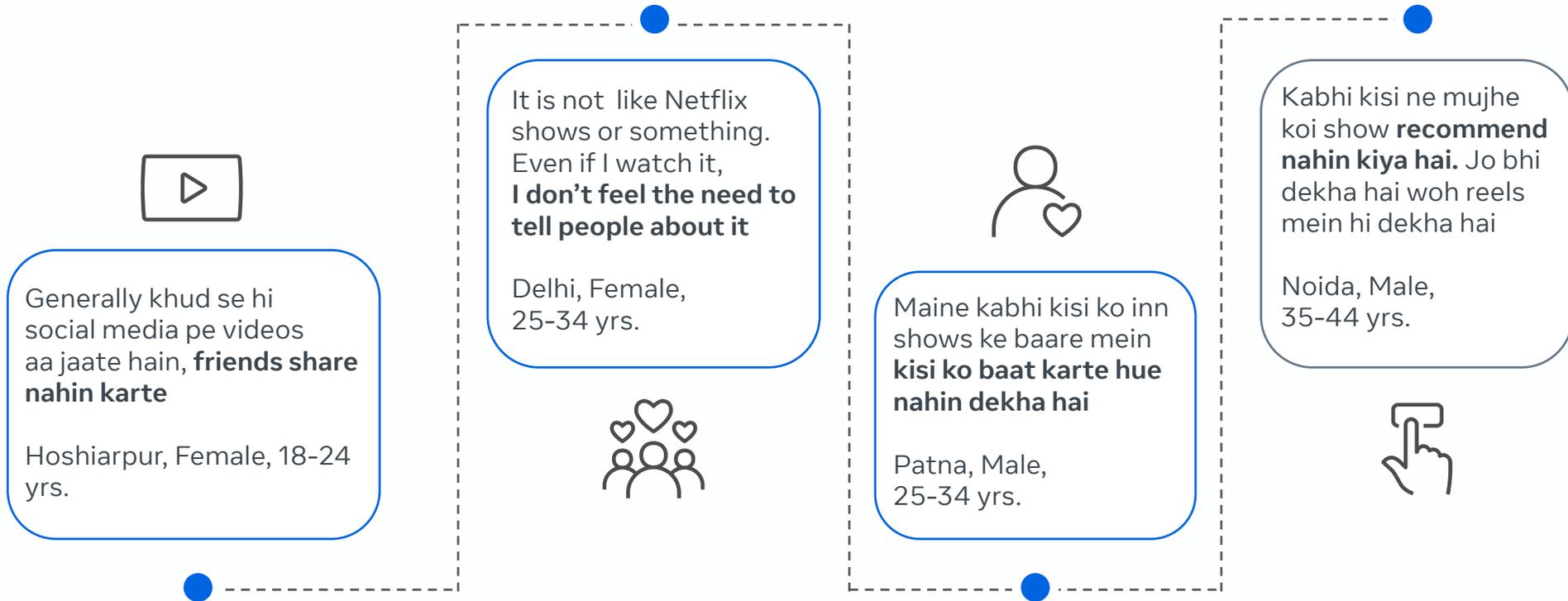
Mumbai, Female, 25-34 yrs

It's anyway not a big commitment to watch, so I can watch very few episodes since they are short and decide to continue. If I don't like I don't continue

Mumbai, Female, 25-34 yrs

Exit
Drop off feels natural, not like a loss or a failure

Low social currency associated with micro dramas



Micro dramas are discovered on social platforms, but the consumption, evaluation, and behaviour formation largely happens at an individual level currently, without social influence, which could halter the pace at which the category scales



Content preferences

Content preferences

Section contents



As micro dramas evolve from casual sampling to more deliberate viewing, viewers begin forming **clear expectations around what kind of stories** are worth continuing



Understanding which genres, themes, and tonal cues get recalled, sampled, or dropped, helps explain **how attention is earned** in a low-commitment, fast-exit environment



This section examines content preferences across **genre, language, and geographical origin**, and explores how viewers **evaluate quality**, including emerging perceptions of **AI-generated content**

Genre appeal

Measured for the following genres

Romance

Family
drama

Suspense
/ Thriller

Action

Comedy

Crime/ Legal

Fantasy

Social issues

Reality shows

Mythology

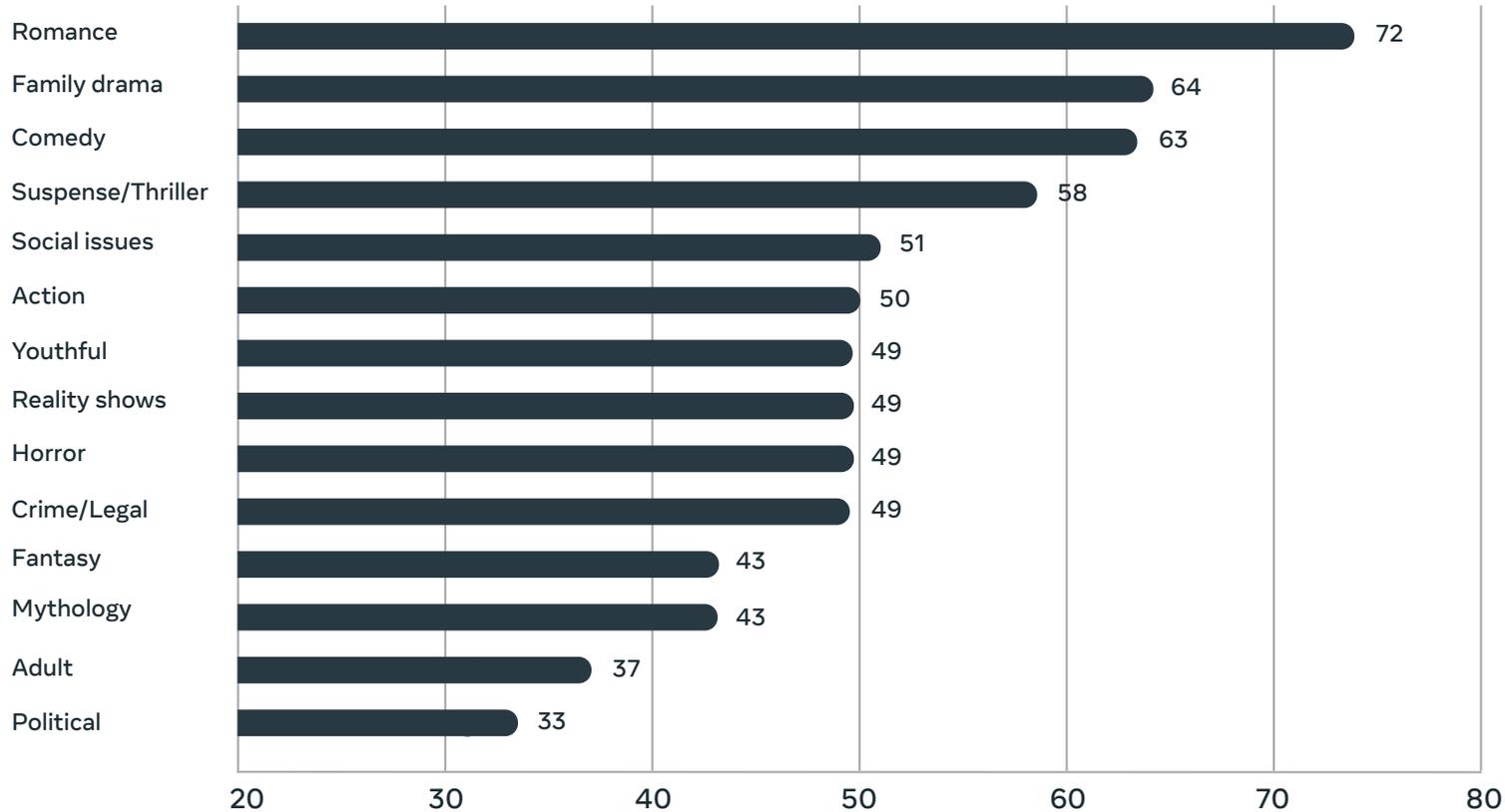
Horror

Political

Adult

Youthful

Genre appeal (%)



Top 3 genres in micro dramas



72%
Romance



64%
Family drama



63%
Comedy

The top 3 micro drama genres are also the top 3 fiction genres on Hindi GEC. Viewers gravitate towards emotionally familiar genres that deliver quick payoff, while high-concept genres struggle to cut through in short, fragmented viewing.

Private viewing of micro dramas enables intimate, romantic exploration

Romance genre in micro dramas delivers the freedom for viewers to lower any social inhibitions, allowing them to engage with romantic fantasy and desires without judgment. This makes the romance genre appealing for those with:

Desire for hopeful, optimistic companionship

Jab bachche bade ho jaate hain, toh parents akela mehsoos karte hain. Har kisi ko end tak ek partner chahiye hota hai. Kuch short dramas yeh dikhate hain ki mid-age mein bhi pyaar ho sakta hai, woh heart-touching lagta hai

Homemaker with kid, Female, 25-34 yrs

Curiosity to explore sexual fantasies

In our (Telugu) movies, we don't see a lot of hugs or kisses. Even in web-series, the romance does not cross the line. But in these micro-dramas, they show everything. We get to see bold and uncensored things

Student, Female, 18-24 yrs

Vicarious yearning for emotional intimacy

I'm a single, introverted guy. I only get to see cute, romantic moments happen in my friends' relationships or social media. Through short dramas, I can relate and imagine myself in such cute situations

Early Jobber, Male, 18-24 yrs

With nighttime (pre-sleep) being the most-preferred time to watch micro dramas, romance aligns more closely with the audience's mindset, enabling intimate and romantic exploration.

Romance demands low investment compared to other genres

Compared to other genres, romance-led micro dramas demand relatively low cognitive investment from viewers. Engagement is driven less by complex plots and more by instantly recognizable emotional cues, due to the following reasons:

Genre-level advantages of Romance over others

Strong dependence on lead-character chemistry that can be established via conversations and gestures

Kuch kahaaniyan aisi hoti hain jahan poori story mein couple ke beech misunderstandings dikhate hain, aur dheere-dheere kaise chemistry build ho jaati hai
Lucknow, Female, 25-34 yrs

Format-level advantages of micro dramas over long-form content



That does not require elaborate subtext, character setups and world-building

K-dramas humein itne appealing nahin lagte. Shaayad fantasy aur fiction ki wajah se humein connect hone mein time lagta hai. Short dramas utne complicated nahin hote
Delhi, Female, 18-24 yrs



And demands low visuals and special complexity

There is a short-drama that shows a couple sharing a cab daily fall in love. For romance, we don't even need to see different locations. Just one car is enough to show how two people can fall in love
Bangalore, Male, 25-34 yrs

Top 10 shows recalled (with >1% recall)



The Lady Boss Returns
Kuku TV



Biwi Boss Dil Tak
Story TV



Kiss My Luck
Kuku TV



The Secret Empire
Kuku TV



Damad 420
Kuku TV



Bewafa Biwi
Kuku TV



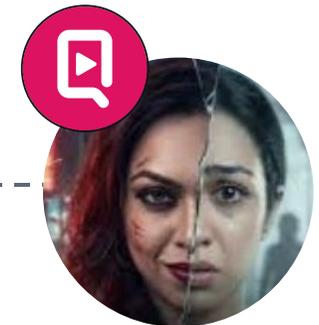
Ishq Aaj Kal
Kuku TV



My Dream Girl
Kuku TV



The Billionaire Husband
Kuku TV



Do Dhori Talwar
Quick TV

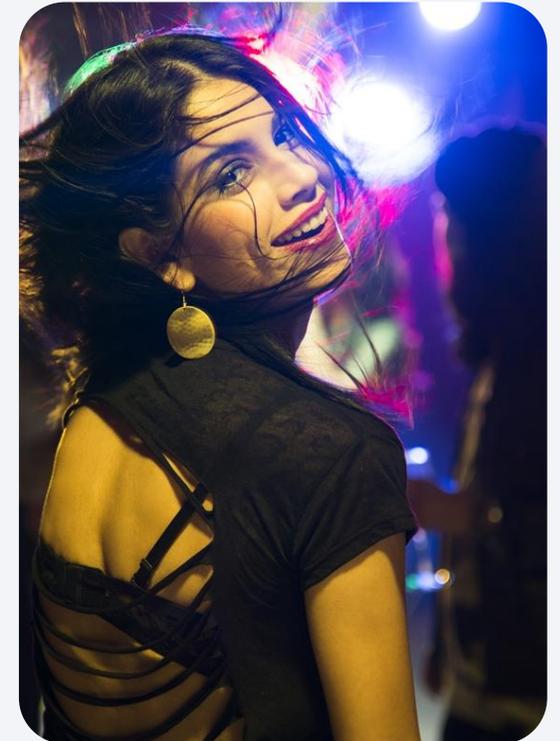
Common themes among the top shows recalled

Common narrative themes

- ▶ Romantic conflict and rich-poor romance
- ▶ Power imbalance within relationships
- ▶ Hidden identity, infidelity and moral tension
- ▶ Family politics, blackmail

Dominant tonality

- ▶ Emotion-first, melodramatic storytelling
- ▶ Provocative and bold portrayal of characters
- ▶ Strong reliance on cliffhangers
- ▶ Over-the-top plots with family drama



Content expectations from micro dramas

Plot unpredictability is the norm and expectation



Baseline Expectation

Twists

Reversals

Reveals

Audio clarity

Dubbing Quality

Visual Quality

Viewers expect frequent twists, reversals, and reveals as a baseline feature of micro dramas. Predictability is not comforting in this format; as it signals stagnation and quickly leads to drop-off

Good production can excite viewers, and poor quality quickly repels them. Dubbing, audio clarity, and visual sharpness are not the norm, and can act as distinguisher, earning trust in the process

They stop at a point where you **want to know what happens next**. Especially the billionaire stories or some stories about a case and finding who did it
Howrah | Female | 25-34 yrs.

Kuch series **bahut boring** ho jaati hai. Maine ek love story dekhi thi jisme koi **naya suspense ya twist nahin tha**, toh maine dekhna bandh kar diya
Lucknow | Male | 35-44 yrs.

If the **visual quality is bad**, I don't feel like watching because I would **rather watch** something on OTT or **YouTube** instead
Bangalore | Male | 18-24 yrs.

Koi-koi series hain jin mein voice sahi se nahin aata hai **aur video thoda cheap quality** ka dikhta hai. Aisa bahut shows hai toh waise shows dekhne mein **interest kam ho jaata** hai
Mumbai | Female | 25-34 yrs.

Exaggerated worlds over realism, to capture attention

Realistic storytelling (Web-Series)

- Needs explanation before stakes emerge
- Characters and motivations unfold gradually
- Conflict builds over time
- Power dynamics are implicit, not obvious
- Emotional direction is unclear at entry



Exaggerated world of micro dramas

- Strange worlds
- Stories prioritise impact over realism
- Conflict is obvious from the first scene
- Over-the-top stakes

Yeh sab thoda over-the-top hota hai, par samajhne mein time nahin lagta. Turant pata chal jaata hai kaun strong hai, kaun fas gaya hai
(Mumbai, Male, 25-34 yrs.)

Yeh series real life jaisa nahin hote hain. Thoda zyada drama hota hai. TV serials se bhi zyaada toh dekhne mein interest badhta hai
(Lucknow, Female, 35-44 yrs.)

I like billionaire stories or hidden identity stories. They are interesting to watch mainly because they seem very unreal and exciting
(Ahmedabad, Female, 25-34 yrs.)

Exaggerated worlds and over-the-top storytelling grab attention in low-fidelity viewing environments

Cliffhangers drive sampling and engagement

- 1. Each episode must re-earn attention in a fragile engagement environment**
Each episode behaves like a fresh pitch, not really continuation in its truest sense
- 2. Unresolved episodic endings create curiosity without demanding long commitment**
These endings keep audiences moving forward without demanding loyalty
- 3. Cliffhangers compensate for low platform loyalty by pulling viewers forward**
The story, not the app, does the retention work
- 4. They enable binge without requiring emotional depth or setup**
Viewers continue easily because nothing feels heavy or binding

Most of the time, it's the end of the episode which makes me want to watch what happens next. If nothing interesting happens, I stop
Delhi | Female | 35-44 yrs

The ad often ends in a moment where you want to know what happens next. That's why I keep watching
Ahmedabad | Female | 35-44 yrs.

Zyaadataar mujhe pata nahin rehata hai ki kaun sa app hai, mostly mai bas story ka suspense dekhne ke liye follow karta hu
Patiala | Male | 25-34 yrs.

Every episode ends in a way that you want to see next and that is the best part unlike movies and all. You come to know of the story instantly
Chennai | Female | 18-24 yrs.

Content sampling drivers

Why do users decide to watch some micro dramas, but skip many others?

To answer this question, the following seven **content sampling drivers** were cued to audiences, and their relative importance was measured

Starcast

Theme
uniqueness

Title

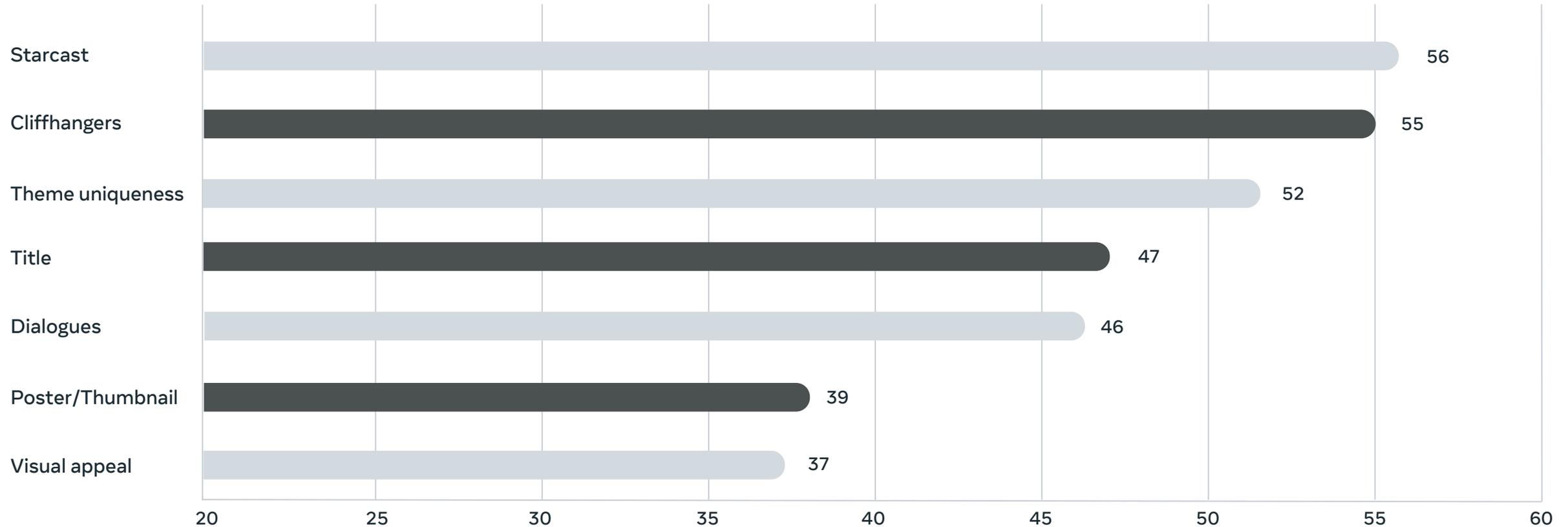
Poster/
Thumbnail

Dialogues

Visual
appeal

Cliffhangers

Content sampling drivers



In a low-attention span category, drivers that are **catchy** in nature, either visually or aurally, play a significant role in generating sampling.

Growing importance of familiar cast, especially in driving trust

56% cite starcast/familiar faces as a key reason for sampling micro drama content



Familiar faces significantly lower the hesitation to try a show, especially in a category driven by quick sampling and drop-offs



Known cast creates immediate talk value, making shows easier to notice, discuss, and recommend within feeds and social circles

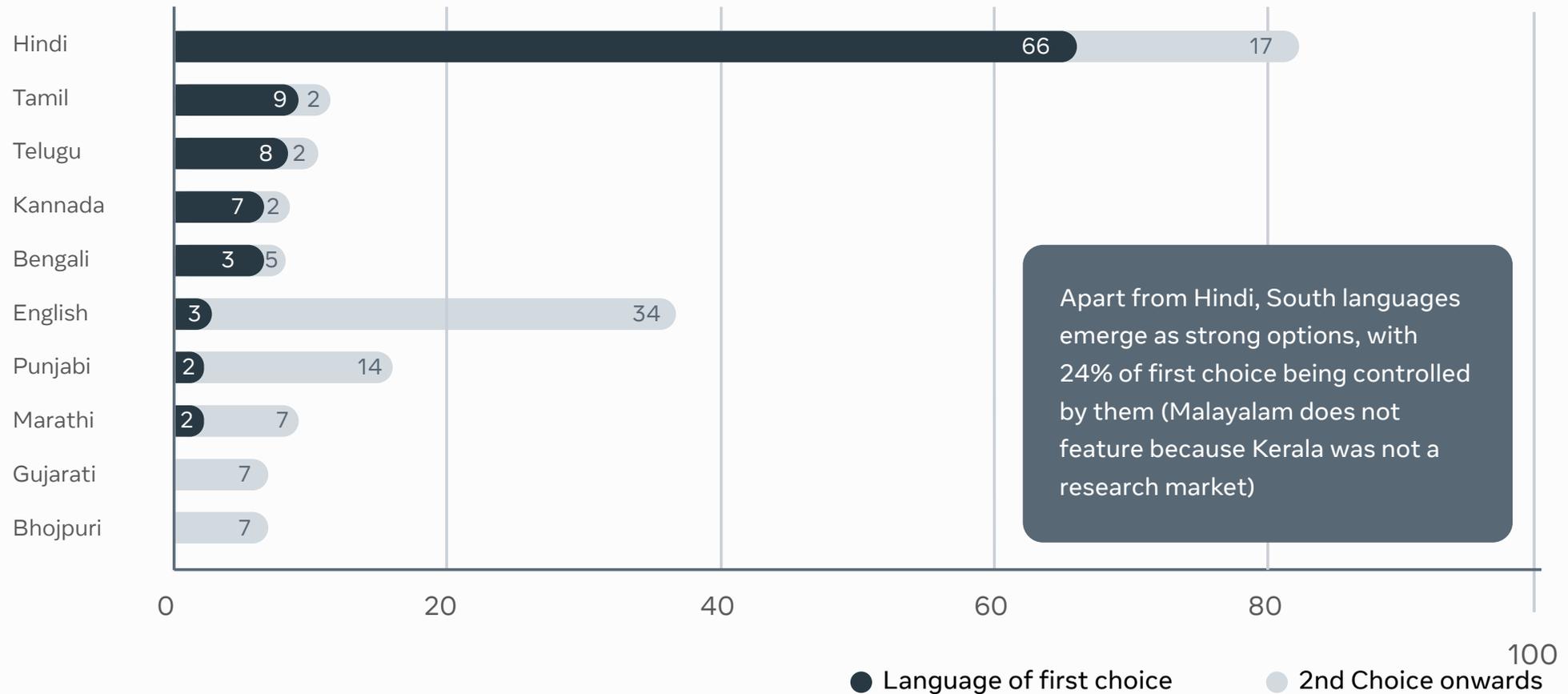


This mirrors OTT behaviour, where shows with recognisable faces tend to generate higher pre-release buzz and faster initial traction

If I recognize the actor, I'll at least watch a few episodes. New apps feel risky, but familiar faces make it feel safer to try **(Mumbai, Female, 18-24 yrs.)**

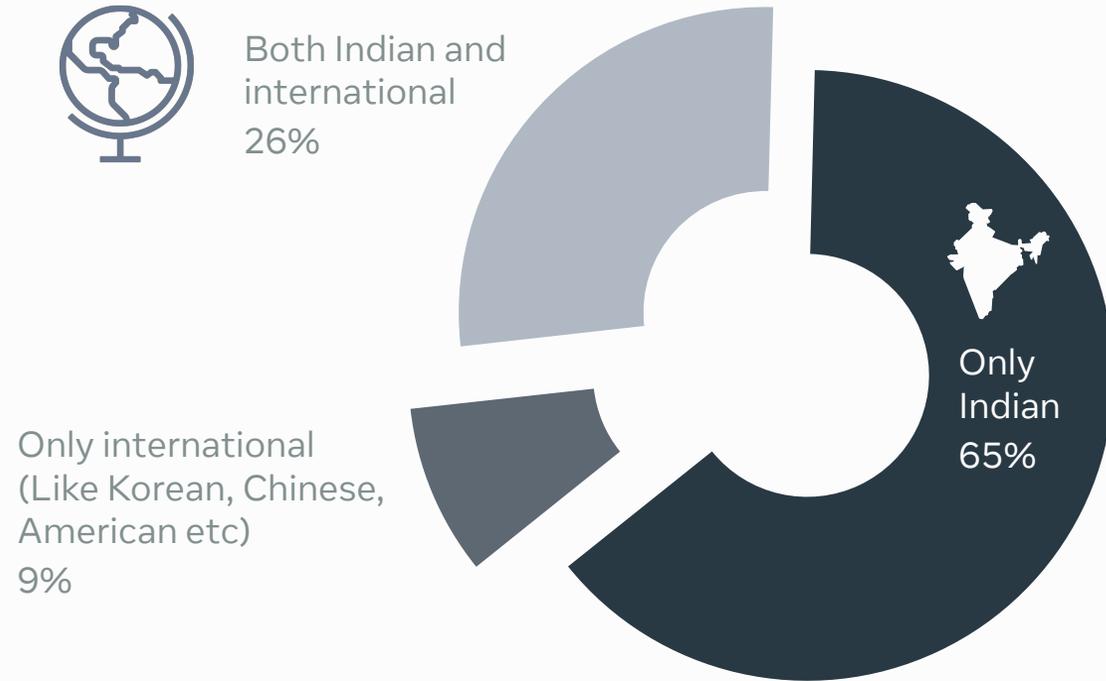
There is a viewer expectation that more familiar faces will start featuring in shows as the category evolves.

Languages of consumption (%)



Based on audio language of viewing, which can be different from the original language of the content

Indian vs. International content preference



India content remains the primary driver of consumption, with two-thirds of viewers engaging exclusively with homegrown shows.

Why Indian content dominates

▶ Indian shows feel familiar and easy to follow, continuing patterns viewers already know from television.

▶ Hindi serves as a common language, enabling shared viewing and wider comfort across regions.



**TV-style
storytelling
continues here**

TV serial jaisa flow hota hai, isiliye dekhna easy lagta hai. Pata hota hai kahani kaise aage badhegi, toh connect karna aasaan ho jaata hai

Jaipur | Male | 25–34 yrs.



**Family and
relationship themes
feel relatable**

Family aur rishton wali kahaniyaan bahut zyaada aati hai apni zindagi jaisi lagti hain aur aise type ke themes bahut dekhe hai. Isiliye interest bana rehta hai aur dekhte rehne ka mann karta hai.

Lucknow | Female | 25–34 yrs.



**Familiar
faces build
comfort**

When I see actors I already know from TV, it feels more comfortable to watch. Most of the time I don't remember their names, but its like I have seen them somewhere on TV so I continue to watch

Mumbai | Female | 35–44 yrs.

Why some viewers explore international content

▶ International shows are often explored to try something new and different from familiar Indian narratives.

▶ Innovative themes, aspirational characters, and attractive casts make Chinese and Korean micro dramas stand out.



Unique and New-concept themes

Unki stories thodi hatke hoti hain. Rich-poor ya identity wali kahaniyaan dekhne mein alag lagti hain. Isliye curiosity hoti hai ki aage kya hoga

Delhi | Male | 25-34 yrs.



Visual appeal and attractive casts

Actors bahut stylish aur polished lagte hain, isliye dekhne mein aur interest aata hai. Unka dressing aur presentation bhi kaafi alag feel hota hai. Kabhi kabhi bas ye dekhne ke liye main story bhi follow kar leti hun

Mumbai | Female | 18-24 yrs.

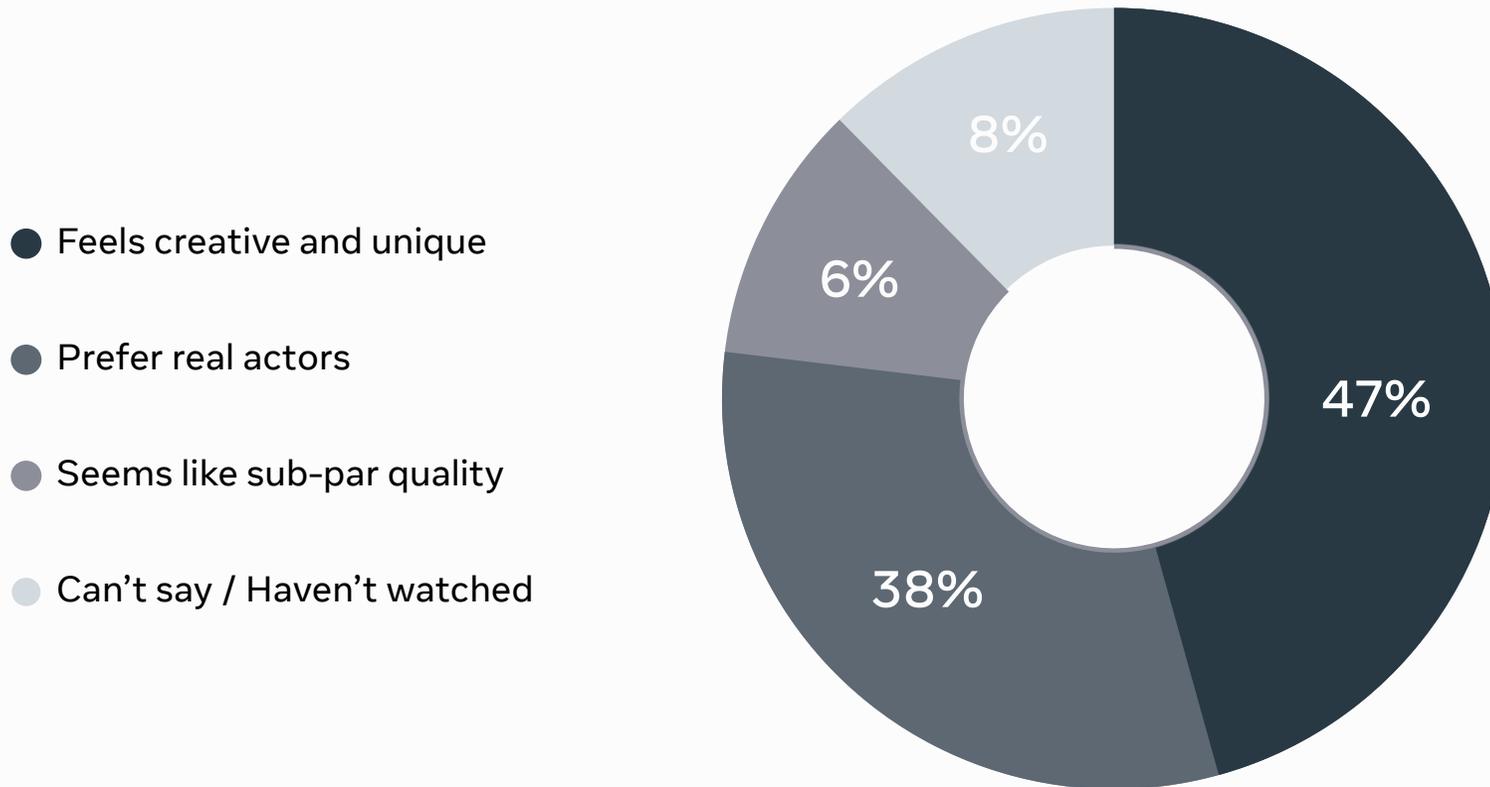


Familiar faces build comfort

Drama toh Indian serial jaisa hi hota hai, bas setting aur log naye hote hain. Isliye dekhne mein naya bhi lagta hai. Ismein bhi kaafi baar family ya billionaire type ki stories hoti hai

Noida | Female | 25-34 yrs.

Perceived quality of AI-generated content



Creative acceptance



Feels new, imaginative, visually different

Emotional comfort



Preference for human actors and familiarity

AI-generated content has fared well on acceptance, with nearly half of viewers finding it creative and unique, and hence acceptable. Preference for real actors reflects familiarity rather than resistance.



Subscriptions and payments

Subscriptions and payments

Section contents



As micro dramas move beyond casual viewing, questions around **payment, value, and trust** become central to continued engagement and **sustainable business performance**

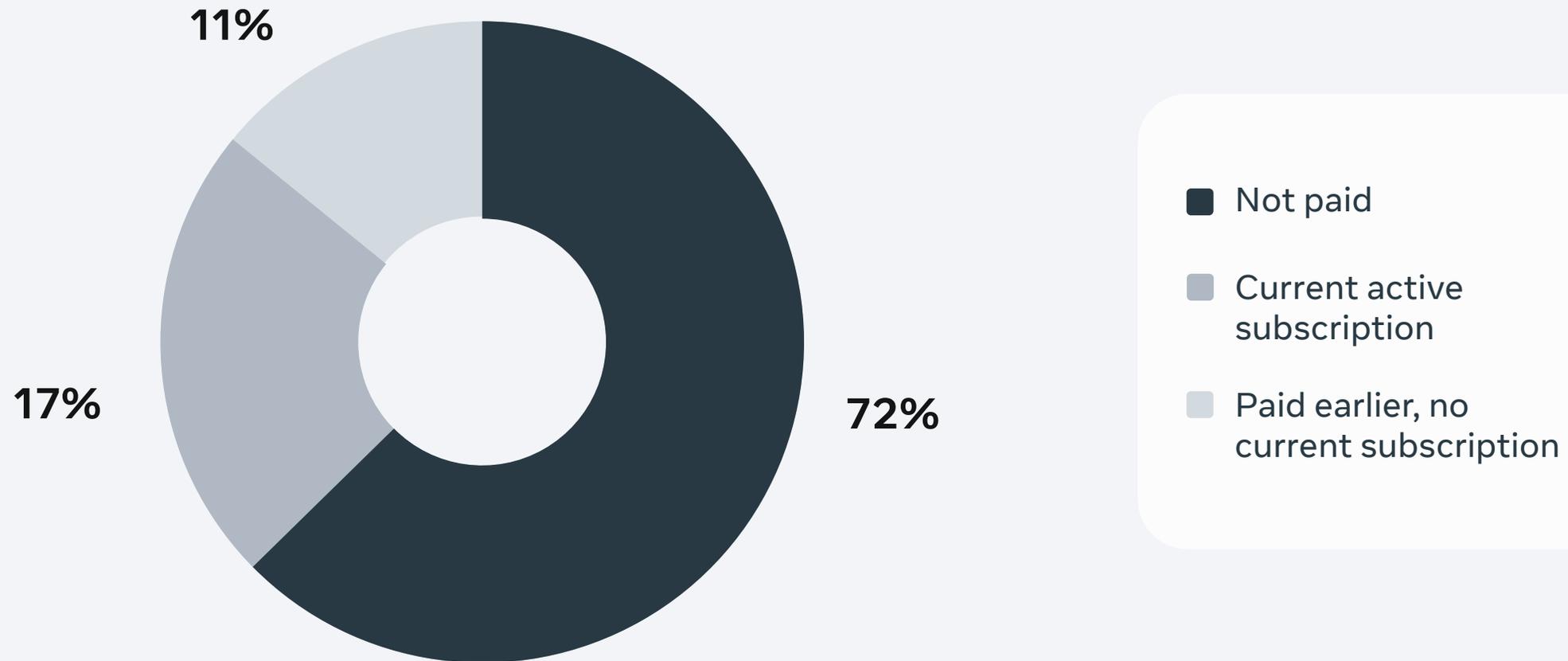


Viewers actively weigh **subscription models, payment flexibility, and perceived fairness** before committing money to the category



This section explores **what drives willingness to pay, what creates friction, and how trust perceptions shape monetisation outcomes** at this stage of the category's evolution

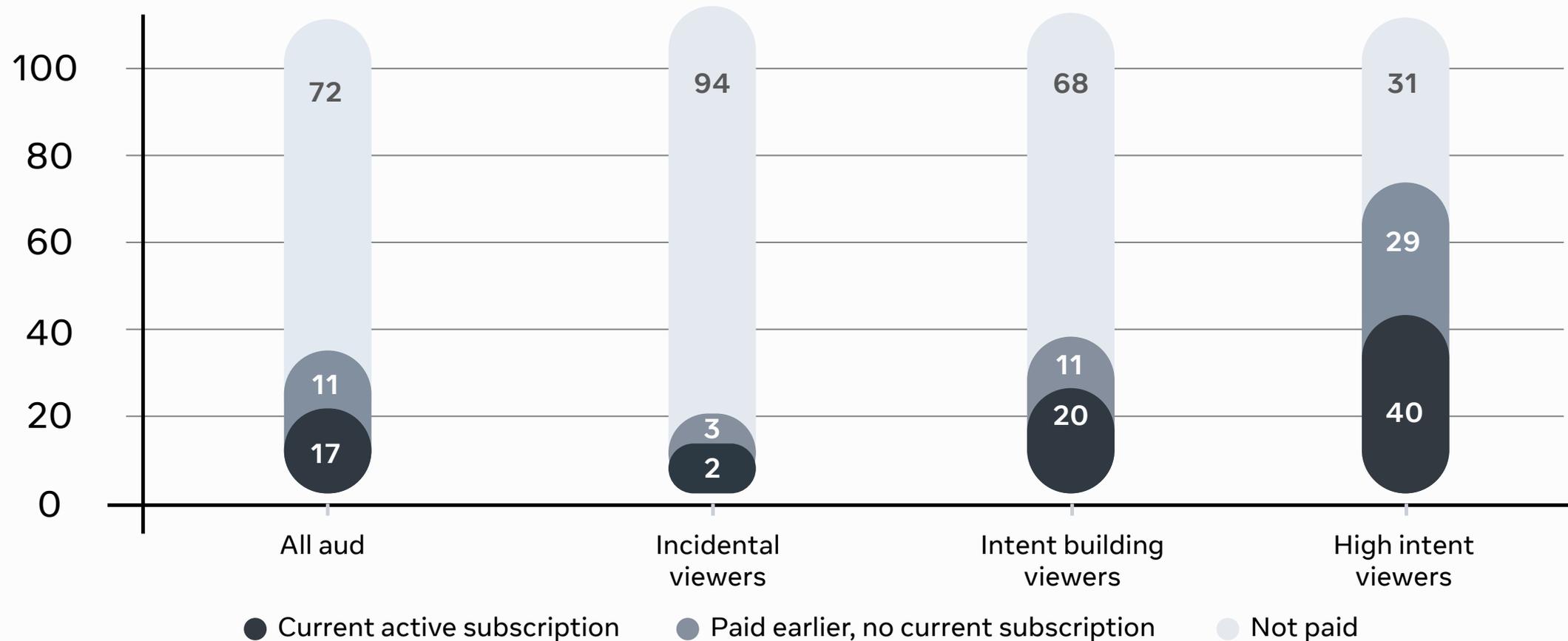
User to paid subscriber journey



28% micro dramas audiences have ever paid to watch content, with only 17% holding an active subscription at the time of the research, highlighting that the category faces **both acquisition and retention challenges**.

User to paid subscriber journey

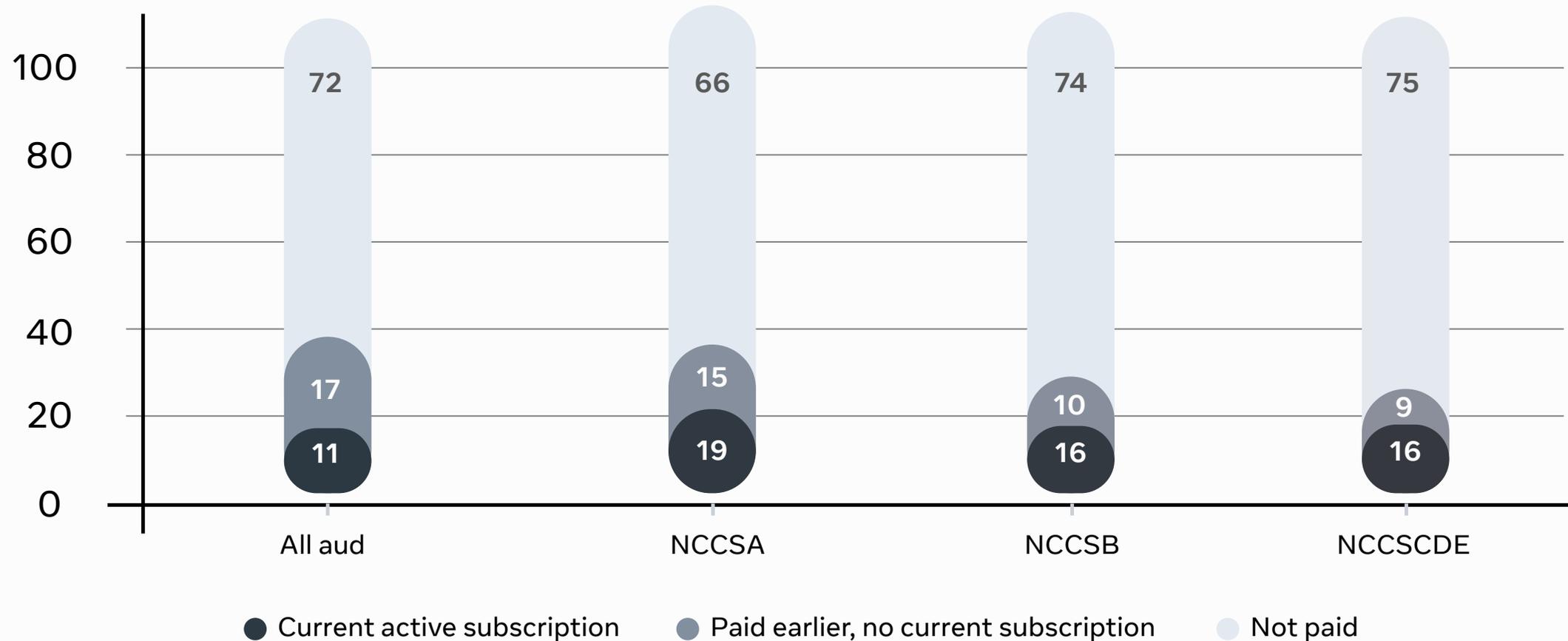
By viewer segments



The journey from free to paid user is highly correlated with the engagement with the category, with **18%** high-intent viewers contributing to **44%** of the total ever-paid audience base, while the **39%** incidental viewers segment contributes only **8%**.

User to paid subscriber journey

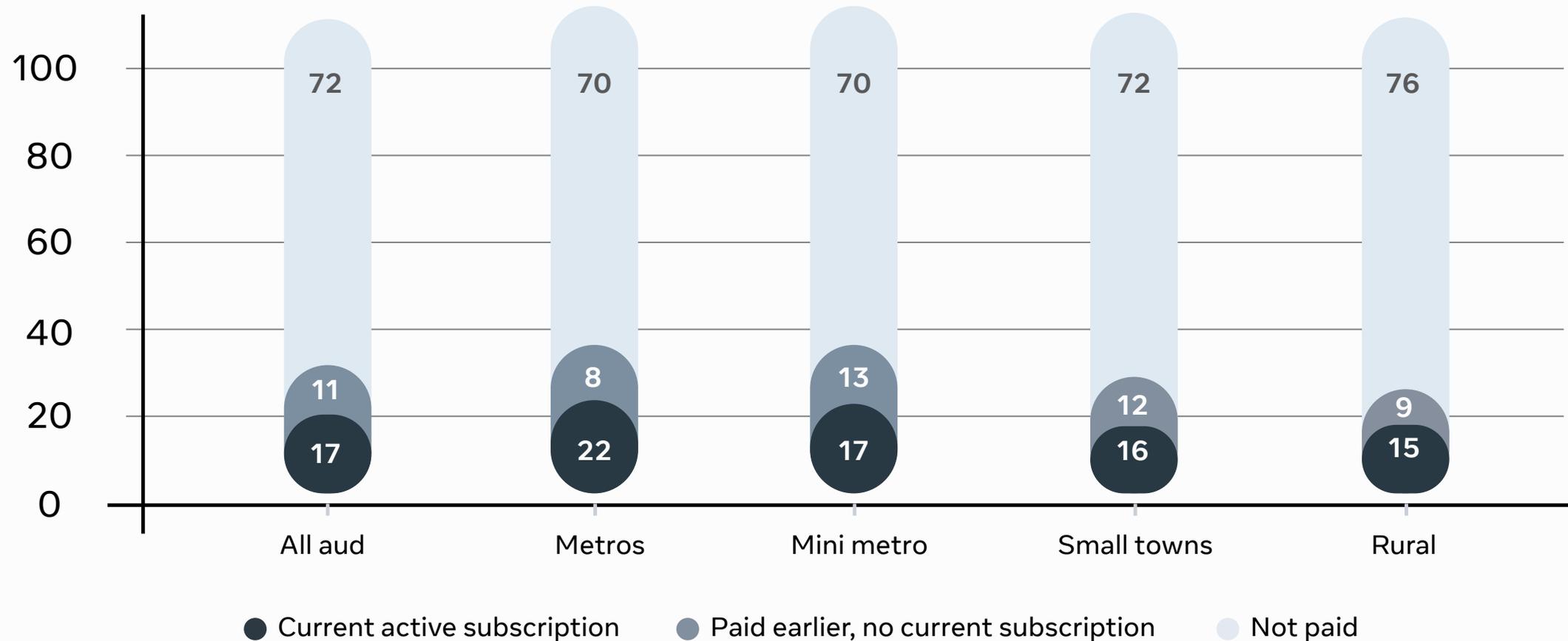
By NCCS



While there is an NCCS A skew in paid subscription, this skew is nowhere close to being as pronounced as it for the long-form SVOD category, where NCCS contributes **66%** of paid B2C subscriptions. This highlights the 'lowest common denominator' nature of the micro dramas category, where growth is likely to come from lower NCCS and smaller towns/ rural India.

User to paid subscriber journey

By pop strata



While paid subscription incidence is relatively higher in Metros and Mini Metros, the skew is not sharply urban-centric, with meaningful participation visible across Small Town and Rural audiences as well. At the same time, the high proportion of “Not Paid” users across all strata indicates significant headroom for conversion.

Subscription drivers

What factors drive audiences' decision to take paid subscription of a micro drama app?

The importance of 13 subscription drivers was measured in the research:

Access to a complete story

Picture and dubbing quality

Ad-free

Quality of content library

Volume of content

Look-feel and design

Affordable pricing

Low-cost trial subscription

Discount offers on subscription

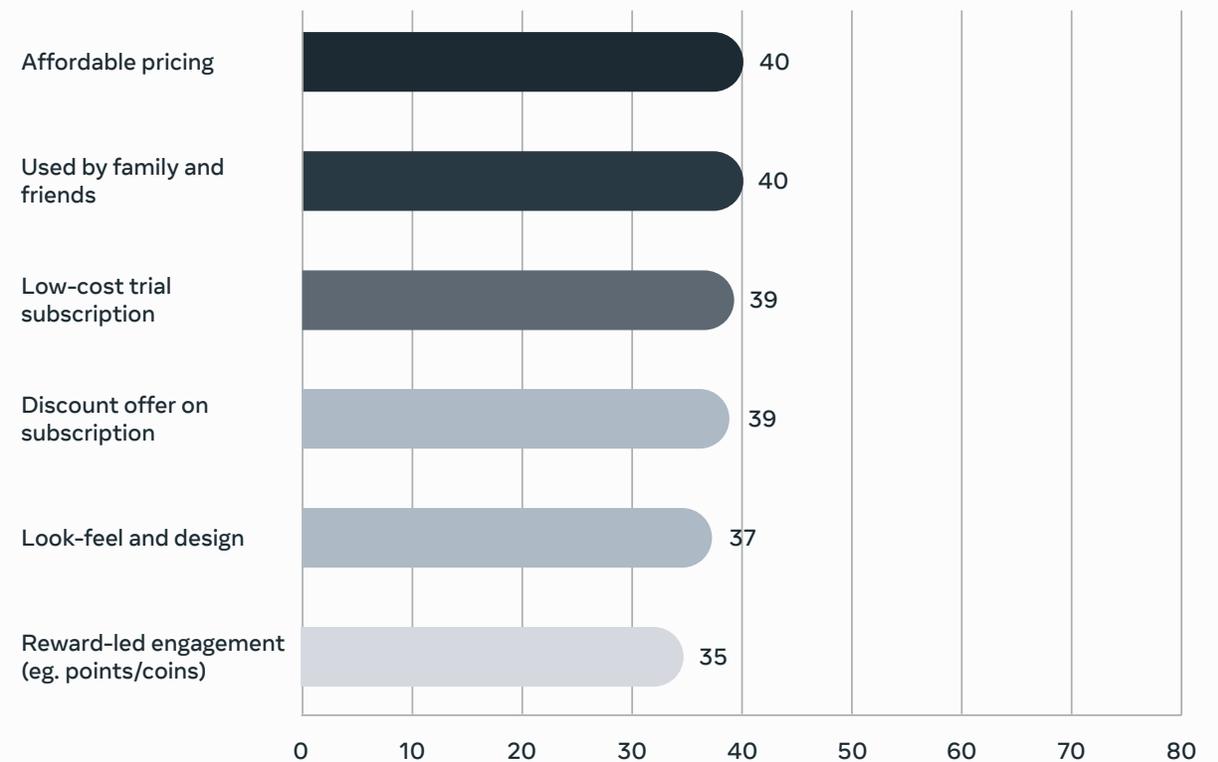
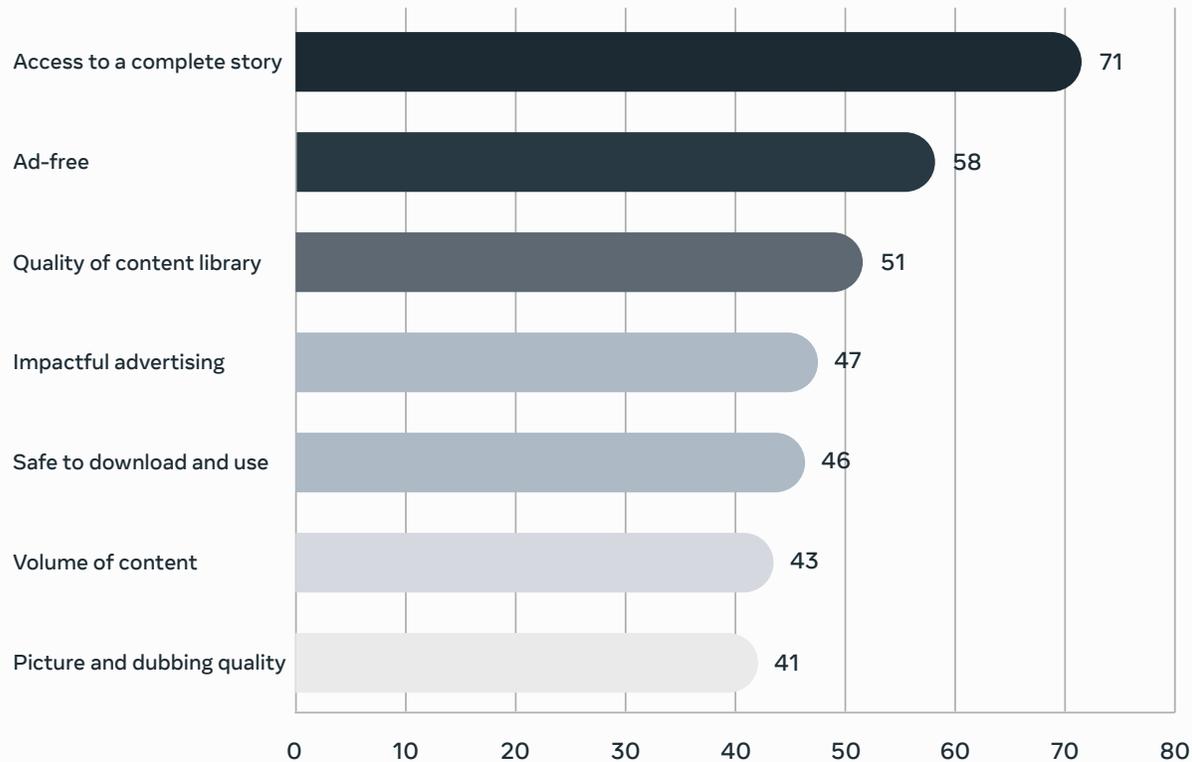
Reward-led engagement (e.g., points/coins)

Safe to download and use

Used by family/friends

Impactful advertising

Subscription drivers(%)



Subscription is driven more by content payoff than pricing. Access to the complete story and an ad-free experience are the strongest triggers, indicating users subscribe once emotionally invested. Price affordability, discounts and trials help, but conversion is ultimately unlocked by narrative continuity and viewing comfort.

Preferences of types of pricing plans

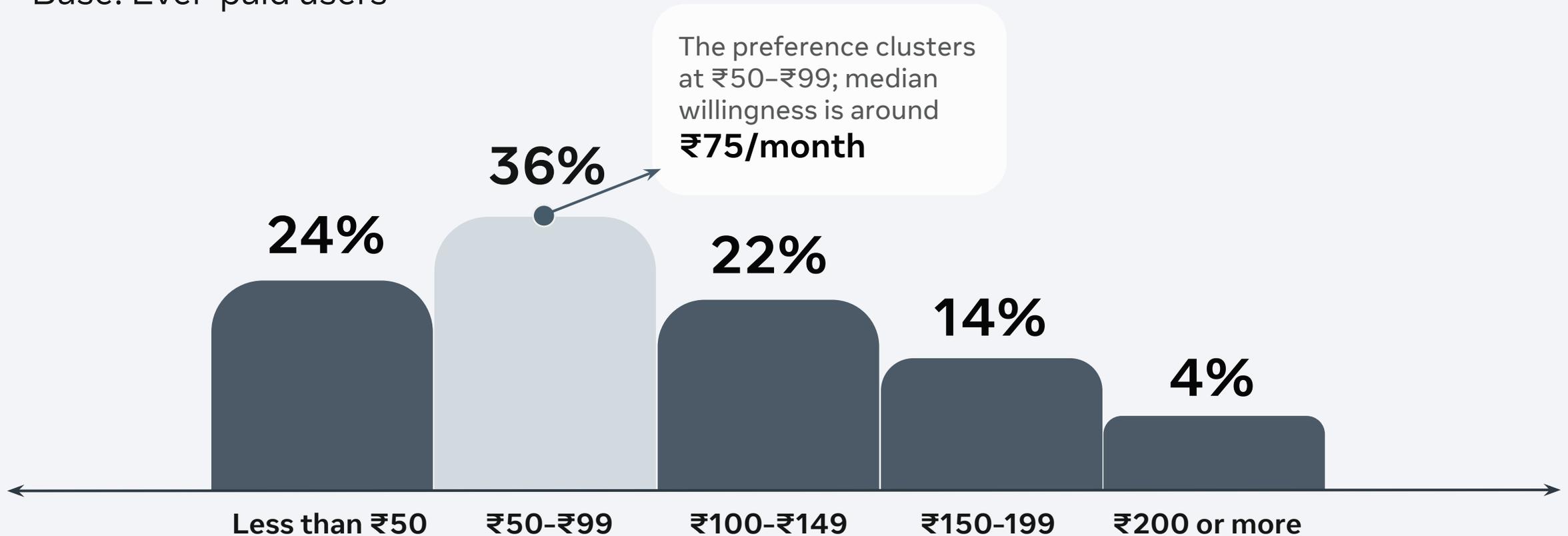
Base: Ever-paid users



Most viewers **prefer paying in small steps**, either per episode or for a single show. Fewer people want a full platform subscription. This **cautious subscription behaviour** underlines some of the trust issues faced by the category in its early stages.

Ideal subscription price for monthly subscription

Base: Ever-paid users



Willingness to pay clusters strongly in the ₹50-₹99 band, indicating a clear comfort zone for viewers in this market. With 60% preferring prices below ₹100, **the effective median settles around ₹75/month**. Pricing beyond ₹150 sharply narrows the addressable base, suggesting that affordability critical for scale in the category at this stage.

Subscription barriers

What factors hinder audiences' decision to take a paid subscription of a micro drama app?

To understand this, importance of 10 subscription barriers, was measured

Free equivalent content available on social media

Free content access on Telegram, Dailymotion, etc.

Content not compelling enough to pay

Largely rely on algorithm-driven feed on social media

Too expensive

Lack of awareness about subscription plans

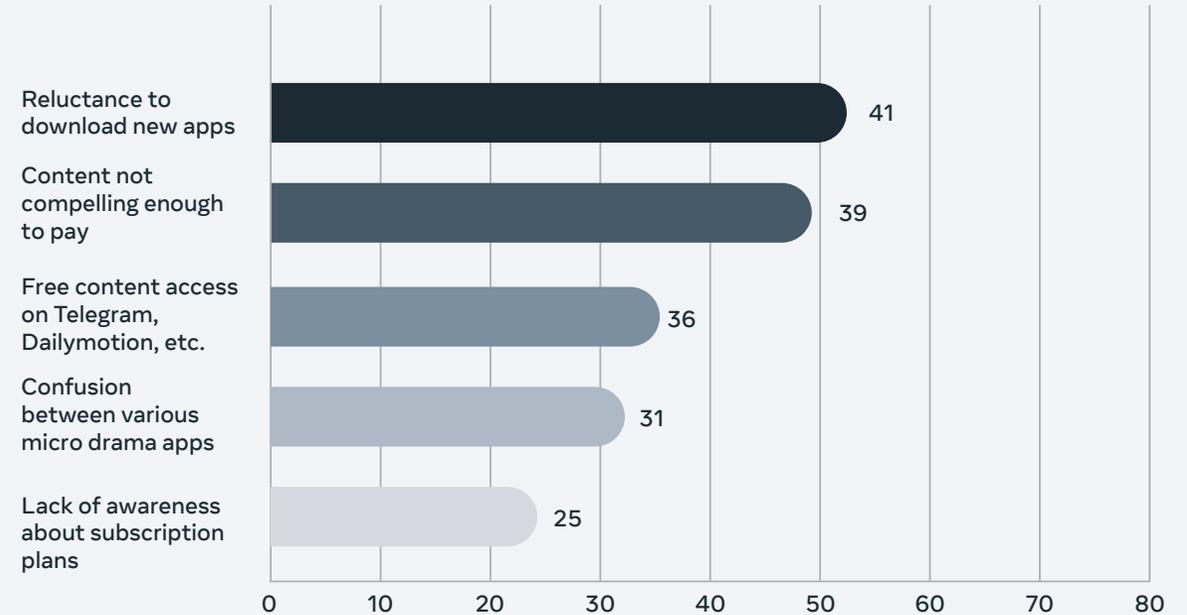
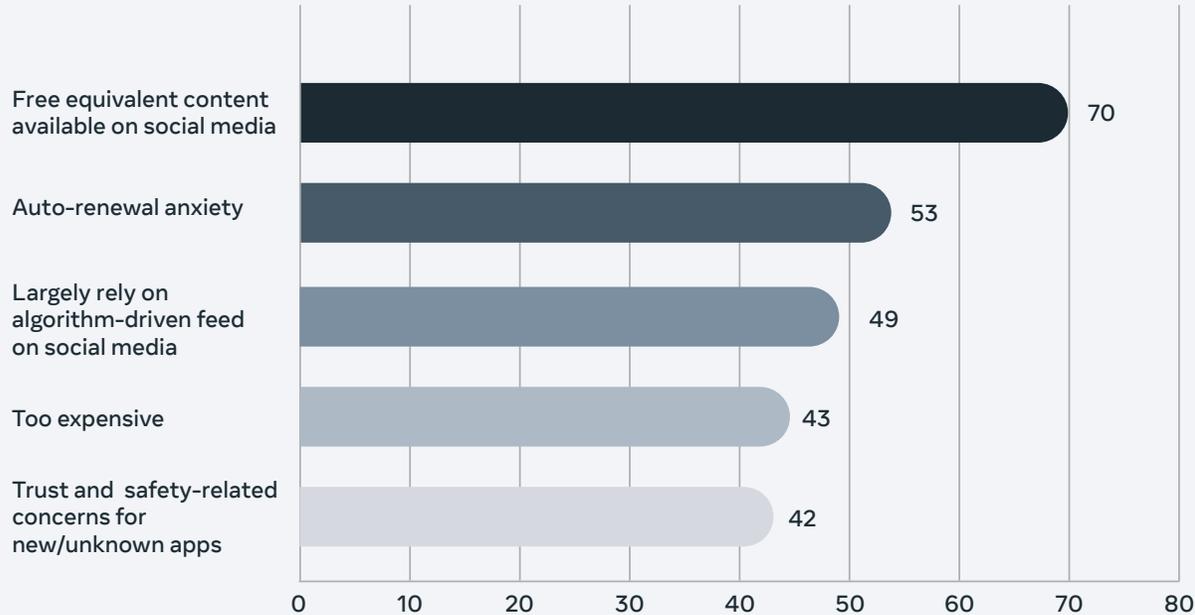
Auto-renewal anxiety

Trust and safety-related concerns for new/unknown apps

Confusion between various micro drama apps

Reluctance to download new apps

Subscription barriers (%)



A free-content mindset (in red), when coupled with credibility and trust deficit (in purple) in the emerging players in the category, creates significant barriers to pay.

Lack of trust limits conversion to paid users



Unfamiliar platforms lack brand legitimacy

Everything is fairly new, so I don't know if it is safe or not. These apps seem very fake and shady

Mumbai, Female, 25-34 yrs



No social proof or word-of-mouth

Iske baare mai koi baat nahin kar raha hai. Isiliye ispe bilkul trust nahin aata

Pune, Female, 25-34 yrs



Payment safety and data privacy concerns are intertwined

Jab bhi aisa kuch download karte hai aisa lagta hai ki kuch chori hone waala hai phone se

Junnar, Female, 35-44 yrs



Established OTTs define what "safe payment" looks like in the OTT space

I can pay on Netflix or Amazon because I trust them. But this seems fake. Actually the interface seems like a scam because first they show free, then suddenly they ask for money

Delhi, Female, 35-44 yrs



Newness of the category amplifies perceived risk

I don't feel confident putting card details on these apps mainly because it's not really known to anyone. It's not a normal OTT app

Delhi, Male, 25-34 yrs

Why payment feels risky?



Value clarity

Do I know what I'll get?

Free dekhne tak theek hai, par subscription khareedne ka clear reason nahin hai

Gwalior, Female, 35-44 yrs

I am okay to pay small amount, but I don't know what will happen after payment

Lucknow, Female, 25-34 yrs



Control and safety

Can I exit safely?

I was scared that money would be deducted again without my knowing

Bareilly, Female, 35-44 yrs

Money can get cut without our knowledge, which makes these apps unsafe

Mumbai, Female, 35-44 yrs



Piracy

Is this available free elsewhere?

Yeh sab mujhe free mai bhi mil jaata hai, iske liye paisa kyon doon? Telegram mai sab links aa jaate hain

Gaya, Female, 35-44 yrs

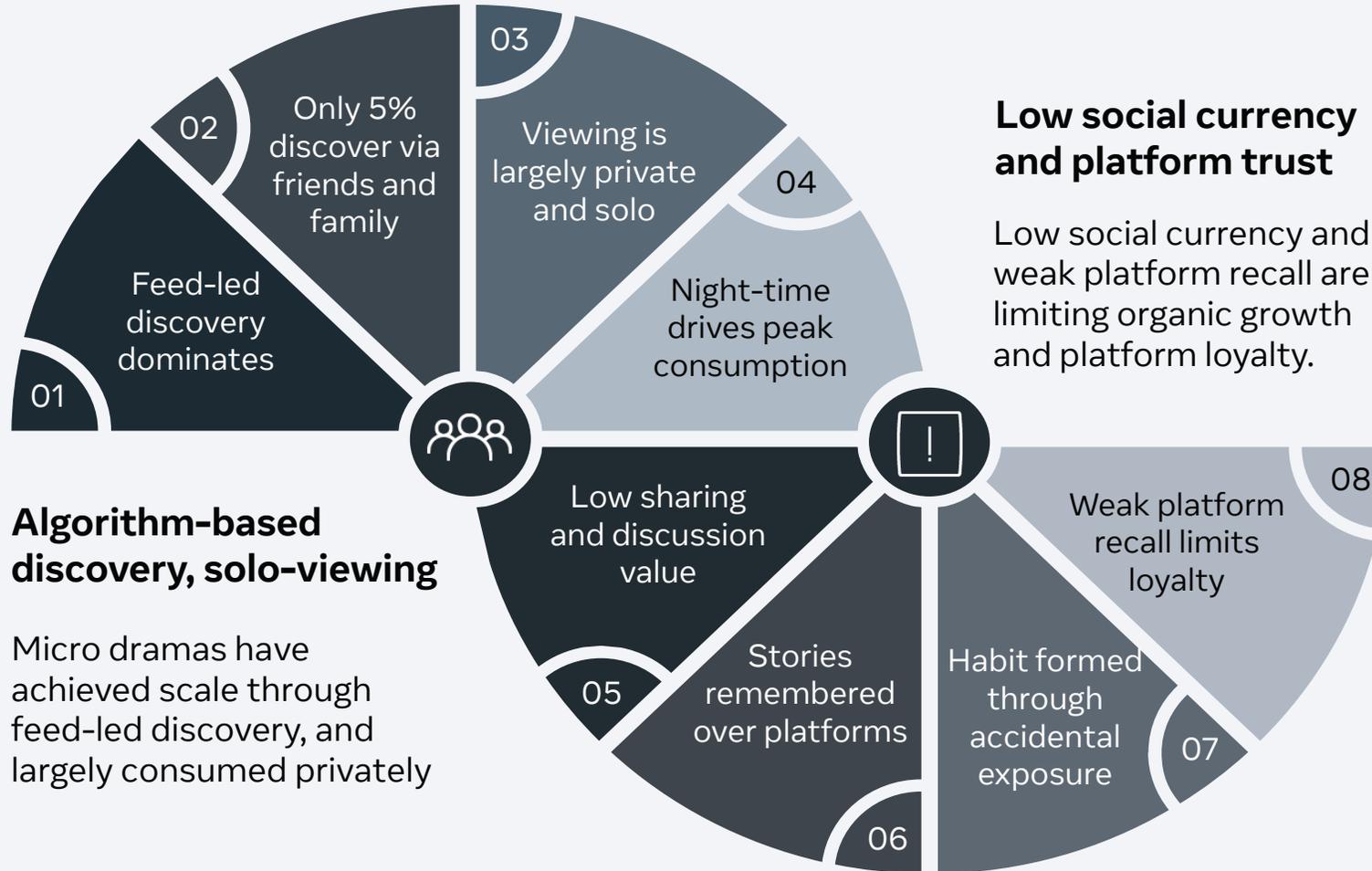
All of this is easily available for free. I watch a lot of short dramas and Korean dramas on Telegram channels or on Dailymotion

Noida, Female, 25-34 yrs



Summary and recommendations

Key findings



Micro dramas have achieved rapid scale through feed-led discovery, but their private consumption and low social currency are limiting organic growth. Additionally, low trust in platforms and payment methods, is hampering monetisation potential of the category.

Key findings

53%

report auto-renewal anxiety

TRUST BARRIER

32%

prefer paying per episode

PAYMENT BEHAVIOUR

71%

say completion of the story is their reason to subscribe

TRIGGERS

47%

find AI generated content creative and different

CREATIVE ACCEPTANCE

₹75

The median for preferred pricing is ₹75/month

31%

prefer show-wise payment

55%

say cliffhangers drive them to subscribe

56%

prefer familiar star-led content as a reason to watch

Monetisation in micro dramas is shaped less by affordability and more by trust, narrative engagement, and low-risk payment pathways. Evolving audience expectations related to content and user experience will shape the category's growth in the near future.

Recommendations

01 Brand-building is the key for growth

Strong platform brands build recall, trust, and repeat behaviour beyond algorithmic discovery loops

03 Manage trust; reduce payment anxiety

Transparent billing, reminders, and easy cancellations directly unlock trust-led monetisation growth

05 Engineer narrative hooks for conversion

Cliffhangers and completion arcs should structurally trigger subscription and episodic purchases

02 Bite-sized payments to drive sampling

Flexible micro-payments reduce perceived risk, encouraging trial and habitual paid consumption

04 Build social currency via content and marketing

Design moments worth sharing to shift viewing from private consumption to conversation

06 Leverage familiar cast to build credibility

Familiar faces accelerate credibility, discovery, and willingness to pay for content

Audience research report

Micro dramas: The India Story

February 2026

**Every connection is an opportunity.
It's Your World.**



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