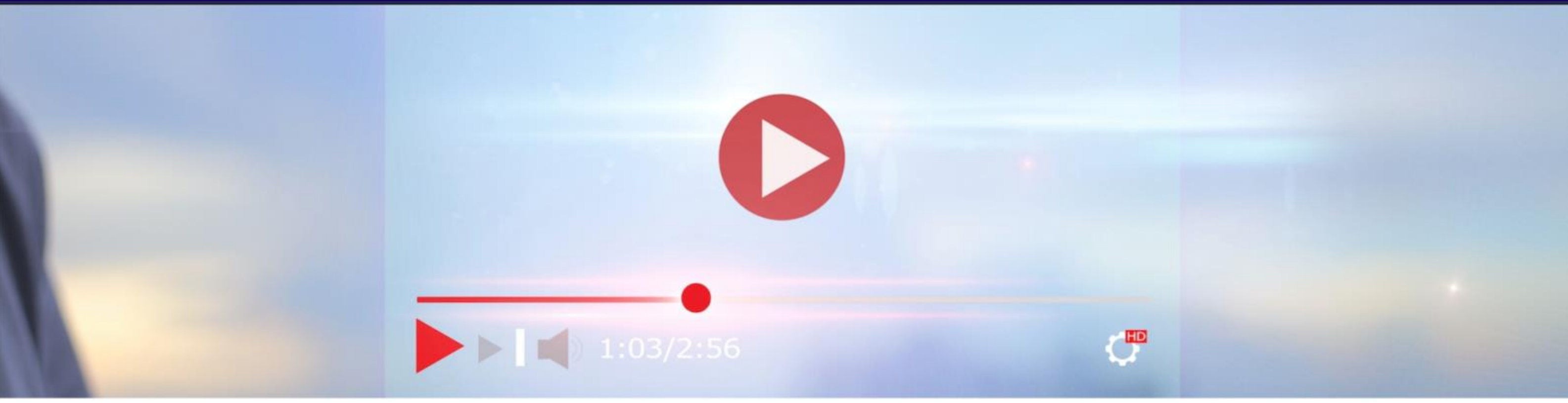

India’s OTT universe: The growth story

The 2022 edition of The Ormax OTT Audience (Sizing) Report pegs India’s digital video universe at 423.8 Million, i.e., a growth of 20% over the previous years

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By Our Insights Desk

Summary

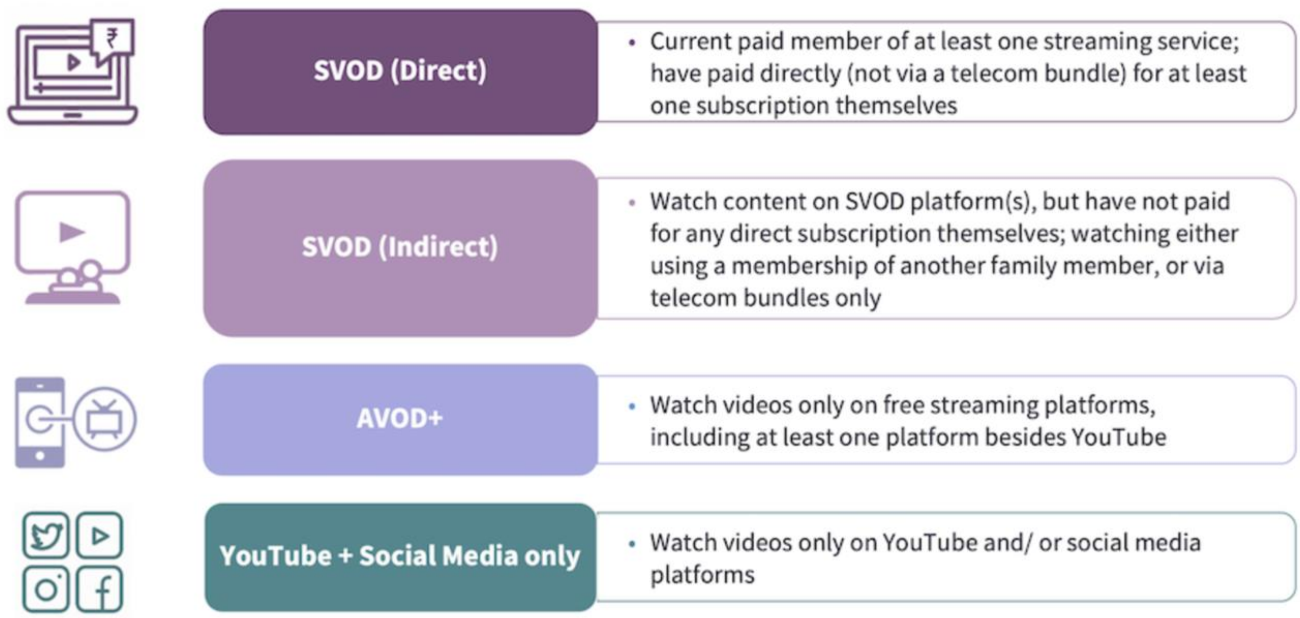
- The 2022 edition of The Ormax OTT Audience (Sizing) Report, now available for subscription, reveals that India’s OTT universe has grown by 20% over the last year
- The AVOD segments have grown faster than the paid segment. AVOD audiences new comprise of 69% of India’s total digital video universe
- The growth has been driven by small towns and rural India, with the metro cities reaching saturation levels on OTT penetration, which now stands at 30% at an all India level

We started publishing **The Ormax OTT Audience (Sizing) Report** from 2021. The annual report is our endeavour to size the growing Indian OTT (digital video) market using primary research, than rely purely on secondary data, proxy variables (like Internet and smartphone penetration) and industry estimates. This article was published at the time of release of the 2021 report.

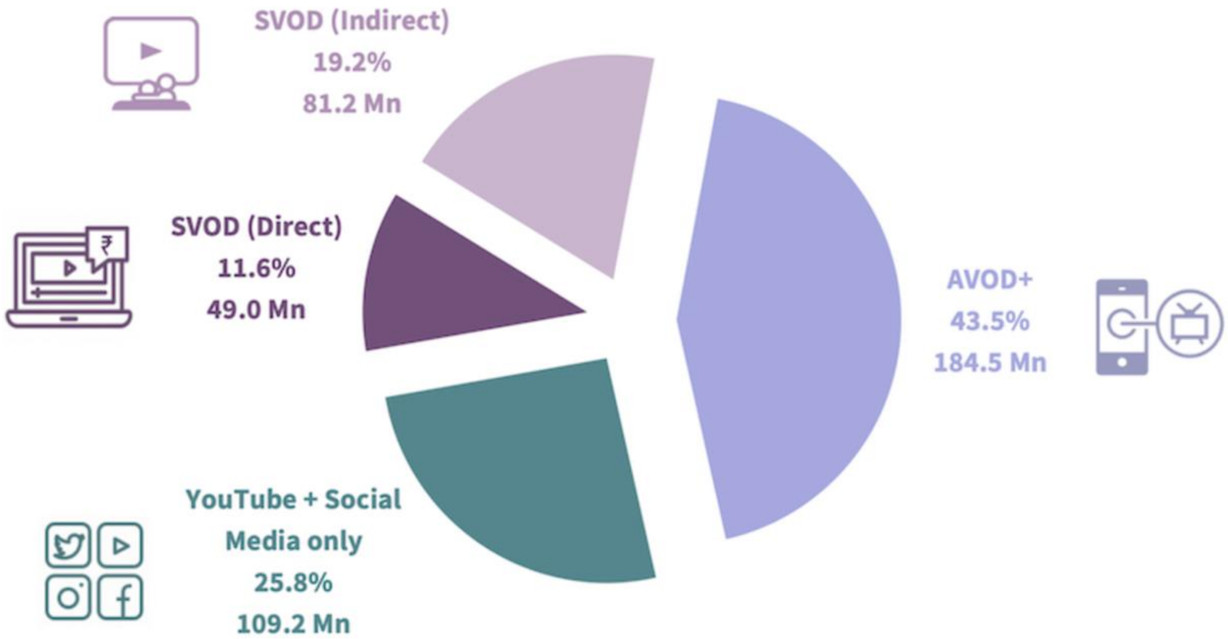
The 2022 edition of The Ormax OTT Audience (Sizing) Report, based on data collected from 13,500 respondents across India in Jul-Sep 2022, is now out, and available for subscription (see details at the end of this article). As per the report, India's OTT audience universe, defined as those who have watched a digital video at least once in the last one month, is now at **423.8 Million** (or 42.38 Crore) people. The growth from 2021 to 2022 stands a healthy 20%, with 70.6 Million new audiences entering the universe. India's OTT penetration now stands at 30.0%, up from 25.3% last year.

The full report highlights how the growth this year has been driven by small towns and rural India, while metros, as well as some of the mini metros, are beginning to reach saturation, with 70%+ population already watching digital videos in many of these markets.

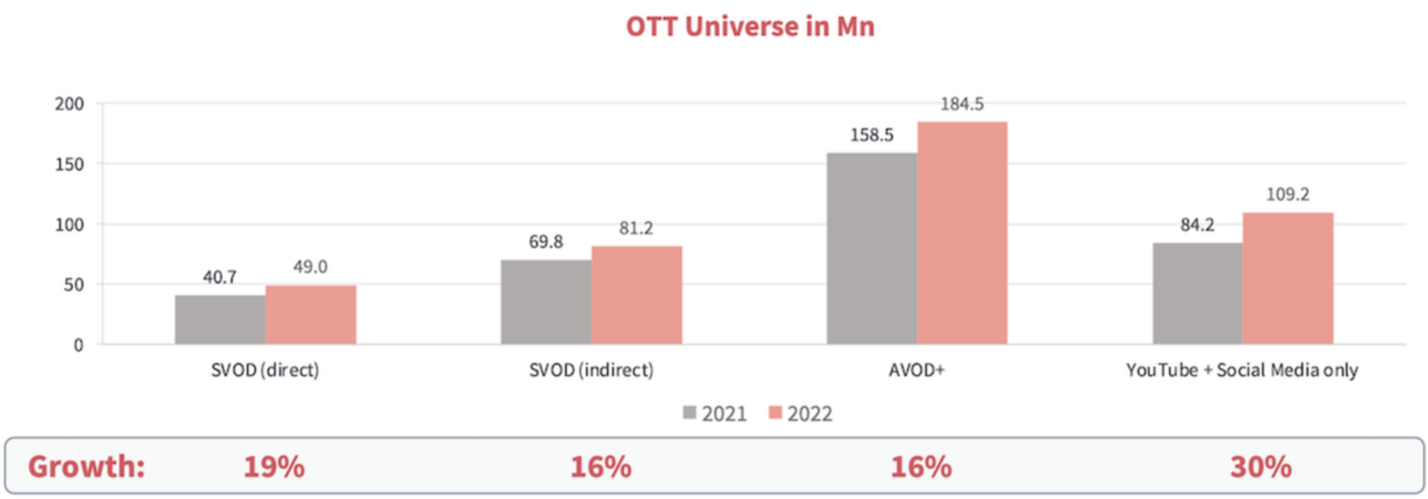
The report divides the 423.8 Million universe into four segments, defined in the chart below, based on free vs. paid usage.



The remaining 69.3% (293.6 Mn) are accessing only free content, and a sizeable section out of these are watching videos only on YouTube and social media apps.



The chart below summarises the growth in these segments since 2021. The ‘YouTube + Social Media only' segment has grown by 25 Mn in size, witnessing the highest percentage growth too, because of a higher share of overall universe growth coming from NCCS CDE and rural markets. AVOD’s share (both segments combined) of the total OTT universe has increased from 68% to 69% as a result.



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