



On the rise: Reality shows on OTT

The Indian OTT landscape, which has been traditionally dominated by fiction series & direct-to-OTT films, is seeing stronger presence of non-fiction in recent times. A deep-dive on this emerging trend

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Summary

- In recent months, there have been multiple weeks when three (or even four) non-fiction shows have made it to the top 5 list of most-watched shows of the week
 - After 5+ years of dominance of fiction content, non-fiction is suddenly making its presence felt in the Indian OTT space
 - This article analyses factors that have boosted the non-fiction category on OTT, especially in 2023
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Till not too long ago, presence of non-fiction shows in our weekly lists of most-watched OTT originals in India was sporadic. In most weeks, the top 5 would all be fiction shows. In some

weeks, an odd non-fiction show would feature in the list, otherwise dominated by fiction shows and direct-to-OTT films. But in the last quarter of 2023, this trend has changed. There have been multiple weeks when three (or even four) non-fiction shows made it to the top 5 list: Koffee With Karan, Temptation Island India, MasterChef India, Squid Game: The Challenge, and Dance+ Pro have featured consistently on the weekly top 5 list. Why is non-fiction suddenly making its presence felt in the Indian OTT space? Let's explore more.

For the purpose of this analysis, “non-fiction” refers to reality shows, and does not include documentaries.

Earnest attempts to create original Indian non-fiction shows for OTT date back to 2018-2019, with shows like The Remix, Skulls & Roses and Comicstaan on Amazon Prime Video. Unlike fiction, where it was easy to level up on the production quality available on linear television, non-fiction shows on OTT didn't have much to add to the high-budget, celebrity-driven reality shows on Indian television, like KBC, Bigg Boss, Indian Idol, etc. As a result, in the first phase of OTT growth in India (2016-17 till 2022), non-fiction was considered secondary to fiction content, especially in terms of its ability to attract new subscribers.

However, in the last year or two, the number of non-fiction shows launched, and the viewership they have managed to amass, have witnessed an upward trend. In 2023, as many as 13 Indian non-fiction properties had a viewership of more than 5 Million audiences in India, up from 10 in 2022, and only four in 2021.

Why is non-fiction emerging as the new, exciting OTT format?

Establishment of sub-genres

Post 2021, two sub-genres of non-fiction began to emerge in India, apart from stand-up comedy shows and specials. One of them can be called **TV show extensions**. This sub-

genre featured shows like Bigg Boss OTT, Koffee With Karan, MasterChef India, etc. These shows were originally made for TV, and were either moved from TV to OTT (like the upcoming Shark Tank India season), or saw spin-offs and brand extensions on OTT.

The second sub-genre can be contentiously labeled '**cringe binge**'. These shows, like Indian Matchmaking, Fabulous Lives Of Bollywood Wives, Hansika's Love Shaadi Drama, Moving In With Malaika, etc. rely to voyeuristic and escapist elements that create engagement and talk value. JioCinema's Temptation Island India is an addition to this growing sub-genre.

With three sub-genres (stand-up comedy, TV extensions, and cringe binge), the non-fiction category now has significantly more width on OTT than a year or two ago.

The reality of show budgets

Unlike linear television, where non-fiction shows can be at least 4-5 times more expensive than fiction shows on a per episode cost comparison, the picture looks quite different on OTT. Some of the bigger fiction shows on OTT can cost upward of ₹2 Cr per episode, making non-fiction shows, especially dailies (an AVOD favorite), a more cost-effective proposition. With increased focus on cost rationalization and profitability, OTT platforms are beginning to look at non-fiction as a far more integral part of their content slate than ever before.

Potential for 'inclusive' growth

In general, reality shows have a higher new user to returning user ratio compared to fiction shows, owing to their wider (more inclusive) appeal, and limited supply of non-fiction shows on OTT. Viewership of many fiction shows is impeded by their genre's limiting appeal, which can lead to exclusion of audience segments such as older or non-metro audiences, who prefer more family-oriented and TV-like content. India's OTT universe is on

its way to become more ‘massified’ ([read here](#)), with higher growth rates coming from smaller towns and lower NCCS (socio-economic strata) audiences. Most OTT platforms have saturated their SVOD subscription potential from the top 20-25 cities. TV-aligned content is a good entry point for the next set of audiences being targeted by these platforms, and reality shows offer this advantage.

Countering the fiction clutter

2023 saw the launch of 107 Hindi fiction shows and 41 direct-to-OTT Hindi films across major OTT platforms in India. In the growing clutter of fiction programming on OTT, reality shows (and even documentaries) become a clutter-breaking option, providing variety and stand-out value for an OTT platform.

AVOD-friendly formats

Non-fiction shows provide more avenues from an advertising revenue perspective, owing to brand integration and sponsorship opportunities. With programmatic advertising being in vogue, the proposition of ads on OTT reality shows is a differentiated and formidable offering. The daily formats are particularly appealing, and even SVOD platforms like Sony LIV are using dailies such as MasterChef India and Shark Tank India for monetization via advertising.

Longer play, higher ARPUs

Unlike fiction shows, which have 6-8 episodes in a typical season, reality shows have seasons of 30-60 episodes. This means higher ad inventory for AVOD platforms, and a stronger potential to drive monthly subscriptions for SVOD platforms, whereby such shows can lead to at least two, if not three, monthly renewals. As a result, non-fiction shows offer a strong opportunity to drive higher ARPU (Average Revenue Per User) for SVOD platforms.

Organic fit with the creator economy

The content creator (or influencer) economy is an integral outcome of the digital boom. Reality shows fit well with this proposition, because formats can be created to include creators as contestants, mentors, judges, etc., in ways that are far more organic than, say, casting an influencer in a supporting role in a fiction series.

So, while it will always be a challenge to create original non-fiction formats (India hasn't done too well on it over the years), the current OTT ecosystem seems well-aligned to stronger presence of non-fiction content in 2024.