

OTT Estimates India
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1. Estimated audio OTT users (mn)¹

Audio OTT users	2025	2030
High (+25%)	513	967
Medium (+15%)	423	832
Low (+5%)	333	698
Current = 200mn		

Calculations:

2025

- Total audio streamers in 2020 per an EY & FICCI 2021 report “Playing by new rules” = [200 million](#)
- Internet users in 2020 per the IMAI-Kantar ICUBE 2021 report is [622 million](#)
- Therefore, the audio OTT users to internet penetration is 200 million of [622 million](#); i.e. 32%.
- Further, the estimated internet population by 2025 per the IMAI-Kantar ICUBE 2021 report - [900 million](#)
- Assuming a 5%, 15% and 25% points increase in the current percentage, the audio OTT user penetration rate in 2025 are 37%, 47% and 57%. Taking into consideration the projected penetration rate and the estimated 2025 internet users i.e., 900 million, we get 333, 423 and 513.

2030

Assuming a further 5%, 15% and 25% points increase to the estimates from internet population [1343 million](#) in 2030 as per Statista and taking into consideration the medium category 47%, the 2030 audio OTT user penetration rates are – 52%, 62% and 72%, we get 698, 832 and 967.

¹Unique Users, Audio OTT users excluding podcast consumption.

*In this document, all +5%, +15%, and +25% **denote percentage point increases**

2. Estimated paid audio OTT Users (mn)

Paid audio OTT users	2025	2030
High (+25%)	51	150
Medium (+15%)	34	117
Low (+5%)	17	83
Current = 2 mn		

Calculations:

2025

- Paid audio streamers in 2020 per an EY & FICCI 2021 report "Playing by new rules" = [2 million](#).
- Therefore, current paid audio OTT vs paid video OTT users = $(2/40.7) = 4.91\%$
- Assuming a 5%, 15% and 25% points increase in the ratio of paid audio to paid video users for 2025 -the new paid audio OTT compared to paid video OTT users are 10%, 20% and 30%. Using the "medium" category calculated for 2025 under estimated paid video OTT (169), we get the figures 17, 34 and 51.

2030

Assuming a further 5, 15 and 25 percentage points increase in the medium category for overall estimated paid video OTT users (333), the new ratio figures would be 25%, 35% and 45%. The new figures are 83, 117 and 150

3. Estimated ad-supported and bundled audio OTT users² (mn)

Add supported audio OTT streamers	2025	2030
High (+25%)	462	817
Medium (+15%)	389	715
Low (+5%)	316	615
Current = 198mn		

Calculation (2025 and 2030):

The above estimates are calculated by subtracting paid audio OTT users (Table 2) from total audio OTT users (Table 1) in 2025 and 2030.

4. Estimated video OTT users (mn)³

OTT video users	2025	2030
High (+25%)	736	876
Medium (+15%)	639	806
Low (+5%)	556	736
Current = 353.2mn		

Calculations:

2025

- a. Internet Population of India in 2020 per the IAMAI-Kantar ICUBE 2021 report– [622 million](#)
- b. Video OTT users in 2021 per the Ormax OTT Audience Report 2021– [353.2 million](#)
- c. Therefore, the proportion of video OTT users to population - 56.8%
- d. Estimated internet population by 2025 per the IAMAI-Kantar ICUBE 2021 report - [900 million](#)
- e. Considering 5%, 15% and 25% percentage point growth by 2025 from the current video OTT penetration, the new penetration figures become 61.8%, 71.8% and 81.8%
- f. The values for 2025, therefore, are 61.8% of 900 = 556.2; 71.8% of 900 = 639.2 and 81.8% of 900 = 736.2

³ Excluding Short Form Apps and Social Media

³ Video OTT includes SVOD, AVOD, non-paying SVOD, YouTube and social media

2030

- a. Smartphone users by 2030 per a techARC report - [887.4 million](#)
- b. Smartphone users in India using video OTT apps per a techARC report - [79%](#)
- c. If the proportion of smartphone users using video OTT remains constant, the number of video OTT users by 2030 would be 701.046
- d. However, given increasing penetration, we assume a 5%, 15% and a 25% increase in the number of estimated video OTT users to the previously estimated figure (701.046) at constant penetration of 79%.
- e. Therefore, the figures are $701.046 + (5\% \text{ of } 701.046) = 736$; $701.046 + (15\% \text{ of } 701.046) = 806$ and $701.046 + (25\% \text{ of } 701.046) = 876$

5. Estimated paid video OTT users (mn)⁴

Paid Video OTT users	2025	2030
High (+25%)	233	413
Medium (+15%)	169	333
Low (+5%)	106	253
Current – 40.7mn		

Calculations:

2025

- a. The number of video OTT users in 2021 per the Ormax OTT Audience Report 2021 - [353 million](#)
- b. The paid video OTT user in 2021 per the Ormax OTT Audience Report 2021 – 40.7 million
- c. Therefore, paid video OTT user penetration in 2021 = 11.5%
- d. During the pandemic, there has been an increase in the number of paid subscribers to OTT and this trend is estimated to sustain. Hence, we assume 5% points, 15% points and a 25% points growth to the existing penetration of 11.5% to the estimated users by 2025.
- e. Taking 16.5%, 26.5% and 36.5% and of the “medium” category calculated for 2025 under Video OTT (639), we get the figures 106, 169 and 233

⁴ Paid OTT does not include bundled users.

2030

- a. Assuming further 5, 15 and 25% points increase from the estimated 26.5% in paid OTT penetration from 2025 to 2030 – 31.5%, 41.5% and 51.5%
- b. Paid OTT penetration from the “medium” category calculated for 2030 under OTT (806), we get the figures 253, 333 and 413.
