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Case Study Report: Decline of Traditional TV Media in India Due to the Rise of OTT Platforms

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Abstract: ***This case study examines the structural decline of traditional television viewership and revenue in India amidst the rapid growth of Over-The-Top (OTT) digital platforms. It synthesizes audience, subscriber, and advertising trends from recent industry reports to reveal shifts in consumer behaviour, economic impacts on television broadcasters, and strategic responses by TV channels—focusing on the music television channel 9XM as a representative case. Findings indicate a notable reduction in pay-TV households, growing OTT penetration (601 million users in India in 2025), and a redistribution of content consumption and advertising spend favoring OTT. The study concludes with implications for TV broadcasters and recommendations for hybrid media strategies.***
Keywords: OTT platforms; Traditional television; Media consumption behavior; Digital disruption; 9XM; India

I. INTRODUCTION

Traditional television media was long the dominant entertainment medium in India. However, the proliferation of high-speed internet, affordable smartphones, and an expanding ecosystem of OTT platforms (e.g., Netflix, Amazon Prime Video, Disney+ Hotstar, JioCinema) has altered media consumption patterns globally and in India. This report investigates the implications of this shift, particularly on TV viewership, subscription trends, and advertising revenue, while considering the positioning of established channels such as **9XM**.

II. BACKGROUND

OTT platforms are digital streaming services that deliver video directly over the internet without the need for traditional broadcast or cable distribution. Globally, streaming has overtaken combined broadcast and cable television usage, representing 44.8% of total television viewership in several markets by mid-2025, compared with 20.1% for terrestrial and 24.1% for cable TV. This marked the first time that streaming surpassed traditional TV viewership in overall share, revealing a structural change in media consumption patterns. (The Sun)

In India, the OTT industry has grown significantly: by 2025, India's OTT audience reached 601 million users, including 148 million active paid subscriptions, and connected TV (CTV) users surged 87% to 129.2 million—indicating that OTT content on television screens is rapidly replacing traditional linear TV viewing. (The Economic Times)

III. TELEVISION MEDIA TRENDS IN INDIA

A. *Decline of Pay-TV Households*

- India's pay-TV subscriber base declined from 151 million in 2018 to 111 million by 2024, reflecting a 40 million drop in six years, largely attributed to OTT substitution, affordability of internet data, and free-to-air channels like DD Free Dish. (Angel One)
- Industry forecasts suggest further decline to 71–81 million pay-TV homes by 2030 if current trends persist. (Angel One)

B. *Advertising Revenue Shifts*

- Digital media revenues now exceed traditional TV in India, with digital expected to reach ₹1.1 trillion with an 11.2% CAGR, while TV advertising has experienced a YoY decline of around 2%, reflecting shifting ad budgets toward digital and OTT platforms. (ETBrandEquity.com)

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C. Television Viewership Behaviour

Reports show that only about 25% of Indian viewers rely solely on conventional TV, while 23% consume content exclusively via digital platforms. Traditional TV is losing ground across age groups and socio-economic segments. (India Bytes - Indias leading news portal)

IV. IMPACT ON TRADITIONAL TV CHANNELS: FOCUS ON 9XM

9XM is a prominent Indian music television channel historically boasting high reach and popularity among youth and general audiences. According to earlier BARC data (2019), 9XM had a cumulative reach of approximately 197 million viewers among the 15+ audience universe, outperforming many leading general entertainment channels at the time. (Broadcast and CableSat)

Despite such historical reach, the broader television environment has changed:

- Viewers increasingly prefer on-demand music and video content on OTT/mobile platforms (e.g., YouTube, Spotify), reducing reliance on scheduled linear music channels.
- Anecdotal community feedback suggests that music TV channels face reduced engagement compared to personalized streaming services, highlighting a broader industry sentiment of declining relevance of linear TV music programming as audiences shift to OTT and video platforms. (Reddit)

While 9XM's historical success is notable, current public audience measurement points toward a growing challenge for linear entertainment channels in retaining viewership amid OTT proliferation.

V. ECONOMIC AND EMPLOYMENT CONSEQUENCES

The shift from traditional TV to digital has wider economic implications:

- Cable and direct-to-home (DTH) operators have witnessed revenue declines exceeding **₹4,000 crore between FY19 and FY24**, with EBITDA falling by 29%. (Business Standard)
- Over **500,000 jobs** in the Indian cable TV ecosystem are estimated to have been lost since 2018 due to shrinking subscriptions and the shift toward OTT consumption. (Angel One)
- Local cable operators report significant reductions in subscriber base and incomes, with many reducing workforce numbers as pay-TV revenue streams contract. (EY)

VI. FACTORS DRIVING OTT ADOPTION OVER TV

Key drivers include:

- On-Demand Viewing: Consumers prefer flexibility over fixed broadcast schedules.
- Content Variety: OTT platforms offer global, regional, and niche content formats.
- Personalization: Algorithmic recommendations and tailored viewing experiences.
- Growing Internet Access: Broadening 4G/5G penetration and affordable data plans.
- Connected TV Usage: OTT content on TV screens (via Smart TVs) increasingly substitutes conventional TV consumption. (The Economic Times)

VII. DISCUSSION

The decline in traditional TV viewership in India reflects a structural media transformation driven by digital enablement and changing consumer preferences. While linear TV remains significant in some rural and less connected segments, its role as the primary medium for entertainment is diminishing.

Channels like **9XM**, once leading in reach, now compete with OTT platforms for audience attention, especially among younger demographics who favor streaming services and video platforms. This underscores the need for traditional broadcasters to adopt hybrid strategies—such as digital content distribution, partnerships with OTT platforms, and enhanced interactive audience engagement—to remain relevant.

VIII. CONCLUSION AND RECOMMENDATIONS

The shift toward OTT platforms represents not just a trend but a **paradigm change** in media consumption. Traditional TV channels must innovate:

- Embrace digital distribution (e.g., hosting curated content on OTT platforms).

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- Leverage data analytics to personalize offerings.
- Develop hybrid monetization models, including ad-supported streaming and content licensing.

Failing to adapt may result in further decline of linear TV relevance and revenue, particularly among younger, urban audiences.

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[4] Decline of traditional TV viewership in India. (India Bytes - Indias leading news portal)
[5] 9XM cumulative reach (historical BARC data). (Broadcast and CableSat)
[6] Economic effects on DTH and cable revenues. (Business Standard)
[7] Cable operator employment impact. (EY)

ANNEXURE

Table 1: OTT Market Growth – India

Indicator	Data	Year / Period	Source
Total OTT users in India	601 million	2025	Ormax / Economic Times
Paid OTT subscriptions	148 million	2025	Ormax
Connected TV (CTV) users	129.2 million	2025	Ormax
Growth in CTV users	+87% YoY	2024–2025	Ormax
OTT industry CAGR (India)	~11–12%	2024–2028	FICCI–EY
Smartphone internet users	~820 million	2024	TRAI

Table 2: Decline of Traditional Pay-TV in India

Metric	Value	Year	Change
Pay-TV households	151 million	2018	Baseline
Pay-TV households	111 million	2024	−40 million
% decline in pay-TV homes	~26%	2018–2024	↓
Projected pay-TV homes	71–81 million	2030 (forecast)	Further decline
Free-to-air DD Free Dish homes	~45 million	2024	Growing

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Table 3: Advertising Revenue Shift (India)

Medium	Revenue Share / Growth	Year
Digital media revenue share	32% (highest)	2024
TV advertising growth	−2% YoY	2023–2024
Digital advertising CAGR	~11.2%	2024–2028
OTT ad-supported user growth	>20% YoY	2024
Share of ad spend moving from TV to digital	~15–20%	Last 5 years

Table 4: Audience Consumption Behaviour (India)

Viewing Behaviour	Percentage of Users
Only traditional TV	~25%
Only OTT / digital	~23%
Both TV + OTT	~52%
Youth (18–30) preferring OTT	>70%
Average OTT daily watch time	~70 minutes
Average TV daily watch time	Declining annually

Table 5: Global Media Consumption Comparison

Platform	Share of Total Viewership	Year
Streaming (OTT)	44.8%	2025
Cable TV	24.1%	2025
Broadcast TV	20.1%	2025
Others	~11%	2025

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Table 6: 9XM Channel – Key Data Points

Metric	Value	Year
Cumulative reach (15+ audience)	~197 million viewers	2019
Ranking among Indian TV channels	No.1 (reach-based)	2019
Core content type	Hindi music & countdowns	—
Primary competitor (now)	YouTube, Spotify, OTT music content	2020s
Audience trend	Declining linear engagement	Post-2020

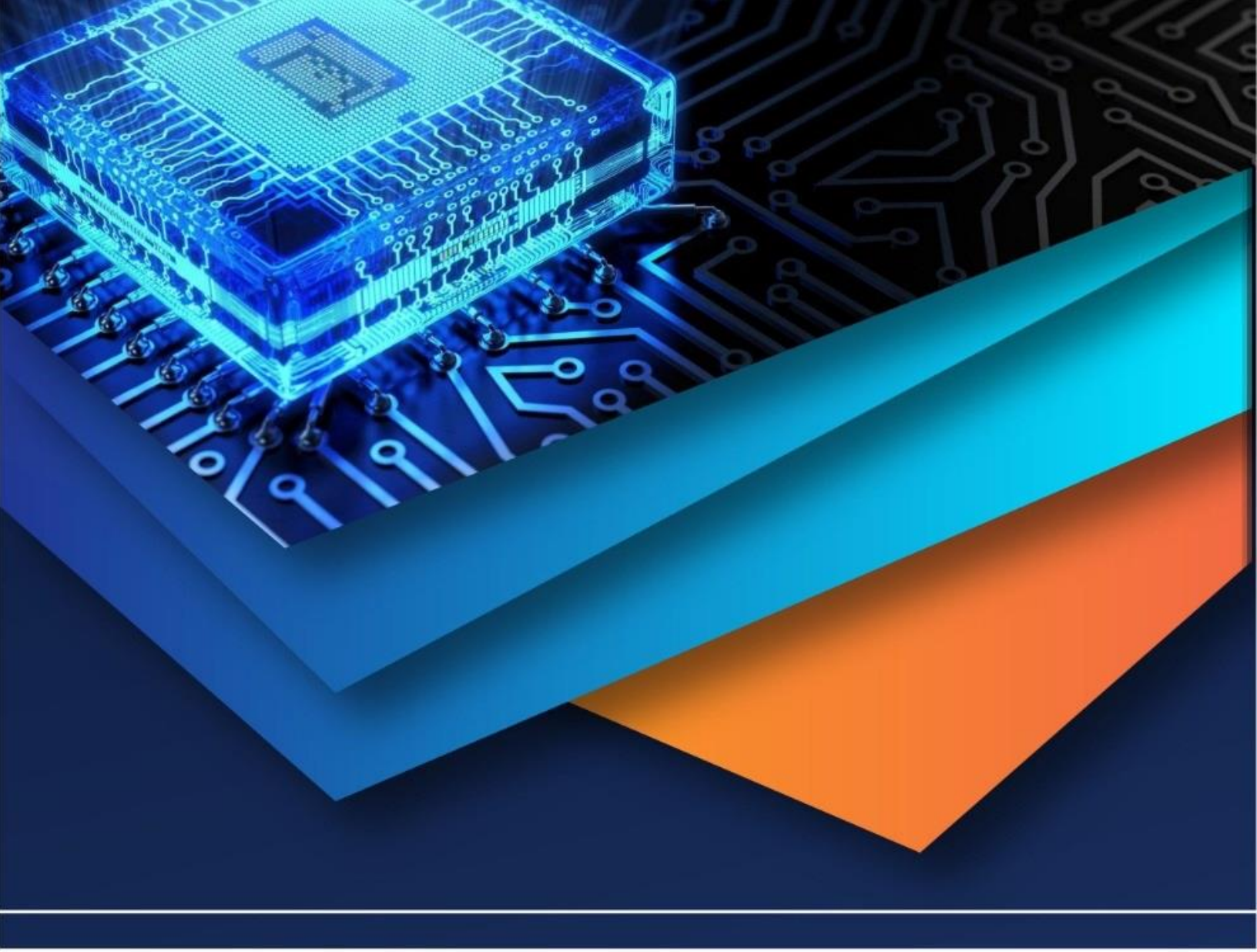
Table 7: Economic & Employment Impact of TV Decline

Indicator	Data
Jobs lost in cable TV ecosystem	>500,000
Revenue loss (DTH + cable)	₹4,000+ crore
EBITDA decline (cable industry)	~29%
Number of small cable operators affected	Thousands
Workforce reduction trend	Continuous since 2018

Table 8: Key Drivers Behind OTT Growth vs TV

Factor	Impact Level
Affordable mobile data	Very High
On-demand viewing	Very High
Personalised recommendations	High
Original & regional content	High
Smart TV penetration	High
Fixed TV schedules	Negative for TV

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