PSYCHOGRAPHIC STUDY / OTT AND MUSIC IN INDIA

India judges OTT content on ideas and writing. Star power comes last.

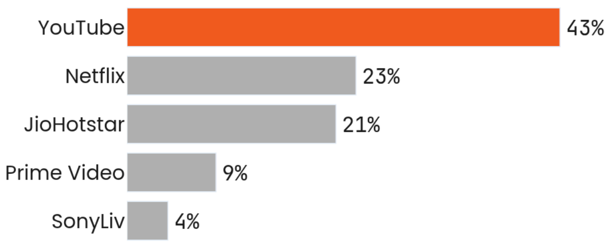
3,121 OTT viewers profiled across twenty states, read alongside a companion MindLink music study of 2,276. Every respondent carries a psychographic archetype, so every answer can be read against who is answering.

3,121	**8**	**20**	**8**	**2**
Consumers profiled across both modules	Archetypes, all with a readable base	States, metro and non-metro	Category and platform questions	Field modules, Jan to Feb 2026

FINDING 01

YouTube is the category default, holding 43% of most-used mentions

Netflix takes 23%, JioHotstar 21% and Prime Video 9%. The largest single share of OTT attention sits with a free platform, ahead of every paid service.



Most-used OTT platform. Base: 1,037 Module II respondents.

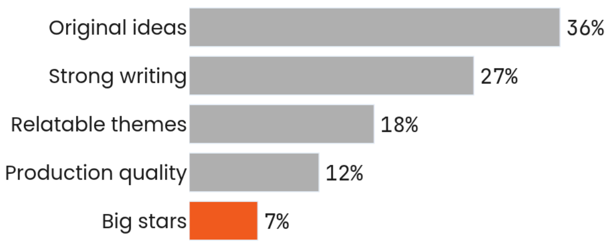
BRAND IMPLICATION

Subscription platforms compete for attention against free video, not only against each other. Share-of-voice planning should price that in.

FINDING 02

Cast is the weakest quality signal in the category, named by 7%

Original ideas leads at 36% and strong writing follows at 27%, together accounting for 63% of how audiences define good OTT content. Production quality draws 12%.



Definition of good OTT content. Base: 1,037 Module II respondents.

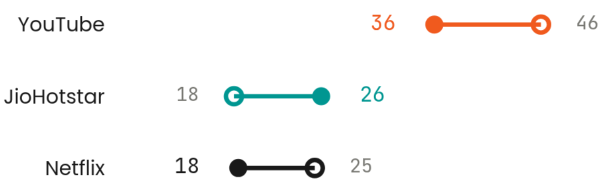
BRAND IMPLICATION

Casting-led creative argues on the dimension audiences weight lowest. Premise and writing carry more persuasive load in launch communication.

FINDING 03

Platform preference moves with age, and JioHotstar gains where YouTube fades

YouTube peaks at 46% among 15 to 24 year olds and settles at 36% by 45 and over. JioHotstar travels the opposite way, from 18% to 26%, while Netflix declines from 25% to 18%.

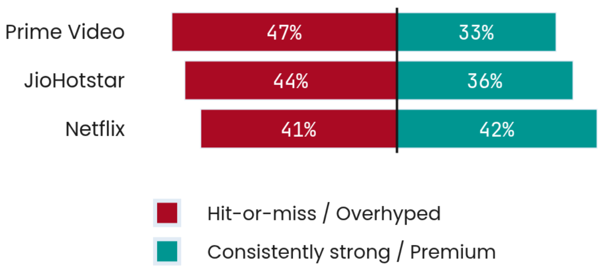


Most-used platform, youngest and oldest bands. Hollow marker 15 to 24, solid 45+.

FINDING 04

No platform owns consistency

Netflix draws 42% positive verdicts against 41% negative, effectively a split decision. JioHotstar sits at 37% against 44%, Prime Video at 33% against 47%. Hit-or-miss is the most common single verdict for both.



Content perception by platform. Base: 1,037 Module II respondents.

BRAND IMPLICATION

Reliability is unclaimed territory. The first platform to evidence consistency takes a position no competitor currently holds.

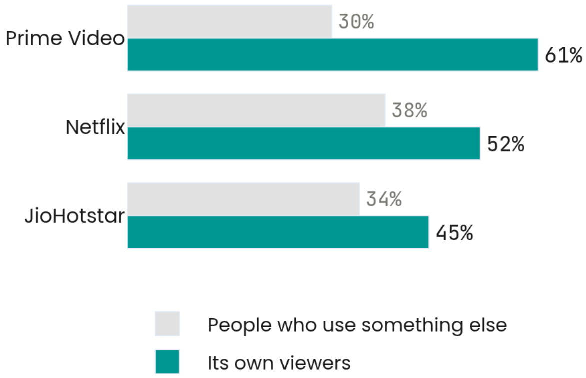
SECTION 02

What usage does to perception

FINDING 05

The harshest verdicts come from people who do not watch

Among its own most-frequent viewers, Prime Video is rated consistently strong or premium by 61% against 30% of everyone else. Netflix moves from 38% to 52%, JioHotstar from 34% to 45%. People who watch rate a slate. People who do not are rating a reputation.



Consistently strong or premium, by whether the respondent uses that service most. Bases: 92, 237, 217.

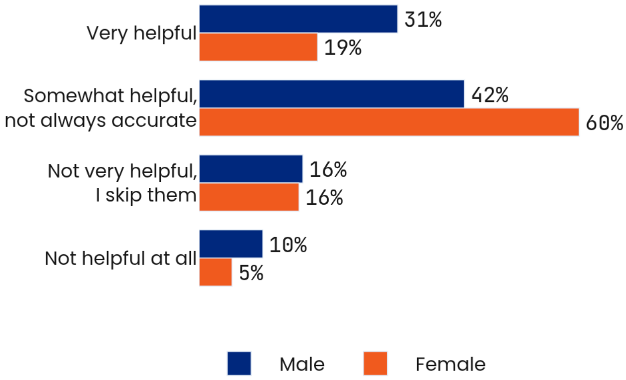
BRAND IMPLICATION

Part of any perception gap is a trial gap. Sampling moves the score more reliably than brand advertising aimed at non-viewers.

FINDING 06

Discovery works for men and misses women

Among viewers, 31% of men call recommendations very helpful against 19% of women. Six in ten women settle on somewhat helpful but not always accurate, a figure 18 points above the male equivalent.



Helpfulness of recommendations, viewers only. Base: 1,039.

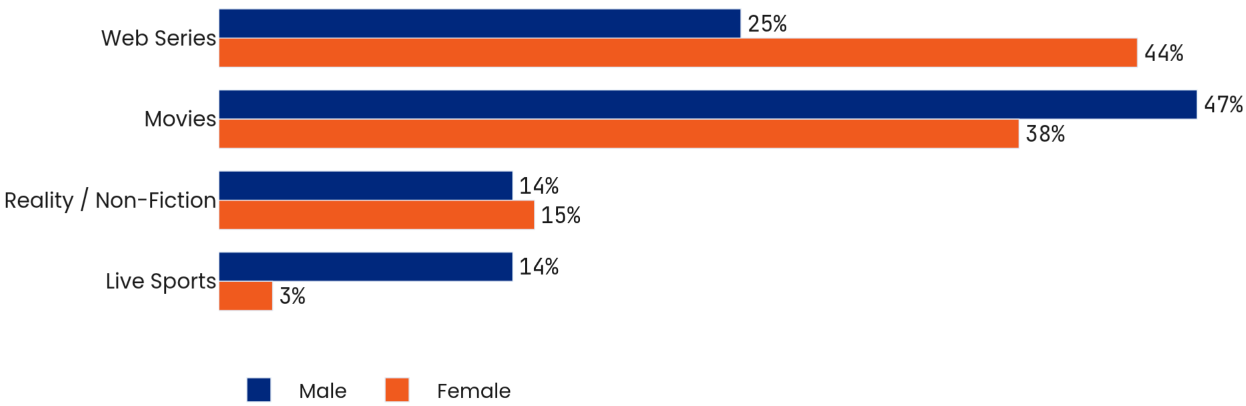
BRAND IMPLICATION

Only one in four viewers trusts what they are recommended, so discovery is the most available point of difference in the category. The gap among women is the recoverable half.

FINDING 07

Sport brings men in. Web series carries women. The split is the widest in the study

Web series draw 44% of women against 25% of men. Movies run the other way, 47% of men against 38% of women. Live sports reach 14% of men and 3% of women, the widest single gap in the study.



Content type watched most, viewers only. Base: 994 Module I respondents.

BRAND IMPLICATION

Sport-led acquisition reaches a heavily male audience. Pairing it with a web series slate is what converts that spike into a broad base.

What a neighbouring category shows about paying

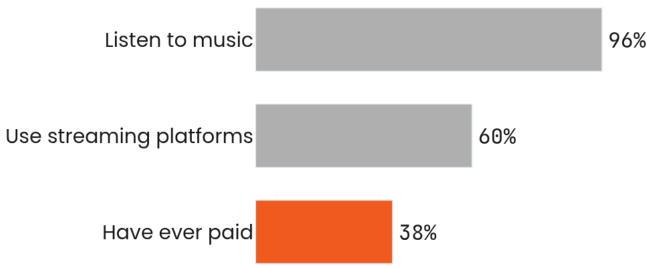
A companion MindLink study of 2,276 consumers, fielded May 2026 for Ernst & Young and the Indian music industry, asked the same audience what makes someone pay for entertainment. For any subscription service, it reads as a map of where paying habits come from, where they transfer, and what walks out of the door with a cancellation.

2,276 Verified respondents, music study	**32.6%** Payers, active music subscribers	**38.6%** Fence-sitters, listening without paying	**28.8%** Never-payers, no paid history

FINDING 08

Listening is close to universal. Paying is not.

Ninety-six per cent of smartphone users listen to music, 60% use a streaming platform and 38% have ever paid, including bundled and telecom-subsidised access. The drop-off sits between using a service and valuing it.

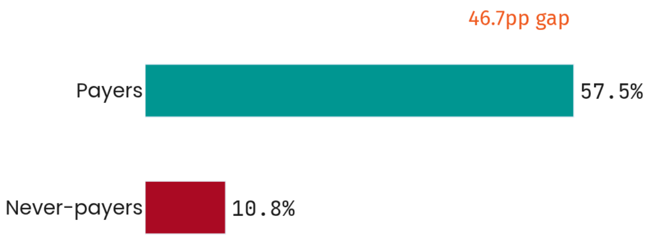


EY music streaming research 2025 to 2026, the baseline MindLink opened up.

FINDING 09

For Never-payers the obstacle is a worldview, and no price point moves it

Payers choose a monthly subscription to full access at 57.5%, against 10.8% of Never-payers. Beneath that, 43% of Never-payers say nothing at all is worth paying for, and 31.6% say paying for digital is wrong while free versions exist.

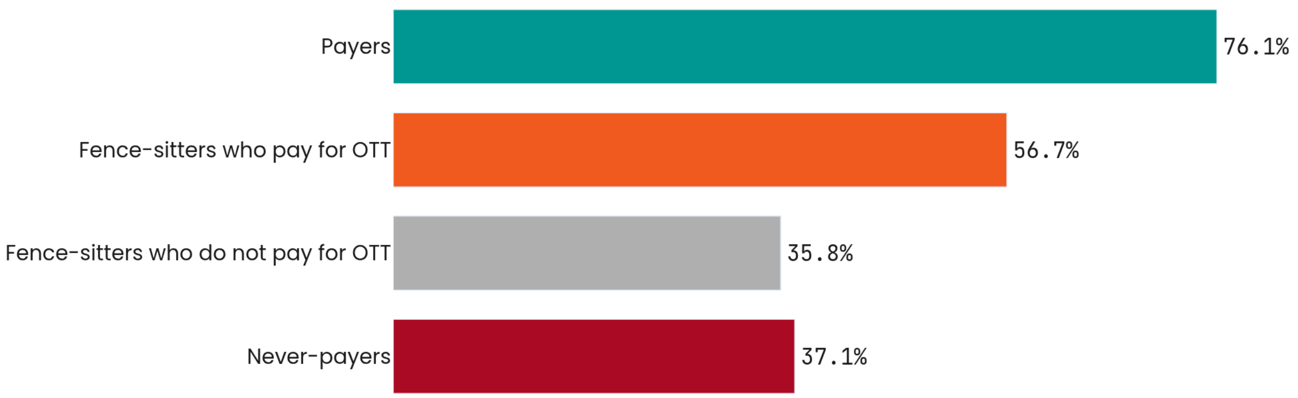


Preferred unit of value. Base: 2,276 music study respondents.

FINDING 10

Paying for video makes someone likelier to pay for audio, and the effect is only partial

Among Fence-sitters, those who already subscribe to a video OTT service hold a positive attitude to digital payment at 56.7%, against 35.8% of those who do not. The habit carries across categories without completing the journey: 16% of all listeners pay for OTT and not for music, having already crossed the threshold once.



Positive attitude to paying for digital content, by segment and OTT status. Base: 2,276.

BRAND IMPLICATION

A subscription buys more than revenue. It builds a disposition to pay for digital that transfers across categories, and a cancellation hands that habit to whoever asks next. Bundles into a live billing relationship convert this group; price messaging does not.

SECTION 04

Who is actually watching

THE EIGHT ARCHETYPES

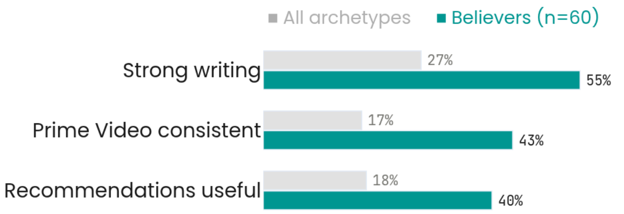
Fixed across every MindLink study. Share shown is of the 2,465 profiled OTT respondents.

- **Geek** 23.1% — Comfort over career progression
- **Explorer** 19.5% — Routine plus a taste for the new
- **Trailblazer** 18.5% — Early adopter, highly social
- **Reformer** 13.7% — Achiever within the norms
- **Free-Spirited** 9.7% — Authenticity above status
- **Ambitious** 7.7% — Life as one growth project
- **Believer** 5.0% — Prefers routine and reliability
- **Mediator** 2.8% — Values patience and stability

FINDING 11

One archetype is quietly satisfied, and it is only 5% of the base

Believers call good content strong writing at 55% against 26%, rate Prime Video consistent at 43% against 17%, and find recommendations helpful at 40% against 18%.

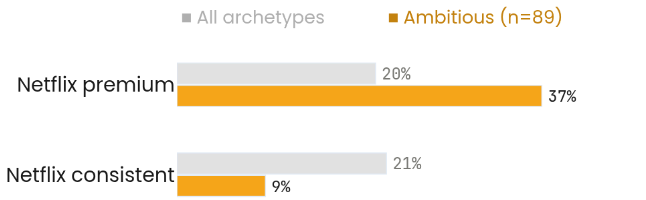


Believer responses vs all archetypes. Believer base: 60 Module II respondents.

FINDING 12

The Ambitious archetype grants prestige and withholds trust

Netflix feels premium to 37% of Ambitious respondents against 19% of everyone else, yet only 9% call it consistently strong against 21% overall.

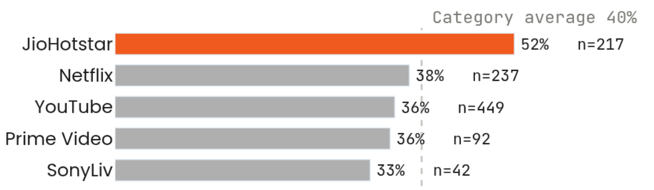


Ambitious responses vs all archetypes. Ambitious base: 89 Module II respondents.

FINDING 13

Each service draws a different mindset

Explorers and Geeks are 40% of the category but reach 52% on one service, while every other base sits at or below average. Both are habit-forming, so this base rewards dependability.

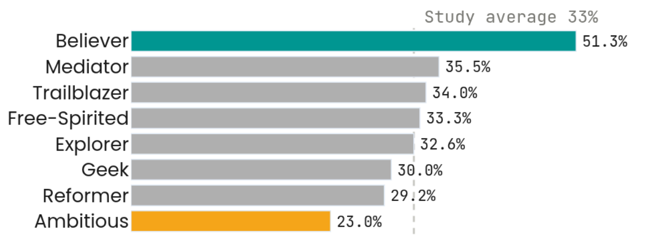


Combined Explorer and Geek share of each platform base. Only the top gap is significant.

FINDING 14

The same two archetypes sit at opposite ends of both studies

Believers pay for music at 51.3% against a 32.6% average, the highest of any archetype, and Ambitious respondents at 23.0%, the lowest. The group that approves also pays.



Active paid music subscribers by archetype. Base: 2,276 music study respondents.

WHY MINDLINK

A niche worth 5% of the market becomes actionable once it can be seen twice

Believers are around **5 to 7% of both samples**. A conventional 300-respondent study would surface fifteen of them, too thin to act on. Profiling 3,121 consumers in OTT and 2,276 in music puts sixty and 154 in that cell, and because the archetypes are fixed, a finding in one category can be tested against the other.

SAMPLE

3,121 respondents in two modules: n=1,713 (January 2026) and n=1,408 (February 2026). Twenty states, metro and non-metro.

INSTRUMENT

MindLink assigns every respondent one of eight fixed psychographic archetypes, then joins category questions to that profile, so results compare across studies.

ANALYSIS

Cross-tabulated by archetype, age band, gender and metro status. Differences hold at $p<0.001$ unless stated. Viewer-only questions exclude the 28% who report not watching OTT.

COMPANION STUDY

Music subscriptions, India, n=2,276, fielded May 2026 for Ernst & Young on the same psychographic baseline, which makes the archetype cut comparable across both studies.