

Shape the future

Indian media and entertainment is
scripting a new story

April 2025



The better the question. The
better the answer. The better
the world works.



report by:

THAI TRADE CENTER, CHENNAI, INDIA



Kamal Haasan

Chairman, FICCI Media and
Entertainment, South

Aim for a bold future.

In the Media and Entertainment sector, two forces reign supreme: Content and the Audience. As we move into a digital first era, it's our responsibility to serve them both with bold, creative storytelling that reflects the rich diversity of our nation. By harnessing this power, we can ensure the industry thrives and stays relevant in an ever evolving landscape.

I envision an Indian Media and Entertainment sector that unites our 1.4 billion viewers, breaking down the linguistic and geographic divides that have long segmented our industry. A screen and language agnostic audience will allow us to produce bigger, bolder content with grander budgets, reflecting the vast potential of our cultural narratives.

The creator economy we are nurturing has the power to shape society and influence the world. To realize this potential, government support is essential

whether it's through regulatory reforms, ease of business, access to credit, or training for emerging creators, technicians, and performers. Creative storytelling with emotional depth, and powerful performances will be in greater demand than ever.

India's technological strengths animation, VFX are positioning us to become a global hub for content production. By investing in intellectual property and nurturing talent, we can lead the way in global content creation.

Collaboration across regions, languages and cultures will be key to building an inclusive and representative industry. Initiatives like this report from FICCI and EY help bridge information gaps and set the foundation for progress.

As we celebrate the 25th year edition of this report, I urge all stakeholders to aim for a bold future, taking India's M&E sector from a \$28 billion to a \$100 billion industry, with content that not only resonates with a billion Indians but captivates audiences across the globe.

FORE



Kevin Vaz

Chairman, FICCI Media and
Entertainment Committee

2024 was a pivotal year for media and entertainment in India.

The industry made global impact with wins and nominations at Cannes and the Oscars and was once again recognised as a production hub, boasting of VFX masterpieces like the Oscar-nominated *Emilia Pérez* and *Mufasa: The Lion King*. The year saw a resurgence of cinema, greater adoption of regional content, and use of technology to enhance production and distribution.

India is a market where traditional and new mediums co-exist as seamlessly; where TV remains a force to contend with, even as the growth path for digital is without parallel. The number of TV screens is projected to increase from 190 million in 2024 to 214 million in 2026. In 2024, nine in ten people continued to watch live TV, with 40% people watching more than six hours, indicating our combinatorial preference. We want the best of all worlds!

The 2024 Indian Premier League reached 525 million viewers on TV, and touched 550-600 million viewers on streaming. Aside from breaking viewership records, 2024 also revolutionised sports consumption, making it more immersive. Fans can now access high-quality coverage on the go, in multiple languages, with real-time statistics, live chat options, multiple feeds from various camera angles. Constant innovation also helped create new revenue streams, via digital ad insertion like live commerce - integrating real-time shopping into live events such as sports matches and streaming of concerts like Coldplay's performance in Ahmedabad.

Rapid consumer-tech adoption has allowed streaming to blossom alongside TV. Streamers have taken bold business model risks and offer hybrid and competitive service formats, democratising consumption. This has deepened investments in niche content, granted independent filmmakers and performers an avenue to showcase their talent and fostered the adoption of emerging tech like AI.

India is poised to become the third-largest M&E market globally by 2028, on the back of this frenetic activity. Effective implementation of self-regulation in both the TV and streaming markets has simultaneously enabled us to pause when needed and demonstrate accountability to our society and culture. We hope to continue this balanced momentum into the new financial year.

WORD



Jyoti Vij
Director General
FICCI

The Indian M&E sector is undergoing a profound transformation.

Driven by digital acceleration, evolving consumer preferences, and cutting-edge technologies. The rapid shift from linear to digital entertainment is reshaping content creation, distribution, and consumption, unlocking new opportunities for growth and global influence. As we enter 2025, India's M&E sector is poised to expand its footprint as a content powerhouse, fuelled by innovation, strategic investments and a resilient creative ecosystem.

A key milestone in 2024 was digital media surpassing television as the largest M&E segment, contributing 32% of total revenues. With deeper internet penetration, the rise of Free Ad-Supported Television (FAST) channels, and a thriving creator-led economy, India is on course to become a global content hub. Strategic investments and private equity funding will further accelerate this transformation.

The gaming industry is also gaining momentum, with Indian publishers and developers expanding globally. Artificial intelligence is revolutionizing the M&E value chain optimizing costs, enhancing content creation and attracting major investments. Meanwhile the resurgence of out-of-home entertainment is driving consolidation as companies integrate services to capture market share.

India is also emerging as a preferred media outsourcing hub much like its dominance in IT services. Cloud-driven applications and digital advertising shifts are prompting traditional players to reinvent business models leading to increased mergers and strategic partnerships.

As India's leading industry association, FICCI has played a pivotal role in bringing together key stakeholders at a single platform called FICCI FRAMES from policymakers and media conglomerates to emerging creators and technology innovators. Our M&E Division continues to serve as a catalyst for policy advocacy, industry collaboration and thought leadership fostering an environment that enables sustainable growth, global expansion and regulatory clarity for all players in the ecosystem. Over the years, FICCI has been instrumental in shaping discussions on content regulation, digital taxation, intellectual property rights, and talent development ensuring that the Indian M&E sector remains future-ready and globally competitive.

As we enter the 25th glorious year of FICCI FRAMES, this report provides a comprehensive analysis of the trends, challenges, and opportunities shaping the M&E landscape. We hope it will continue to serve as a valuable resource for industry leaders and policymakers, equipping them to navigate and lead in this dynamic era.

FORE



Ashish Pherwani
M&E Sector Leader
EY India

Finally, the digital inflection point. And it changes everything.

Digital media became the largest segment of the M&E sector in 2024, breaking TV's 25-year hold on the pole position.

Digital media has not only changed how content is created, distributed and monetized, it has also redefined the fundamentals of the M&E sector. From being a provider of knowledge and escapism, M&E now provides consumers with value across four tenets:

- **Information** to live life better, through news and communities
- **Escapism** to forget troubles by getting immersed in fiction and reality content
- **Materialism** to enable commerce through funded content and e-commerce
- **Self-actualization** via social media, professional portals and the creator economy

Every media and content company is now evaluated by consumers against the utility it provides across the above tenets, which in turn is driving how traditional and new media companies are redefining their product, processes, customer acquisition and purpose.

As digital media keeps growing relentlessly, we can expect to see an ocean of innovation, consolidation, new business models and partnerships. Interactivity and gamification have proliferated all segments of the M&E sector. Every M&E segment is now conducting events. The Star India and Viacom18 merger is defining the path to scale and reinventing sports broadcasting, while digital integrations across music, radio, news and OOH are helping grow traditional segments. WhatsApp is reshaping communication.

All of this makes the future extremely exciting!

This report aims to provide our point of view on the shape of the future. We have included over 50 future trends for media businesses to consider as they take advantage of the opportunities that will surely emerge.

We hope you enjoy reading this report as much as we enjoyed putting it together for you. We are certain you would find this report to be insightful.

WORD

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1

EXECUTIVE SUMMARY

1.1 Summary

The Indian film industry, valued at approximately INR 279 billion (~\$3.35 billion) in 2024, is projected to reach INR 425 billion (~\$5.1 billion) by 2030, growing at a CAGR of 7.3%. This vibrant market presents significant opportunities for Thai content creators seeking international expansion, driven by:

1.Digital Transformation: India's OTT(OTT platforms in India are internet-based services that offer on-demand access to films, TV shows, web series, documentaries, music, and live sports, often through subscriptions (SVOD), advertising (AVOD), or pay-per-view models, More about tuis in subsequent Chapter) market is experiencing explosive growth with 450+ million users in 2025, creating new distribution avenues for international content.

2.Regional Diversification: Beyond Hindi-language Bollywood, robust regional film industries in Tamil, Telugu, Malayalam, and other languages offer multiple entry points for Thai content.

3.Cross-Cultural Appeal: Significant cultural similarities between Thai and Indian storytelling traditions, including mythology, family values, and aesthetic sensibilities, provide natural synergies.

4.Evolving Consumer Base: India's young demographic (median age 28.4 years) is increasingly open to international content, with 72% of urban youth consuming non-Indian films and series regularly.

5.Policy Liberalization: Recent reforms in India's filming, distribution, and co-production frameworks have reduced barriers for international collaborations.

For Thai content creators, the Indian market offers multiple strategic approaches including:

- Direct theatrical distribution in specific regional markets
- OTT platform partnerships focusing on digital-first releases
- Co-production ventures leveraging India's production infrastructure and talent
- Rights licensing for remakes and adaptations
- Format sales for successful Thai television and web series concepts

However, success requires navigating challenges including complex regulatory frameworks, strong domestic competition, linguistic diversity, and content sensitivity considerations.

1.2 Purpose & Scope of the Report

This comprehensive market analysis aims to equip Thai content creators, production houses, studios, and media companies with actionable intelligence to successfully enter and navigate the Indian entertainment landscape. The report examines:

- Current market dynamics and five-year projections (2025-2030)
- Consumption patterns across theatrical, television, and digital platforms
- Comparative analysis of genre preferences and cultural reception factors
- Detailed evaluation of distribution channels and partnership opportunities
- Regulatory considerations and compliance frameworks
- Case studies of successful international content strategies in India
- Practical recommendations for market entry and growth

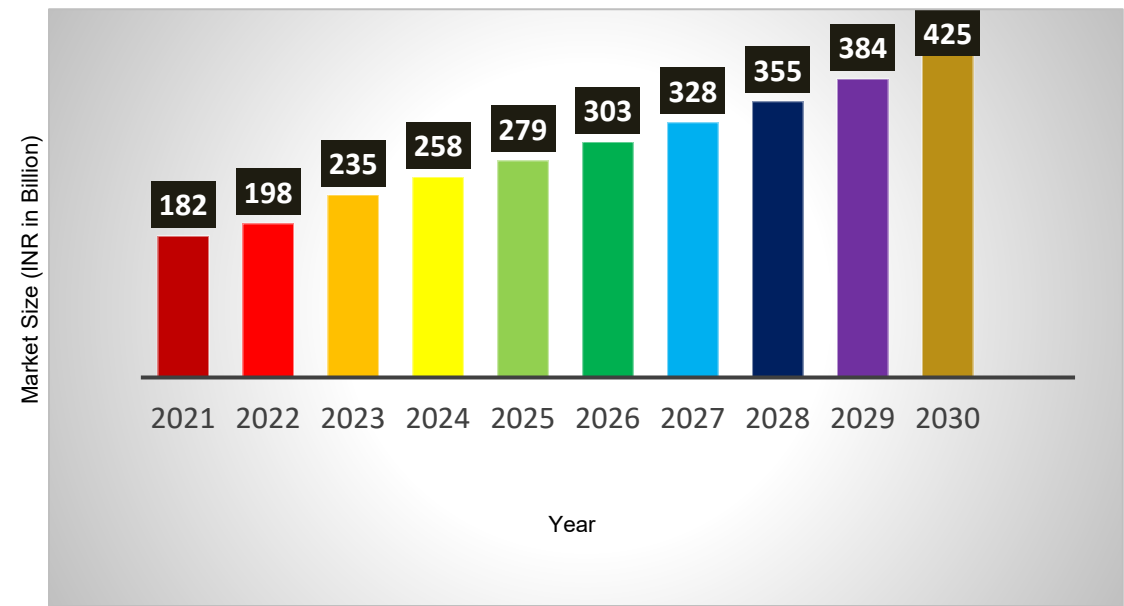
The analysis draws on primary research with industry stakeholders, government data sources, market intelligence reports, and consumer behavior studies to provide Thai creators with a roadmap for successful engagement with the Indian audience.

2. OVERVIEW OF THE INDIAN FILM INDUSTRY (2020-2030)



2.1 Market Size & Growth Projections

The Indian film industry, the world's largest by output volume with approximately 2,000 feature films produced annually, continues to demonstrate robust growth despite global economic uncertainties. In 2024, the industry generated revenue of INR 258 billion (~\$3.35 billion), recovering strongly from pandemic-era disruptions.



Source: FICCI-EY Media & Entertainment Report 2024, PwC Global Entertainment & Media Outlook 2025-2029

Figure 2.1 Indian Film Industry Market Size and Projections (2021-2030)

The industry is projected to reach INR 425 billion (~\$5.1 billion) by 2030, representing a compound annual growth rate (CAGR) of 7.3%. This growth is driven by several factors:

- Rising Disposable Income:** India's middle class is expected to comprise 547 million people by 2025, with increasing discretionary spending on entertainment.
- Screen Expansion:** Despite already having 9,500+ screens nationwide, India remains significantly under-screened compared to other major markets, with ongoing multiplex expansion in Tier 2 and Tier 3 cities.
- Digital Consumption:** Increasing smartphone penetration (projected 1 billion+ users by 2025) and affordable data (average cost of \$0.17 per GB in 2024) are expanding digital viewership.
- Premium Experiences:** Growth in premium theatrical formats (IMAX, 4DX, Dolby Atmos) is driving higher average ticket prices and per-capita spending.

3. **International Market Expansion:** Growing global interest in Indian content, particularly in

Growth Driver	Impact Rating	Primary Beneficiary
Digital Transformation	High	OTT Platforms, Small/Mid-budget Films
Multiplex Expansion	Medium	Mainstream Commercial Films
Premium Experiences	Medium-High	High-budget Spectacle Films
Rural Penetration	Medium	Regional Language Films
International Markets	Medium-Low	Regional Language Films

Source: Analysis based on FICCI-EY Report 2024, Deloitte India Entertainment Outlook

Fig 2.2: Growth Drivers Impact Analysis (2025-2030)

2.2 **Bollywood, Regional, and International Film Segments**

India's film ecosystem comprises multiple distinct industries differentiated by language, production scale, and cultural orientation. While Hindi language "Bollywood" has traditionally dominated global perception of Indian cinema, regional industries have gained significant market share and international recognition. Kollywood, Tollywood, Sandal wood , Mollywood will be collectively called as South Indian Movies.

Language	Films Produced	% of National Box Office
Hindi (Bollywood)	354	43%
Tamil (Kollywood)	304	13%
Telugu (Tollywood)	278	16%
Malayalam (Mollywood)	185	8%
Kannada (Sandalwood)	154	6%
Bengali	132	4%
Marathi	98	3%
Others	495	7%

Source: Central Board of Film Certification Annual Report 2024, Film Federation of India

Fig 2.3: Film Production by Language (2024)

The Hindi Film Industry (Bollywood)

Centered primarily in Mumbai, Bollywood remains India's largest film industry segment with annual revenue of approximately INR 120 billion (~\$1.44 billion) in 2024. Key characteristics include:

- High production values, with top-tier films budgeted at INR 100-400 crore (\$12-48 million)
- Star-driven system with established actors commanding significant box office draw
- Nationwide distribution networks and marketing capabilities
- Increasing focus on international markets with strategic release planning
- Genre diversification beyond traditional song-and-dance formats
- Growing polarization between blockbuster event films and mid-budget content moving to OTT platforms

South Indian Film Industries

The four major South Indian film industries—Tamil (Kollywood), Telugu (Tollywood), Malayalam (Mollywood), and Kannada (Sandalwood)—collectively accounted for 43% of national box office in 2024, up from 36% in 2019.

- The Telugu film industry has emerged as a powerhouse for action spectacles with pan-Indian appeal
- Malayalam cinema is recognized for content-driven, critically acclaimed films with growing OTT audiences
- Tamil cinema blends commercial entertainment with artistic innovation
- Kannada industry has seen breakthrough pan-Indian successes in recent years
- This notable growth underscores the rising prominence and influence of southern cinema in the Indian entertainment landscape.

Other Regional Industries

Several other language industries serve specific linguistic regions:

- Bengali cinema: Artistic tradition with commercial resurgence
- Marathi cinema: Growing commercial viability with strong content focus
- Punjabi cinema: Robust diaspora appeal and rural audience base
- Gujarati, Bhojpuri, Assamese, and other regional industries: Serving specific linguistic markets

International Films in India

Hollywood and other international films account for approximately 15% of the Indian theatrical market as of 2024, primarily in metropolitan areas and predominantly in the English language with some dubbed versions. This segment has grown at 11.2% CAGR since 2019, outpacing the overall market.

Content Origin	Box Office Share	YoY Growth
Bollywood	43%	5.4%
South Indian	38%	8.7%
Other Regional	4%	3.2%
Hollywood	12%	11.3%
Other Int'l	3%	9.8%

Source: Ormax Media Box Office Report 2024, EY Analysis
Fig 2.4: Indian Box Office Market Share by Origin (2024)

Movie	Genre	Box Office (₹ Crore)
2020		
Tanhaji: The Unsung Warrior	Historical Action	279.50
Baaghi 3	Action Thriller	97.00
Shubh Mangal Zyada Saavdhan	Comedy Drama	60.78
Street Dancer 3D	Dance Drama	56.77
Malang	Romantic Action Thriller	59.04
2021		
Sooryavanshi	Action	195.04
83	Sports Drama	108.41
Bell Bottom	Spy Thriller	33.58
Roohi	Horror Comedy	28.09
Mumbai Saga	Action Crime	17.81

Fig2.5(a): Top Five Bollywood Box Office Hits (2020-2024)

Movie	Genre	Box Office (₹ Crore)
2022		
Brahmastra Part One: Shiva	Fantasy Adventure	431.00
The Kashmir Files	Drama	340.92
Drishyam 2	Crime Thriller	240.37
Bhool Bhulaiyaa 2	Horror Comedy	182.58
Gangubai Kathiawadi	Biographical Crime Drama	153.69
2023		
Jawan	Action Thriller	640.42
Animal	Crime Drama	554.32
Pathaan	Action Thriller	543.05
Gadar 2	Action Drama	525.50
Tiger 3	Action Thriller	280.50
2024		
Fighter	Action	337.90
Stree 2	Horror Comedy	390.70
Shaitaan	Supernatural Thriller	148.75
Kalki 2898 AD (Hindi)	Sci-Fi Action	261.20
Crew	Comedy Drama	115.00

Fig2.5(b): Top Five Bollywood Box Office Hits (2020-2024)

Movie	Language	Genre	Box Office (₹ Crore)
2020			
Ala Vaikunthapurramulo	Telugu	Action Drama	262.00
Sarileru Neekevvaru	Telugu	Action Comedy	260.00
Darbar	Tamil	Action Thriller	220.00
Bheeshma	Telugu	Romantic Comedy	40.00
Ayyappanum Koshiyum	Malayalam	Action Drama	38.00

Movie	Language	Genre	Box Office (₹ Crore)
2021			
Master	Tamil	Action Thriller	230.00
Vakeel Saab	Telugu	Legal Drama	137.00
Krack	Telugu	Action	70.00
Jathi Ratnalu	Telugu	Comedy	70.00
Doctor	Tamil	Action Comedy	100.00
2022			
KGF: Chapter 2	Kannada	Action Period Drama	1250.00
RRR	Telugu	Historical Action	1200.00
Kantara	Kannada	Supernatural Thriller	400.00
Vikram	Tamil	Action Thriller	442.00
Ponniyin Selvan: I	Tamil	Historical Drama	500.00
2023			
Leo	Tamil	Action Thriller	607.00
Jailer	Tamil	Action	605.00
Salaar: Part 1 - Ceasefire	Telugu	Action	560.00
Ponniyin Selvan: II	Tamil	Historical Drama	345.00
2018	Malayalam	Disaster Drama	175.00
2024			
Kalki 2898 AD	Telugu	Sci-Fi Action	1030.00
Manjummel Boys	Malayalam	Survival Thriller	240.00
Premalu	Malayalam	Romantic Comedy	150.00
Hanu-Man	Telugu	Superhero	290.00
Aranmanai 4	Tamil	Horror Comedy	135.00

Fig2.5(c): Top Five South Indian Box Office Hits (2020-2024)

2.3 Key Revenue Streams: Box Office, OTT, Ancillary Markets

The monetization landscape for films in India has undergone significant transformation, with digital platforms creating new revenue opportunities while traditional theatrical windows have compressed.

Revenue Stream	2019 Share	2019 Market cap in crore	2024 Share	2024 market cap in crore	Growth Rate
Theatrical (Domestic)	62%	₹ 9300	48%	₹ 12000	2.1%
Theatrical (International)	7%	₹ 1050	8%	₹ 2000	7.2%
Digital Rights (OTT/SVOD)	13%	₹ 1950	27%	₹ 6750	22.5%
Television Rights	12%	₹ 1800	9%	₹ 2250	-1.3%
Music Rights	3%	₹ 450	4%	₹ 1000	11.3%
Ancillary (Merchandising)	2%	₹ 300	3%	₹ 750	13.7%
In-film Advertising	1%	₹ 150	1%	₹ 250	4.2%

Source: FICCI-EY Media & Entertainment Report 2024, PwC Entertainment Outlook
Fig 2.6: Revenue Stream Contribution to Indian Film Industry (2019 vs. 2024)

Theatrical Market

Despite relative decline in percentage contribution, theatrical exhibition remains the primary revenue driver and brand-building platform for major films:

- Box office collections reached INR 134 billion (~\$1.61 billion) in 2024
- Average ticket price increased to INR 213 (~\$2.56) nationwide, with premium formats commanding 2-3x higher prices
- Theatrical windows have compressed from traditional 8 weeks to 4-6 weeks for most releases
- Major films generate 30-40% of lifetime collections in opening weekend
- Week-on-week decay rate typically exceeds 50% except for exceptional word-of-mouth performers

OTT/Digital Rights

Digital platforms have emerged as crucial revenue streams, especially for mid-budget and content-driven films:

- OTT acquisition values for range from INR 50-150 crore (\$6-18 million)
- Direct-to-digital releases accounted for 38% of all Indian major films feature films in 2024
- Hybrid release models (short theatrical windows followed by OTT) are increasingly common
- Leading platforms include Netflix, Amazon Prime Video, Disney+ Hotstar, ZEE5, and SonyLIV. Cumulative They comprise about 48 – 56 percentage of total OTT market in India
- Platform exclusivity premiums have declined as competition has intensified

Television Rights

Digital performance frequently diverges from theatrical results:

- Films with modest theatrical runs often achieve substantial digital viewership
- Genre films (horror, action) outperform on digital relative to theatrical
- Critical acclaim translates more directly to digital performance than box office
- International films with strong social media buzz achieve 2.3x higher digital conversion
- Dubbed versions significantly outperform subtitled versions in digital consumption

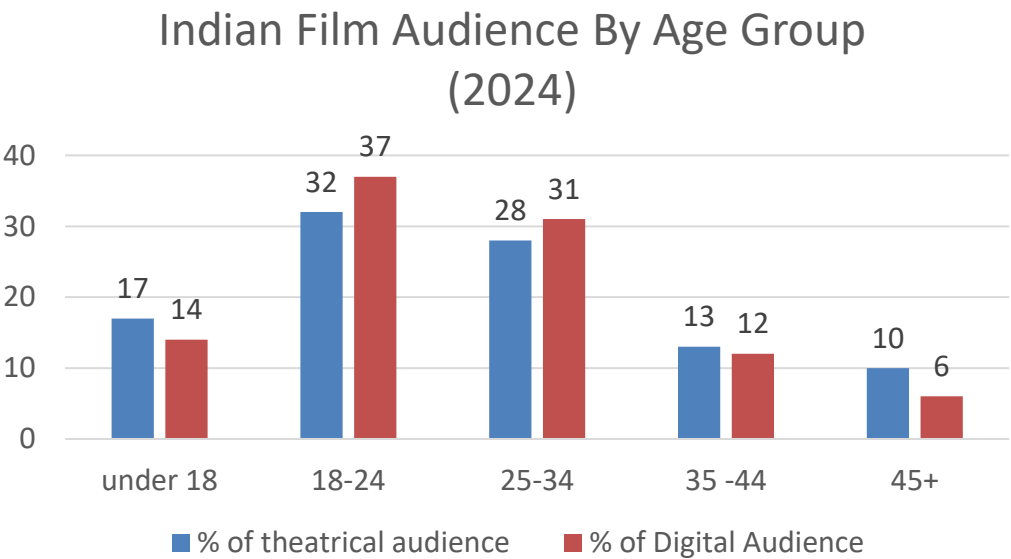
Music Rights

The digital music ecosystem has revitalized soundtrack revenues:

- Streaming platforms account for 87% of music consumption
- Major film soundtracks generate INR 10-30 crore (\$1.2-3.6 million) in rights fees
- Music release typically precedes film by 1-3 months to build marketing momentum
- Integration with short-form video platforms (e.g., Instagram Reels, YouTube Shorts) has created new promotional avenues

2.4 Audience Demographics & Consumption Trends

India's film audience is undergoing significant demographic and behavioral shifts, creating both challenges and opportunities for content creators.



Source: Ormax Media Audience Report 2024, BARC India

Figure 2.7: Indian Film Audience by Age Group (2024)

Urban-Rural Divide

Significant disparities exist between urban and rural consumption patterns:

- Urban centers contribute approximately 70% of theatrical revenue despite representing only 35% of the population
- Average film consumption frequency: 6.3 theatrical films annually in metros vs. 2.1 in rural areas
- Rural audiences show stronger preference for action, comedy, and mythology genres
- Single-screen theaters (predominantly in smaller towns and rural areas) account for 65% of screen count but only 40% of box office
- Digital consumption growing faster in rural areas (38% YoY) than urban markets (17% YoY) due to improving connectivity

Language Preferences

Language dynamics significantly impact content performance:

- 72% of Indian audiences prefer content in their native language
- Hindi language films have nationwide appeal but face increasing regional competition
- South Indian films in original language or dubbed versions are gaining pan-Indian acceptance
- English language content primarily limited to urban, educated demographic (approximately 12% of population)
- Dubbing quality increasingly important for cross-language success
- Subtitling adoption growing on digital platforms but minimal for theatrical releases

Region	Primary language	Secondary Language	English Acceptance
North India	Hindi	Punjabi/Regional	15% (urban)
South India	Rgional	English	24% (urban)
West India	Hindi/Marathi	Gujarathi	17% (urban)
East India	Bengali /Regional	Hindi	12% (urban)
Metro cities	Native/Hindi	English	32%

Source: KPMG Media Consumption Survey 2024, EY Analysis

Figure 2.8 Content Language Preferences Across Major Indian Markets (2024)

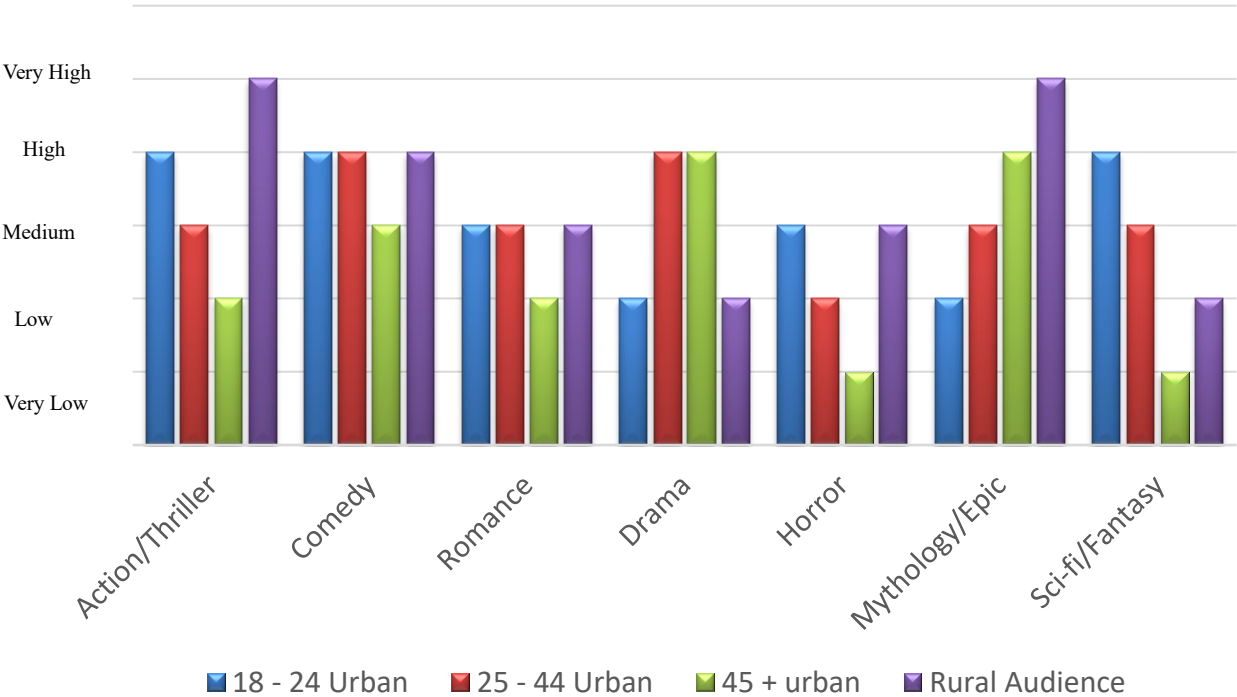
Viewing Behaviours

Genre Preference:

Genre preferences show significant demographic variations:

Several macroeconomic and structural factors are reshaping India's film landscape:

Genre preferences show significant demographic variations



Source: Omax Media Genre Track 2024, PVR Inox Annual Report

Fig 2.9: Genre Preferences by Demographic Segment (2024)

2.5 Key Drivers: Urbanization, Digital Adoption, Policy Reforms

Urbanization Impact

India's rapid urbanization is significantly influencing entertainment consumption patterns nationwide. Urban population is projected to reach 40% by 2030, up from 35% in 2021, with Tier 2 and Tier 3 cities experiencing the fastest multiplex growth at 17% year-over-year. Urban centers demonstrate 2.8 times higher per-capita entertainment spending compared to rural areas, reflecting greater disposable income and accessibility to entertainment options. The "urban rural" phenomenon is also emerging, where rural consumers increasingly display urban content aspirations despite geographical location. This trend coincides with increasing disposable income in urban areas, which has grown at a CAGR of 8.2% from 2021-2024, further fueling entertainment spending.

Policy and Regulatory Developments

Several policy initiatives have impacted the film ecosystem:

1. Amended Cinematograph Act (2023):

- Streamlined certification process
- Strengthened anti-piracy provisions
- Introduced age-based certification replacing broad categories

2. National Film Development Corporation (NFDC) Restructuring:

- Consolidated film institutes and government bodies
- Enhanced co-production support and funding mechanisms
- Established single-window clearance for international productions

3. Production Incentives:

- 30% cash rebate for international productions filming in India (introduced 2022)
- Additional 5% bonus for projects employing 15%+ local crew
- State-level incentives in Maharashtra, Gujarat, Uttar Pradesh and others

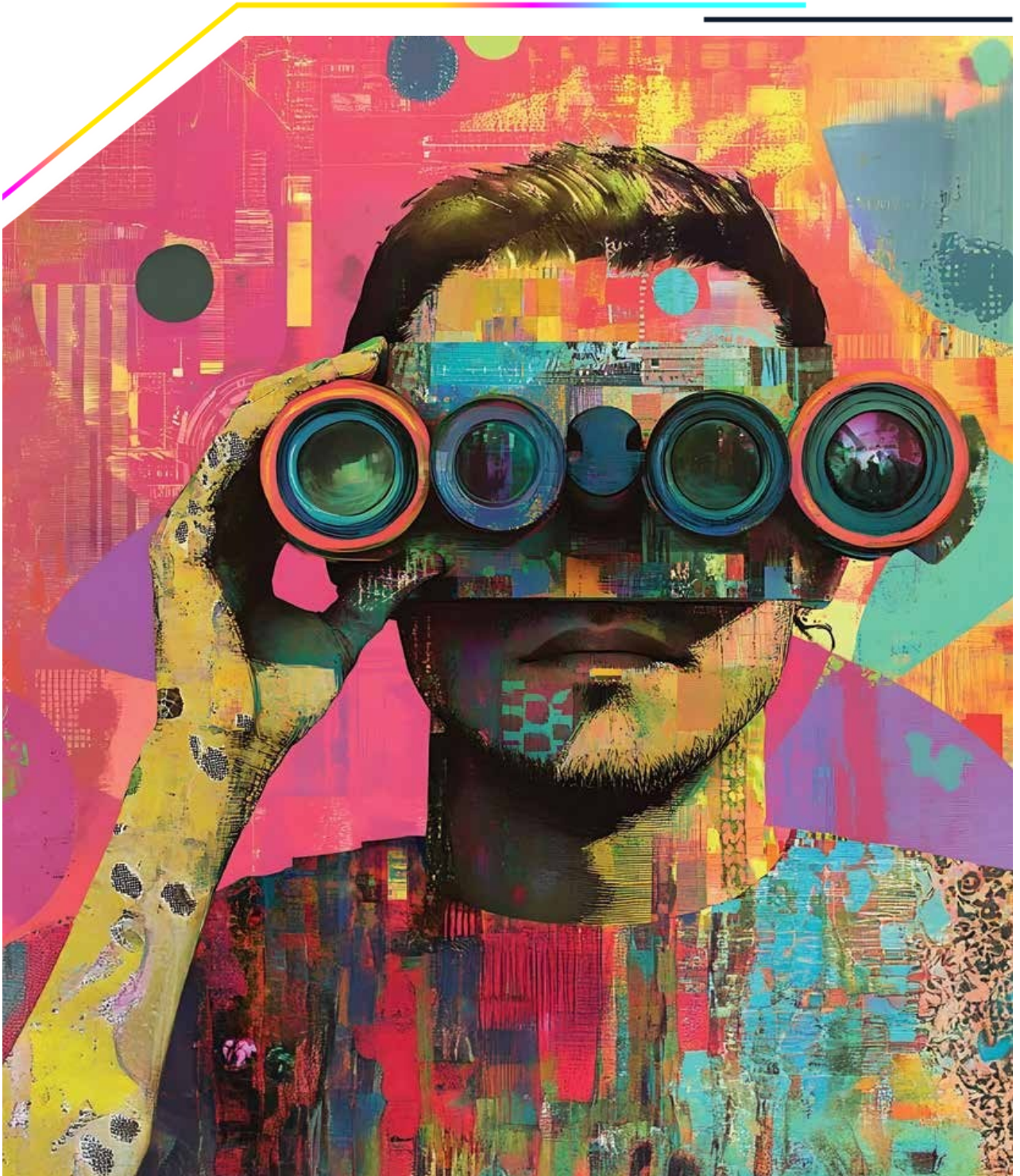
4. GST Rationalization:

- Tiered GST rates based on ticket prices (12% for tickets under ₹100, 18% for higher)
- Simplified compliance framework for independent productions
- Input tax credit mechanisms for production services

5. Digital Content Regulation:

- IT Rules 2021 (amended 2023) establishing self-regulation framework for OTT
- Age verification mechanisms becoming mandatory
- Content descriptors and classification requirements

3. MARKET POTENTIAL FOR THAI FILMS IN INDIA



3.1 Demand for International Films & Cultural Exchange

India has demonstrated growing receptivity to international content, particularly in urban markets and digital platforms. This evolution has created unprecedented opportunities for non-Hollywood international films, including Thai productions.

Content Origin	2019	2021	2023	2024	CAGR
Hollywood	9.6%	8.2%	11.1%	12%	4.6%
East Asian	0.8%	1.7%	2.5%	2.4%	24.6%
European	0.4%	0.5%	0.5%	0.6%	8.4%
Others	0.2%	0.1%	0.2%	0.3%	8.4%

Source: Ormax Media Box Office Report, EY Analysis

Fig 3.1: Market Share of International Content in India (2019-2024)

Theatrical Market for International Films

- Primarily dominated by Hollywood tentpoles, particularly superhero, action, and animation titles
- Non-Hollywood international films limited to film festival circuits and niche theatrical releases
- Average theatrical screen count for non-Hollywood international films: 85-120 screens
- Performance concentrated in metropolitan multiplexes (Mumbai, Delhi, Bangalore, Chennai, Hyderabad)
- Language remains significant barrier, with most foreign films screened with subtitles only

Digital Platform Demand

- International content consumption on OTT platforms significantly outpaces theatrical viewing
- Algorithm-driven recommendations increasingly exposing Indian viewers to diverse international content

- Korean, Japanese, Spanish, and Turkish content leading non-English international viewing

Cultural Exchange Initiatives

- Film festivals featuring international cinema increased from 32 (2019) to 54 (2024)
- Government-sponsored cultural exchange programs with ASEAN nations expanded
- Film tourism driving increased awareness of Southeast Asian locations
- Indian Film and Television Institute collaborations with international counterparts
- Growing presence of Indian film professionals in international productions creating cross-cultural awareness

3.2 Popularity of Thai Genres: Action, Horror, Romance

Specific Thai content genres have demonstrated particular resonance with Indian audiences, based on digital platform performance and theatrical test cases.

Genre	OTT Completion Rate	Audience Rating	Growth Potential
Action/Martial Arts	73%	★★★★ 4.2/5	Very High
Horror/Supernatural	68%	★★★★ 3.9/5	High
Romantic Comedy	61%	★★★★ 3.7/5	Medium
Drama	42%	★★★ 3.3/5	Low
Thriller	58%	★★★★ 3.8/5	Medium-High

Source: Aggregate data from major OTT platforms, Ormax Media Consumer Research

Figure 3.2: Performance of Thai Content Genres in Indian Market (2023-2024)

Thai Action Films

Thai martial arts and action films have demonstrated strongest performance in the Indian market:

- Muay Thai-focused action films generating highest completion rates on digital platforms
- Titles featuring Tony Jaa and other recognizable Thai action stars performing 25-40% better than average foreign titles
- Urban male audience (18-34) demonstrates strongest affinity
- Theatrical test screenings of Thai action films achieved 62% average occupancy in metropolitan multiplexes
- Technical aspects (fight choreography, stunt work) frequently praised in audience feedback
- Low dialogue dependence reduces language barrier impact

Thai Horror

Horror and supernatural content from Thailand has cultivated a growing niche audience:

- Thai horror films outperform global average completion rates on major OTT platforms
- Distinctive Thai supernatural elements and visual aesthetics differentiate from domestic horror
- Resonance with Indian supernatural beliefs and mythology creates cultural connection points
- Younger audiences (18-28) comprise primary viewership demographic
- Late-night theatrical screenings in urban multiplexes showing commercial viability
- Limited marketing support has constrained broader awareness

Thai Romantic Content

Romance-focused Thai content has demonstrated mixed results:

- Thai romantic comedies performed stronger than dramas on digital platforms
- BL (Boys' Love) content from Thailand found niche but passionate audience base

- Cultural differences in relationship portrayal create both interest and occasional disconnection
- Younger female audience (16-30) comprises primary viewership
- University towns and educational hubs show stronger performance
- Limited theatrical potential but significant digital opportunity

Emerging Genre Opportunities

- Thai historical/period dramas with visual spectacle showing crossover potential
- Thailand-set crime thrillers gaining traction with thriller-focused Indian audiences
 - Family-oriented content with universal themes demonstrating cross-cultural appeal
- Thailand-set youth-focused content resonating with urban Generation Z viewers

3. Thai-Indian Cinematic & cultural Overlap

Several significant cultural and thematic parallels between Thai and Indian traditions create natural synergies and resonance points:

Spiritual and Mythological Foundations

Both cultures feature rich spiritual traditions with overlapping elements:

- Buddhist influence creates philosophical alignment (particularly resonant in Eastern India)
- Shared Hindu mythological references and iconography
- Similar approaches to portraying supernatural elements and beliefs
- Comparable visual aesthetics in depicting divine entities
- Ritualistic practices with visual similarities

Family Values and Relationship Dynamics

Conservative social structures create narrative parallels:

- Emphasis on family hierarchy and intergenerational relationships
- Similar approaches to portraying filial responsibility and obligation
- Comparable marriage and relationship expectations
- Resonant conflicts between tradition and modernity
- Similar approaches to portraying emotional expressiveness

Visual and Aesthetic Traditions

Shared artistic sensibilities enhance cross-cultural appreciation:

- Rich color palettes and visual symbolism
- Elaborate costume and production design aesthetics
- Appreciation for melodrama and emotional expressiveness
- Similar approaches to music integration in storytelling
- Dance as cultural expression and narrative device

 Cultural Element	 Resonance Level	 Primary Indian Regions
 Buddhist Themes	High	Eastern India, Himalayan Regions
 Spiritual/Supernatural	Very High	Pan-India
 Family Centered Narratives	High	Pan-India
 Martial Arts/Combat	High	North, West India
 Visual Aesthetics	Medium-High	Pan-India
 CHumour Styles	Medium-Low	Urban India
 Relationship Portrayals	Medium	Urban Youth

Source: Cultural Resonance Analysis, Audience Surveys in 6 Major Indian Demography

Fig 3.3: Cultural Resonance Factors for Thai Content in India

Eastern India Region –

West Bengal, Bihar, Odisha, Jharkhand, Assam, Sikkim, Arunachal Pradesh, Nagaland, Manipur, Mizoram, Tripura

Himalayan Region states-

Jammu and Kashmir ,Himachal Pradesh, Uttarakhand, Sikkim, Arunachal Pradesh, Nagaland (part of it lies in the foothills),Assam

West India -

Goa, Maharashtra, Gujarat, Rajasthan

North India-

Delhi, Punjab, Haryana, Uttar Pradesh, Rajasthan, Bihar, Madhya Pradesh, Uttar Khand

Collaboration History

While limited, existing Thai-Indian collaborations have established precedent:

- Thailand has been a popular filming location for Indian productions, with 37 major Indian films shot partially or entirely in Thailand (2018-2024)
- Thai tourism campaigns targeting Indian travelers have utilized Bollywood celebrities
- Cross-casting of Thai actors in Indian productions remains minimal but growing
- Limited co-production activity but successful format adaptations
- Growing Indian diaspora in Thailand creating cultural exchange opportunities

3.4 Box office performance of Foreign films in India

Understanding the performance metrics of international films provides context for market entry potential:

Hollywood Benchmarks

Hollywood films have established the primary benchmark for international content performance:

- Top-performing Hollywood films achieve 15-22% of their global box office from Indian market
- Average screen count for major Hollywood releases: 2,100-2,800 screens
- Dubbed versions (Hindi, Tamil, Telugu) account for 60-65% of Hollywood box office
- Superhero, action, and visual spectacle genres consistently outperform
- Family animation increasingly significant, particularly in dubbed versions
- Hollywood film average box office: INR 24-32 crore (\$2.9-3.8 million)

East Asian Film Performance

Films from East Asian markets provide the most relevant comparisons for Thai content:

Film Title (Origin)Factors	Year	Box Office (INR)	Screen Count	Key Success
Parasite (South Korea)	2021	3.2 crore	142	🏆 Oscar win, critical acclaim
Demon Slayer (Japan)	2022	4.1 crore	186	🔥 Anime fanbase, action focus
The Eight Hundred (China)	2022	1.8 crore	95	🧱 Historical epic, visual scale
Suzume (Japan)	2023	3.7 crore	165	🎨 Animation quality, distributor push
Train to Busan (South Korea)	2023	2.9 crore	123	🧟 Horror/action n blend, word of mouth

Source: Box Office India, Distributor Release Data

Fig 3.4: Notable East Asian Film Performances in India (2021-2024)

Performance Patterns of Non-Hollywood International Films

Several patterns emerge in the performance of non-Hollywood international films:

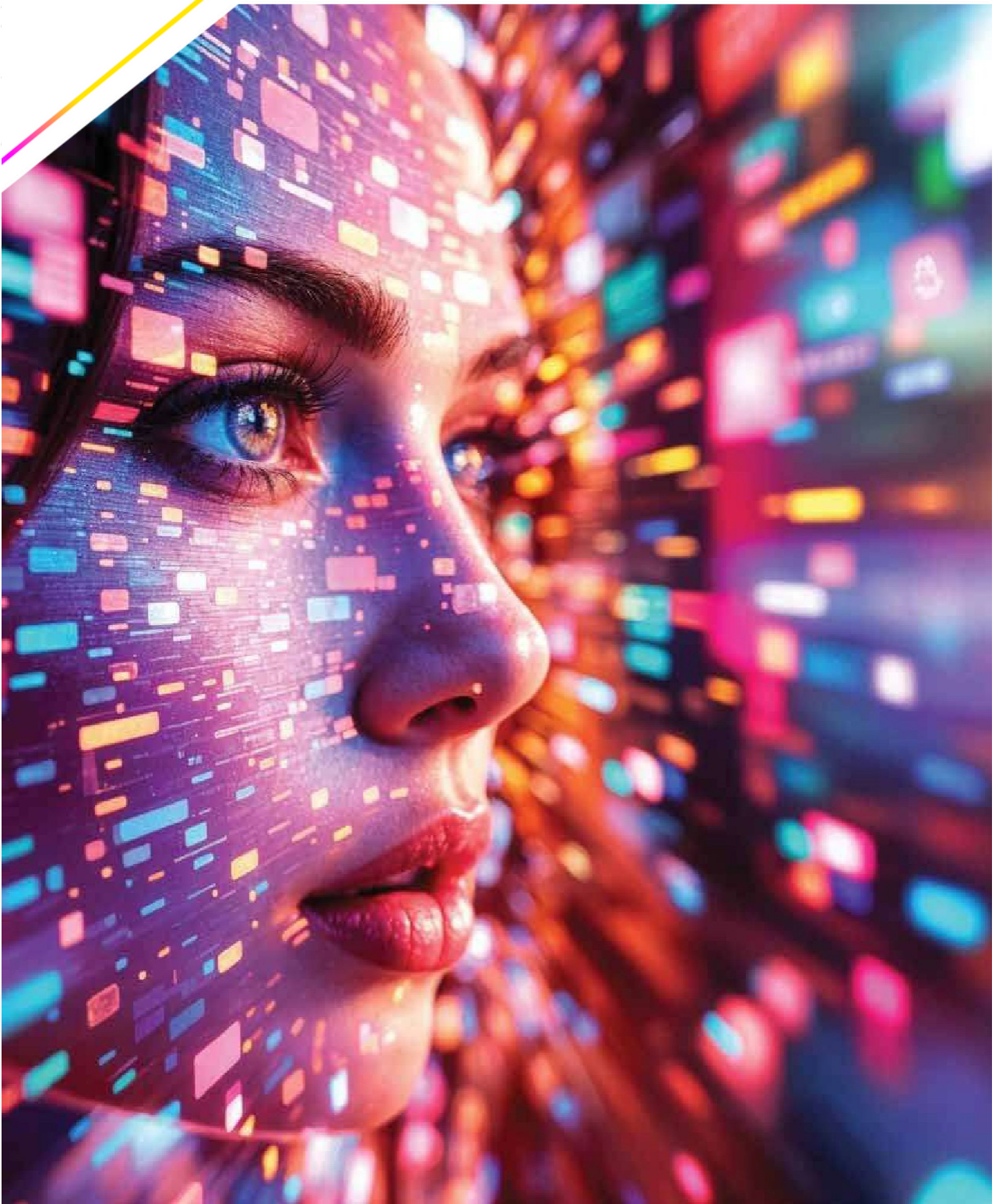
- Average screen count: 85-150 screens nationally
- Metropolitan concentration: 70-80% of box office from top 8 cities which are Mumbai, Delhi NCR (Delhi + Gurgaon + Noida), Bengaluru, Hyderabad, Chennai, Kolkata, Pune, Ahmedabad.
- Limited promotional budgets (typically INR 1-2 crore) restricting awareness
- Critical acclaim and festival recognition driving initial interest
- Word-of-mouth and social media sentiment crucial for sustained performance
- Average run of 2-3 weeks in theaters, shorter than domestic productions
- Premium pricing strategy (10-15% above domestic film ticket prices) common in metropolitan multiplexes

Theatrical vs. Digital Performance Correlation

Digital performance frequently diverges from theatrical results:

- Films with modest theatrical runs often achieve substantial digital viewership
- Genre films (horror, action) outperform on digital relative to theatrical
- Critical acclaim translates more directly to digital performance than box office
- International films with strong social media buzz achieve 2.3x higher digital conversion
- Dubbed versions significantly outperform subtitled versions in digital consumption

4. ENTRY STRATEGIES FOR THAI CONTENT CREATORS

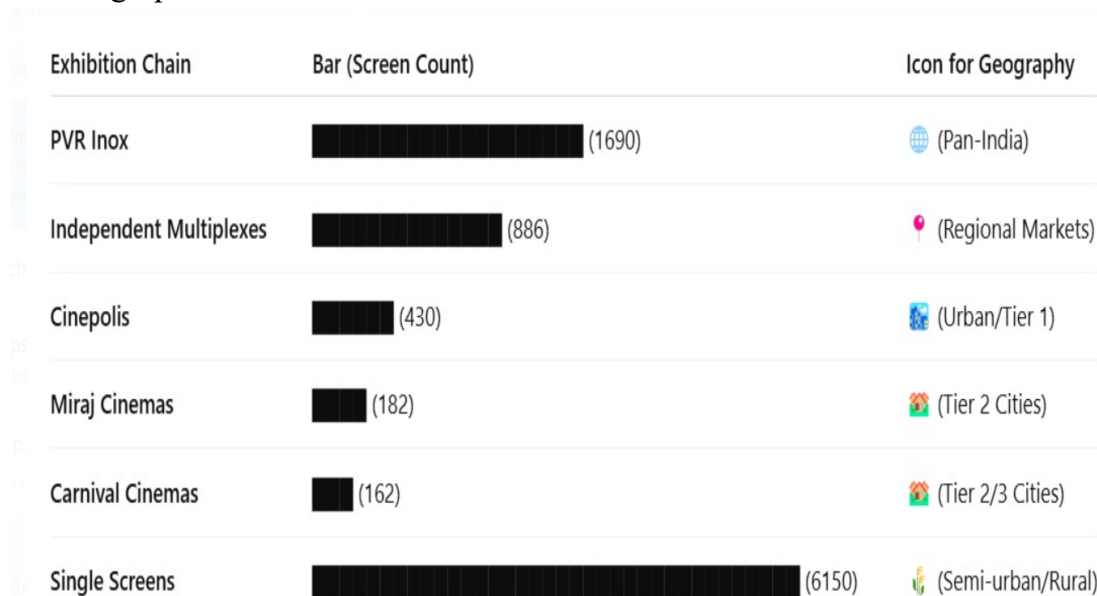


4.1 Distribution Channels: Theatrical, OTT, Satellite & TV

The Indian market presents Thai content creators with multiple distribution avenues, each offering distinct advantages, requirements, and monetization potential. A comprehensive understanding of these channels is essential for developing an effective market entry strategy.

Theatrical Distribution Landscape

India's theatrical exhibition sector comprises approximately 9,500 screens nationwide, with a notable division between multiplexes (3,350) and single-screen theaters (6,150). This bifurcated infrastructure necessitates tailored distribution approaches depending on content positioning and target demographics.



Source: Multiplex Association of India, Film Exhibitors United Organization of India

Fig 4.1: Key Theatrical Exhibition Chains in India (2024)

For Thai content creators seeking theatrical distribution, three primary pathways exist:

1. Direct Distribution Partnership

- Partnering directly with exhibition chains for limited/specialized releases
- Typical revenue share: 50% (Week 1), 42.5% (Week 2), 37.5% (Week 3+)
- Minimum guarantee models uncommon for international films outside Hollywood
- Virtual Print Fee (VPF): INR 20,000-30,000 per screen (~\$240-360)
- Marketing commitments typically required: INR 1-3 crore (\$120,000-360,000) minimum

2.Indian Distribution Partner

- Sub-licensing to established Indian distributors with existing exhibition relationships
- Typical acquisition models:
 - Flat fee acquisition (INR 50 lakh-2 crore for Thai films)
 - Revenue share with minimum guarantee (40-50% to content owner)
 - Pure revenue share (50-60% to content owner)
- Distributor handles local marketing, censorship, and release logistics
- Reduced financial risk but lower potential upside
- Geographic territorial splits common (North, South, East, West India)

3.Festival Circuit to Theatrical Pipeline

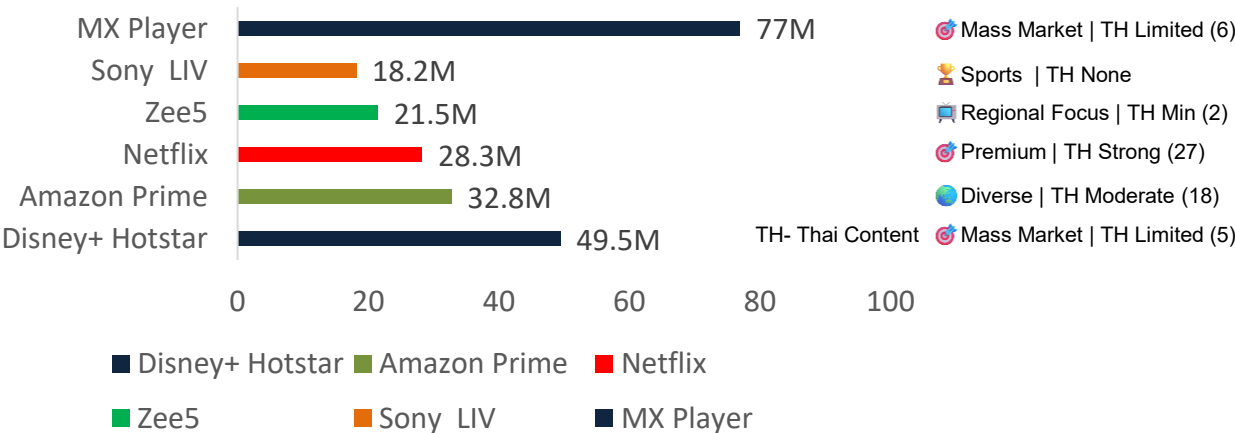
- Leveraging film festival recognition to secure theatrical distribution
- Film Bazaar (Goa), Mumbai Film Festival key industry marketplaces
- Festival accolades significantly enhance commercial potential
- Specialty distribution partners like PVR Pictures, Movietime Cinemas focus on festival titles

Digital Platform Strategies

The OTT segment represents the fastest-growing and potentially most accessible channel for

Thai content in the Indian market. Digital platforms offer significant reach while typically

requiring lower entry barriers than theatrical distribution.



Source: Media Partners Asia OTT Report 2024, Platform Disclosure Data

Figure 4.2: Major OTT Platforms in India (2024)

Strategic approaches to OTT distribution include direct licensing, aggregator partnerships, and digital-first release strategies. Direct licensing to platforms typically involves 2–5-year terms with substantial value differentiation between premium, mid-tier, and catalog content. Exclusive rights command a 30-40% premium over non-exclusive arrangements, with dubbing costs generally covered by the platform.

Aggregator partnerships provide an alternative route, working through established content packagers who facilitate multi-title deals. Though these arrangements yield lower per-title values, they reduce negotiation complexity and provide faster monetization channels. Leading

aggregators include Shemaroo Entertainment, Ultra Media, and Times Bridge, who typically retain 15-25% of licensing fees. Digital-first release strategies bypass theatrical windows entirely, focusing on direct-to-digital premieres. This approach typically generates higher acquisition values (40-60% premium) and stronger marketing support, with viewership data sharing and performance bonuses becoming increasingly standard in premium agreements

Television Broadcast Opportunities

Despite digital disruption, linear television remains a significant mass-market channel in India. Foreign film blocks on mainstream entertainment channels (Star Gold, Sony Max, &TV) providesubstantial reach, though typically with more content restrictions than other platforms.

*Television broadcast characteristics for Thai content:

*Acquisition values typically range from INR 30-80 lakh (\$36,000-96,000)

*Mandatory dubbing, typically handled by the broadcaster

*Heavy editing for content compliance common

*Usually acquired as part of content packages rather than individual titles

*Generally represents secondary monetization after theatrical/OTT windows

Channel	 Revenue Potential	 Market Reach	 Brand Building	 Entry Barrier
Theatrical	Medium-Low	Low	High	High
Premium OTT	Medium	Medium	Medium-High	Medium
Mass OTT	Medium-High	High	Medium	Medium-Low
Television	Low	Very High	Low	High

Source: Analysis based on industry interviews and market data

Fig 4.3: Distribution Channel Evaluation Matrix

4.2 Co-Productions & Collaborations with Indian Studios

Strategic partnerships with Indian production entities offer Thai creators expanded market access while mitigating risks associated with direct entry. These collaborative models facilitate knowledge transfer, shared resources, and enhanced distribution potential.

Co-Production Models

Financial co-productions represent investment-focused partnerships without significant creative collaboration. Thai parties typically contribute 30-40% of production budgets, with rights split by territory. Indian partners generally retain domestic rights, while Thai contributors secure minimum guarantees for their territory. Typical deal structures follow a 60/40 investment ratio (Indian/Thai), with revenue sharing approximately 70/30 for Indian market, 30/70 for Thailand, and 50/50 for other international territories.

Creative co-productions entail substantive collaborative development between partners, often featuring cross-cultural storylines or settings. These arrangements involve talent participation from both countries and typically offer enhanced marketing potential through dual-market appeal. While more complex to structure and execute, creative co-productions potentially yield more rewarding outcomes and are frequently established as joint ventures for specific projects.

Service Production

- *Thai projects filming in India using local crews and infrastructure
- *Access to India production incentives and cost advantages
- *Creative control remains with Thai producers
- *Local production partner handles permissions and logistics
- *Typical service fee model: Cost-plus (15-20% markup)

Key Indian Production Partners

Several Indian studios have demonstrated interest in international collaborations, presenting viable partnership opportunities for Thai content creators. Relationship cultivation with these entities should be prioritized according to strategic alignment with content type and target demographics.

Co-Production Treaty Considerations

While no specific Thailand-India co-production treaty exists currently, both countries participate in multilateral frameworks that facilitate collaboration. The Asia-Pacific Co-Production Agreement provides an informal structure, and India's "most favored nation" treatment for ASEAN film industries offers favorable conditions. Production service agreements typically do not require formal treaty frameworks, simplifying initial market entry.

Benefits of formal co-production status include tax advantages in both territories, qualification as domestic content in both markets, access to government subsidies and incentives, and simplified talent immigration processes. These factors should be evaluated when determining optimal partnership structures.

 Company	 International Track Record	 Collaboration Areas	 Strategic Fit
Dharma Productions	Hollywood, UK	 Commercial, youth-oriented	 Medium
Excel Entertainment	Hollywood	 Urban, contemporary	 High
Yash Raj Films	Hollywood, China	 Commercial mainstream	 Medium
Reliance Entertainment	Hollywood	 Various genres	 Medium-High
Matchbox Pictures	European	 Content-driven, arthouse	 High
T-Series	None	 Commercial, music-driven	 Medium-Low
Phantom Films	European	 Edgy, contemporary	 High

Source: Industry interviews, corporate disclosure data

Fig 4.4: Potential Indian Production Partners (2024)

Co-Development Opportunities

Early-stage collaboration through co-development initiatives can mitigate risk while building relationships. Script development partnerships, format adaptation of successful Thai concepts, and character licensing for Indian adaptations represent viable entry points. Writer/director exchanges for developmental projects facilitate knowledge transfer and market understanding, with typical investment ranges from INR 15-40 lakh (\$18,000-48,000).

4.3 Dubbing & Subtitling for Regional Market

Language strategy constitutes a critical component of market penetration given India's linguistic diversity. Effective localization requires strategic prioritization of languages based on market size, audience receptivity, and distribution channel.

Language	Speakers (millions)	% of Indian Population	Key Markets
Hindi	528	43.6%	North, Central, West
Bengali	97	8.0%	East (West Bengal)
Telugu	81	6.7%	South (Andhra Pradesh, Telangana)
Marathi	83	6.9%	West (Maharashtra)
Tamil	69	5.7%	South (Tamil Nadu)

Urdu	51	4.2%	North, Scattered urban
Gujarati	46	3.8%	West (Gujarat)
Kannada	37	3.1%	South (Karnataka)
Malayalam	34	2.8%	South (Kerala)

Source: Census of India, KPMG Languages of India Report

Fig. 4.5 Market Language Distribution

Dubbing Strategy Considerations

For theatrical and OTT distribution, strategic dubbing investments are essential to maximize market penetration. Hindi dubbing should be prioritized as it provides access to approximately 60% of the potential audience. South Indian languages (Tamil, Telugu) represent logical second phase expansion targets, with Bengali addressing the eastern market. English dubbing/subtitling serves the urban, educated demographic across regions.

Quality factors significantly impact audience reception of dubbed content. Voice casting decisions prove critical for audience acceptance, as does cultural adaptation rather than literal translation. Maintaining tonal consistency with the original while localizing humor and idioms requires specialized expertise. Religious and cultural sensitivity in adaptation should be carefully managed to avoid market resistance.

Dubbing Costs and Logistics

*Professional dubbing rates per feature film:

*Hindi: INR 5-8 lakh (\$6,000-9,600)

*South Indian languages: INR 4-6 lakh (\$4,800-7,200) each

*Other regional: INR 3-5 lakh (\$3,600-6,000) each

*Timeline: Typically 3-4 weeks per language

*Quality control and cultural consultancy advised

*Centralizing through Mumbai-based studios most efficient

Subtitling Considerations

Subtitling provides cost-effective language coverage but with inherent limitations in market penetration. This approach primarily resonates with urban, educated audiences and proves essential for film festival and niche theatrical distribution. Subtitle quality significantly impacts audience retention, with technical specifications varying considerably by platform.

Typical subtitling costs range from INR 50,000-80,000 (\$600-960) per language, representing a substantially lower investment than dubbing. While acceptance of

subtitled content is growing on OTT platforms, theatrical viability remains limited. Cultural adaptation and contextual notes have become increasingly expected elements of professional subtitling.

	Channel	Primary Languages	Secondary Languages	Subtitle Viability
	Premium Theatres	Hindi English	Regional by territory	Medium (Urban Only)
ived	Mass Theatres	Hindi	Regional by territory	Low
dom	Premium OTT	Hindi English	Tamil Telugu	High
dom	Mass OTT	Hindi	Tamil Telugu Bengali	Medium
-All	Television	Hindi only	Regional by channel	None

Language Strategy by Distribution Channel

Fig. 4.6 Language Strategy by Distribution Channel

4.4 Role of Film Festivals & Trade Shows in India

Film festivals and industry events serve as crucial market entry points and networking platforms for Thai content creators seeking to penetrate the Indian market. These venues facilitate critical relationship development, market validation, and direct business opportunities.

Major Film Festivals

Festival	Location	Date	Focus	Industry Component
International Film Festival of India	Goa	November	Global & Arthouse	Film Bazaar Market
Mumbai Film Festival (MAMI)	Mumbai	October	International & Indie	Word to Screen Market
Kolkata International Film Festival	Kolkata	November	Asian Focus	Limited
International Film Festival of Kerala	Thiruvananthapuram	December	Asian & Developing World	Market Meetups
Dharamshala International Film Festival	Dharamshala	November	Independent	None
Chennai International Film Festival	Chennai	December	International	Limited

Source: Festival websites, industry calendars

Fig 4.7: Key Indian Film Festivals for Thai Content (2025)

Festival Strategy Benefits

Festival participation offers multiple strategic advantages, beginning with market validation. Critical reception establishes credibility with distributors, while festival awards significantly enhance commercial potential. Press coverage creates awareness among domestic audiences, and industry screening opportunities connect content with potential buyers. Audience testing provides valuable feedback for refining marketing approaches.

The networking value of festivals cannot be overstated. These events provide direct access to Indian distributors and producers, platforms for co-production partner identification, and relationship-building opportunities with festival programmers and critics. Cross-promotion activities with other Asian filmmakers and meetings with sales agents possessing Indian expertise further enhance market entry potential.

Distribution Opportunities at Festivals

- *Film Bazaar (IFFI Goa) includes formal market component
- *MAMI's Word to Screen Market for adaptation opportunities
- *Several festivals include distribution prizes
- *Specialized distributors actively scout festivals for acquisition
- *OTT platform content teams regularly attend major festivals

Industry Trade Events

Beyond film festivals, several trade-focused events offer valuable business development opportunities. FICCI Frames (Mumbai, March) represents the largest media and entertainment conference in the region, while the Media & Entertainment Business Conclave (Chennai, November) provides focused access to South Indian markets. Additional events include Indy-wood Film Market (Hyderabad, September), Screen Writers Association Conferences, and the CII Big Picture Summit (New Delhi, December).

The optimal festival strategy typically follows a sequential approach: international festival premiere (preferably at an A-list festival), Indian premiere at a major festival (IFFI Goa or MAMI preferred), regional festival circuit participation, specialized/themed festivals aligned with content, distribution deal announcement at a festival when possible, and incorporation of festival accolades into the marketing campaign.

Festival Achievement	Avg. Impact on License Value	Impact on Screen Count	Marketing Value
Major Festival Selection	+15–20 %	+20–30 screens	Medium
Competition Selection	+25–30 %	+40–60 screens	High
Award Winner	+40–60 %	+70–100 screens	Very High
Audience Award	+30–40 %	+50–80 screens	Very High
Special Mention	+10–15 %	+15–25 screens	Medium

Source: Analysis of festival film performance 2021-2024

Fig 4.8: Festival Impact on Distribution Outcomes

4.5 Licensing, Copyrights, and Intellectual Property Rights

Navigating India's intellectual property landscape requires strategic management and clear contractual frameworks. While India's copyright regime is generally robust, enforcement challenges necessitate proactive protection measures.

Copyright Protection Framework

India's copyright protection is automatic upon creation, though registration is strongly recommended for enforcement purposes. Copyright terms extend to the life of the author plus 60 years, with registration processes typically requiring 6-9 months through the Copyright Office. Dual registration in both Thailand and India represents best practice for Thai content creators. Copyright infringement constitutes both a civil and criminal offense under Indian law.

Licensing Structures

Common licensing arrangements for Thai content in India include limited period distribution licenses, remake/adaptation rights, and format licensing. Distribution licenses typically specify rights granted for defined terms (3-7 years), with clear segmentation by platform, territory, and language. Revenue models may involve flat fees, revenue sharing, or hybrid arrangements depending on content type and market positioning.

Remake and adaptation rights enable Indian reinterpretations of Thai original content, typically limited to specific Indian languages. Standard arrangements include original creator credit and "based on" acknowledgments, with fee structures combining upfront payments and backend participation. Protection of original titles and character names is common practice, as are consultation rights for significant story changes.

Format Licensing

- *Structured framework for adaptation of concepts
- *Typical for series concepts and television formats
- *Format bible" detailing core elements provided
- *Technical consultation from original creators common
- *Episode-based royalties standard for television formats

Contract Considerations

Key contractual elements requiring special attention include censorship compliance responsibility, force majeure provisions covering regulatory changes, delivery requirements specifications, and quality control standards for dubbing/subtitling. Title clearance responsibility, dispute resolution mechanisms (with arbitration preferred), promotional material usage rights, music synchronization rights, and trademark protection for titles and key elements should be explicitly addressed.

IP Protection Challenges

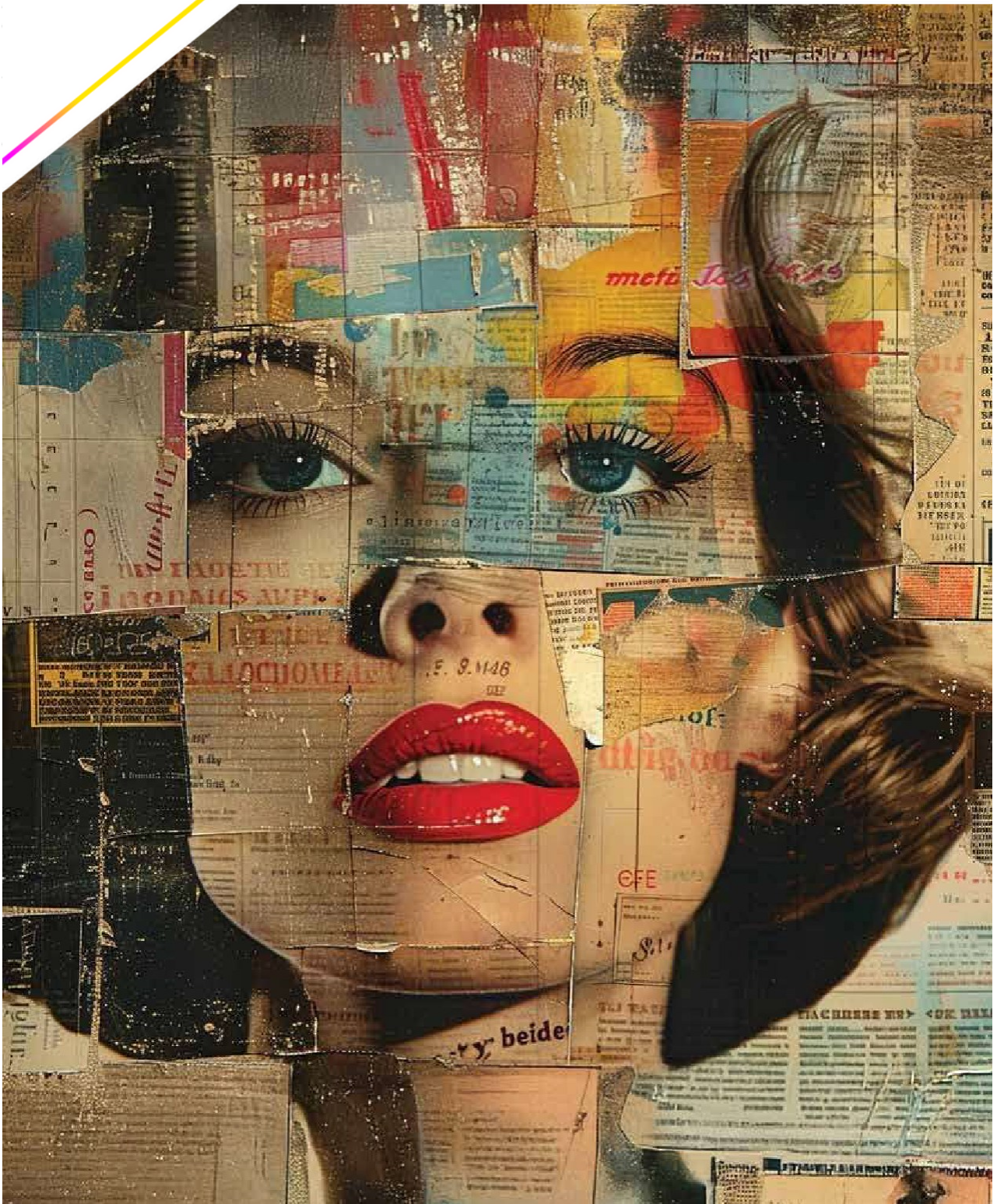
Several challenges require strategic mitigation, particularly in the area of piracy management. Digital piracy remains a significant concern, with theatrical Camcording persisting despite legal prohibition. Pre-release leak risk from the censorship process and parallel imports from Thailand present additional vulnerabilities.

Mitigation strategies include simultaneous or near-simultaneous release across markets, digital watermarking of preview copies, limited distribution of full-length screeners, and enforcement partnerships with industry associations. Unauthorized adaptation risk presents another concern, with "inspired by" adaptations occurring without formal rights acquisition. Limited legal precedent for concept protection makes proactive registration of distinctive elements advisable, while local legal representation facilitates monitoring and enforcement

Regulatory Compliance

- *Central Board of Film Certification (CBFC) approval required for theatrical release
- *Self-regulation framework for OTT platforms under IT Rules 2021
- *Specific guidelines for foreign content classification
- *Content categories potentially requiring modification:
 - *Political sensitivity
 - *Religious depictions
 - *Sexual content
 - *Violence depiction
 - *Substance use portrayal

5. CASE STUDIES: SUCCESS STORIES OF FOREIGN



5.1 Hollywood's Growth in Indian Markets

Hollywood's expanding footprint in India provides valuable lessons for other international content creators seeking market entry. The systematic approach applied by major studios demonstrates how strategic localization and market-specific adaptations can drive significant revenue growth and audience development.

Case Study 5.1.1: Universal Pictures India Strategy (2021-2024)

Universal Pictures implemented a comprehensive market penetration strategy yielding 47% growth in Indian box office share over three years. Their approach was characterized by deep market understanding and strategic adaptations across multiple touchpoints with the Indian audience.

The strategy employed a language-first approach with simultaneous releases in five or more Indian languages, recognizing the multilingual nature of the market. Universal Pictures further enhanced audience connection through strategic casting of Bollywood stars as voice talent for animated content, creating immediate recognition and cultural relevance.

Marketing efforts transcended simple translation, developing India-specific campaigns that resonated with local cultural touchpoints. Particular attention was paid to South Indian markets through regionally targeted approaches that acknowledged distinct preferences and consumption patterns among different demographic segments.

Digital innovation played a crucial role in audience development, with TikTok and Instagram-led campaigns specifically designed to engage the youth demographic. This was complemented by a strategic expansion of theatrical footprint, increasing screen count by 30% for major releases while carefully timing releases to avoid direct competition with major Indian films.

The results demonstrated clear market validation:

- Box office growth from INR 267 crore (2021) to INR 392 crore (2024)
- Per-film average audience growth of 34%
- South Indian market revenue increased 56%
- Dubbed version revenue exceeded English version in 2023
- Social media engagement increased 127%

For Thai content producers, Universal's approach offers several transferable insights:

- * Language strategy proves critical for market penetration
- * Star association creates immediate recognition
- * Regionally targeted approach outperforms national campaigns
- * Digital-first marketing is essential for youth demographics
- * Release strategy requires careful navigation of local competitive landscape

Case Study 5.1.2: Franchise Building - "Fast & Furious" in India

The Fast & Furious franchise demonstrates how sustained audience development through strategic localization can build impressive market performance over time. The franchise employed a multi-film audience development strategy with incremental marketing investment, increasing promotional budgets by approximately 15% per film.

Audience connection was significantly enhanced through Indian cast inclusion in the global franchise, notably featuring Deepika Padukone in the ninth installment. This was reinforced by location shooting in Mumbai for a franchise installment, creating authentic local connection and generating substantial earned media. The strategy was further supported by India-specific promotional content creation and automotive influencer partnerships uniquely developed for the market.

Fan engagement was prioritized through comprehensive event strategies implemented across six major cities, creating direct audience touchpoints and social media amplification opportunities.

This sustained market development approach delivered impressive results:

- Box office growth from INR 42 crore (FF7) to INR 108 crore (FF10)
- Audience demographic expansion beyond core urban male
- Tier 2/3 city penetration increased 67%
- Branded partnerships value increased 85%
- Franchise recognition reached 78% among target demographic

For Thai content producers considering the Indian market, the Fast & Furious case study highlights several strategic imperatives:

- * Long-term market development outperforms one-off releases
- * Local talent integration creates significant market connection
- * Physical presence through events and location filming builds authenticity
- * Consistent release patterns build audience expectation
- * Franchise potential allows audience growth across installments

5.2 Japanese Anime & Korean Dramas Expanding in India

Asian content success stories provide directly relevant models for Thai content, demonstrating pathways to market penetration that navigate cultural and language barriers.

Case Study 5.2.1: Anime India - Crunchyroll's Market Strategy

Japanese animation platform Crunchyroll implemented a focused digital-first strategy that prioritized community building and content accessibility. The platform utilized a premium subscription model with free tier access, enabling broad market sampling while monetizing engaged viewers. This was supported by simultaneous global releases including India, eliminating the lag time that often drives unauthorized consumption.

Community development was prioritized through digital events and forums, creating direct engagement with the audience base. Content accessibility was enhanced through Hindi and Tamil dubbing for select premium titles, reducing language barriers for mainstream audience expansion.

Physical market presence was established through partnerships with anime conventions and pop culture events, while user-generated content promotion strategies amplified organic marketing reach. The digital-first approach was complemented by limited theatrical releases for major titles positioned as "events" rather than traditional film distribution.

The results demonstrated significant market development:

- * Subscriber growth from 85,000 (2021) to 670,000 (2024)
- * Average watch time increased 37% year-over-year
- * Theatrical "event" releases averaged 78% occupancy
- * Fan community expansion to 15 major Indian cities
- * Merchandising revenue grew 124% annually
- * Hindi-dubbed content viewership exceeded subtitled by 3.2x

Lessons for Thai content producers include:

- * Community-building is essential for niche content
- * Digital-first approach can build theatrical opportunity
- * Event-based theatrical strategy outperforms traditional distribution
- * Superfan cultivation creates marketing amplification
- * Merchandising and ancillary revenue present significant growth potential

Case Study 5.2.2: Korean Drama Expansion - Netflix India Strategy

Korean content has achieved mainstream breakthrough on digital platforms through strategic positioning and investment. Netflix India implemented a comprehensive approach featuring high-visibility positioning in platform UI/recommendations, elevating Korean content from niche to mainstream consideration.

Significant marketing investment was allocated for selected titles, creating flagship properties that could build broader category interest. Celebrity endorsement and reaction content connected Korean dramas to established Indian cultural touchpoints, while substantial investment in Hindi dubbing (exceeding INR 12 crore annually) removed language barriers.

Platform algorithm optimization included cross-recommendation with Indian content, creating discovery pathways from established viewing patterns. Content selection emphasized thematic matching with Indian content preferences, identifying universal storytelling elements that resonated across cultural boundaries. Promotional strategy was enhanced through short-form content developed specifically for social platforms, adapting marketing approach to contemporary consumption patterns.

The results demonstrated remarkable market penetration:

- * K-drama viewership increased 348% (2021-2024)
- * Average completion rate exceeds platform average by 22%
- * Hindi-dubbed versions account for 74% of viewership
- * Viewer demographic expanded beyond initial female youth base
- * Cross-viewership between K-dramas and Indian content increased 126%
- * Indian remake rights values increased 85% for Korean formats

For Thai content producers, this case study offers several strategic considerations:

- * Platform algorithms can be leveraged for discovery
- * Dubbing investment is essential for mainstream breakthrough
- * Content formats can cross cultural boundaries more easily than specific titles
- * Digital success can drive remake and adaptation opportunities
- * Careful title selection matching Indian genre preferences is essential

5.3 Hollywood-India Co-Productions

Strategic partnerships have created successful cross-cultural productions that leverage complementary strengths and market access.

This structured co-production relationship created successful cross-market content through deep integration across development, production, and distribution phases. The partnership employed a slate development approach rather than single-film focus, distributing risk across multiple projects while building systematic collaboration processes.

Joint creative development engaged writers from both markets from inception, ensuring authentic cross-cultural narratives rather than superficial adaptation. Production resources were divided between U.S. and Indian locations, optimizing cost efficiency while maintaining production values relevant to both markets. The collaborative approach extended to talent integration from both industries, creating marketing leverage in multiple territories.

Financial structure incorporated shared financing with territory-based recoupment provisions, aligning incentives while acknowledging different market potentials. Marketing execution featured integrated global strategy with synchronized global release timing, maximizing promotional efficiency and cross-market audience development.

This systematic approach delivered multiple positive outcomes:

- * Three successful co-productions averaging 41% above market performance
- * Production cost efficiencies of 28% through shared resources

Cross-market talent value enhancement

- * Expanded distribution footprint in both territories
- * Knowledge transfer between production teams
- * Technical capability enhancement for Indian partner

This multi-country co-production demonstrates international collaboration potential beyond binary partnerships. The project was distinguished by source material featuring cross-cultural narrative elements that provided natural integration points. Financing was secured from six countries including India, distributing risk while accessing production incentives across multiple territories.

Casting featured Indian lead actor (Dhanush) with international supporting cast, creating marketing hooks for multiple markets. Production efficiency was enhanced through creation of multiple language versions simultaneously rather than through post-production adaptation. Creative integrity was maintained through unified vision guided by cultural consultants, ensuring authentic representation across diverse settings.

Distribution strategy prioritized international festival premiere to build critical acclaim and marketing momentum, followed by market-specific promotional campaigns customized to regional audience preferences.

The results validated this complex collaborative model:

- * Theatrical release in 30+ countries including successful Indian run
- * Production budget optimization through multi-country incentives
- * Critical acclaim including audience awards at three festivals
- * Sequel currently in development with expanded Indian component
- * Successful OTT performance across multiple territories
- * Format adaptation rights sold for television development

For Thai producers, this case study illustrates several strategic opportunities:

- * Multi-territory financing reduces individual market risk
- * Cross-cultural narratives create built-in multi-market potential
- * Festival strategy creates marketing platform for commercial release
- * International collaboration enhances production value at comparable budget
- * Framework establishes model for subsequent collaborations

5.4 Insights from Chinese & South Korean Film Success

Strategic approaches from other Asian industries offer relevant models for navigating the Indian market.

Case Study 5.4.1: Chinese Film "Wolf Warrior 2" - Limited Indian Release

Despite modest expectations, this action film found commercial success through focused marketing and distribution strategy. The release was carefully targeted across 125 screens in 18 Indian cities, concentrating resources for maximum impact rather than pursuing wider but underfunded distribution.

Marketing employed a genre-first approach emphasizing action sequences, positioning the film primarily as action entertainment rather than foreign or cultural content. Promotional materials minimized cultural context that might create audience barriers, while emphasizing technical achievements in stunts and cinematography that would appeal to action audiences.

Audience targeting focused on the established Hollywood action demographic rather than arthouse or foreign film viewers, with premium format (IMAX) prioritization for selected locations enhancing the event positioning. Promotional strategy emphasized social media channels to reach younger demographics with higher propensity for action content consumption.

This focused approach delivered results that significantly exceeded projections:

- * Box office of INR 4.2 crore exceeding projections by 128%
- * Average occupancy of 58% against industry average of 31%
- * Audience composition dominated by 18-34 male demographic (76%)
- * Strong second-weekend hold with minimal drop
- * Digital rights sold at 175% of pre-release valuation
- * Established distribution template for subsequent Chinese action titles

For Thai content producers, this case study demonstrates several actionable strategies:

- * Genre can transcend cultural barriers when effectively positioned
- * Technical excellence creates marketing differentiation
- * Focused release strategy outperforms wider but underpromoted distribution
- * Clear target audience identification is essential for marketing efficiency
- * Premium format strategy enhances per-screen performance

Bong Joon-ho's Oscar-winning film transcended traditional arthouse boundaries to achieve mainstream commercial success through strategic marketing and distribution. The campaign leveraged festival acclaim as the primary marketing angle, creating prestige positioning that generated audience interest beyond typical foreign language viewership.

Critical endorsement was prioritized through advanced screening programs, building review coverage that validated the film's quality. This was complemented by influencer preview screenings across entertainment and social sectors, generating organic promotional content from credible voices.

Distribution strategy employed a platform release approach, beginning with limited release (45 screens) before expanding to wider distribution (142 screens) based on performance metrics. The Academy Award campaign created sustained momentum through international recognition, while sophisticated social media strategy emphasized universal themes of class inequality positioned as globally relevant.

The results demonstrated how critical acclaim can translate to commercial performance:

- * Initial arthouse performance transitioned to mainstream success
- * Box office of INR 3.2 crore with 87% occupancy in premium screens
- * Audience demographic expanded beyond typical foreign film viewership
- * Continued theatrical performance for 8+ weeks
- * Academy Award win created second box office surge
- * Established new benchmark for Korean film commercial potential
- Significantly increased acquisition interest in Korean titles

For Thai content producers, Parasite's journey offers several strategic insights:

- * Quality and universal themes can overcome subtitle barrier
- * Platform-building through festival and critical recognition
- * Staged release expansion based on performance metrics
- * Patient exhibition strategy can build word-of-mouth momentum
- * Critical recognition translates to commercial performance when properly leveraged
- Award recognition significantly impacts commercial potential

5.5 Thai Films in the Indian Market

While Thai films have had more limited penetration in India compared to Korean, Japanese, or Chinese content, there have been several notable successes that provide instructive case studies.

1. Shutter (2004/2008)

The original Thai horror film didn't see wide theatrical release in India but became influential through unofficial distribution channels. Its impact extended beyond direct revenue, ultimately inspiring the official Hindi remake "Click" (2010) and Malayalam remake "Clicked" (2022).

Several factors contributed to its cult status and remake potential:

- * Distinctive Asian horror aesthetics influenced Indian horror filmmaking
- * Concept traveled well across cultural boundaries
- * Photography-based supernatural element was novel for Indian audiences
- * Technical excellence in horror execution
- * Cult following developed through DVD/digital circulation
- Format rights provided monetization despite limited original distribution

2. Ong-Bak: Muay Thai Warrior (2003)

This martial arts film employed a multi-platform entry strategy, beginning with specialty circuit screenings before reaching wider audiences through dubbed versions on satellite television and eventually digital platforms. While theatrical performance was limited, the film developed a strong following through broadcast television exposure.

Success factors included unique action choreography and minimized language barriers:

- * Tony Jaa's action sequences provided unique selling proposition
- * Minimal dialogue reduced translation issues
- * Action choreography stood out from both Bollywood and Hollywood offerings
- * Satellite TV broadcasts (Sony Max, UTV Action) reached mass audiences
- * Muay Thai as distinct martial arts style created differentiation
- * Re-runs on television built audience awareness over time

3. Pee Mak (2013)

•**Entry Strategy:** This horror-comedy found its audience through festival circuit followed by targeted horror community engagement and digital release. The film's genre-blending approach aligned well with Indian audience preferences for horror combined with comedic elements.

Key factors in its digital success included:

- * Horror-comedy combination aligned with Indian audience preferences
- * Festival screening generated critical attention
- * Unique Thai ghost mythology offered novelty
- * Humor translated well despite cultural differences
- * Strong word-of-mouth among horror genre fans
- * Digital availability on multiple platforms extended reach

4. Bad Genius (2017)

This youth-oriented thriller navigated market entry through festival exposure leading to targeted youth marketing and digital platform release. The film found particular resonance with the 18-24 demographic through its universal themes of academic pressure and examination stress.

Its successful digital performance was driven by several factors:

- * Universal theme of academic pressure resonated with Indian students
- * Heist/thriller elements provided entertainment beyond the social message
- * Youth-oriented marketing focusing on examination stress
- * Social media campaign targeting college students
- * Contemporary visual style appealed to younger viewers
- Dubbed versions in Hindi increased accessibility

Key Takeaways for Thai Content Creators

Based on these case studies, several actionable templates emerge for successful market entry into India. These strategies leverage observed success patterns across multiple content types and origin markets

Film festival leverage has proven effective for market introduction, as demonstrated by films like *Parasite* and *Shoplifters*. Indian film festivals such as MAMI and IFFI Goa can serve as effective launchpads for Thai content, creating critical endorsement that helps overcome foreign film skepticism.

Genre-focused approaches show particular promise, with horror (*Shutter*), action (*Ong-Bak*), and thrillers (*Bad Genius*) demonstrating the strongest cross-cultural travel. Genre expectations help audiences overcome cultural unfamiliarity, while technical excellence in genre execution creates meaningful differentiation from domestic offerings.

Digital-first strategies have shown consistent effectiveness, with several case studies demonstrating stronger digital performance than theatrical. OTT platforms provide extended exhibition windows for audience discovery, while algorithmic recommendations help content reach appropriate target demographics efficiently.

2. Content Optimization Insights

The most successful international films in India demonstrate the importance of universal theme resonance. Elements such as class conflict (*Parasite*), academic pressure (*Bad Genius*), and family bonds (*Shoplifters*) create emotional connection that transcends cultural boundaries. These universal human experiences provide connective tissue that enables audience engagement despite cultural differences.

Visual storytelling priority reduces dependence on dialogue and subtitles, with strong visual narratives traveling more effectively across language barriers. Action sequences, visual effects, and cinematography that exceed local production standards create differentiation from domestic content and justify audience investment in foreign material.

Successful films demonstrate careful balance of cultural specificity, maintaining authentic cultural elements while focusing on universal themes. Thai-specific elements should be positioned as unique selling points rather than barriers, with clear exposition of cultural contexts helping Indian audiences connect with unfamiliar elements.

3. Distribution & Marketing Strategies

Targeted release approaches have consistently outperformed broader but underfunded distribution. Metropolitan focus on the top 8 cities for theatrical releases, combined with premium multiplex strategy for art/prestige content, creates efficient allocation of limited promotional resources. The evidence suggests limited but well-promoted releases consistently outperform wider but under-marketed releases.

Language optimization presents a critical success factor, with dubbing in Hindi extending reach beyond subtitle-comfortable audiences. Additional investment in

regional language dubbing (Tamil, Telugu) can open additional markets, with quality dubbing investment showing strong correlation with performance success

Community targeting provides efficient audience development, with genre communities such as horror fans and action audiences providing initial audience base. Film societies and cultural organizations offer promotional partnership opportunities, while university circuits provide intellectual audience base for certain content types.

4. Partnership Leverage

Local distributor relationships demonstrate significant value creation, with companies like PVR Pictures (Parasite distributor), AA Films, and Tanweer Films providing essential market knowledge. Local marketing expertise is essential for appropriate positioning of foreign content, while established exhibition relationships facilitate critical screen allocation in competitive release environments.

Co-production elements that include Indian components or talent (as demonstrated in Kung Fu Yoga) create valuable marketing hooks. Even minimal Indian components can significantly change market perception from "foreign" to "collaborative," while format adaptation rights present monetization opportunities when direct distribution is challenging.

5. Specific Opportunities for Thai Content

Technical excellence showcases offer distinctive value propositions for Thai content, with Thai action choreography (as demonstrated in Ong-Bak) providing clear differentiation. Thai horror techniques and visual aesthetics differ significantly from Indian horror conventions, creating novelty that can attract genre audiences. Visual storytelling strengths can effectively compensate for language barriers when properly emphasized.

Youth-oriented content shows particular promise, with coming-of-age narratives and youth-focused content like Bad Genius connecting effectively with India's young demographic profile. Contemporary issues and modern aesthetic approaches appeal particularly to metropolitan audiences, while digital consumption patterns favor youth-oriented content through algorithmic recommendation systems.

Format rights present significant value potential even when direct distribution is limited, as demonstrated by Shutter's successful remakes. Format adaptation allows cultural localization while maintaining core story elements, with potential for multiple regional language remakes within the diverse Indian market.

6. CHALLENGES & MITIGATION STRATEGIES



6.1 Censorship & Certification Issues

Based on our comprehensive analysis of the case studies, several actionable templates have emerged for successful market entry into the Indian film landscape. Understanding the Central Board of Film Certification (CBFC) process is essential as it governs theatrical film releases in India. The CBFC, colloquially known as the "Censor Board," maintains a mandatory certification requirement for any theatrical exhibition. Films are categorized into four distinct certificate categories: U (Universal), U/A (Parental Guidance), A (Adult), and S (Specialized). The average processing timeline typically spans 4-6 weeks, during which an examination committee review may require potential revisions. While an appeals process exists for unfavorable decisions, it tends to be notably lengthy and should be factored into release timelines.

International content frequently encounters specific censorship challenges that warrant strategic consideration. Content elements with varying degrees of risk include graphic violence (high risk), sexual content/nudity (very high risk), religious references (medium risk), political commentary (medium risk), substance use depiction (medium-high risk), and coarse language (medium risk).

Content Element	Risk Level	Common CBFC Requirements
Graphic Violence	High	Significant editing required
Sexual Content/Nudity	Very High	Substantial cuts/blurring
Religious References	Medium	Context-dependent scrutiny
Political Commentary	Medium	Context-dependent scrutiny
Substance Use Depiction	Medium-High	Warning labels, potential cuts
Coarse Language	Medium	Muting/subtitle modification

Source: CBFC Annual Reports, Industry Case Analysis

Figure 6.1: Content Elements with Potential Censorship Impact

Each element triggers different CBFC requirements, ranging from significant editing for violent content to substantial cuts or blurring for sexual content, and context-dependent scrutiny for religious and political references. Substance use typically necessitates warning labels and potential cuts, while coarse language often requires muting or subtitle modification.

Several mitigation strategies can be implemented to minimize certification complications:

- *Professional pre-screening by censorship consultants who can identify problematic sequences
- *Voluntary pre-submission editing of contentious elements
- *Preparation of comprehensive justification documentation for artistic elements
- *Research into precedents for similar content certification

Creating strategic version variants represents another effective approach. This includes developing India-specific versions that address likely concerns while maintaining artistic integrity, preparing alternative shots or sequences for sensitive elements, and developing a separate export version specifically calibrated for the Indian market. Certification strategy should involve realistic target certification identification, business impact analysis of potential certification outcomes, appropriate certification representative engagement, and thorough appeal preparation for unfavorable decisions.

The OTT-first strategy presents a viable alternative, as digital platforms operate under a self classification system that is considerably less restrictive than theatrical certification. This approach allows for content warnings and age-gating rather than extensive editing, with the potential for uncut version availability when appropriately classified.

Digital content regulation follows a different framework, with OTT platforms adhering to a self regulatory system under IT Rules 2021. This framework places platform responsibility for age classification and content descriptions, with categories including Universal, 7+, 13+, 16+, and 18+. Requirements include grievance officer appointments and industry association memberships that provide collective positioning. Importantly, compliance requirements are notably less restrictive than theatrical regulations.

Platform-specific content guidelines vary significantly, as illustrated in Figure 6.2. Netflix and Amazon Prime adhere to strict self-classification with minimal content modification practices, primarily implementing clear content warnings. Disney+ Hotstar maintains a more conservative approach with occasional blurring and warnings. ZEE5 follows a conservative stance with more frequent modification, while SonyLIV implements case-by-case modification practices.

Platform	Self-Classification	Content Modification Practices
Netflix	Strict adherence	Minimal, clear content warnings
Amazon Prime	Strict adherence	Occasional blurring, warnings
Disney+ Hotstar	Conservative	More frequent modification
ZEE5	Conservative	Significant modification common
SonyLIV	Moderate	Case-by-case modification

Source: Platform policy documents, industry interviews

Fig 6.2: Platform-Specific Content Guidelines

6.2 Complex Licensing & Shooting Permissions

Production and distribution in India necessitates navigating multiple permission frameworks that impact project timelines and budgets. Theatrical distribution requires several key approvals, including mandatory CBFC certification, foreign film import permission from the Ministry of Information & Broadcasting, import duty payment through the Customs Department, local language dubbing clearance if applicable, music rights clearance through the Indian Performing Rights Society, and state-level entertainment tax compliance.

For Thai productions planning to shoot in India, location filming requirements encompass a comprehensive set of permissions. These include Foreign Filming Permission from the Film Facilitation Office (which offers single-window clearance), location-specific permissions from state and local authorities, Archaeological Survey of India permission for historical sites, and Forest/Wildlife Department permission for natural locations. Additionally, temporary work visas for cast and crew, equipment import permits (with ATA Carnet recommended), and foreign exchange permissions for local expenditure must be secured.

Several streamlined solutions can simplify this complex permission landscape. Engaging an Indian Production Service Partner represents a highly effective approach, as these local entities can navigate permissions on behalf of Thai producers, leveraging established relationships with regulatory authorities. With standard operating procedures for common requirements and comprehensive compliance management, these partners typically charge a service fee of 15-20% of the managed budget.

The Film Facilitation Office presents another valuable engagement opportunity. This government entity was specifically created to assist international productions and can provide higher-level intervention for complex approvals. The office coordinates between multiple agencies and authorities, offering pre-application consultation services, process guidance, and application review.

Co-production structures yield significant benefits, including:

Reduced foreign production restrictions through formal co-production agreements

*Permission securing by the Indian partner as a domestic entity

*Simplified visa processes for key personnel

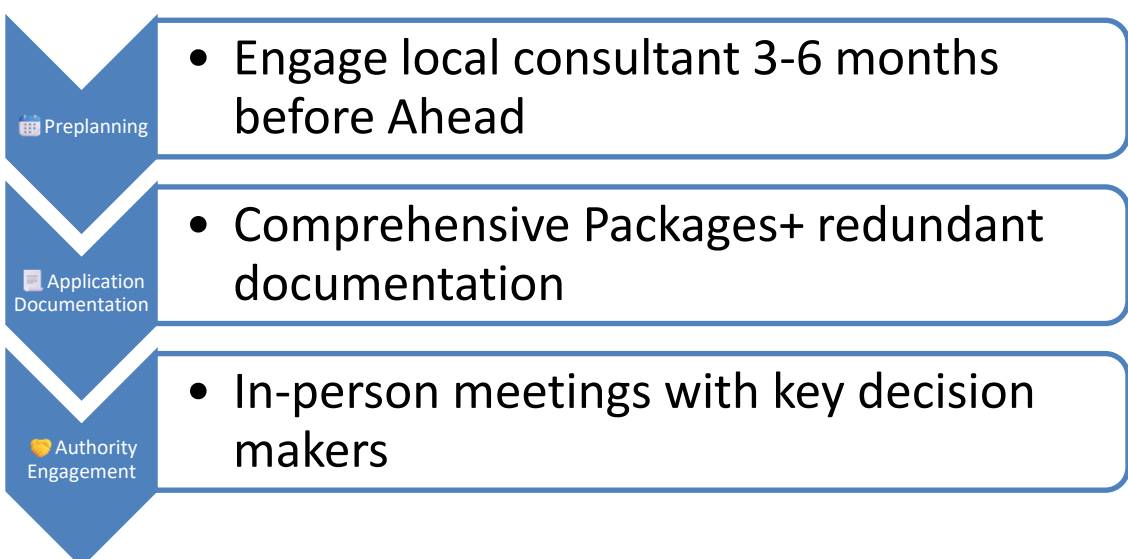
*Domestic production status for incentive eligibility

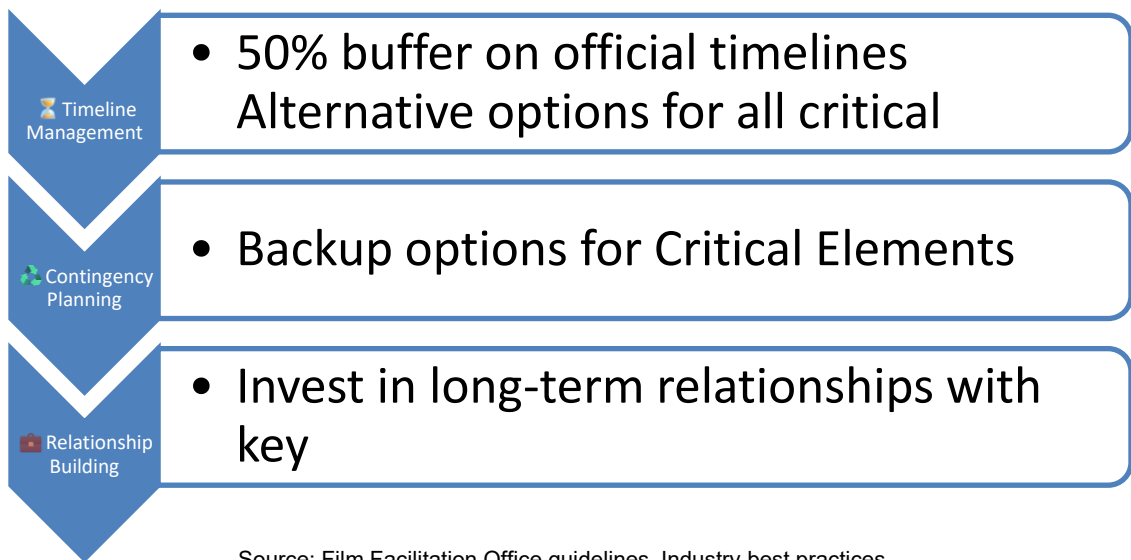
*Reduced import duties for equipment

*Realistic permission timeline planning is essential for project management. Key timeframes

include CBFC certification (4-6 weeks), foreign filming permission (3-4 weeks), location-specific permissions (2-8 weeks depending on location), archaeological/protected site permission (8-12 weeks), temporary work visas (3-4 weeks), equipment import permits (2-3 weeks), and music/performance clearances (2-4 weeks).

Best practices for regulatory approval success, as illustrated in Figure 6.3, include comprehensive preplanning by engaging local consultants 3-6 months in advance, preparing complete application documentation packages with redundant documentation, and arranging in-person meetings with key decision makers. Effective timeline management incorporates a 50% buffer on official timelines, while contingency planning ensures alternative options for all critical elements. Long-term relationship building with key authorities represents an investment that yields ongoing benefits for future productions.





Source: Film Facilitation Office guidelines, Industry best practices

Fig 6.3: Best practices For regulatory Approval Success

6.3 Piracy & Digital Rights Protection

Content protection represents a significant challenge in the Indian market, with digital piracy remaining widespread despite a strengthened legal framework. The industry suffers estimated annual losses of INR 2,200 crore (approximately \$264 million) through primary forms including Cam cording, file sharing, stream-ripping, and password sharing. With over 1,200 active online piracy sites with Indian domain registration, pirated content typically becomes available within 13 days after release. While enforcement is improving, it remains challenging, with regional variance in piracy prevalence (highest in South India).

India's anti-piracy legal structure has strengthened significantly in recent years. This includes Copyright Act amendments criminalizing Cam cording (2019), Information Technology Act provisions addressing digital piracy, and Cinematograph Act amendments increasing penalties (2021). Civil remedies including site blocking have become increasingly effective, though criminal enforcement remains inconsistent across regions. International cooperation frameworks continue to improve, enhancing cross-border enforcement potential.

Recommended protective measures for Thai content entering the Indian market include implementation of robust technical protection systems. These encompass digital fingerprinting and watermarking, forensic watermarking of preview and screener copies, controlled digital asset management systems, and robust DRM implementation for digital distribution. Theater-specific coding enables piracy source identification, while screening copy limitations and tracking reduce unauthorized distribution risk.

Strategic release planning plays a crucial role in piracy mitigation. Effective approaches include:

*Compressed windows between territories to reduce demand for unauthorized versions

* Simultaneous multi-territory releases where possible

*Theatrical-to-digital window compression to accelerate legitimate availability

*Accelerated legitimate digital availability in high-piracy regions

*Premium early access options for digital content to capture potential piracy consumers

Enforcement partnerships substantially enhance protection capabilities. These include

membership in the Alliance Against Copyright Theft (AACT), cooperation with the Motion Picture

Association (MPA) India, engagement with the Federation of Indian Chambers of Commerce

(FICCI) Entertainment Committee, and participation in the India Online Anti-Piracy Task Force. Pre-release monitoring services and post-release takedown service utilization further strengthen the protection framework. Distribution partner accountability should be contractually established with specific anti-piracy obligations and associated penalties. Security audit requirements, watermarking mandates for partner-managed content, reporting requirements for leak incidents, and shared responsibility clauses in distribution agreements create a comprehensive protection ecosystem.

Channel Effectiveness	Piracy Risk	Primary Method	Mitigation
Premium Theatrical	Medium	 Cam cording	 Technical Measures
Mass Theatrical	High	 Cam cording	 Enforcement Challenges
Premium OTT	Medium-Low	 Password sharing	 Technical Solutions
Mass OTT	Medium	 Stream ripping	 DRM implementation
Television	Low	 Minimal concern	Not applicable
Festival Exhibition	High	 Screener leakage	Watermarking

Source: FICCI Anti-Piracy Research, MPA India Reports

Figure 6.4: Piracy Risk Assessment by Distribution Channel

6.4 Competitive Landscape: Bollywood & Regional Dominance

The highly competitive Indian content landscape necessitates strategic positioning for Thai productions seeking market entry. Domestic productions dominate screen time and audience attention, with Indian films accounting for 82% of theatrical market share. Non-Hollywood international films typically secure only 85-150 screens, making it difficult to establish marketing voice against high-budget Indian campaigns. Release dates are frequently crowded by major Indian films, and awareness of international content beyond Hollywood remains limited.

Competitive intensity varies significantly across market segments, as detailed in Mass theatrical exhibits very high competition from Bollywood and regional industries, offering limited advantage for Thai content. Premium theatrical faces high competition from Bollywood and Hollywood, though Thai content can differentiate through technical and genre distinction. Mass digital confronts high competition from Indian series and regional films, again with limited advantage for Thai productions. Premium digital presents medium competition from premium Indian and international content, allowing Thai productions to distinguish themselves through quality and uniqueness. The festival circuit and niche/genre audience segments face medium low competition from global arthouse productions, offering opportunities for cultural distinctiveness and genre authenticity.

Market Segment	Competitive Intensity	Key Competitors	Thai Content Advantage
Mass Theatrical Limited advantage	Very High	 Bollywood, Regional Industries	 Limited advantage
Premium Theatrical	High	 Bollywood, Hollywood	 Technical/genre distinction
Mass Digital	High	Indian Series, Regional Films	 Limited advantage
Premium Digital	Medium	 Premium Indian, International	 Quality, uniqueness
Festival Circuit	Medium-Low	Global arthouse	 Cultural distinctiveness
Niche/Genre Audience	Low	Limited direct competition	 Genre authenticity

Source: FICCI Anti-Piracy Research, MPA India Reports

Fig 6.5: Piracy Risk Assessment by Distribution Channel

Several competitive differentiation strategies can enhance positioning for Thai content. Strategic release timing represents a critical approach, involving avoidance of direct competition with major Indian releases, counterprogramming against dominant genres, and identification of release windows with reduced competition. Festival momentum can be leveraged for release timing, while seasonal planning should avoid cricket tournaments, elections, and major holidays.

Precision in audience targeting significantly improves competitive positioning through identification of underserved audience segments and genre-specific marketing rather than broad positioning. Community-based promotion for specific interest groups, influencer engagement aligned with content themes, and cultivation of niche but passionate audience bases further strengthen market position.

Content differentiation emphasis should highlight unique Thai cultural elements and showcase technical excellence, particularly in specialized areas such as martial arts choreography and cinematography. Authentic representation can be positioned as a marketing advantage, while critical acclaim and international recognition provide valuable leverage. Emphasis on distinctive storytelling approaches further differentiates Thai content from domestic productions.

The collaboration versus competition paradigm merits strategic consideration.
Potential

approaches include:

- *Integration of Indian talent into Thai productions
- *Cross-promotion with complementary Indian content
- *Development of festival programming relationships

- *Industry association partnerships

- *Collaborative marketing with similar international content

Thai content offers several distinctive competitive advantages in the Indian market. These include technical excellence in specific genres (particularly martial arts choreography and horror aesthetics), fresh creative perspectives distinct from familiar domestic content, and production value typically higher than comparable Indian budget levels. Genre authenticity, particularly in martial arts and horror categories, international recognition and festival credentials, and the novelty factor for audiences seeking content diversity further strengthen the competitive position.

6.5 Economic & Regulatory Barriers (GST, Import Duties)

Financial and regulatory hurdles significantly impact profitability and market entry prospects for Thai productions entering India. The taxation framework encompasses multiple layers affecting distribution economics, including Goods and Services Tax (GST) on theatrical tickets at 18% for tickets over ₹100 and 12% for tickets under ₹100. Additional tax considerations include GST on digital distribution (18%), foreign film import duty (10% of print value), TDS (Tax Deducted at Source) on foreign entity payments (10%), state-level entertainment taxes in some regions, and withholding tax on royalty payments (10%, potentially reducible under tax treaties).

Distribution cost structures introduce additional financial considerations that impact profit potential. These include Virtual Print Fee (VPF) of ₹20,000-30,000 per screen, marketing minimum thresholds of ₹1-3 crore for limited releases, certification and compliance costs of ₹2-5 lakh, dubbing investments of ₹5-8 lakh per language, distribution commission of 15-25% of box office, and collection monitoring costs of ₹1-2 lakh.

Regulatory compliance costs add further complexity and financial burden. These encompass

foreign film import registration (₹50,000-1 lakh), content certification (₹20,000-50,000), legal representation requirements, mandatory GST registration for direct distribution, local office requirements for direct distribution, and annual compliance maintenance.

Several mitigation approaches can effectively address these financial barriers.

Structural

optimization strategies include:

- *Distribution through Indian entities to minimize import complexities
- *Evaluation of revenue share versus minimum guaranteed arrangements
- *Implementation of co-production structures to qualify as domestic content
- *Tiered release strategies reducing upfront costs
- *Digital-first models reducing theatrical expense

Financial engineering presents additional optimization opportunities through utilization of tax treaty benefits (specifically the Thailand-India treaty), optimization of distribution expenses allocation, marketing cost sharing with promotional partners, sequential investment based on performance metrics, and multiple territory release cost amortization.

Revenue optimization strategies further enhance financial performance. These include premium pricing strategies for target audiences, development of alternative revenue streams such as merchandising and music, extended life cycle planning across platforms, ancillary rights packaging for enhanced value, and exploration of festival revenue opportunities.

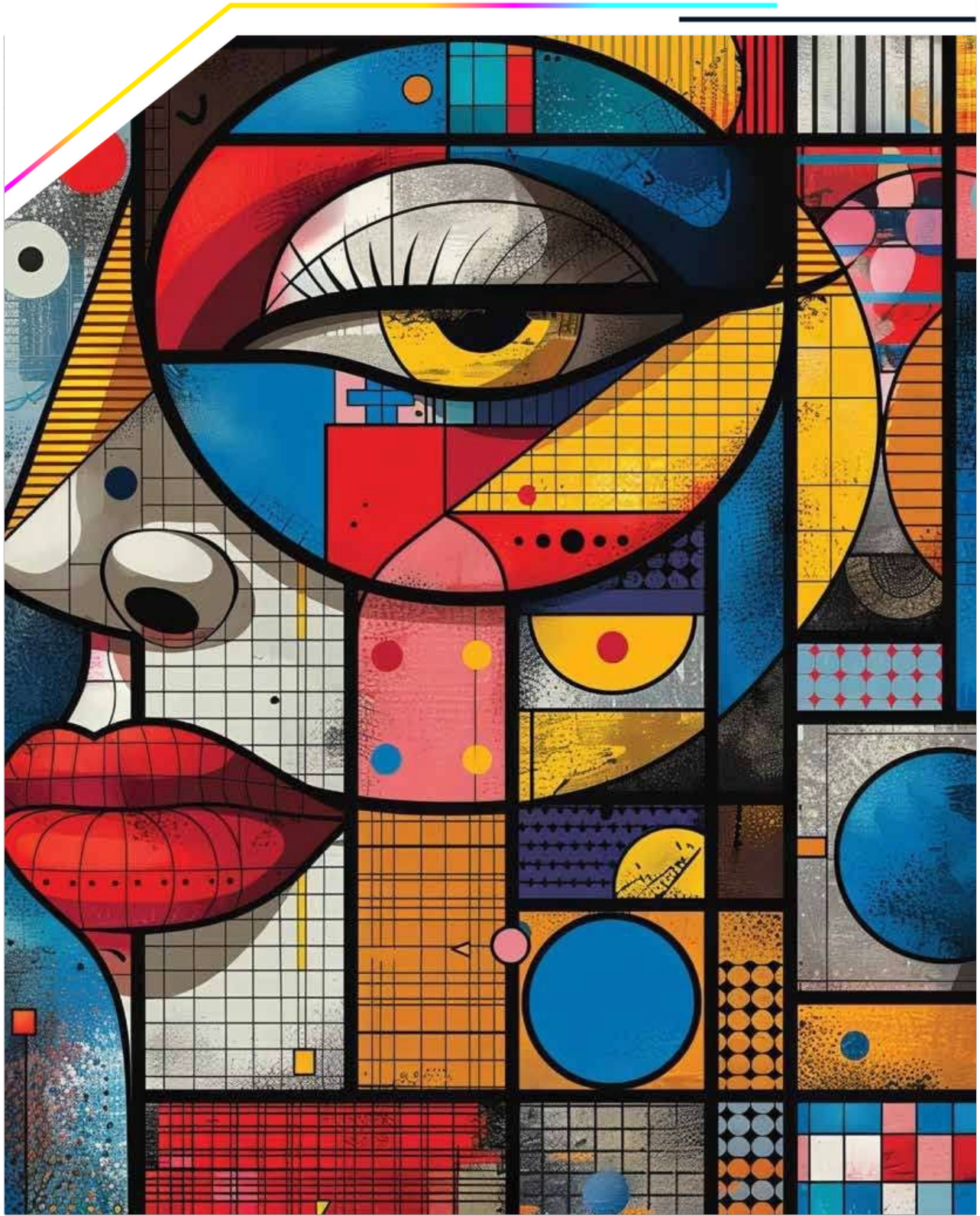
provides a financial model impact analysis across distribution models, highlighting the varying profit margin ranges and primary cost factors. Direct theatrical distribution yields 5-15% profit margins, primarily impacted by marketing, VPF, and taxes, with medium optimization potential. Indian partner theatrical distribution offers 12-25% profit margins, affected by revenue share and minimum guarantee arrangements, with high optimization potential. Premium digital distribution provides 15-35% profit margins, influenced by marketing and dubbing costs, with medium-high optimization potential. Festival and limited release approaches generate 8-20% profit margins, impacted by travel, prints, and marketing expenses, with medium optimization potential. Multi-platform rights sales yield 18-30% profit margins, affected by sales agent commissions, also with medium optimization potential.

Distribution Model	Profit Margin Range	Primary Cost Factors	Optimization Potential
Direct Theatrical	5-15%	⚠ Marketing, VPF, taxes	Medium
Indian Partner Theatrical	12-25%	💰 Revenue share, minimum guarantee	High
Premium Digital	15-35%	🔊 Marketing, dubbing	Medium-High
Festival + Limited Release	8-20%	✈ Travel, prints, marketing	Medium
Multi-Platform Rights Sale	18-30%	🏠 Sales agent commission	Medium

Source: Industry interviews, financial modeling

Fig 6.6: Financial Model Impact Analysis

7. FUTURE OUTLOOK & STRATEGIC RECOMMENDATIONS



7.1 Emerging Trends: AI, VFX, 3D & Digital Innovations

Technological advancements are reshaping production and distribution landscapes across the global film industry. These developments present significant opportunities for Thai content creators seeking to enter the Indian market, with varying levels of impact and implementation timelines.

Technology Trend	Impact Level	Timeline	Market Implications
AI-Enhanced Production	High	2025-2027	Cost reduction, efficiency
Virtual Production	Medium-High	2026-2029	Location flexibility, VFX integration
Advanced VFX Pipelines	High	2025-2028	Visual quality at lower budgets
Cloud-Based Workflows	Very High	2025-2026	International collaboration ease
Enhanced Distribution Analytics	High	2025-2027	Targeted marketing efficiency
Blockchain Rights Management	Medium	2027-2030	Simplified rights tracking
Extended Reality (XR)	Medium-Low	2028-2030	New content formats

Source: Industry forecasts, technology adoption studies

Fig 7.1: Technology Impact Analysis (2025-2030)

Production Technology Evolution

Several technology trends will significantly impact content creation methodologies and capabilities. AI-Enhanced Production represents a transformative force in the industry, with automated subtitling and dubbing quality improvements allowing for more efficient localization of Thai content for Indian audiences. Script analysis and development tools are increasingly incorporating AI to identify market-appropriate narratives, while post-production workflow automation is reducing time-to-market for international releases. VFX cost reduction through AI assisted processes is democratizing high-quality visual

elements, and performance enhancement technologies are enabling more efficient shooting schedules. Virtual Production Accessibility is expanding rapidly as LED volume technology costs decrease, making these tools available to mid-budget productions. Location-independent production capabilities allow for creating Indian settings without physical presence in the country, while international collaboration without physical presence reduces travel expenses and complications. Real-time visualization is enabling immediate creative decisions that previously required postproduction iterations, and budget optimization through combined production phases is creating new efficiency models for cross-border collaborations.

VFX Democratization continues to accelerate, with high-quality visual effects becoming accessible at mid-range budgets that align with Thai production economics. Cloud-based enduring is reducing infrastructure requirements that previously presented barriers to entry, while pre-visualization tools enhance planning efficiency for complex sequences. Distributed workforce models are enabling access to global talent without relocation requirements, and template-based effects systems for common requirements are streamlining production for routine visual elements.

Workflow Transformation is perhaps the most immediately impactful trend, with cloud-based production management systems enabling seamless coordination across borders. Real-time collaborative editing platforms allow for simultaneous work by teams in Thailand and India, while remote review and approval systems streamline decision-making processes. Centralized asset management solutions ensure consistency across markets, and international team collaboration tools break down traditional geographic barriers to co-production.

Distribution Technology Evolution

Distribution models are similarly evolving in ways that facilitate market entry. Advanced Analytics now enable audience segmentation at micro-demographic levels previously impossible, allowing Thai content to identify precise market opportunities. Predictive modeling for content performance reduces risk in new market entry, while dynamic marketing optimization tools ensure efficient resource allocation. A/B testing frameworks for promotional content allow for culturally appropriate messaging development, and cross-platform performance correlation analysis provides holistic performance measurement across diverse Indian consumption models.

Discovery Enhancement technologies are addressing critical visibility challenges for foreign content. Recommendation algorithm sophistication increasingly surfaces content based on viewing patterns rather than origin, while contextual content suggestion technologies present Thai productions in appropriate consumer moments. Social graph influence on discovery is amplifying word-of-mouth across digital communities, and voice-based and conversational search integration is bypassing traditional navigation limitations. Mood and preference-based recommendation systems match content to emotional states rather than conventional categories.

Monetization Innovation is creating flexible models suited to market entry strategies. Dynamic pricing models based on demand metrics allow for strategic pricing during market establishment, while microtransaction frameworks for content access reduce barriers to trial. Hybrid subscription/transactional models provide multiple revenue streams from diverse consumer segments, and engagement-based revenue sharing structures align platform success with content performance. Community support models for niche content enable targeted approaches for specific genres where Thai productions may have distinctive advantages.

Strategic Technology Implications

For Thai content creators, these trends suggest several strategic directions that merit consideration. Investing in cloud-based workflows will enable international collaboration essential for market understanding and adaptation. Exploring AI-enhanced dubbing technologies can significantly improve quality while controlling costs—a critical factor in market acceptance of foreign content. Leveraging virtual production capabilities provides opportunities to create India set content without location barriers that previously limited authentic storytelling.

Developing proprietary audience data through direct engagement strategies will create competitive advantages in targeting and positioning. Exploring technology partnerships with Indian innovation companies can provide access to market-specific solutions while building valuable relationships. Additionally, considering blockchain-based rights management systems for complex territorial deals will protect intellectual property while enabling flexible distribution arrangements across India's diverse regional markets.

7.2 Growing Role of OTT Platforms in Content Distribution

Digital platforms are increasingly central to content monetization strategies, particularly for international content seeking efficient market entry. The evolution of these platforms presents strategic opportunities for Thai productions to reach Indian audiences.

Platform Evolution Forecast

The OTT landscape continues to undergo rapid transformation that favors international content diversity. Subscriber base projections indicate growth to 589 million by 2030 (from 450 million in 2025), creating a massive addressable market for Thai content. The subscription-only model is shifting to hybrid (SVOD/AVOD) approaches that provide multiple entry points for foreign content experimentation. Platform consolidation is expected to result in 8-10 major platforms by 2030, necessitating strategic relationship development with key players. Content investment is increasing at an impressive 18% annually through 2028, creating expanded acquisition budgets for international programming. International content allocation is growing substantially from 15% to 25% of catalogs, reflecting consumer demand for diverse storytelling. Regional language content is becoming a platform differentiator, creating opportunities for Thai

Platform	Content Strategy Direction	International Focus	Thai Content Opportunity
Disney+ Hotstar	Mass market, sports-led	Hollywood focused	Limited, specific genres
Amazon Prime	Diverse, quality focus	Global curation	Strong, multiple genres
Netflix	Premium, urban-focused	Global originals	Very strong, original potential
ZEE5	Regional language depth	Limited, SAARC	Medium, through aggregators
SonyLIV	Sports, entertainment	Limited, Western	Limited, specific genres
MX Player	Mass market, AVOD-led	Limited, dubbed	Medium, action/thriller focus

Source: Platform strategy analysis, industry interviews

Fig 7.2: Major Platform Strategy Evolution (2025-2030)

narratives that complement domestic Indian production, while original content investment is surpassing acquisition budgets in 2026, suggesting value in co-production approaches.

Emerging Platform Models

New distribution approaches are creating additional opportunities beyond the major platforms. Specialized/Niche Platforms targeting passionate communities represent attractive entry points for distinctive Thai content. These genre-specific platforms, such as MUBI India, DocuBay, and Spuul, offer curated art/international film selections under membership models with community features. While these platforms deliver lower volume, they generate higher engagement metrics that can build sustainable audience relationships.

Aggregator Services are creating efficient multi-platform distribution possibilities. Content bundling across multiple services, particularly through telecom-led bundling (Jio, Airtel, VI), extends potential reach without individual platform negotiations. Payment aggregation simplifies multiple subscriptions for consumers, increasing willingness to explore international content, while discovery layers across platform content improve content visibility. Examples like JioTV+ and Tata Play Binge represent important channel relationships for Thai content distribution.

Creator-Led Models present innovative approaches for distinctive content. Direct-to-audience distribution by creators circumvents traditional platform gatekeepers,

while subscription/membership support models provide predictable revenue for niche content. Community engagement serves as a central feature of these platforms, creating passionate advocates for international storytelling. Examples like Patreon creator models and TVF Premium demonstrate the viability of these approaches for cultivating dedicated audiences.

Strategic Implications for Thai Content

Platform evolution suggests several strategic directions for Thai content creators. Prioritizing platform relationships based on international content investment history will focus resources on receptive partners. Considering multiple platform strategies rather than exclusivity will maximize audience reach during market entry phases. Exploring niche platform opportunities for specialized content can build audience proof-points for subsequent mainstream platform negotiations. Developing direct-to-consumer capabilities alongside platform distribution creates audience relationship assets and negotiation leverage. Bundling multiple titles for enhanced negotiating positions improves economics and platform attention, while investing in platform-specific optimization (metadata, artwork, promotional assets) ensures content performance within each ecosystem's unique algorithms and user interfaces.

7.3 Policy Reforms & Incentives for Foreign Filmmakers

India's policy landscape for international content is evolving positively, creating improved operational conditions for Thai productions. Recent reforms have significantly reduced administrative barriers while introducing financial incentives that enhance project economics.

Recent Policy Developments

Several reforms have improved the operating environment for international productions. The Film Facilitation Office Enhancement represents a significant administrative advancement, with single-window clearance system implementation reducing complexity for foreign productions. Dedicated facilitation for international productions provides specialized support for nondomestic requirements, while standard operating procedures establish predictability in previously variable processes. Reduced processing timelines (35% average reduction) improve production scheduling reliability, and location database development aids efficient production planning.

Production Incentives Introduction creates compelling financial advantages for Thai producers. A 30% cash rebate on qualified Indian expenditure significantly improves project economics, with an additional 5% available for significant Indian employment. The minimum spend requirement of \$150,000 aligns with typical Thai production budgets for potential India-focused projects. Above-the-line costs are eligible up to 30% of budget, allowing creative talent inclusion in qualifying expenses, and post-production services inclusion enables partial production approaches.

Co-Production Framework Expansion provides structural advantages for formal partnerships. Bilateral treaty negotiations with ASEAN countries, including preliminary discussions with Thailand, signal government commitment to regional collaboration. Simplified approval processes for co-productions reduce administrative overhead, while domestic content status benefits extension provides significant market advantages. Automatic approval routes for qualifying projects eliminate uncertainty, and tax advantages alignment with domestic productions improves overall economics.

Foreign Shooting Permissions Streamlining addresses historical barriers to production in India. Processing time reduction from 40-60 days to 15-25 days creates practical scheduling possibilities, while digital application portal implementation improves transparency and efficiency. Standardized requirements across locations eliminate regional procedural variations, and inter-departmental coordination improvements reduce bureaucratic complexities. Regional single-window systems development further simplifies location production throughout India.

Future Policy Direction

Several anticipated policy developments will further enhance the operating environment for Thai productions. A comprehensive film policy update expected in 2026 signals continued government focus on industry development. GST rationalization for the film industry is under consideration, potentially reducing tax complexity and burden. A co-production treaty with Thailand is under preliminary discussion, which would formalize advantages for collaborative projects.

An expanded production incentive program planned for 2025-2030 suggests increasing financial benefits, while digital content regulatory framework stabilization will provide certainty for OTT focused productions. Intellectual property protection enhancement initiatives address historical concerns about content security, and increasing state competition for production is driving additional regional incentive offerings that can be strategically leveraged.

Strategic Recommendations

These developments suggest several approaches for Thai producers considering the Indian market. Engaging with the Film Facilitation Office early in production planning will ensure optimal navigation of administrative requirements. Exploring state-level incentives for location selections can identify exceptional economic opportunities in specific regions. Considering formal co-production structures to access benefits may justify the additional administrative requirements through tangible advantages.

Monitoring bilateral treaty developments between India and Thailand will identify emerging opportunities for structural collaboration. Leveraging the Indian embassy cultural attaché in Thailand for facilitation can provide invaluable guidance and relationship development.

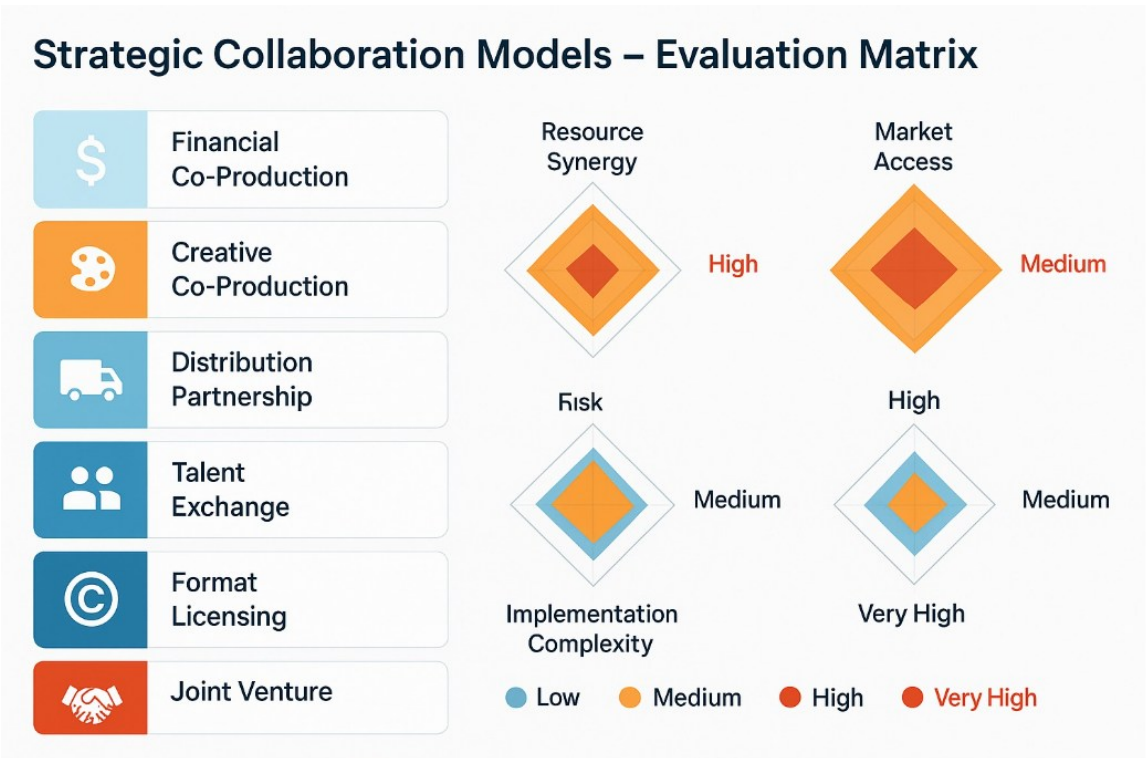
Additionally, participating in policy consultations through industry associations ensures Thai perspectives are considered in future regulatory developments.

7.4 Potential Collaborations & Co-Production Incentives

Strategic partnerships offer enhanced market access and resource optimization for Thai productions entering the Indian market. Various collaboration models present distinctive advantages that align with different strategic objectives and operational capabilities.

Collaboration Models Assessment

Various partnership structures offer distinct advantages depending on strategic priorities and resource capabilities.



Source: Industry partnership analysis

Fig 7.4: Collaboration Model Comparison

Potential Indian Partners

Several Indian entities have demonstrated international collaboration interest and capability. Among production companies, Excel Entertainment offers urban, contemporary focus aligned with modern Thai narratives. Matchbox Pictures provides content-driven, director-focused approaches suitable for artistic collaborations. Roy Kapur Films specializes in quality commercial content with mainstream appeal, while Phantom Films creates edgy, contemporary content for younger demographics. Dharma Productions delivers commercial mainstream, youth-focused content with wide market reach.

Distribution partners provide critical market access infrastructure. AA Films maintains a wide distribution network with international experience relevant to

foreign content. PVR Pictures leverages exhibition-linked distribution with premium positioning ideal for selective Thai releases. Reliance Entertainment offers integrated distribution capabilities across multiple platforms and regions. Pen Studios provides multi-language distribution strength essential in India's linguistically diverse market, while Anil Thadani Films specializes in independent distribution for distinctive content.

Digital aggregators facilitate efficient platform relationships. Shemaroo Entertainment maintains extensive platform relationships across the OTT ecosystem. Ultra Media & Entertainment specializes in library content placement for catalog monetization. Times Bridge provides international content representation with strong platform relationships, while Rain Shine Entertainment focuses on digital-first content distribution aligned with contemporary consumption patterns. One Take Media offers dubbing and adaptation specialization particularly valuable for Thai language content.

Strategic Partnership Recommendations

Based on market analysis, several strategic approaches emerge with different time horizons. Short-Term Partnership Priorities (1-2 Years) should focus on distribution partnerships with established Indian distributors to leverage existing market infrastructure. Digital rights aggregator relationships for library content can generate immediate revenue and market presence. Festival programming relationship development will build critical industry recognition and awareness, while Indian talent inclusion in Thai productions develops relationships and market relevance. Limited test cases for theatrical distribution provide valuable learning and audience feedback.

Medium-Term Partnership Development (2-3 Years) should advance to more integrated approaches. Financial co-production structure implementation creates mutual investment in market success. Creative talent exchange program establishment develops deeper collaborative capabilities and cultural understanding. Format licensing for successful Thai concepts provides tested narratives adapted for market preferences. Joint development of India-Thailand stories creates authentic cross-cultural content with inherent market relevance, while multi-title slate approaches with distribution partners build sustainable business relationships.

Long-Term Collaboration Vision (3-5 Years) should aim for comprehensive integration. Full creative co-production implementation enables truly bilateral content development. Potential joint ventures for sustained collaboration institutionalize market participation beyond individual projects. Production service facility development creates infrastructure assets for ongoing operations. Talent development initiatives build human capital for sustained collaboration, while integrated multi-platform distribution structures maximize market reach and revenue optimization.

Resource Optimization Strategies

Partnerships enable significant resource optimization that improves project economics and risk profiles. Production cost efficiency through Indian crew integration leverages favorable cost structures in specific roles. Marketing leverage through partner audience relationships provides access to established consumer connections. Distribution infrastructure access without capital investment enables market participation without fixed costs.

Local market intelligence reduces the learning curve for cultural nuances and preferences, while regulatory navigation expertise mitigates compliance risk in a complex and evolving environment. These efficiencies collectively improve project viability while accelerating market understanding.

Incremental Approach Recommendation

A phased market entry strategy is recommended to build sustainable market presence while managing risk and resource commitment.

Phase	Timeframe	Primary Focus	Key Activities	Success Metrics
1	0-12 months	Market Testing	Digital platform entry, Festival participation	Platform performance, Audience feedback
2	12-24 months	Distribution Development	Limited theatrical release, Partner identification	Revenue performance, Partner quality
3	24-36 months	Relationship Deepening	Co-production structure, Expanded release slate	Partnership stability, Market share

Source: Strategic planning framework

Fig 7.5: Phased Market Entry Roadmap

8. REFERENCES & ADDITIONAL RESOURCES



8.1 Industry Reports & Market Data Sources

Key Industry Reports

- FICCI-EY Media & Entertainment Industry Report 2024
- PwC Global Entertainment & Media Outlook 2025-2029
- Orman Media Indian Box Office Report 2024
- KPMG Media & Entertainment Industry Report 2024
- Boston Consulting Group - The Future of Indian Media 2025
- Media Partners Asia - Asia OTT Distribution Report 2024
- Deloitte - Digital Media Trends India 2024

Market Data Sources

- Box Office India (theatrical performance database)
- ComScore India (audience measurement)
- BARC India (television audience measurement)
- IRS (Indian Readership Survey) Media Consumption Report
- Motion Picture Association of America - APAC Market Statistics
- Film Federation of India - Annual Indian Film Industry Report
- Multiplex Association of India - Exhibition Industry Data

Academic & Research Resources

- Indian Institute of Mass Communication - Media Studies Papers
- Mudra Institute of Communications - Entertainment Industry Research
- Film & Television Institute of India - Industry Papers
- National Film Archive of India - Historical Data and Archives
- Observer Research Foundation - Digital Economy Papers
- MICA (Mudra Institute of Communications) - Entertainment Industry Studies

8.2 Industry Reports & Market Data Sources

Key Policy Documents

- National Film Policy 2019 (with 2023 amendments)
- Cinematograph Act 1952 (with 2021 amendments)
- Information Technology (Intermediary Guidelines) Rules 2021
- Foreign Direct Investment Policy for Media & Entertainment
- Import Policy for Films and Audio-Visual Content

- Goods and Services Tax Guidelines for Entertainment Sector
- National IPR Policy (as applicable to entertainment)

Regulatory Bodies

- Central Board of Film Certification (CBFC) - •Ministry of Information & Broadcasting - www.mib.gov.inwww.cbfcindia.gov.in
- Film Facilitation Office (FFO) - www.ffa.gov.in
- National Film Development Corporation (NFDC) - www.nfdcindia.gov.in
- Directorate of Film Festivals - www.dff.gov.in
- Intellectual Property India - www.ipindia.gov.in
- Telecom Regulatory Authority of India (for OTT) - www.trai.gov.in

State Film Policies

- Maharashtra Film, Stage & Cultural Development Corporation - <https://filmcitymumbai.org/>
- Gujarat Film Tourism Policy - <https://www.gujarattourism.com/film-tourism.html>
- Uttar Pradesh Film Bandhu Scheme - <http://film.up.gov.in/>
- Film Development Corporation of Tamil Nadu - <https://www.tn.gov.in/tourism/film.html>
- Kerala State Film Development Corporation - <https://ksfdc.in/>

8.3 List of Major Film Studios, Distributors, and OTT Players

Major Film Studios

- Yash Raj Films
- Dharma Productions
- Excel Entertainment
- T-Series Films
- Reliance Entertainment
- Zee Studios
- Viacom18 Studios
- Maddock Films
- Nadiadwala Grandson Entertainment
- UTV Motion Pictures / Disney India

Key Distributors

- AA Films
- PVR Pictures
- Pen Marudhar Entertainment
- NH Studioz
- Panorama Studios Distribution
- Zee Studios International
- Reliance Entertainment Distribution
- Star India / Disney Distribution
- Viacom18 Motion Pictures Distribution

OTT Platforms

- Netflix India
- Amazon Prime Video India
- Disney+ Hotstar
- ZEE5
- SonyLIV
- MX Player
- JioCinema
- ALTBalaji
- Lionsgate Play
- Apple TV+

Content Aggregators

- Shemaroo Entertainment
- Ultra Media & Entertainment
- Times Bridge
- One Take Media
- Rainshine Entertainment
- Pocket Films
- FilmKaravan
- Vuclip / Viu

8.4 Key Film Festivals & Networking Events in India

Major International Film Festivals

International Film Festival of India (IFFI), Goa – November

 www.iffigoa.org

Includes Film Bazaar market

Government-organized, largest official festival

Mumbai Film Festival (MAMI) – October

 www.mumbaifilmfestival.com

Industry program includes *Word to Screen Market*
Strong international selection and industry presence

Kolkata International Film Festival – November

 www.kff.in

Focus on Asian cinema, strong Bengali connection
Limited but growing industry component

International Film Festival of Kerala – December

 www.iffk.in

Strong focus on Asian and developing world cinema
Dedicated Thai/Southeast Asian spotlight sections

Dharamshala International Film Festival – November

 www.diff.co.in

Mountain setting, independent focus
Emerging platform for alternative content



Industry Events & Markets

FICCI Frames, Mumbai – March

 www.ficci-frames.com

Largest media & entertainment business conclave
Executive-level networking, policy discussions

Film Bazaar (during IFFI), Goa – November

 www.filmbazaarindia.com

Most important co-production market
Project pitching, works-in-progress, industry screenings

Indywood Film Market, Hyderabad – September

 www.indywood.co.in

Production services and equipment focus
International production facilitation



Specialized/Genre Festivals with Industry Components

Mumbai International Film Festival for Documentary, Short & Animation

 www.miff.in

Biennial (odd years) – January/February
Leading documentary and animation platform
Pune International Film Festival

 www.piffindia.com

January annually
Academic connections, emerging filmmaker focus
Bengaluru International Film Festival

 www.biffes.org

February/March annually

Technology integration focus, growing industry presence

Chennai International Film Festival

 www.chennaifilmfest.com

December annually

South Indian focus with international selection

International Film Festival of Thrissur

 www.ifftkochi.com

August annually

Growing platform for international independent films

 Networking Resources

Film Federation of India

 www.filmfed.org

Industry body coordinating multiple associations

Indian Motion Picture Producers' Association (IMPPA)

 www.imppa.info

Oldest film producers' association

Indian Film & TV Producers Council (IFTPC)

 www.iftpc.org

Production-focused trade body

Screenwriters Association (SWA)

www.swaindia.org

Development and adaptation opportunities

FICCI – Entertainment Committee

 www.ficci.in

Industry-government liaison

8.5 Appendix

In India, cities are often classified into Tier 1, Tier 2, and Tier 3 based on factors such as population, infrastructure, economic activity, and standard of living. This classification is commonly used in contexts like real estate, employment, marketing, and government allowances (like HRA – House Rent Allowance).

◆ Tier Classification Criteria

Criteria	Tier 1	Tier 2	Tier 3
Population	More than 4 million	1 to 4 million	Less than 1 million
Economic Activity	High (corporate, IT hubs)	Moderate (industrial, services)	Low to moderate (local business)
Infrastructure	Excellent (metro, airports)	Developing	Basic infrastructure
Living Standards	High	Medium	Low to medium
Real Estate Cost	Very high	Moderate	Low
Examples	Metro cities	State capitals, big cities	Smaller towns

Tier 1 Cities in India (Major Metros)

These are India's most developed and urbanized cities.

Mumbai, Delhi (NCR), Bengaluru, Chennai, Hyderabad, Kolkata, Pune, Ahmedabad

Tier 2 Cities in India (Emerging Metros)

These are rapidly growing cities with good infrastructure and rising economic activity.

Lucknow, Jaipur, Chandigarh, Bhopal, Indore, Nagpur, Surat, Vadodara, Kochi, Coimbatore, Vishakhapatnam, Ludhiana, Patna, Bhubaneswar, Mysuru, Guwahati, Thiruvananthapuram, Madurai, Ranchi, Raipur.

Tier 3 Cities in India (Smaller Towns)

These are smaller urban centers with limited but growing infrastructure.

Jalandhar, Gwalior, Dehradun, Agra, Nashik, Udaipur, Amritsar, Jodhpur, Gorakhpur
Varanasi, Meerut, Mangalore, Jammu, Trichy, Cuttack, Allahabad (Prayagraj),
Siliguri, Ajmer, Dhanbad, Hubli-Dharwad.

Note:

Different government bodies (like the 7th Central Pay Commission or Census India) and private sectors (real estate, HR) may define tiers slightly differently. However, the above is a widely accepted general classification.



Thai Trade Center, Chennai, India

www.thaitradechennai.in

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