

## **CHAPTER 4**

### **CONSUMER BASE OF CINEMA IN THE DIGITAL ERA IN INDIA: RESEARCH WITH SPECIAL REFERENCE TO OTT PLATFORMS**

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#### **ABSTRACT**

**T**he Over-the-Top (OTT) platform revolution has changed the way the Indian film business is constituted. This study examines how audiences have changed in the digital age, paying special attention to OTT services. This study seeks to shed light on the evolving dynamics of Indian movie consumption by thorough research of the effects of digitalization on traditional cinema. It looks at essential issues including accessibility, diversity of content, and technical developments in an effort to provide some insight into the consequences and potential outcomes of this changing customer base. In a nutshell this research paper offers a thorough examination of the dynamics that

are changing in the Indian film business as a result of the emergence of OTT platforms and the digital age. It aims to shed light on the many dimensions of this shift and provides insightful information for those working in the industry, decision-makers, and academics interested in the future of Indian cinema consumption.

#### **4.1 INTRODUCTION**

The digital era has redefined the way Indian consumers engage with cinema. OTT platforms have emerged as a disruptive force, offering diverse content, convenience, and accessibility. This paper investigates the evolution of the consumer base in the digital era, exploring the factors driving this transformation. As we delve into the evolving consumer base of Indian cinema, it becomes evident that the digital era plays a pivotal role. In an era marked by technological advancements and increased internet penetration, consumers' preferences and behaviors have been reshaped. Consumers now have the power to dictate when, where, and how they consume cinematic content. OTT platforms, such as Netflix, Amazon Prime Video, and Disney+ Hotstar, have emerged as key players in this transformation. These platforms offer an extensive library of content, spanning genres, languages, and regions. This paper directs particular attention toward OTT platforms due to their prominent role in reshaping the cinematic landscape. One of the central objectives of this research paper is to provide a thorough analysis of consumer preferences. We investigate what drives viewers to OTT platforms, exploring aspects such as convenience, content diversity, and cost-effectiveness. By dissecting these factors, we gain insights into why consumers are gravitating towards digital platforms over traditional cinema. While our focus primarily rests on OTT platforms, we also analyze the impact of this digital revolution on traditional cinema. We assess box office trends in relation to OTT releases, identify changing distribution models, and investigate the enduring appeal of the cinema-going experience.

This paper does not shy away from addressing the challenges posed by the digital era, including content regulation and evolving monetization models. Simultaneously, we highlight the opportunities that arise from this transformation, offering insights into how stakeholders can adapt to a rapidly changing landscape. As the digital era continues to evolve, we anticipate future trends and their implications for the Indian cinema industry. This includes discussions on emerging technologies, hybrid models that bridge traditional cinema and OTT platforms, and the potential for new business strategies.

## 4.2 THE RISE OF OTT PLATFORMS

### 4.2.1 MARKET GROWTH

An overview of the rapid expansion of the OTT market in India.

#### **Case study: Leading OTT platforms and their market share-**

As of September 2021, the Over-the-Top (OTT) streaming market in India was highly competitive, with several platforms vying for market share. Keep in mind that the market share of OTT platforms can change rapidly due to various factors, including the release of exclusive content and changing consumer preferences. Therefore, it's essential to consult up-to-date sources or market research reports for the most current data. Some of the leading OTT platforms in India and their approximate market shares as of 2021:

- **Amazon Prime Video:**
  - Amazon Prime Video has been a strong player in the Indian OTT market.
  - Its market share was estimated to be around 15% to 20%.
  - Amazon Prime Video's strategy included producing original Indian content and securing exclusive rights to popular movies and series.
- **Netflix:**
  - Netflix is known for its premium content and global reach.
  - Its market share in India was estimated to be around 10% to 15%.
  - Netflix focused on producing high-quality original content across various genres to attract Indian audiences.
- **Disney+ Hotstar:**
  - Disney+ Hotstar (formerly Hotstar) held a significant share of the market.
  - It was estimated to have a market share of approximately 30% to 35%.
  - Disney+ Hotstar offered a vast catalog of content, including sports, TV shows, movies, and original programming.
- **Zee5:**
  - Zee5, owned by Zee Entertainment Enterprises, had a notable presence.
  - Its market share was estimated to be around 10%.
  - Zee5 focused on providing a diverse range of regional content in multiple Indian languages.
- **Voot:**
  - Voot, owned by Viacom18, was among the key players.
  - Its market share was estimated to be around 5% to 10%.
  - Voot aimed to cater to a broad audience with a mix of free and premium content.

- **SonyLIV:**
  - SonyLIV, owned by Sony Pictures Networks India, had a smaller but growing market share.
  - Its market share was estimated to be around 5%.
  - Sony LIV offered a variety of content, including sports, TV shows, and movies.

Please note that these market share estimates are approximate and may have changed since 2021 due to evolving market dynamics and competition. Additionally, new entrants and partnerships between platforms and telecom operators can significantly impact market share figures. For the most up-to-date information on the market share of OTT platforms in India, it's advisable to consult industry reports and market research data.

#### 4.2.2 ACCESSIBILITY

Over-the-Top (OTT) platforms have played a transformative role in democratizing access to cinema content in India, impacting both rural and urban viewership. Here's an exploration of how OTT platforms have achieved this and their influence on viewership in both settings:

- **Rural Impact:** Prior to the rise of OTT platforms, rural areas often had limited access to cinemas, particularly multiplexes, due to geographical constraints and lower income levels. OTT platforms have eliminated this barrier by making cinematic content accessible through the internet. Rural viewers can now access a vast library of movies and shows on their smartphones, tablets, or smart TVs.
- **Urban Impact:** In urban areas, while cinemas are more accessible, OTT platforms have provided a convenient alternative. Urban viewers often have busy lifestyles, and OTT platforms offer the flexibility to watch content at their convenience, making it easier to balance work, social life, and entertainment.

#### 4.2.3 CONTENT DIVERSITY

Diverse content is a key driver in attracting and retaining consumers on Over-the-Top (OTT) platforms. The availability of a wide range of content types, genres, and languages caters to different tastes and preferences, making OTT platforms more appealing to a broad and varied audience. Here, we'll delve into the role of diverse content and its influence on both regional and international viewers:

##### 4.2.3.1 ATTRACTING AND RETAINING CONSUMERS

- **Broad Appeal:** Diverse content attracts a larger and more diverse user base. While some viewers may prefer action-packed blockbusters, others may be drawn to romantic comedies, documentaries, or international dramas. Having a mix of genres ensures that there is something for everyone.
- **Continuous Engagement:** Diverse content keeps viewers engaged over time. Instead of consuming one type of content exclusively, consumers are more likely to return to the platform repeatedly if they can find a variety of content that suits their changing moods and interests.
- **Reducing Churn:** For OTT platforms, retaining subscribers is as important as attracting new ones. Offering a diverse catalog minimizes subscriber churn. When subscribers have access to content they love, they are less likely to cancel their subscriptions.

#### 4.2.3.2 INFLUENCE OF REGIONAL CONTENT

- **Catering to Local Preferences:** OTT platforms recognize the significance of regional preferences in India. They invest in producing or acquiring content in various regional languages to cater to specific regional tastes. This localized approach resonates with viewers in different parts of the country.
- **Regional Audience Engagement:** Regional content has the power to forge strong emotional connections with viewers from specific regions. When viewers see stories and characters they can relate to culturally and linguistically, it enhances their viewing experience.
- **Market Expansion:** Offering regional content allows OTT platforms to tap into previously underserved markets. By breaking down language barriers, they can expand their reach and compete effectively with local and international players.

#### 4.2.3.3 INFLUENCE OF INTERNATIONAL CONTENT

- **Global Appeal:** International content broadens the horizons of viewers, exposing them to different cultures, languages, and storytelling styles. It offers a unique viewing experience that appeals to those seeking something beyond their immediate surroundings.
- **Diverse Perspectives:** International content often provides diverse perspectives and narratives that can be both enlightening and entertaining. It introduces viewers to issues, stories, and experiences they might not encounter in domestic content.

- **Quality and Variety:** Many OTT platforms invest in acquiring and producing high-quality international content, including award-winning series and films. This positions them as platforms offering a wide range of content options, adding to their appeal.

#### 4.2.4 CONTENT DISCOVERY AND PERSONALIZATION

- **Recommendation Algorithms:** OTT platforms use recommendation algorithms to personalize content discovery for users. These algorithms analyze a viewer's past preferences and viewing history to suggest content that aligns with their interests. Diverse content helps these algorithms make more accurate recommendations.
- **Content Mix:** By maintaining a balance between regional, international, and mainstream content, OTT platforms can ensure that their content discovery algorithms cater to a broader set of viewer preferences.

### 4.3 CONSUMER PREFERENCES AND BEHAVIOUR

#### 4.3.1 CONVENIENCE AND FLEXIBILITY

Over-the-Top (OTT) platforms have revolutionized the way viewers consume content by offering flexible viewing options that cater to individual preferences. This analysis explores how OTT platforms provide flexibility in viewing, with a focus on two significant trends: binge-watching and time-shifted viewing. To illustrate these trends, we will use case studies and examples from the OTT industry.

- **Binge-Watching:**
  - Definition: Binge-watching refers to the practice of watching multiple episodes or an entire series of a TV show in a single sitting.
  - Flexibility Offered:**
    - All Episodes Released at Once: Many OTT platforms release entire seasons of original series at once, allowing viewers to watch at their own pace. Netflix, for example, is known for this practice.
    - No Scheduling Constraints: Unlike traditional TV, where viewers must adhere to a fixed broadcast schedule, binge-watching allows viewers to watch whenever it's convenient for them.
    - Pause and Resume: OTT platforms offer the ability to pause and resume content seamlessly. Viewers can stop watching at any point and pick up where they left off later.
    - Case Study:** Netflix's "Stranger Things": Netflix's release strategy for "Stranger Things" is a prime example of binge-watching facilitation. The platform releases

an entire season at once, encouraging viewers to immerse themselves in the series at their own pace.

**Impact:** Binge-watching has become a cultural phenomenon, increasing viewer engagement with OTT platforms. It has also influenced storytelling, with creators developing content designed for binge-watching, incorporating cliff hangers and serialized narratives.

- **Time-Shifted Viewing:**

Definition: Time-shifted viewing refers to the practice of recording or streaming content for later viewing, allowing viewers to watch on their schedule rather than in real-time.

**Flexibility Offered:**

DVR and On-Demand Services: OTT platforms often include DVR-like functionality, enabling viewers to record live broadcasts and watch them later. On-demand libraries provide access to previously aired content.

Live TV Streaming: Some OTT platforms offer live TV streaming, allowing viewers to watch events, news, or shows in real-time or access them later if they missed the live broadcast.

Cross-Device Viewing: OTT platforms support cross-device viewing. Viewers can start watching content on one device and seamlessly switch to another, ensuring they can consume content when and where they prefer.

**Case Study:** Hulu's Live TV and DVR Feature: Hulu offers a live TV streaming service with a DVR feature, enabling subscribers to record live broadcasts and watch them later. This approach combines live TV with time-shifted viewing.

**Impact:** Time-shifted viewing has empowered viewers to tailor their viewing schedules to their daily routines. It also allows viewers to catch up on missed content, reducing the fear of missing out (FOMO) associated with live TV.

#### 4.3.2. PERSONALIZATION

Recommendation algorithms play a pivotal role in shaping consumer choices on Over-the-Top (OTT) platforms. These algorithms analyze user behavior, preferences, and viewing history to provide personalized content recommendations, making the viewer experience more engaging and tailored to individual tastes. In this analysis, we'll explore how recommendation algorithms influence consumer choices, with a focus on personalized content discovery using case studies from OTT platforms.

- **Role of Recommendation Algorithms**

**Understanding Viewer Preferences:** Recommendation algorithms track a user's viewing history and preferences, analyzing data such as the types of content watched, the genres favored, and the time spent on each title.

**Content Discovery:** These algorithms help users discover relevant content they might not have found otherwise. They suggest movies, TV shows, or series based on similarities to what users have previously enjoyed.

**User Engagement:** By providing tailored suggestions, recommendation algorithms keep viewers engaged with the platform, increasing the likelihood that users will spend more time on the service and discover new content.

- **Personalized Content Discovery on OTT Platforms**

**Case Study:** Netflix's Personalization Engine:

**Algorithm:** Netflix is renowned for its recommendation algorithm, powered by a complex system that considers user interactions with content, viewing history, and even factors like the time of day.

**Example:** If a user frequently watches science fiction series and has previously enjoyed shows like "Stranger Things" and "Black Mirror," Netflix's algorithm might recommend "Altered Carbon" due to its similar genre and themes.

**Impact:** Netflix's personalized content discovery has contributed significantly to its subscriber engagement and retention. According to some reports, up to 80% of the content watched on Netflix comes from recommendations. This has also played a role in the platform's content creation strategy, as it informs decisions about which original shows and films to produce.

- **Consumer Choices and the Long Tail Effect**

**Long Tail Theory:** Recommendation algorithms enable the "Long Tail" effect, where niche content and less popular titles gain exposure. Users are not limited to mainstream or trending content; they can explore a vast catalogue that caters to a broad range of interests.

**Enhanced Diversity:** These algorithms encourage viewers to explore diverse content, including regional, independent, and non-mainstream titles. Users are more likely to try out new genres or foreign films if they receive personalized recommendations based on their preferences.

- **Challenges and Ethical Considerations**

**Filter Bubble:** A potential downside of recommendation algorithms is the creation of filter bubbles, where users are exposed only to content similar to what they've already seen. This can limit serendipitous discoveries and diverse perspectives.



**Ethical Concerns:** Algorithms that predict user preferences can sometimes reinforce biases or lead to content recommendations that reinforce stereotypes. Ensuring ethical and unbiased algorithms is an ongoing challenge.

## 4.4 IMPACT ON TRADITIONAL CINEMA

### 4.4.1. BOX OFFICE TRENDS

- Investigating the relationship between OTT releases and box office performance. Before OTT Releases theatrical revenue was the primary source of income for filmmakers. Box office collections served as a measure of a film's success and popularity.
- After OTT Releases, films released on OTT platforms simultaneously or shortly after theatrical release witnessed a shift in revenue streams. Box office collections were supplemented or, in some cases, substituted by digital distribution revenue. Theatrical footfalls experienced a decline as audiences increasingly opted for the convenience of streaming platforms.
- Case study: Box office performance before and after OTT releases.
- *Film: "Shershaah" (2021)*
- The biographical war film "Shershaah," starring Sidharth Malhotra, was released theatrically and simultaneously on Amazon Prime Video.
- Box Office Performance: "Shershaah" received positive reviews from critics and audiences alike, translating into solid box office numbers during its theatrical run.
- OTT Performance: While specific viewership figures were not publicly disclosed, "Shershaah" reportedly performed well on Amazon Prime Video, attracting a sizable audience.
- Relationship Analysis: The film's success both theatrically and on OTT platforms indicated a positive correlation between critical acclaim and audience reception. Strong word-of-mouth and patriotic themes likely contributed to its success across both distribution channels.

### 4.4.2. CHANGING DISTRIBUTION MODELS

- How OTT platforms have altered distribution strategies for filmmakers. The rise of OTT platforms, such as Netflix, Amazon Prime Video, Disney+, and others, introduced a paradigm shift in the way films were distributed and consumed. These platforms offered filmmakers an alternative avenue to showcase their content directly to audiences, bypassing the traditional theatrical release model.
- Case study: Exclusive OTT releases and their impact on the industry.

- *"Gulabo Sitabo"*: The comedy-drama film, starring Amitabh Bachchan and Ayushmann Khurrana, opted for a direct-to-digital release on Amazon Prime Video in June 2020 due to the pandemic. While the decision drew mixed reactions initially, it highlighted the growing importance of OTT platforms as a viable distribution channel. The film's performance on the streaming platform was deemed successful, although specific box office figures were not disclosed.
- *"Ludo"*: An ensemble dark comedy directed by Anurag Basu, "Ludo" was released directly on Netflix in November 2020. Despite not having a theatrical release, the film garnered positive reviews from both critics and audiences. While exact box office comparisons were not possible, the film's success on the streaming platform underscored the potential of OTT releases in reaching wider audiences.

#### 4.4.3. CINEMA-GOING EXPERIENCE

- Analysing the factors that still draw consumers to cinemas.
- **Case study:** The influence of big-budget blockbusters.
- **Film - "Baahubali 2: The Conclusion" (2017)**  
It was a magnum opus Indian epic film directed by S.S. Rajamouli. It was released theatrically on April 28, 2017, across India and worldwide.
- **Spectacle and Cinematic Experience:**  
"Baahubali 2" was a visual extravaganza that demanded to be experienced on the big screen. The film boasted of grandiose sets, breathtaking visual effects, and epic battle sequences, which provided an immersive cinematic experience. Despite the availability of high-definition screens and home theater systems, certain films, like "Baahubali 2," offer a spectacle that can only be fully appreciated in a cinema hall, driving audiences to theaters.
- **Social and Cultural Event:**  
The release of "Baahubali 2" became a social and cultural event in India. The film generated immense anticipation and hype, leading to a collective excitement among audiences.  
Going to the cinema to watch a highly anticipated film like "Baahubali 2" became a collective experience, where friends and families gathered to witness the epic saga together, enhancing the overall viewing experience.
- **Star Power and Fan Following:**  
The "Baahubali" franchise had garnered a massive fan following, owing to its compelling narrative and larger-than-life characters. The star power of actors like Prabhas, Rana Daggubati, and Anushka Shetty further contributed to the film's appeal.

Fans of the franchise were eager to witness the conclusion of the epic saga on the big screen, driven by their loyalty and admiration for the actors and the filmmakers.

- **Limited Release Window:**

"Baahubali 2" had a limited theatrical release window before its digital release, creating a sense of urgency among audiences to watch the film in cinemas.

The exclusivity of the theatrical release window incentivized audiences to experience the film on the big screen before it became available on OTT platforms or other digital mediums.

## 4.5 CHALLENGES AND OPPORTUNITIES

### 4.5.1. CONTENT REGULATION

Exploring the regulatory challenges posed by OTT content.

Case study: OTT Platform: "Tandav" (2021)

- "Tandav" is a political drama web series released on Amazon Prime Video in January 2021. The series, directed by Ali Abbas Zafar, featured a star-studded cast and explored themes of power, politics, and corruption in Indian society. Shortly after its release, "Tandav" sparked controversy over allegedly offensive content. Certain scenes and dialogues were perceived as derogatory towards religious sentiments and depicted political figures in a negative light.
- Various individuals and organizations, including politicians and religious groups, lodged complaints and filed legal cases against the makers of "Tandav," alleging blasphemy and defamation.
- The controversy surrounding "Tandav" reignited debates about the need for stricter content regulation on OTT platforms. Critics argued that OTT content should be subject to the same censorship standards as traditional media, such as television and cinema.
- Calls were made for government intervention to regulate and censor OTT content to prevent the dissemination of potentially offensive or harmful material.

### 4.5.2 REGULATORY CHALLENGES

- **Lack of Clear Guidelines:** One of the primary challenges in regulating OTT content is the absence of clear and comprehensive guidelines. Unlike traditional media, which are subject to established censorship laws and regulatory bodies, OTT platforms operate in a relatively unregulated environment. The absence of

specific guidelines regarding acceptable content standards on OTT platforms creates ambiguity and inconsistency in content regulation.

- **Balancing Freedom of Expression and Regulation:** Regulating OTT content requires striking a delicate balance between upholding freedom of expression and protecting societal values and sensibilities. While censorship aims to prevent the dissemination of harmful or offensive material, it must not infringe upon individuals' rights to creative expression and artistic freedom. Establishing effective content regulation mechanisms that accommodate diverse viewpoints while safeguarding against potential harm poses a significant challenge for regulatory authorities.
- **Jurisdictional Issues:** OTT platforms operate across international borders, making it challenging to enforce uniform content regulations. Content that may be deemed acceptable in one country could be considered offensive or inappropriate in another, leading to jurisdictional conflicts and regulatory inconsistencies. Harmonizing content regulation standards across different jurisdictions and collaborating with international regulatory bodies are essential steps in addressing jurisdictional challenges in regulating OTT content.

#### 4.5.2. MONETIZATION MODELS

Assessing sustainable revenue models for OTT platforms.

Case study: OTT Platforms: Netflix (Subscription-based) vs. YouTube (Ad-supported)

- **Netflix (Subscription-based):**  
Netflix operates on a subscription-based model, where users pay a monthly fee to access its library of content without any advertisements. Netflix generates revenue primarily through subscription fees paid by its subscribers. The platform offers tiered subscription plans with different pricing and features. The subscription-based model provides a steady and predictable stream of revenue for Netflix, allowing the platform to invest heavily in content creation and acquisition.

Additionally, the absence of advertisements enhances the user experience, leading to higher customer satisfaction and retention. One challenge of the subscription-based model is the need to continuously offer compelling content to justify the subscription fee and retain subscribers. Additionally, Netflix faces competition from other subscription-based platforms, necessitating ongoing investments in original content to differentiate itself.

- **YouTube (Ad-supported):**

YouTube operates on an ad-supported model, where users can access content for free but are shown advertisements during video playback. YouTube generates revenue primarily through advertising. The platform offers various advertising formats, including pre-roll ads, display ads, and sponsored content, allowing advertisers to reach a broad audience. The ad-supported model allows YouTube to offer its platform and content for free to users, thereby attracting a large and diverse user base. The platform's extensive reach and engagement make it an attractive advertising platform for brands, driving ad revenue. One challenge of the ad-supported model is balancing the user experience with ad monetization. Excessive or intrusive ads can lead to user frustration and ad-blocking, affecting revenue generation. Additionally, YouTube faces scrutiny over content moderation and brand safety concerns, which can impact advertiser confidence and revenue.

#### 4.5.3 COMPARISON

- **Revenue Stability:** Subscription-based models offer more predictable revenue streams compared to ad-supported models, as they are not dependent on fluctuations in advertising demand and rates.
- **User Experience:** Subscription-based platforms typically offer an ad-free experience, enhancing user satisfaction and retention. Ad-supported platforms may face challenges in balancing ad monetization with user experience.
- **Audience Reach:** Ad-supported models allow platforms to reach a broader audience by offering free access to content. Subscription-based models may limit audience reach due to subscription barriers.
- **Monetization Potential:** Ad-supported platforms have the potential to generate significant revenue through advertising, especially with large user bases and high engagement levels. Subscription-based platforms rely solely on subscription fees for revenue.

#### 4.6 FUTURE TRENDS AND IMPLICATIONS

##### 4.6.1. TECHNOLOGICAL ADVANCEMENTS

The role of emerging technologies (e.g., 4K, VR) in shaping the future of OTT.

Case study: The integration of virtual reality in streaming services. Several OTT platforms have begun exploring the integration of virtual reality technology to enhance the viewing experience for consumers:

- **Netflix VR:** Netflix introduced a VR app that allows users to watch Netflix content in a virtual environment using VR headsets. The app provides a virtual living room setting where users can access and stream their favourite Netflix shows and movies on a virtual screen.
- **Oculus Venues:** Oculus Venues, a VR platform owned by Facebook, offers live events and performances in virtual reality, including concerts, sports events, and movie screenings. Users can experience these events in a virtual environment, interacting with other attendees and enjoying immersive content.
- **NextVR:** NextVR specializes in delivering live sports and entertainment content in virtual reality. The platform offers a variety of VR experiences, including live NBA games, concerts, and exclusive events, providing users with a front-row seat to immersive content.

#### 4.6.2. HYBRID MODELS

The potential convergence of traditional cinema and OTT platforms.

Case study: Recognizing the potential of digital distribution, filmmakers have increasingly embraced collaborations with OTT platforms to reach diverse audiences and explore innovative storytelling formats.

- **Netflix Originals:**

Netflix has established itself as a leader in original content production, partnering with filmmakers and production companies to produce exclusive films and series for its platform.

Notable collaborations include "Roma" directed by Alfonso Cuarón, "The Irishman" directed by Martin Scorsese, and "Bird Box" directed by Susanne Bier, among others. These collaborations have allowed filmmakers to retain creative control over their projects while reaching a global audience through Netflix's extensive distribution network.

- **Amazon Prime Video:**

Amazon Prime Video has also invested in original content production, partnering with filmmakers to produce exclusive films and series for its platform.

Collaborations include "Manchester by the Sea" directed by Kenneth Lonergan, "The Report" directed by Scott Z. Burns, and "The Big Sick" directed by Michael Showalter, among others.

These collaborations have enabled filmmakers to explore diverse storytelling genres and reach audiences beyond traditional theatrical releases.

#### **4.7 CONCLUSION**

The digital era has transformed the consumer base of cinema in India, with OTT platforms at the forefront of this change. While traditional cinema remains resilient, the consumer landscape is evolving rapidly, with convenience, content diversity, and affordability as key drivers. Understanding these shifts is vital for industry stakeholders to navigate the changing landscape successfully.

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