



Change In Consumption Habits Of Entertainment During Lockdown And The Role Of OTT Platforms

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ABSTRACT:

Purpose – The purpose of this paper is to find out the changes in the consumption habits of entertainment by people, especially during the lockdown when traditional content like movies in theatres was missing and television was restricted since new content was not available and channels were streaming old or repeat content. The lockdown necessitated families to stay at home, the pandemic had also resulted in a lot of stress. With no other way of distressing themselves. Many families switched to the OTT platform to get content that was new and they could view their families.

Design/methodology/approach – The paper is mainly based on secondary data collected from various sources

Findings– The OTT platform has become very popular during the lockdown and will continue to be the choice of viewers due the huge choice of content available. The availability of content on Smartphone, small subscription packages and regular updating of content, access liberty (anywhere at any time) has made the OTT platforms very popular.

Practical implications – The study aims to study the rise of OTT platforms and the future of the same and also to study what OTT platforms can do to continue to grow in a country like India which is highly diverse in culture and language.

Originality/value – There are several studies on the OTT platforms and their entry into the Indian entertainment market, their growth etc. the study aims here to study the effect of the pandemic and the lockdown in the growth of the sector and also to point out the future expectations from the sector.

Keywords – OTT platforms, consumption of entertainment, Traditional Medium, role of internet

Paper type - Research paper

1. Introduction:

Entertainment is a very important sector in our country, where people have awarded demi god status to movie stars and even television stars. Television serial like Ramayan and Mahabharat continue to attract huge TRP even after being initially aired 3 decades ago. The entertainment industry has evolved, especially so after the internet boom. The biggest players in this change have been the OTT (Over-the-top) players. They have given the consumer expansive content which they were never used to thus completely changing the way people viewed and consumed entertainment.

There are several reasons for the growth of the OTT platforms in India the major among them has been

- The pandemic COVID19, which led to the lockdown due to which there was non availability of new content on the cable based platforms.
- Total closure of movie theaters, the largest platform for entertainment in India and no release of new movies
- The producers and film makers using OTT platforms to release new movies
- Easy and cheap availability of internet and any time any where access by most OTT players.
- The availability of content on smart phones has aided the growth of OTT in semi-urban and rural areas.
- Competitive costing strategy by OTT operators, whereby the customer was paying lesser than what they paid for cable network which had advertisement ridden content.

Rajib Basu of Entertainment & Media, PwC India reported that “India is the fastest-growing entertainment and media market globally and is expected to keep that momentum” (PwC India, 2019). India is only second to China in terms Internet users and these users are propelling the OTT streaming market. At the end of 2019, India had 451 million monthly active Internet users, which is projected at 666.4 million by 2023. The majority of them are mobile phone Internet users (IAMAI, 2019).

A good internet connection with a smart device became a necessity during the lockdown as children had to attend classes online and work from home became the new normal. Reliance Jio was instrumental in providing cheap and good quality internet. The introduction of Jio fiber, which was initially provided free of cost, and later at very reasonable rates had a whole package of OTT channels as add-ons this enabled a number of people who were not on the OTT platforms to view the content and thus get hooked to a large cache of entertainment. Jio’s telecom network supports over 55% of India’s overall OTT traffic and over 65% of OTT consumption on a Smartphone (Keshavdev, 2019).

Customers who got used to free content on Jio fiber then started exploring other OTT channels for regional and high quality content.

2. What is OTT?

The term OTT refers to over-the-top media services. OTT offers viewers streaming media services via the internet. No cable connection or broadcast is needed to use OTT. An over-the-top or OTT platform is basically a streaming media service that offers content to viewers via:

- Internet bypassing cable
- Broadcast
- Satellite TV platforms

OTTs in India are over a decade old, Reliance Entertainment launched the first OTT platform in India in the year 2008. Thereafter, India received its first OTT mobile app called nextGTV, which provided access to both - normal TV and on-demand content including live-streaming of the Indian Premier League match in the year 2013-14. The medium gained popularity when biggies like Zee and Sony entered the market with DittoTV (Zee) and Sony Liv. DittoTV went on to aggregate content from channels including Star, Sony, Viacom, Zee and more.

3. Enablers:

OTT operation depends on the availability of devices that are compatible with online video viewing. To consume content via OTT medium, the consumer has to have access to an internet enabled device like a Smart TV, Mobile phone, Laptop or a Tablet. Smartphone are the most preferred video streaming device in India. In February 2019, nearly 144 million people spent a total of 362 million hours on an OTT platform. In which, 87% of time spent occurred in a Smartphone environment and 13% in a desktop environment (Gevers, 2019).

Indians are a very cost conscious society therefore, pricing is very critical factors in choosing of online streaming. Players like Netflix and Prime Video are Subscription-based Video on Demand (SVoD) services, where viewers have to pay to watch. Indian viewers prefer free services, which is possible only with advertisement and other promotions which makes the viewing not so pleasant, they may be ready to pay

a small amount of subscription with few advertisements. The Indian viewer is used to advertisement as the DTH and cable platforms have programs that have lower content and more advertisement. Among the top eight video streaming services, except for Netflix and Amazon Prime Video, all other services offer ad-supported content. That is why the market remains highly focused on AVoD services. A study by Brightcove and YouGov states that, 29% of consumers prefer to watch movies in the free online streaming sites, 23% said that they did not mind paying a small fee and watch one to three ads (Brightcove, 2018).

Thus for the OTT platforms to be successful the right plan for subscription and good quality internet based smart devices are a must.

3. Why the rise in viewership of OTT platforms:

The pandemic “Corona Virus” lead to the “Lockdown” situation where everyone was forced to stay at home, with a lot of time on hand and no new entertainment available in the traditional formats. The television has no new content, theatres were closed for airing new movies and stress was running high among families. The OTT platforms and the web shows became the best tool for people to ward off boredom, and the OTT platforms ensured that the audience was spoilt for choice.

Availability of cheap and good quality of internet connections, and availability of smart devices, especially phones has helped consumers to access content which is different and new. Since the penetration of smart phones is very high among the youth of India some OTT service providers launched free apps to capture the youth market. Some of them like Netflix came up with very low subscription for mobile phones at Rs. 199 per month which lead to huge subscription rise. Jio Fiber has been a huge contributor in increase in viewership with their high speed low cost internet service.

5. Major streaming services in India

There are nearly 40 VoD providers in India in 2021, and the number is expected to reach 100 by 2023. local players like Hotstar and Jio Cinema have gained a stronger footing in the domestic market, global platforms like Netflix and Amazon Prime have also steadily grown their market share. The major streaming services that are available in India are:

5.1 Amazon's Prime Video

Prime Video is a VoD service owned and operated by Amazon. In India, the Prime Video hosts over 2,000 movies and 400 television shows. The subscription costs around Rs. 129 per month or Rs. 999 per year. With over 10 million subscribers, India is the biggest market in the world for Prime Video.

5.2 Dizney - Hotstar

Dizney- Hotstar is the best site for watching movies, daily soaps, live sports and news channels. The users can create an account and view the content for free with advertisements in between. Whereas, a Hotstar Premium subscription offers ad-free access to exclusive international movies and TV shows for a price of Rs. 199 per month or Rs. 999 per year. Its main pulling factors has been live streaming of cricket matches. During Indian Premier League (IPL) 2019 the platform recorded 300 million active viewers. India versus Pakistan match at the ICC World Cup 2019 registered an exceptional 100 million viewers.

5.3 Netflix

Netflix entered India in January 2016. Their Unique Selling Proposition is the abundance of original movies and television shows it offers. As they initially lacked many India-oriented or localized content, Netflix has made its highest investment ever in India to produce more original content. Netflix comes with three different subscription plans with various benefits. The Basic subscription starts at Rs. 500 and does not support HD streaming. The Standard subscription costs Rs. 650 per month and supports HD streaming. The Premium subscription costs Rs. 800 per month and supports ultra-HD streaming and allows up to four devices to stream simultaneously. Netflix is a lot costlier than all of its competitors. So additionally, they launched a low-cost, mobile-only version of its service exclusively in India. The plan costs Rs. 199, and it is aiming to bring a unique personalized experience to the Smartphone users in India.

5.4 Jio Fiber with Jio Cinema and Jio TV

Reliance Jio mobile data service comes bundled with various OTT apps like JioTV, JioCinema, Jio News and JioSaavn catering to different needs of the customers. The content offered by the service is mostly dedicated to the Indian audience. JioTV offers 647 Live TV channels which are nearly double the channel count provided by its competitors. Whereas, the JioCinema hosts over 10,000 movies and TV shows. Jio has signed a long-term content deal with Disney India to host a dedicated Disney branded section on their homepage with content spanning Disney's movies and animation series. Jio has also announced the launch of Jio Fibre's 'First-Day-First-Show' plan which is set to launch in 2020. Premium Jio customers would be able to watch new movies on their release date, on-demand in the comfort of their house.

5.5 SonyLiv

SonyLiv is a VoD streaming service operated by Sony Pictures Networks. It has more than 40,000 hours of content from a wide variety of genres. SonyLiv had a higher growth rate in non-metropolitan cities like Lucknow, Indore, Patna and Jaipur, as compared to the metropolitan cities (KPMG, 2019).

5.6 MX Player

MX Player, a mobile video player app was acquired by Times Internet (TIL) group. TIL has built a digital-first streaming service atop of MX Player to leverage its 350 million user bases in India. Currently, MX Player hosts 14 original shows and is free

5.7 Other OTT players

Eros Now launched by Eros International has the most amount of content compared to other OTT services in India. It hosts over 11,000 movies, 100,000 albums, and 100 TV shows. ErosNow was titled the 'Best OTT Platform of the Year 2019' at the British Asian Media Awards. Hooq is a lesser-known competitor in the market even though it was launched in India much before other services. Hooq offers more than 10,000 titles. Voot is a streaming service owned by Viacom 18. It hosts programmes that are already aired on their television channels such as Colors, MTV, Nickelodeon. ALTBalaji is a VoD platform operated by Balaji Telefilms Ltd. At Rs. 25 per month or Rs. 300 per year, ALTBalaji is the cheapest of all OTT players in India. The platform has over 250 hours of original content with a new show releasing every month.

6. Content typically consumed in OTT

VoD platforms strive for high engagement, they attract viewers through unique, addictive and binge-worthy contents. Binge-watching is very high among young professions as a weekend plan. (Matrix, 2014).

The film industry is facing very challenging times with theatres shut down second time during the pandemic the only source for many is to release their movies on the OTT platform. Many movie makers have started making movies especially to be released on OTT platforms. There has been a massive growth in the production of original, edgy and alternative content by movie makers only for OTT platforms. Many high ticket movies were released on OTT platforms and were well received.

Amazon has invested about one-fourth of its Rs. 2,000 crore budgets to collaborate with Indian production houses and digital content creators, to create original content for Indian viewers and have also started investing in creating regional content.

A survey by Vidooly, stated that 85% of the surveyed audience stated that they watch more original content in OTT platforms (Vidooly, 2019). The younger audiences between 14-24 years of age prefer the romance genre most, whereas those between 20-45 prefer drama, crime thriller and reality shows the older generation prefer religious and travel related programs and films are consistent among all age groups. Documentaries are very popular among the educated audience. The survey revealed that there is a difference in the content consumed among the old and younger audience.

Content is very important even big names do not attract attention if content is not good and unknown names get great appreciation example being high appreciation for Scam 1992 and cold response for The Big Bull.

The BCG report 'Entertainment Goes Online' - suggests that OTT consumers can be classified under three main categories:

- Traditionalists – who primarily consume on other than OTT platforms
- OTT Experimenter – who have significant consumption on both conventional and OTT platforms
- Early Adopter – whose primary consumption occurs on OTT platforms.

The early adopters and the OTT experimenters are the ones who are driving the growth of the platform. Good service, great content and regional content, huge cache to select from and global content continues to encourage these segments to continue to experiment and also to encourage friends and family to try the platform.

7. Preference:

According to London-based Omdia's 'India: Online Video Trends and Omdia Consumer Research Highlights -2020,

- Disney+ Hotstar leads the subscription VOD market with a 41% share.
- Eros Now with a 24% share,
- Amazon Prime Video (9%) and
- Netflix (7%).
- ZEE5 and ALTBalaji both had a 4% share
- SonyLIV has a 3% market share.
- Apple TV+, YuppTV, and Voot Select had a similar market share at 1%.

Disney+ Hotstar's subscription base tripled in a year from 8 million in April 2020 to around 25 million by the end-20, thanks to Indian Premier League (IPL) cricket coverage and the competitive pricing of its annual plan. The report noted that Eros Now's subscription growth can mainly be attributed to an extensive network of local partnerships with telcos such as Idea Cellular, Reliance Jio, and BSNL and pay-TV operators including Airtel Xstream and Tata Sky Binge+. Omdia estimates 90% of Eros Now subscriptions are bundled users.

Netflix also grew its subscription base significantly to 4.4 million subscribers up from 2.4 million in 2019. Netflix and Disney+ Hotstar accounted for 50% of all SVOD subscribers in India in 2020. ALTBalaji, we added 2.1 million paid subscribers in the last quarter alone (Q3 FY21)

The online video-on-demand (VOD) subscription market reached a value of \$639 million in 2020, up 142% from \$265 million in 2019. Disney+ Hotstar and Netflix led in terms of revenue share: between them, they account for 78% of the total online video subscription market.

8. Literature Review

In the rapidly changing world of media in the last five years, technology was undoubtedly the driving force behind people's live diversity.(Patel, Social Media in the Indian Context: -New flavor of the Season, 2015) The nationwide Lockdown situation resulted in a sudden growth in online viewing percentage. In a survey conducted by In Mobi a Marketing Platform for Smartphones there was a 46% hike in online content viewing. There was also an alteration in consumption primetime of OTT which changed to 7 pm from 10 pm to 12 am **(Financial Express, Apr 06, 2020).**

According to Google Trends report OTT leading platforms like Netflix and Hotstar were the most-searched OTT platforms since March 1 2020. Similarly, Daily average users for Amazon Prime had a hike of whopping 83%, which meant there was an ever-growing appetite for Content Consumption since the lockdown (CNBCTV18, Apr 16, 2020).

Similarly, in a report “Reboot to a New Normal” which detailed factors like consumption pattern and media usage by Public is Grouped stated that in the first month of Lockdown OTT registered a 34 % increase in time spent by the users.

The internet is reaching a common man today, and social media played an incredible role in the media. (Patel, Impact Of Advancements In Technological Aids In Communication Media In Bringing About Social Reformation, 2018)

Media consumption behaviour of the Users that higher percentage of Audience watched content in night and at a two-hour daily basis (Paramveer Singh, 2019). According to the same research in the year 2019, that older age groups averaging 35 to 44 years, and 45 to 54 years, showed growth increase in OTT viewership consumption at 18%, and 63% respectively. And the wider audience already showed interest in subscription-based platforms.

Media Consumption Timing had an interesting result is that the OTT viewership was divided into a variety based on Age group and content (Parul Grover, 2019). The morning slot was dominated by the Elderly viewers, whereas the afternoon observed more viewership by the Middle-Aged people in comparison to Elderly or Young ones which were the maximum consumers during Night time.

Although people have started investing a lot of time and money on OTT platforms, it is difficult to say that it will ever replace television as a primary video consumption platform (Dr. Sabyasachi Dasgupta & Dr. Priya Grover, 2019).

Over the Top in India : It includes subscription-based services, free, ad supported services and pay-to-watch streams offered by services including iTunes and Video on demand. (Deloitte, 2017). the Canadian Radio-Television and Telecommunications Commission (CRTC), Canada's telecom regulator, stated that “it considers that Internet access to programming independent of a facility or network dedicated to its delivery (via, for example, cable or satellite) is the defining feature of what have been termed 'over-the-top' services”.

Lockdown and OTT Viewership : If there is one industry which wouldn't like the lockdown to end, it's indeed the OTT players. According to recent survey by mobile marketing platform In Mobi, the viewership for movies especially has gone up across the platforms. Cinema streaming service MUBI has seen a 28% rise in viewership on its platform in March, as compared to February (Financial Express, Apr 06, 2020).

(Sharma, 2020)The ongoing COVID-19 crisis has forced the multiplexes to shut down. As a result, the production houses are now releasing their movies onto OTT platforms directly. (Dixit, 2020) has focused on the deification of the Indian OTT and the strategies or different ways used by them to establish and gain more popularity. The elements that are mentioned in this article are - Focusing on the local content and needs. This was backed by the data in a KPMG report which stated that 64% of Indian digital consumers preferred consuming content in Hindi followed by Tamil Telegu and Bengali. **Digitalisation:** the digital era has undeniably opened up avenues for streaming services to connect and engage with customers in real time. In order to remain competitive, it becomes imperative for the service providers to focus on key drivers that impact the customer's decision to stay connected to the firm and provide it steady flow of sales in future (Viswanathan et al., 2017).

(Chang & Chen, 2008; Delafrooz et al., 2011) have provided an exhaustive list of factors that include the quality and usefulness, perceived ease of use, attitude of customers, trust, perceived risk, security, engagement and service experience to mention a few. With a number of OTT services to choose from, the way the service provider engages the customers becomes really important for them to attract attention (Gardner, 2020). Further, due to a surge in internet consumption during the lockdown (Madhukalya, 2020), it has become necessary for service providers to search for ways to deal with the problem of increased demand for data without hampering the QoSE, else customers will easily switch to another service providing better quality (Van Daele, 2020).

9. Impact of Lockdown on viewership of OTT

Technology and entertainment are interrelated today, consumers want their entertainment when they are traveling or doing household chores thus mobility is very important, anytime anywhere viewing is also an important aspect, Personnel viewing has lead to multiple access feature by some operators like

Netflix . OTTs are not limited to audio visual content and entertainment only, the audio only market is also large. Platforms like StoryTel and Audible are gaining popularity, innovative offerings like Graphy Unacademy are also OTTs. Their demand is ever rising because of the need to educate children at home, a task that parents never took seriously when children went to school. Music has also gone OTT with players like Sawaan, Gaana, Spotify and Amazon Music gaining high popularity. There are likely to be other innovative solutions and offerings consistently available in the market. Players are leaving no stone unturned to catch attention of the consumer, grow their user base and retain each user for a longer duration than before.

Bollywood and Cricket rule the hearts of Indian consumers on OTT platforms and release of big banner movies have triggered a new trend in B town to have releases of big star movies on OTT channels as well as making movies specially to be released on the OTT platform. Many OTT platforms have managed to attract customers by screening cricket series and especially the very popular IPL series.

Viewership on the OTT platform has gone up considerably owing to COVID lockdown in India and Globally. The global over-the-top market was experiencing good growth even before the pandemic the slight slowdown which was seen in the US market for Netflix again saw a growth during the pandemic. India has seen the highest growth in the OTT market during the pandemic

All players are adopting various business growth strategies to fortify their position in the global market. According to the **Global Web Index report**, India's streaming market is one of the biggest and fastest-growing in the world. The country's video market is valued at over \$700 million and is expected to grow to \$2.4 billion by 2023, with the OTT industry projected to have the highest growth.

10. Future of OTT

The trend of VoD platforms is likely to see an upward growth for some time to come. Thus good content developers and good movies will see a demand. The likely hood that the time spend on OTT platforms may go down from what exists now because when schools, colleges and workplaces open up, people will have lesser free time. Service providers are likely to come with new content and new ways to reach the customer.

Players like Jio fiber have already revolutionized the way people consume content. The data speed the cost of data and free bundle pack of OTT has made it the cheapest available service. Other telecom providers are working towards giving similar benefits to their customers thus giving the customer huge choice. Introduction of 5G may further change this the 5G is expected to create an opportunity for new product and services offerings in the media and entertainment industry (Deloitte, 2019).

The Government of India's Digital India Initiative has helped rural India to digitalize, along with it very cheap smart phone availability under Made in India, has enable a large population to view content on their phones which most OTT providers have ensured. Cricket is a huge attraction for people all over India. With streaming rights going to OTT platforms the likelihood people subscribing to the channels increases. Hotstar found its subscription soaring when it streamed the very popular IPL series

India is a huge country with several different cultures and languages, development of regional content will have to be priority for OTT platforms. Netflix and Amazon Prime are investing huge amount on developing Indian content with maximum being in Hindi, then Tamil, Telugu and Bengali.

Marketing of OTT platforms will have to change drastically. The free usage will have to be phased out as advertisement revenues have been shrinking and it is increasingly becoming difficult for operators to provide free services. Therefore, working on subscriptions is important. Partnerships and co-screening will have to be worked on. Reliance Jio has offered bundled services with its Jio fiber network that can be used on smart TV as well as smart phones.

If technology providers are able to provide smart TV's or laptops or even tabs at competitive rates the smart phone users will quickly move to these devices for a better viewing experience. "People sample content on their smartphones and migrate quickly to larger screens if the content is long-form and compelling" (Chatterjee, 2017). Xiaomi claimed that they have sold more than two million smart TVs in India in 14 months of its launch (Mukherjee, 2019). The OTT sector could also start a revolution in the TV sector for smart TV's and other larger screen based technology.

11. Conclusion

The pandemic has changed the way people consume content. The soddy service providers like cable networks and DTH viewing is a matter of the past. Consumer is also not very keen on viewing several advertisements when they are seeing interesting content. The consumer is also not interested in seeing content that is meaningless and frivolous. The youth have a lot more free time on hand and they are tech savvy too and therefore, they are spending most time of OTT platforms. Service providers will have to provide with content that is more suitable for youngsters and will have to start thinking seriously about gaming as an option for this section. Along with streaming, the online gaming market in India is projected to become a billion-dollar industry by 2020. More than video streaming, Indian youths are more into gaming on their Smartphone.

The older population and housewives have also moved away from the traditional TV cable programs. The OTT platforms will have to cater differently for this section as they may use the same subscription as other family members but the content they seek will not be the same. The religious based, home improvement, cookery etc. content will have to be increased for this section.

The emergence of OTT would harm the penetration of cable TV in India. Therefore, traditional TV stations should prepare for a paradigm shift brought on by OTT platforms. More importantly, they should work towards making high-quality content that can compete with the material that is available in OTT (Shin et al. 2016).

12. Further study:

The change in consumer behaviour towards OTT viewing is interesting to observe and evaluate as there are numerous layers in this consumption pattern which need to be unravelled and understood from various angles and point of views. Aspects like nature of content being consumed, timings for different genres of consumption, consumer age and commensurate content consumption, TV channels v/s OTT providers, impact of the medium on advertising patterns, innovative deals and discount packaging and much more. Therefore, a separate study needs to be done to specifically review consumer consumption trends during the pandemic period and look in to the changes that will be the new normal and changes that will not stand the test of time.

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