

Analysing the Role of OTT in Changing Entertainment Scenario in India

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ABSTRACT

The shift from traditional marketing to contemporary digital-aged marketing happened gradually over time as a result of innovative technical advancements that affected entertainment industry. The way media is consumed these days has altered as a result of global digitalization. New over-the-top media services have changed the entertainment consumption patterns in India because of growing internet connections, improved network quality, technological advancements, availability of inexpensive smart phones, data plans, and other smart devices. This review paper aims to examine the role of OTT in changing entertainment scenario in India. It will also analyse the shift from traditional media to digital services, changing consumer behaviour, latest trends in the digital entertainment sector, and factors responsible for the growth and rise of OTT platforms in India. The scope covers the latest trends in content consumption, viewing habits, and binge-watching habit of consumers in India. The present study concludes that because of advancement in technologies, OTT platforms have completely transformed the entertainment scenario in India. These digital entertainment services need to analyse the changing behaviour of consumers carefully, and make strategies accordingly to attract more users.

Keywords: OTT, Over-the-Top Video Streaming Services, Impact of OTT, Consumer Behaviour, Regional Content, Rise of OTT, Changing Entertainment Patterns, COVID-19, Binge-Watching.

Introduction

The shift from traditional marketing to contemporary digital-aged marketing happened gradually over time as a result of innovative technical advancements that affected entertainment industry. Undoubtedly, most of them have been brought by the development of internet and its widespread use in the entertainment sector. The invention of the internet led to a large-scale economic growth in India that never witnessed before.¹ The way media is consumed these days has altered as a result of global digitalization. New over-the-top media services have changed the entertainment consumption patterns in India because of growing internet connections, improved network quality, technological advancements, and the availability of smart phones and other smart devices. Films and television have always been an integral part of people's daily lives. When blockbuster movie tickets were formerly available only in "black" and there used to be only one television in a neighbourhood where people gathered to watch their favourite shows, Indian entertainment industry have come a long way. We are now living in the modern digital era of entertainment consumption, i.e. over-the-top (OTT) services, where everyone can access any type of content at any time. It has been an unimaginable, fascinating journey for the entertainment industry in India.² A form of revival also occurred in the media and entertainment industries. As a result of Reliance Jio's disruption in the telecom industry, OTT content consumption, which had already been rising, entered the mainstream and experienced exponential development. According to surveys, the number of consumers using OTT platforms for 16 or more hours per week has increased by 5 times,

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while the number of consumers using them for 12 to 16 hours per week has increased by 4 times. Internet use, the availability of inexpensive phones with internet connectivity, and changes in the patterns of consumer behaviour are some of the reasons that have contributed to the expansion of digital entertainment media. The number of internet users has been constantly growing, which has aided in the development of new entertainment services i.e. OTT platforms. People began spending more time on the internet during the lockdown phase of COVID-19 as their reliance on digital technology grew. Mobile wallets like Paytm and PhonePe processed more transactions for digital payments than credit and debit cards combined. An increase in the access of these utility apps was seen among people who live in non-metro cities of India. People love to consume content in their local language and has started to spend more time on streaming video services like YouTube, Hotstar, and Amazon Prime.³

Need and Significance of the Study

The shift from traditional marketing to contemporary digital-aged marketing has taken place gradually over time as a result of innovative technical advancements that affected entertainment industry in a positive way. The way entertainment media is consumed these days has altered as a result of global digitalization. New over-the-top media services have changed the entertainment consumption patterns in India because of growing internet connections, improved network quality, technological advancements, availability of inexpensive smart phones, data plans, and other smart devices. The present study covers the latest trends in content consumption, viewing habits, and binge-watching habit of consumers in India. Therefore, It has become necessary for the video streaming service providers to understand and carefully analyse the changing consumption patterns, changing behaviour of consumers, their viewing habits, content preferences, etc. carefully, so as to make strategies accordingly to attract more users, retain them, and survive in this highly competitive environment.

Objectives of the Study

The objectives of the study are as follows;

- To analyse the changing entertainment scenario of India.
- To identify the major factors which led to growth and rise of OTT services in India.
- To analyse the role of COVID-19 in the growth of OTT platforms in India.
- To identify the changing consumer trends and their video consumption patterns.

The Emergence of Over-The-Top Video Streaming Services

Television made its debut in India in 1959. For a long time, Doordarshan was the only channel and option of entertainment available to the viewers. The public could see movies and other types of video content for entertainment on television and in theatres. Later, as technology advanced, individuals could readily watch movies at their home thanks to Video Home System (VHS), Digital Video Discs (DVDs), Blu-rays, and DVDs by mail (discs sent to consumers on rent). In India, the access to cable television was introduced in 1991. At that time entertainment content was telecasted by using Coaxial cables and fibre optic cables at home.⁴ Later, Direct-to-home (DTH) services were launched on October 2, 2003, in India by Dish TV. DTH technology connected by satellite and dish. Consumers were now able to access more entertainment content with a greater number of channels through these DTH services. Because of recent advancements in technology, ways of entertainment such as, watching movies and other video content on television has become more easier for the viewers because of online video streaming services. BIGFLIX, which Reliance Entertainment debuted in 2008, was the first provider of an Over-the-Top video streaming service in India. BIGFLIX provided content in 9 language which include Hindi, Telugu, Tamil, Malayalam, Marathi, Bengali, Punjabi, Gujarati, and Bhojpuri to the viewers. It had a huge collection of 2000 plus HD movies. Previously, YouTube was utilized by people for enjoyment.⁵ In 2010, Digivive released nexGTV, the country's first Over-the-top mobile application in the entertainment industry. There has been seen a huge popularity for cricket in India. The audience could watch Indian Premier League (IPL) games live on their smartphones thanks to this video entertainment application. Later, by providing viewers with live streaming of IPL matches in 2015, Hotstar gained enormous popularity among the cricket fans which significantly contributed to the expansion of the Over-the-top video streaming sector in India. Over-the-top services achieved more progress after the launch of Ditto TV (ZEE, 2012) and SonyLiv (2013) in the Indian entertainment market.

Defining Over the Top Video Streaming Services

OTT platforms, commonly referred to as Over-the-Top video streaming platforms, that provide entertainment content to users directly over the Internet. These media services are completely Internet-based. The traditional forms of entertainment, such as a satellite connection, cable TV, set-top box, etc., are bypassed by these over-the-top video streaming services, where video content is delivered directly to the consumer with the help of the Internet. As Indian consumers have gradually started shifting their entertainment consumption, and viewing patterns away from broadcast media, it has been predicted that Over-the-top video streaming services market will increase from \$1.5 billion in 2021 to \$12.5 billion in 2030.⁶

Over-the-Top Services may be Divided into the following 4 Categories

- Television- Amazon Fire Stick and Apple TV
- Video- JioHotstar, Amazon Prime, and Netflix etc.
- Messaging- Facebook Messenger and WhatsApp
- Voice calls using WeChat, WhatsApp, and Skype⁷

Research done by Mobile Broadband India Traffic Index (MBIT) 2021, states that Indian user's average data-use in a month has increased by 20% year by year to 13.5 GB and Indian consumers spend around five hours on their smartphones in a day. India has come a long way from having around 251.59 million Internet users in 2015 to having 749.07 million users in 2020. Internet penetration is close to 55% in India with an estimated 1.38 billion people.⁸

According to Telecom Regulatory Authority of India TRAI, 2022 "India is the world's second largest and fastest growing telecom market. India is presently the second-largest telecommunications market in the world with a subscriber base of more than 1.17 billion" because of the explosive rise of mobile broadband subscriptions over the past ten years.⁹

The report by Ormax on "OTT Audience Sizing Report 2022" estimates that "424 million people currently make up the audience of Over-the-top streaming services in India. India's video on demand market is anticipated to have 178.4 million consumers by the year 2027."¹⁰

Due to technological advancements, Indian customers have adopted the new entertainment consumption options and are gradually inclining towards video streaming platforms for content in the form of movies, video games, dramas, music, news, events, and sports. These latest technological advancements like AI (Artificial intelligence), Machine to Machine (MOM), the Internet of Things (IoT), Machine Learning (ML), etc. have affected the consumer's lives in an unexpected manner and offered several new and unseen possibilities to the Over-the-top video streaming services. That is why India has developed into the most promising market for Over-the-top video streaming services in the world.⁸

The number of subscribers for Over-the-top video streaming services have increased worldwide, while number of viewers for traditional TV have started to show a modest decline. India's over-the-top (OTT) markets appear to be promising and thriving in this present digital era. The ideal moment for Over-the-top platforms right now is with more investments, more content, more customers, and more sales. 2024-25 has been a fascinating year for the Indian OTT content market. The availability of various forms of content increased dramatically in the preceding year across all media entertainment market.

Ways to Consume OTT Services

There are numerous ways to use OTT services. The several alternatives to add OTT at home are following:

- **Smart TV:** A connected TV (CTV), often known as a smart TV, that has internet access built in. The operating system is already installed in smart TVs.

Earlier in India, a Smart TV was out of reach for the majority of households due to their high price tags. Now-a-days consumers can buy a flat screen 30"- or 40"-inch Smart TVs at much lower prices. Furthermore, a number of Over-the-top entertainment applications are pre-installed in the majority of Smart TVs now in the market.

- **By Getting a TV add-on for the Existing One:** There are many devices which can turn an ordinary TV into a smart TV. These devices are called add-on devices e.g., Roku, Chromecast Stick, and Amazon's Fire TV Stick. These add-on devices allow the consumers to watch video content on an OTT app by simply plugging the device into the HDMI port on the TV.

- **Home Screen on a Fire TV Stick:** Once logged in, one can access any Over-the-top video streaming service on the TV by logging into any of subscription applications straight on the screen.
- **By using Laptop, Computer, Tablet, or other Devices:** Consumers can access Over-the-top video entertainment streaming service through the OTT provider's website. Viewers can get an access to watch OTT content immediately on their Smartphone, computer, laptop, tablet or any other computer device.¹¹

Impact of COVID-19 on Over-the-Top Video Streaming Services

The Covid-19 outbreak forced the entertainment sector to stop and reconsider some of its key products. For several months, people were restricted to stay in their houses. At first, they were frightened to leave the house. The entertainment business slowed down as a result. Events, movie watching and releasing in multiplexes, outdoor advertising, and live sports were among the entertainment options that were most affected. Covid-19 affected the entertainment consumption pattern and global consumer behaviour. As a way to keep the people aware, educate, and entertained while they are restricted to their homes, digital streaming media gained more significance.⁸ The entertainment sector is hardly an exception to how Covid-19 has impacted nearly every industry and sector. Numerous theatres in India were already closed when the lockdown began on March 24, 2020. While online video streaming services like Hotstar, prime video, Netflix, etc. profited from this circumstance because people were not allowed to stay out of their homes and could enjoy everything in the comfort of their own homes for pleasure.¹² Businesses moved online during the lockdown as a result of the pandemic, which aided the acceleration of digital developments. Digital technology has led the way as the media, entertainment, and advertising industries change drastically.³ During the coronavirus outbreak, there was a greater desire for in-home entertainment options, and OTT content in general was becoming more and more popular, which helped in increasing the demand for televisions.¹³ People were becoming bored after Covid19 when everyone was forced to stay inside during lockdown, so they passed the time by streaming video on OTT sites. Thus, the viewership of over-the-top video streaming services suddenly increased during covid-19 lockdown period.¹⁴ Changes in technology, convenience, and consumer tastes are major factors which are responsible for the changing scenario of entertainment, and affecting the expansion of Over-the-top video streaming services in India and Covid-19, worked as a catalyst for the sudden rise in the use of Over-the-top video streaming services.¹⁵ In India, the average amount of time spent on Over-the-top video streaming apps during the Covid lockdown period climbed by 30%, according to a study by BARC India and Nielsen.¹⁶ Cinema halls, multiplexes were forced to shut down because of Covid-19. As a result, the movie production houses started releasing movies directly over these OTT apps. Actors were also unable to shoot for the new and next episode of their drama shows. Therefore, Tv channels aired old shows during Covid-19. In such a situation people wanted to watch fresh and new content for entertainment, so they headed to Over-the-top video streaming services to watch fresh video content.

Reasons for the Growth of Over-the-Top Video Streaming Services

With Over-the-top video streaming services, the entertainment service providers have full control over their audience, brand, user experience, monetization, and most importantly, their data. There are many reasons which are responsible for the growth and popularity of over-the-top video streaming services. "The average Indian OTT user spends almost 70 minutes per day viewing videos on these platforms, with a frequency of 12.5 times per week", according to an Eros Now-KPMG analysis.¹⁷

Main reasons for the growth of OTT video streaming services are following:

- **Simple to Set Up:** The first factor to take into account is usability where search for a streaming platform that one can easily set up without any technical knowledge. Over-the-top video streaming services are user-friendly and simple to use since they allow users to view their entertainment programs on-the-go without bothering about timings or tickets.
- **Variety of Content:** Over-the-top video streaming services provide their customers a tremendous selection of short series, television shows, films, and documentaries. People are driven to these platforms because they are sick of the traditional Indian TV serials which has thousands of episodes and running on the Television for 8-10 years.
- **Low Subscription Rates:** Majority of Indian audience belongs to middle- class category. They cannot afford expensive entertainment options. Over-the-top video streaming services are less costly than other sources of entertainment. Indian consumers prefer to watch quality content at

a reasonable amount. Over-the-top players provide premium content for entertainment to the viewers at an affordable price.¹⁸ In addition to getting reduced monthly rates and access to special programming which was not available on cable channels, viewers can easily share their subscription with family or friends.¹⁹

- **Freedom for Consumers:** Because of Over-the-top video streaming services, consumers are now in charge of their entertainment. More than ever, consumers have full liberty over the content, like if they want to watch a particular content, they have to pay for that only.
- **Fantastic Viewing Experience:** Over-the-top platform delivers high-quality video hosting, low-latency streaming, and quality enhancement, ensures that customers can quickly access a quick app that is compatible with any device, operating system, and browser. Viewers anticipate a seamless, excellent streaming experience for entertainment.
- **Easy Accessibility:** Easy accessibility is one of the main reasons for the popularity of Over-the-top video streaming services. To access OTT services, consumers need a smart Tv or any connected device and Internet connection.
- **Low Data Prices:** Accessing OTT platforms on smartphones has become simpler because of the availability of inexpensive data plans in India. Due to this, Over-the-top video streaming services have replaced traditional TV as the preferred entertainment watching option in India.
- **Extensive Internet Penetration:** The Internet infrastructure in India have changed the entertainment scenario completely. It has greatly affected Over-the-top video streaming services in a positive way and also played a major role in the popularity of these services. The amount of time spent using smartphones and consuming entertainment has significantly increased. In India, video streaming has spread to the country's smaller cities and towns. It gives businesses and marketers a fresh way to precisely target people with content that is tailored to them.³
- **Multi-Screen Facility:** Over-the-top video streaming service providers allow the consumers to watch video content on many devices. That is why consumers are attracted towards these Over-the-top video streaming services for entertainment. The OTT video streaming service providers also provide multi-screen feature to the subscribers in which more than one user can access content on different devices at the same time.²⁰ Viewer can watch content on any device (smart phone, tablet, laptop, smart TV, computer)
- **Movies are being Released on Over-the-Top Platforms:** The closing of movie theatres during pandemic was another significant factor contributing to the rise of the Over-the-top video streaming business in the entertainment sector. Even before closing, Over-the-top video streaming services had started to pose a serious threat to cinema halls. It is far more convenient to watch movies online than it is to go to a movie theatre. The main factor driving many consumers to choose OTT platforms over the conventional movie-going experience is the time and effort one saves by avoiding traffic, and other viewing features related to convenience.²¹
- **Live Sports Streaming:** The way sports fans consume, experience, and enjoy sports like cricket has evolved in the past few years. Live streaming, particularly sports, draw more viewers' attention for entertainment and offer more opportunity for Over-the-top video streaming service providers. Live streaming of cricket matches in India have a significant value for the viewers. One of the main reasons for the adoption of Over-the-top video services in India is live streaming of IPL cricket matches.
- **Dissatisfied Paid TV Customers:** For a multitude of reasons, Over-the-top video streaming service providers like JioHotstar, prime video, Netflix, Zee 5, and others have become extremely popular among Indian audiences. These platforms give viewers complete control over their viewing experience by enabling them to watch TV and movies whenever and wherever they desire. This essential element of entertainment has been absent from television, where the viewers had to wait for an entire week to watch the next episode of their favourite Tv show. Over-the-top video streaming service providers allow the user to watch many episodes of a show, or an entire season of a series at once. Additionally, customers have the option of pausing the particular program, taking breaks, or going back to an earlier episode on online streaming services. There are no commercial breaks like on television because streaming services are subscription-based.

- **Viewers have More Control:** Over-the-top video streaming services provide consumers more freedom and control than traditional cable services. They can pick and choose what they want to watch, skip commercials when it's convenient for them to do so, access movies and shows in many languages, and view programs whenever they want on whatever device they want.
- **Binge-Watching:** Over-the-top video streaming services let the consumers binge-watch the entire season of any show or series. The term "binge-watching," refers to "watching two to six episodes of a TV show in a single sitting. It is the latest trend among the OTT audience which has changed the entertainment scenario completely in the world."²² Binge-watching, involves viewing many episodes of a TV show back-to-back. It is a leading sign of the cultural shift in entertainment viewing and is particularly popular among young adults. Instead of waiting for new episodes to air at a particular day, users can binge-watch entire seasons of television shows, web-series, etc. on these streaming services without waiting for the next episode to air.
- **Availability of Content in many Languages:** For Over-the-top video streaming service providers in India, availability of content in many regional languages is major growth generator in the entertainment sector. A KPMG analysis states that between 70 and 75 percent of the content consumed in India is in Hindi and other regional languages.
- **Availability of Regional Content:** India is a diverse country, and it is crucial to emphasize the value of regional languages for entertainment consumption. Regional language usage is widely spread, mostly due to the availability of video content in local languages on Over-the-the applications. The vast majority of customers are spending more time viewing content in their native tongue. According to WAT Consult's research named Digital, Diverse, and Multilingual India, "11% of individuals prefer to watch exclusively English content, while 28% prefer to watch content in both English and their native language". The availability of regional language content has been an important factor for changing the entertainment scenario in India and positively affected the growth and popularity of OTT platforms. The major players in the market, including Netflix, Amazon, JioHotstar, and others, are aggressively investing in creating shows in local language original content to attract broad audience.³
- **Launch of 5G in India:** Internet penetration grew by 1.82 times during the previous couple of years. With the launch of 5G services in India, wireless network services will see higher speeds and connection. Its introduction will change the entertainment consumption scenario in India positively and provide the Over-the-top video streaming service environment with new opportunities. This technology will affect the OTT industry and have a significant impact on how people consume online content for entertainment.³

Conclusion

The present study concludes that because of rapid advancement in technologies, cheap smartphones and data packs, OTT platforms have completely transformed the entertainment scenario in India. These digital entertainment services need to analyse the changing behaviour of consumers, their viewing habits, content preferences, etc. carefully, so as to make strategies accordingly to attract more users and retain them.

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