

A Study: OTT Viewership in “Lockdown” and Viewer’s Dynamic Watching Experience

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Abstract

Today we are going through a period of lock-down which the people of India have never seen before, for such a long time. In such a situation, in the era of this technology and the Internet, anyone likes to spend their free time in front of the digital screen, where they have many options to see. The ever-increasing viewership of the OTT video streaming services and the big star's inclination towards this platform justifies this. Today, the time we spent looking at our screens has increased immensely. As the cinema halls shut and film release has been suspended amid nationwide, this technological shift by internet has created a new kind of viewing experience and that might end up changing the collective movie watching experience in cinema hall which result in dent in the footfall whenever the screens open again.

This change in viewing experience created by OTT has a greatest fear for cinema hall owners. This thesis explore tries to analyse the impact of increasing OTT video streaming services viewership in lockdown to assess the future of collective watching experience in India. It frames the attitude of Indian people towards cinema hall through assessing different vantage points that mark shift in watching experience. At the end it gives the, recommendation contextualized the immensely increasing OTT viewership during lock down and its resultant effects on the collective watching experience.

Keywords: OTT, Viewership, Watching Habits, Traditional Medium, Cinema Hall.

Introduction

Today, as fast as technology is changing, the faster we are also changing our habits. Talking about television, there would have been a television in the entire locality and everyone used to sit and watch it at the same time, whereas today it is the age of OTT where every person has a smart phone in which he can watch any kind of content anytime.

Amidst all this, the dominance of watching movies in the cinema hall has always remained. But now this domination is suspected. Most big-ticket movies in the USA have been pushed to later this year, some even to next year. Similarly, in India, the theatrical release of all major films has been indefinitely postponed. But OTT platforms are buzzing with activity. Especially after the lockdown in India, with the OTT channel gaining such a large number of viewers, people have gained a new kind of viewing experience, which can be said if it continues after this. So there will be a lot of concern for cinema hall owners.

According to the **Global Web Index report**, India's streaming market is one of the biggest and fastest-growing in the world with biggies like Voot, AltBalaji, Zee5 and MX Player. 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. A trend of people viewing multiple content channels at the same time, along with demand for newer and more exclusive content will force the big budgets producers and directors to release movies directly onto the OTT channels rather than Cinema halls like Vidya Balan-starrer Shakuntala Devi Biopic will premiere exclusively on Amazon Prime Video and first time that Amitabh Bachchan will witness the worldwide premiere of his film on a digital platform. His new film 'GulaboSitabo', also starring Ayushmann Khurrana, was supposed to release in April but couldn't make it to the theatres because of the lockdown. In the lockdown period, quality content on OTT platforms is in great demand. It provides more variety in OTT channels and so in future this dynamic watching experience will affect the cinema hall footfalls after lockdown period? This study is based on this research questions.

The first chapter of research analysis the existing literature and theory on the sudden increase in OTT viewership only due to lock down or is the change being felt much earlier? This study also explores, how the habit of people looking at screens is at different times of the day. The next section presents a search for analysis and study based on the percentage of the survey given. This research then discusses the result of the finding and its basis. Finally, the paper is concluded the future scope and suggestions.

Literature Review

In every society media are an integral part of the superstructure. It plays a major role in information dissemination. (Patel, An Analysis of Impact of Personal Communication Technology on Public Policy Making Process In India, 2017). Particularly in the rapidly changing world 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 Hot star were the most-searched OTT platforms since March 1 2020. Similarly, Daily average users for Amazon Prime had a hike of whopping 83 percent, 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 Groupe 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**). The latest hike was a subject to research that did the media habits and watch time drastically altered during Lockdown as more time was being spent with the family. Also, as Singh’s research said that Movie watching habits were second preferred content after web series and the audience was already widening in the year 2019 as reported by Research Firm Kantar.

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. With the internet and mobile penetration increasing by the day, the future of OTT looks bright. 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**).

The most important report which led us to this research was that doomsday films like Contagion which was based on a similar fictional virus pandemic along with Zombiel and: Double Tap were the most watched films (**HT Dated Apr 6, 2020**). The report further added that the documentary Pandemic: How to Prevent an Outbreak now was another top viewed Content on respective streaming platform. Netflix a major player of OTT streaming had a similar trend again, because another pandemic apocalyptic film such as Resident Evil: The Final Chapter, a sci-fi movie in which humanity is wiped out because of a T-Virus outbreak was on top in consumer viewership.

So, it was interesting to learn out further about the viewership Media habits consumption that did the segregated distribution changed into a collective movie watching habit as this was the most prominent gap in all of the research sourced.

1) Over the Top in India

OTT (Over The Top) is the term which is used world-wide for the video streaming content services which are access through high speed internet on your smart gadgets and also by pass the traditional distribution like cable, DTH and Cinema. OTT or “Over-the-top” refers to video content streamed through internet and not through broadcast or cable television. 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). Though it is very easy to access at anywhere at any time. OTT doesn’t have any official definition but in 2011, 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”*.

OTT started in India in 2015 when Star India launched Hotstar in 2015. the big bang launch of Hotstar, supported by multi-million-dollar marketing and promotion blitzkrieg, ensured a top-of-the-mind recall of the product. The international and national players followed soon with Netflix switching on its service in India in January last year, followed by Voot from Viacom18 and Amazon’s Prime Video finally launching in December last year. The chain reaction was set in motion with the launch of Reliance Jio in October 2016, which got into the mainstream over 70 million mobile internet users with free hi-speed 4G internet (Economic Times, 02 Mar, 17). That opened the floodgates for OTT players and helped the companies add new subscribers and increase time spent on the platforms. And while there is bandwidth available now, the key factors remain compelling content and seamless user experience.

2) Lockdown and OTT Viewership

If there is one industry which wouldn't like the lockdown to end, it's indeed the OTT players. Due to epidemic “Corona Virus” which spread in all over the world, everyone facing the Pandemic “Lockdown” situation in which you are not allowed to go outside your house which means you have to spend your whole time inside your house with your family and gadgets. And naturally, the more we stay at home, the more we find ourselves glued to the screens. Now, with no film releases in sight because of the shutdown of theatres and shoot of TV shows stalled across the country, what everyone is finding solace in are the OTT platforms. In fact, web shows have become the best tool for people to ward off boredom, and the platforms, too, are ensuring that the audience is spoilt for choice. It just not increased the OTT viewership but also changing the viewer’s watching habits. 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**).

Objective of the Study

The objective of this paper is to propose a conceptual framework which attempts to analyse the factors of viewership during lockdown in India. Also, it identifies the factors such as watching experience of viewers will affect the future footfalls of cinema hall. Furthermore, it studies the various reasons of OTT content. This study will help OTT players and cinema hall owner's in designing strategies to overcome the OTT threat and also in identifying changing consumer needs, thereby helping them design offerings to suit their needs.

In order to formulate the framework, we have asked the following research questions

- To study the factors of sudden increase in OTT channels viewership during lockdown period in India.
- To highlight the major challenges for cinema hall owners due to changing habits of digital viewers due to dynamic watching experience?

Methodology and Research Design

This study is based on Report analysis and survey method. Through reports and documents analysis we try to find the reasons behind the increasing number of viewership of OTT video streaming services in India. There is not much study on this so far, so we will have to take recourse to media reports and documents. And to know that “Will the increasing number of OTT viewers will affect the future footfalls of cinema hall” we use Questionnaire for data collection. Online Survey through google forms was conducted to know the reasons of sudden increases in OTT subscribers and its viewers also this change in watching habit will affect the future footfalls of cinema hall. Total 100 respondents from various universities and age group have been selected as sample for data collection in which 89 respondents have respond. Data is analysed through simple percentage analysis.

1) Research Question

This research explores the viewership of Over the Top video streaming services during lockdown period and its effect on future footfalls of cinema hall after lockdown. Currently Indian viewers looks very much attracted towards OTT video streaming services and due to increasing demand and reach, it is definitely having some impact on traditional mediums. The primary research questions can be divided within following avenues of exploration.

- a. What are the factors of sudden increase in OTT channels viewership before and during lockdown period in India?
- b. Will increasing number of OTT viewers will affect the other traditional medium?

- c. Will the viewers collective movie watching habits change during this lockdown period and have some impact on future cinema hall footfalls?

2) Research Design

This research is divided into two parts. In one of the parts we did document or report analysis. It is procedure for evaluating documents both electronic and physical to develop to understand a particular phenomenon or an issue. It provides a rich analysis of a particular phenomenon and it often times is useful as a standalone method of research (Bowen 2009). Another method we use percentage analysis of the selected respondents with the set of questionnaires. Percentage analysis is one of the basic statistical tools which is widely used in analysis and interpretation of primary data. It deals with the number of respondent's response to a particular question is percentage arrived from the total population selected for the study.

Data Interpretation and Analysis

New age audiences are increasingly looking for fresh, relatable, and engaging content and are willing to shed an extra penny to seek a completely transformative experience. This is one of the main reasons behind the increasing numbers of viewers and subscribers of OTT video streaming services. OTT (Over-the -Top) is an evolution in media broadcasting which affects the audience of every country including India (**Quora, July 23, 2019**). OTT is the change which explored the audience to the bigger world providing easy access to it. It is a platform where consumption of audio or video content is done using Internet directly. OTT is the game of subscriptions, the platform with highest subscription leads the way. According to the "GlobalWebIndex report, India's streaming market is one of the biggest and fastest-growing in the world with biggies like Voot, AltBalaji, Zee5 and MX Player. 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." This story is not there yet, It has been since once the tyranny of data ends that is when users move away from snacking on content to spending time on high quality, curated content. In fact, with falling data prices and free service from Jio, between the months of June 2016 and January 2017, total time spent on social media witnessed a 40% jump, while on video apps it was up by 135%. Hotstar, meanwhile, saw a 400% jump in its time spent during the same period (**Economic Times, Mar 02, 2017**).

Faster broadband, cheaper smart TV sets and proliferation of video streaming services will have an impact on the film industry in general and multiplexes in particular and lockdown has added fuel to such situation. Opting for a digital release may seem like a smart choice for filmmakers in this time of a lockdown. However, film theatre owners, their integral business partners for long, are not too pleased with this change in tack. The film exhibition sector is dealing with zero revenue and the biggest loss ever to their business.

Interestingly, apart from recent films such as Chhapaak, Tanhaji (both on Hotstar), and Street Dancer 3D (on Amazon Prime), doomsday films such as Contagion (based on a fictional virus pandemic), Zombieland: Double Tap and the documentary Pandemic: How To Prevent an Outbreak now figure among the top watched films on their respective streaming platforms. On Netflix again, films such as Resident Evil: The Final Chapter, a sci-fi movie in which humanity is wiped out because of a T-Virus outbreak is on top besides filmmaker Imtiaz Ali's SHE, a web show, is trending at Number 1.

There must be

To know the viewers changing behaviour or habit of collective watching experience during lockdown period, we use survey method. Data was collected online through google forms. Some questions were close ended and some open ended. Basically, questions were asked to know the factors of watching habits of Indian viewers and their perception towards the future of cinema industry due to over the top applications in India.

This research involves the 95% of viewers from the age group of 20 to 40 years which are the major stake holders of viewership data. There are also the viewers involved with different educational background like 82% are the post graduates, 26.9% are the graduates and remaining are from school. 71.9% of male viewers and 28.1% are the female viewers. One of the major factors which effect of OTT viewership is marital status of viewer for obvious reasons. As both viewers have major stake in increasing the viewership of any medium because of different factors like time, money, resources, status etc. In this research also 62.9% are the unmarried viewers and remaining 37.1% are the married viewers.

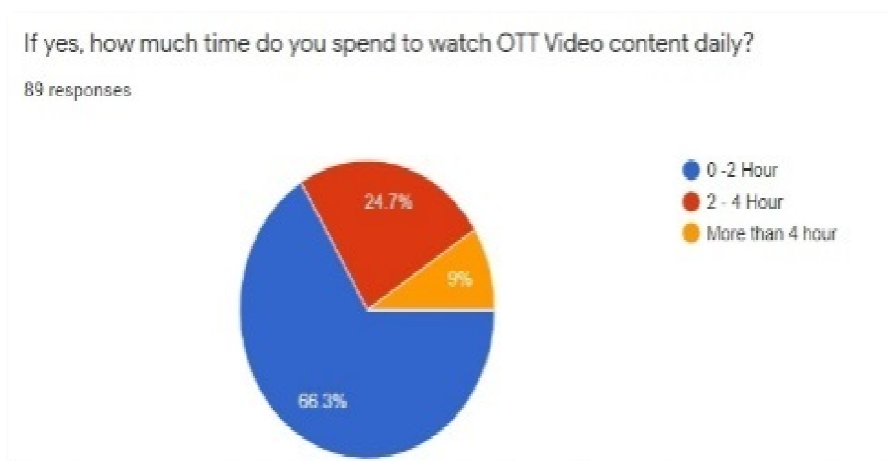


Figure 1

Over the Top applications and Television is the most preferred option for viewers to watch new content during this lockdown period. So how much time they spend to watch OTT applications is the first question. In responding this question 63.5% viewers says they spend 0-2 hours to watching the OTT applications and 24.7% viewer's spending 2 to 4 hours and 9% respondents says they spending more than 4 hours to watch OTT applications in a day

and this 9% of viewers will affect the other traditional mediums as they may change their watching habits.

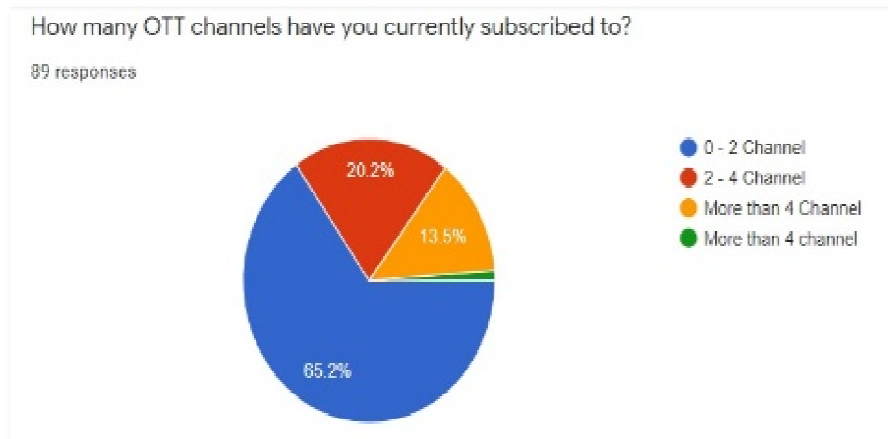


Figure 2

Subscription of an OTT application is another important factor as subscription is proportional to viewership of any OTT application. Therefore, the second question we asked that how many OTT channels you currently subscribed to. 65.2% viewers are satisfied with to 0 to 2 OTT channels subscription whereas 20.2 % viewers subscribed to 2 to 4 channels and remaining 14.6% viewers subscribed to more than 4 OTT channels who spent most of their time to watching it. Which clearly indicate the viewers want see variety of content.

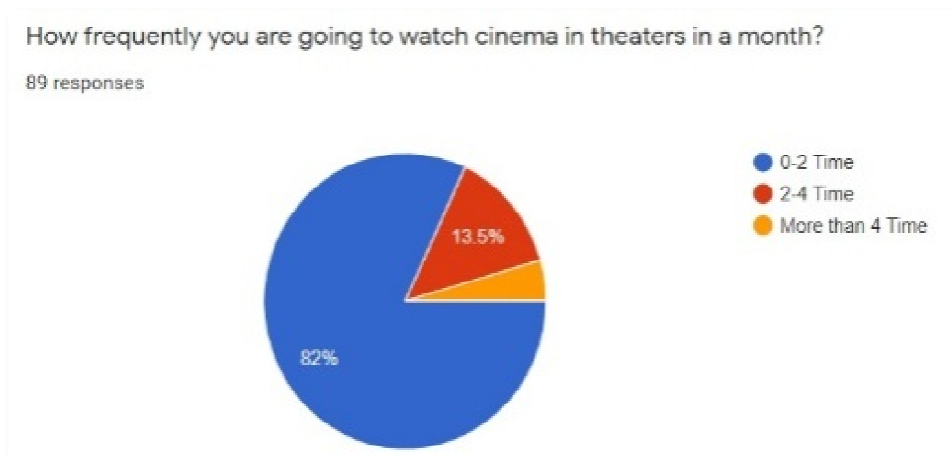


Figure 3

We moved to the next question that how frequently you are going to watch cinema in a month. 82% viewers are stated that they 0 to 2 times in a month and 13.5% viewers are 2 to 4 times in a month go to watch movie in cinema hall. Remaining 4.5% viewers went more than 4 times in month to cinema hall to watch movies. This is the story before the lockdown and there may be some definite change after the lockdown period for which we are doing this study.

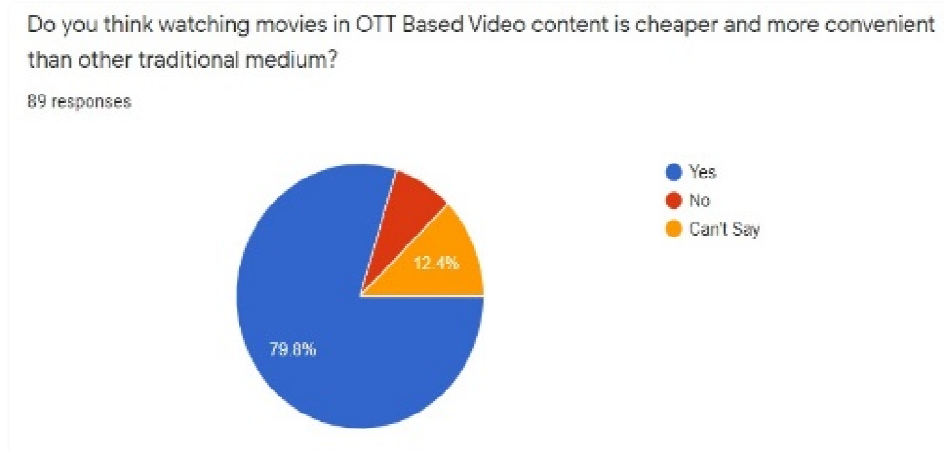


Figure 4

Cost and comfort are an important factor behind using and watching any video content and the graphics indicating that viewers found that OTT applications is cheaper and convenient than other traditional medium like DTH and Cinema Hall. Specially in Lockdown period many OTT distributors provide different lucrative offers which is definitely looks very good at the moment and also you can watch this content on smart phone which is very comfortable to watch at any time anywhere. That's why 79.8% viewers say Yes, they found OTT based video content cheaper and also convenient than other traditional medium and 12.4% says they are not able to answer this question. Also 7.8% viewers do not consider the OTT video content cheaper and convenient as compare to other traditional medium.

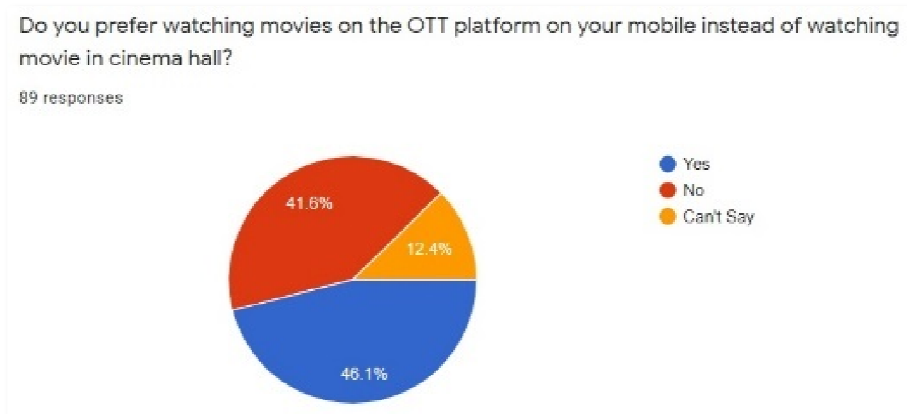


Figure 5

When we talk about movies, there is one more factor that need to be talked about and that is the release time of movie. Many people want to see movie on big screens and on as soon as possible from release date which is one of the drawbacks of OTT. Despite this, graphic chart states that 46.1% viewers prefer to watch movies on OTT platforms rather than cinema hall as they get the same quality with maximum comfort and minimum cost. Furthermore, it is indicative of the changing viewing habits of viewers. 41.6% viewers prefer to go the cinema hall to watch movies and 12.4% are not sure about the answer.

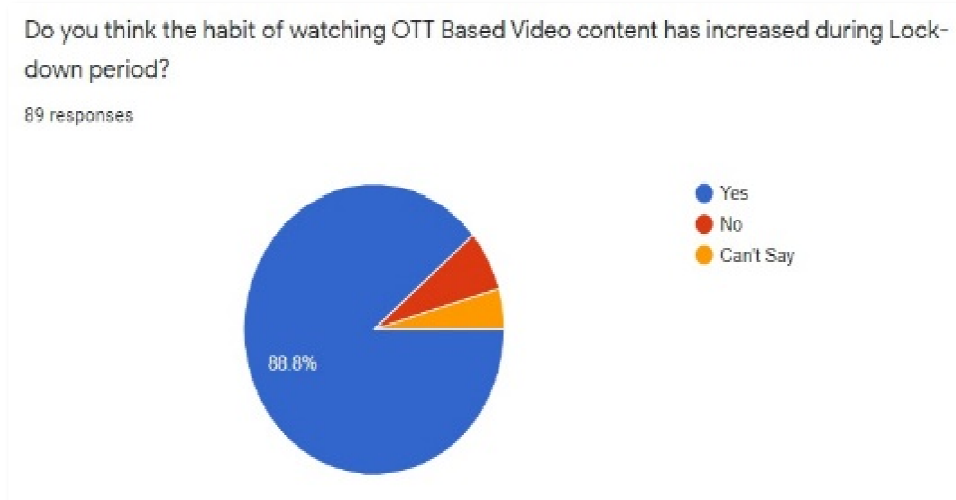


Figure 6

Next graphics chart clearly shows that viewers habit of watching OTT based video content has increased during the lockdown period as 88.8% viewers accepting this truth remaining 11.2% either do not believe this or they have not answer of this question. During this period viewers have only two choices of watching video content either television or digital content and because quality content is always on demand by viewers and hence OTT applications remains the first choice of viewers.

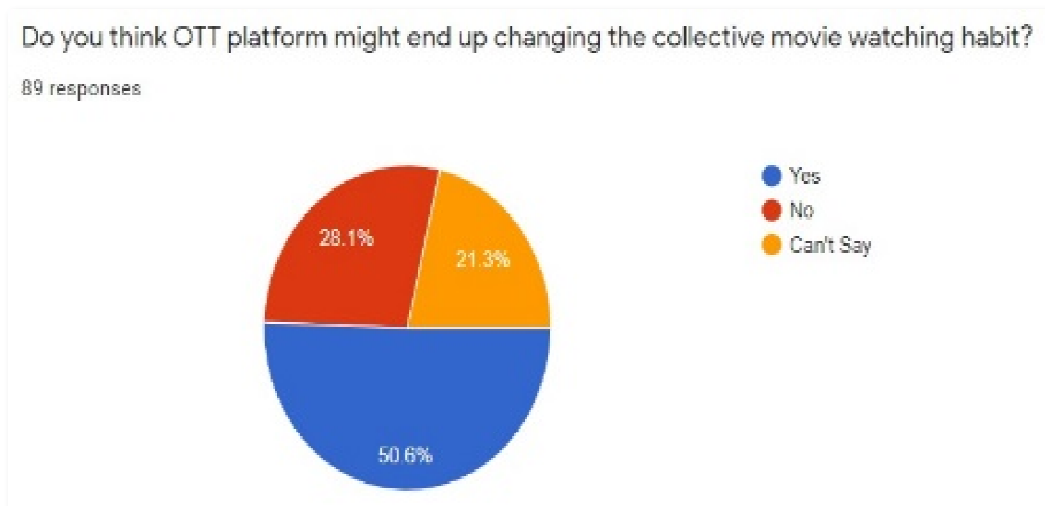


Figure 7

Sitting together and watching movies or any other video content or spending time on the pretext is the foundation of our family. After the arrival of Mobile and internet and then OTT platforms, the biggest impact is going to be on this foundation. We asked this question to viewers that OTT platform might end up changing the collective movie watching habit. 50.6% viewers agree with the statement. Whereas, 28.1% viewers did not agree and 21.3% viewers are not sure about it.

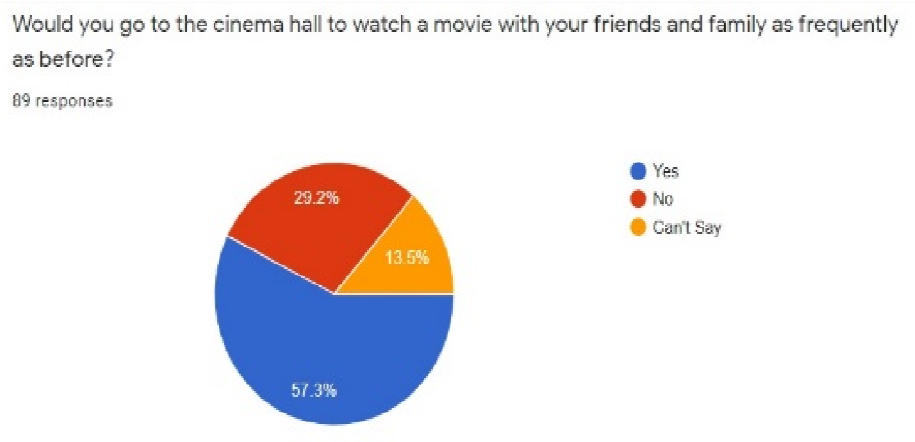


Figure 8

Things are not as they were before the lockdown and the same can happen in the case of cinema halls. When we asked the viewers that they go to cinema hall to watch films with their friends and family as frequently as before. Surprisingly, 57.3% viewers say yes, they still want to go to watch movies to the cinema hall as before. One of the reasons can also be the spending quality time with friends and family. 29.2% rejected the earlier method and 3.5% viewers are still under dilemma.

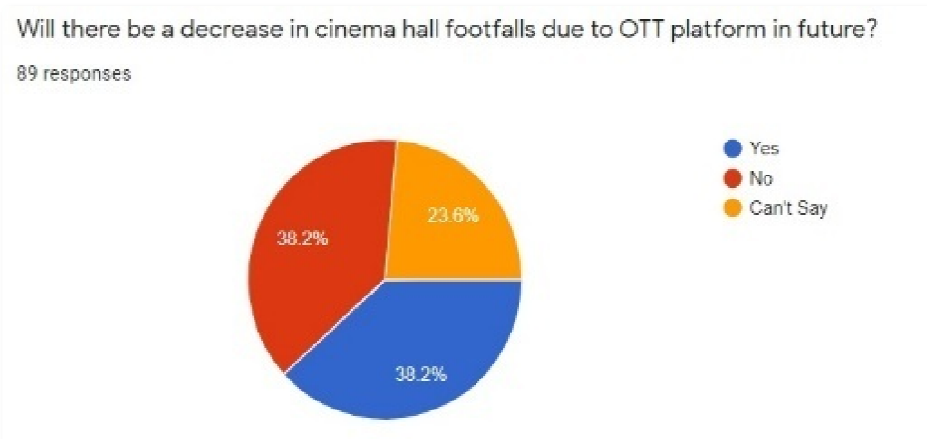


Figure 9

As OTT channels has increased their viewership during this lockdown period, the very important question arises as to whether the habit of watching OTT video streaming services and its convenient factors can reduce cinema hall footfalls in future. Here we got the very interesting data in which 38.2% viewers except the threat for cinema hall owners whereas same number of viewers deny this. 23.6% of the viewers are not able to answer this question.

Suggestion and Conclusion

Current generation doesn't have the patience to wait for a show or movie to air on a linear platform like television. This viewer wants her content just like Maggi noodles - Masaledaar,

instant and on-demand. That is what our study reveals that due to some such reasons the growth of OTT will only increase in India. All the reports and articles that we have read and go through, the only thing understood is that in India, the OTT video streaming service will continue to spread its feet and it is going to have a huge impact on our traditional medium like television and Cinema Hall. The strong attachment of OTT to the audience in the lockdown period has further confirmed this fact. Smartphone penetration, International collaborations between media moguls and digital quality of the medium. Cost effectiveness and access liberty (anywhere at any time) is also one of the reasons behind growth of streaming media in India.

In other findings about the viewers dynamic watching habits may change the collective watching experience and it also effect the future footfalls of cinema hall. As per study shows viewers have equal way of thinking about the future of cinema hall. There may be decrease or may be not in the future footfalls of cinema hall after this lockdown period, it all depends on the viewers who are still in dilemma about this. We have to suggest the cinema hall owners they should think of more comfort and offers and also it must be cost worthy. As we find OTT spreading very fast, its effect is going to be very deep on other traditional medium.

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