THE EVOLUTION OF ENTERTAINMENT IN INDIA

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INTRODUCTION

Television was introduced in India in 1959 but for many years it was limited to state-owned broadcaster Doordarshan[1], which had one channel with twice-weekly, one-hour programs.

However, there has been a marked shift in the television entertainment options available in India today, with 48 paid-for broadcasters, an estimated 60,000 cable operators, 6000 Multi System Operators (MSOs) and six pay direct-to-home (DTH) operators, all in addition to the public service broadcaster – Doordarshan.[2] In total, there are over 850 TV channels registered with the Ministry of Information and Broadcasting.

2016 witnessed the arrival of a revolution in content consumption in India, with the entry of OTT (over-the-top) media services. OTT content is defined as the *"productized practice of streaming content to customers directly over the web* [3].*"* This has marked a big shift from the traditional tune-in, "consume-what-you-are-fed" model of conventional terrestrial, cable or satellite dish television, towards a new on-demand era of choice.

Given the OTT boom, 82% of users in the Indian market are currently engaged on free-to-view, advertising-led video-on-demand platforms (like YouTube), compared to the 18% who pay for content on subscription-led video-on-demand services (such as Netflix and Amazon Prime).[4]

There are many factors that have been conducive to the on-demand model in India, the foremost being the growing penetration of internet and smart phones.

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DIGITAL INFRASTRUCTURE IN INDIA: FACTS AND FIGURES

- India is the **fastest growing mobile market in the world**.[5]
- Not only are over half of internet users solely mobile, **nearly 60% accessed the internet for the first time on their mobile phones** – a clear contrast to many other countries, where desktop and laptop are the first devices used.
- The **mass launch of 4G services** by Reliance Jio in 2016 and subsequent launches by other service providers was an inflection point in India's data story. This disruption led to a rapid surge in data usage on the back of promotional offers by all leading telecom operators.
- **OTT content consumption is evolving from niche to mass content**, with long-form content gathering traction. The increased popularity of large screens and investments in original content creation is further driving consumption. Live streaming has emerged as a focus area for OTT players, with the sports genre especially attractive from a viewership and monetization point of view.[6]
- **Video is driving the data traffic**. The average consumer spends around three to five hours consuming media per day, of which, 35% is spent on digital media consumption on a mobile phone.[7]

Figure 1 Digital population in India

Active internet users — **560** Million

Active mobile internet users — **515.2** Million

Active social media users — **310** Million

Active mobile social media users — **290** Million

Source: Statista (January 2019)

STUDY AND METHODOLOGY

With the many economic and digital changes happening in the Indian market, we set out to research how online and offline content stack up against each other in the viewer's mind. One of the main sources of information for this is social media, as Indians are increasingly expressing their views online about almost everything. We proceeded to gain an understanding of the key aspects driving users to both online and offline content, and explored the differences in these trends.

We used our social intelligence tool, Synthesio[8], to crawl social media and pull out relevant conversations that took place over the past year in respect to both offline and online content.

For online, we included both unpaid and paid content (YouTube, Amazon Prime, Netflix and HotStar). For offline, we considered all conversations dealing with channels available through satellite TV.

We then sifted through these conversations to weed out the junk, ads and other non-relevant content. Following this, we searched for relevant and insightful conversations, analyzing the data of 311 in total to unearth the themes around the type of content being talked about for both offline and online.

ONLINE STREAMING CONTENT: KEY THEMES

Focussing on the data for conversations around online streaming content, we examined the key themes emerging around what is watched, and how.

We could ascertain three distinct themes, as highlighted in figure 2, in terms of the way the user was discussing the content on social media.

Figure 2 Online streaming content themes

14%
Realism

54%
Individual preferences

32%
Social currency
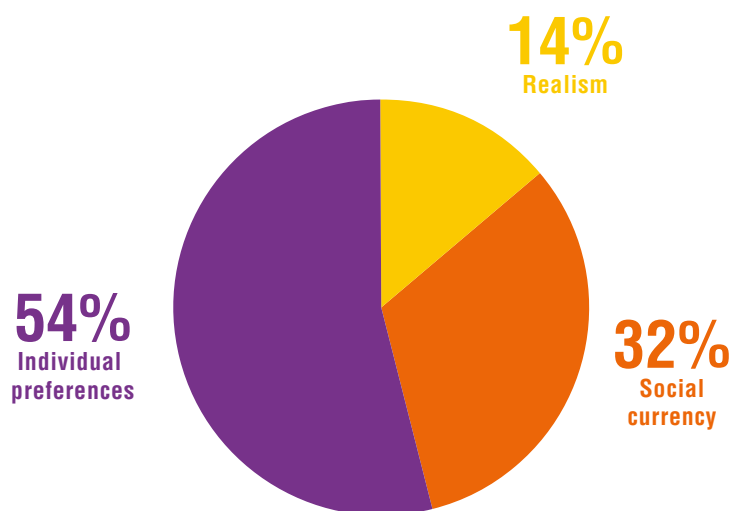
Source: Social data captured through Synthesio (March-April 2019)

THEME 1: REALISM

Online content has built a distinct identity beyond the genre of fantasy or idealism, which was the core theme over the years and dominated the content world in India. Now we observe the trend of realism emerging, even in Indian cinema, with films such as Gully Boy, Gold and Toilet. We are witnessing an attitudinal change in the following ways:

- Breaking stereotypes through strong and realistic character representations – the characters are interestingly not perfect, but their flaws create more empathy
- A fresh take on existing concepts and complex plots, and not always a happy ending
- Viewers are no longer looking at content to escape reality but are now open to coming face-to-face with a dark reality

Quotations taken from online conversations tracked by Synthesio on the theme of realism include:

"Loved watching #LustStories on #Netflix ... the four films were so different and yet so similar in giving us four amazing female protagonists... an absolute treat for all."

"I just finished watching all three seasons of Hannibal on Netflix and I'm speechless. You are a creative genius. You created such a dark and complex world. Amazing. Why do I feel like I have had some good therapy?"

"Love watching Netflix on a big screen #Ghoul is such an entertaining series and the concept is so awesome."

Figure 3 Most talked about online streaming shows in India
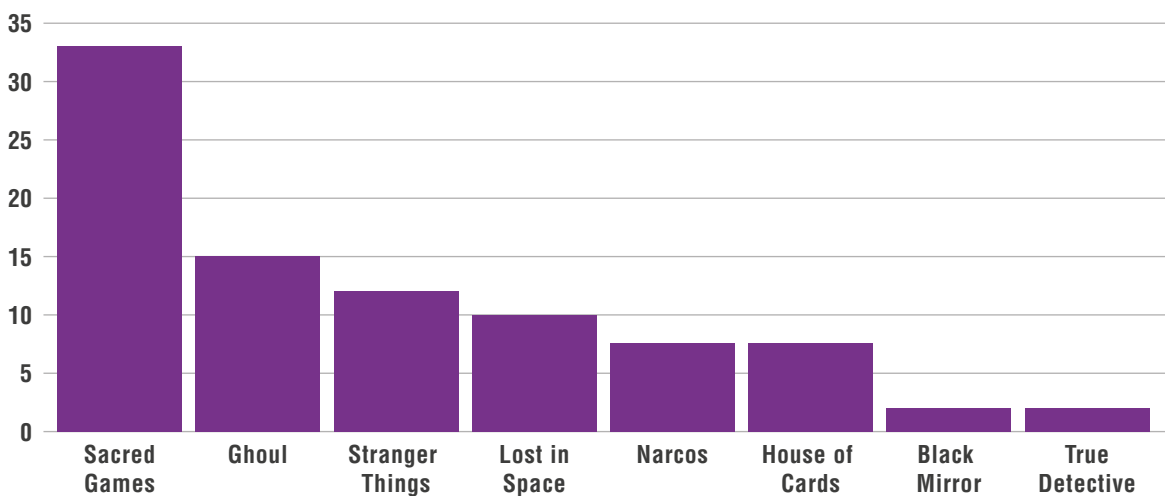
Source: Social data captured through Synthesio (March-April 2019)

THEME 2: SOCIAL CURRENCY

Interaction with online content, especially realistic, dark, western content, is used as a social currency by consumers. Sharing views is a trending phenomenon, driving offline content viewers to interact with online content in order to be part of the conversations. Somewhere the unstated but implied belief seems to be that TV is for the masses and OTT is for the classes - a divide which was earlier seen through art house versus mainstream Bollywood movies. Online content is also helping the viewer feel like a citizen of the world, revealing new cultures, countries and lifestyles.

THEME 3: INDIVIDUALISM

Given that there are so many genres of programmes available, viewers can make choices about what they want, and don't want, to watch. Entertainment is not limited to just collective consumption anymore. It allows viewers to give preference to their individual needs over family needs and allows freedom to be themselves without any judgement.

Online content offers better control to the viewer; access anytime, anywhere and on any device. Interestingly, the lethal mix of on-demand non-stop access to content, combined with the high probability of finding something that you love, has resulted in the phenomenon of binge watching. In fact, it can be argued that the core competition for online streaming content is sleep!

This practice of binge watching also matches the youth credentials of impatience, hedonism and impulsiveness.

Quotations taken from online conversations tracked by Synthesio on the theme of individualism include:

> "Watching TV with other humans just gives me anxiety, and that's 100% of the time. Sometimes, I want to watch a crappy show and shove cheese balls into my mouth while I sprinkle crumbs all over the place."

> "Sunday brings this for us! What did it get for you? Order a yummy pizza, tune in to Netflix and let your weekend rest in peace! #SundayMotivation #WeekendWisdom #weekendvibes"

> "Ideal way to unwind after work, during weekends, catch up on what is missed #Netflix&Chill"

BRAND REPUTATION

For online streaming content, we can see that most of the conversations are around the programmes and the different content providers. The audience have clear perceptions about the content provider, such as:

- **Netflix:** Quality, international content but not affordable to all
- **Amazon Prime:** Good value for money with bundled benefits on shopping and entertainment
- **Hotstar:** The place to go for live cricket and TV show

Quotations taken from online conversations tracked by Synthesio about online content providers include:

> "I intended to get a Netflix subscription, but it is too overpriced and expensive compared to others."

> "There isn't much to watch on Hotstar apart from sports or missed shows on TV"

> "Netflix has good content, Amazon Prime is a good price"

OFFLINE CONTENT - THE KEY THEMES

For offline viewers, we found a number of different themes emerging through our analysis of how users were discussing offline content on social media. We can separate these into four distinct themes (as outlined in figure 4).

14%
Negativity

13%
Embedded in daily routines

28%
Idealism

45%
Love for the never-ending
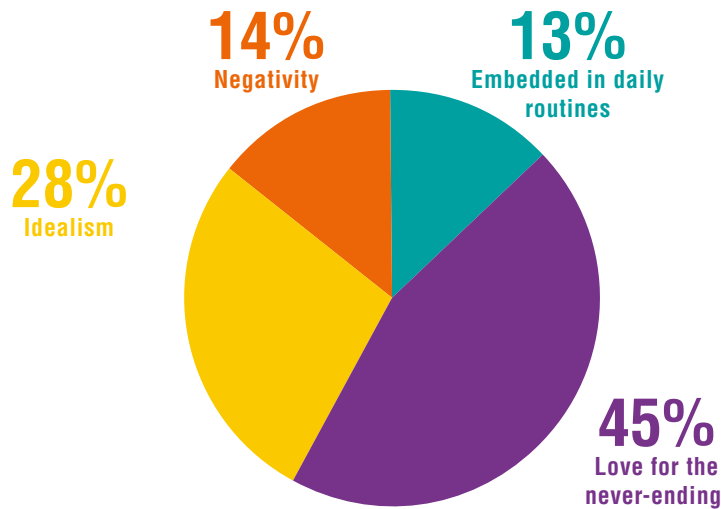
Source: Social data captured through Synthesio (March-April 2019)

THEME 1: LOVE FOR THE NEVER-ENDING

One major theme that we can see emerging is what we are referring to as the 'love for the never-ending', i.e. when viewers want their favourite programmes to go on endlessly. Many of the conversations online are from a viewer urging a channel to never end a particular programme.

THEME 2: EMBEDDED IN DAILY ROUTINES

Some of the conversations around offline content are about how a show has become an integral part of daily life. Interestingly, unlike online, offline content viewing is more about finding a slot in the viewer's everyday life, rather than it taking over (binge watching).

Quotations taken from online conversations tracked by Synthesio on the theme of daily routine include:

> *"Chilling out on the bed in your hotel room watching television, while wearing your own pajamas, is sometimes the best part of a vacation"*

> *"We don't do much in the evenings except watch television"*

THEME 3: IDEALISM

Offline content featuring storylines with idealistic characters seem to connect well with the audience. India is a collective society; values such as love, nurture and family relationships are dear to viewers and these are reflected in the content on TV. In this context, some of the popular programmes mentioned were Bepannah and Silsila.

Clearly online and offline content are addressing two distinct needs reflecting the cusp of where India is currently. As a traditionally collective society, we are now seeing a strong emergence of the 'I' within the collective. This is being reflected in brand choices and media consumption. Offline viewers are watching family shows, in the company of their loved ones, and upholding family values. Life is presented as black or white, a world the traditional viewer is comfortable with. Online viewers, on the other hand, have had enough of this idealistic world which neither reflects contemporary culture nor life in the truest sense, with all its shades of grey.

THEME 4: NEGATIVITY

From our analysis, we can see that offline viewers are also objecting to TV shows that make them uncomfortable. For example, those that feature themes of infidelity or discrimination. It appears "moral policing" is higher on offline shows as typically the entire family watches it, so any transgressions are a concern for the viewer.

Quotations taken from online conversations tracked by Synthesio on the theme of negativity include:

"Worst show ever in the TV industry, stop encouraging the extra marital affair."

"Colors TV plz stop this show. Stop spreading negativity. It is harmful for society."

FUTURE TRENDS

Through our research at Ipsos, and insights from the industry in general, we can make a number of predictions about future trends for offline and online content consumption:

- Given that offline and online content seem to be satisfying two distinct needs, offline TV will continue to hold a special place for viewers in India.[9] India is a collective society where TV watching is almost a family ritual, which many households still hold on to.[10] There is also a huge consumption base in rural India and amongst the older generation for whom watching on a big screen is the preferred experience. They can relate better to the content on television, and it delivers the best value for money.

- In order for OTT players to attract viewers from offline, some of the following strategies could be implemented:

  - In terms of content, there are certain genres, such as romance, which are not as well represented in online content as in offline content, so online content providers might want to focus on these.
  - Currently, online content has an English-speaking westernized profile and that is what our social listening tool has tapped into. However, a change in user demographics from a digital savvy youth in top cities to tier 1 and 1 cities across geographies and socioeconomic classes is having an effect. According to a recent report, 40% of OTT platform viewership comes from regional content.[11] To attract this offline and/or regional content viewer, there needs to be some bridge content which cuts across different sets of viewers in India. Interestingly Sacred Games, a bilingual show, has done this successfully.
  - Given that a large segment of online content viewers are using their mobile screens to watch programmes, the content needs to work well on all devices and phones with different kinds of capabilities.

- Increasingly, viewers are consuming shows based on their individual preferences. Tapping into this need for personalization is important. For example, Netflix uses Artificial Intelligence (AI) to make recommendations to the user based on their viewing history.[12] The role of AI is increasingly integral to how we discover content.

- Although online streaming services provide depth in content choice, discovering content that viewers like requires time and research. People are increasingly time-poor, unable to search for content that is relevant and interesting to them. In future, OTT providers will be curating content based on viewers friends' preferences and recommendations, just like good reads in Kindle. Additionally, the search interface needs to be more user-friendly and intuitive – currently an area of improvement for Amazon Prime Video and Netflix.

- A reason for preferring online to offline content is because there is better control for the viewer - they decide what, and when, to watch. Extending the same rationale to a show, i.e. control in deciding the storyline, is the next level for the viewer, possibly across both online and offline media. Content which is more immersive and participative is also seen to be more engaging.

- Price is a barrier to adoption for online streaming content.[13] Different price rates by types of content (English, regional etc.) could be an option in future. Sachet pricing could also be introduced - offering daily/weekly subscriptions instead of monthly.[14]

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CONCLUSION

Our methodology is a good indicator for understanding viewer attitudes and perceptions of online vs offline media, considering how freely people share their opinions, views and interests on social media today. Social media data is a useful way of capturing trends and is as close to being 'in the moment' as possible, with postings usually happening while the viewer is watching a program, or shortly afterwards.

It's important to note, however, that social media data tends to be skewed more towards the younger and higher socio-economic classes. Online streaming content also seems to generate more conversations on social media than offline content. Hence social media data alone is not enough for a thorough analysis of consumer preferences. Additionally, we need to adopt a cultural lens to understand consumers' content needs and how society is changing. Trends in media consumption are often led by larger cultural changes happening around us.

For example, one of the reasons for the success of Sacred Games on Netflix in India was that it filled a gap in the market for a slick thriller in Hindi. Thriller is a comparatively unexplored genre in Indian movies/TV and only in the last three years have they found a consumption market. Sacred Games exposed the dark underbelly of India, combining the themes of friendship, lust, betrayal and power in a contemporary manner. Similarly, the success of Lust Stories, a show which talks about four independent women exploring their passions openly (a somewhat taboo topic), reflects a larger societal change happening in India with women becoming more assertive, independent, uninhibited and open in their acknowledgment of their physical and emotional needs. For any content provider it is important to have a sense of the cultural shifts and hot topics which are capturing the pulse of the viewer.

ABOUT SYNTHESIO

The Ipsos trend radar and social analytics tool which uses the Synthesio platform helps to surface trends by tracking top performing content and hashtags across social networks. Synthesio is owned by Ipsos and sources social listening data in over 80 languages to provide access to the most complete collection of data on the market. More details of this can be found here: www.synthesio.com/signals/

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FURTHER READING

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