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THE SHIFT FROM CINEMA TO OTT PLATFORMS AMONG YOUTH POST COVID-19

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EXECUTIVE SUMMARY

The Indian entertainment industry has undergone a permanent and structural shift from conventional movies to OTT platforms, especially among youth between the ages of 15 and 25, a phenomenon that has been accelerated by the COVID-19 pandemic. For decades, movies were not just a form of entertainment but an integral part of Indian society, but with the advent of OTT platforms like Netflix, Amazon Prime, Disney+ Hotstar, and Jio Cinema, not only has this phenomenon been disrupted, but it has been accelerated by the COVID-19 pandemic, forcing movie theaters across India to remain shut for almost 18 months. Three major factors are at play here. Firstly, there are the behavioural traits of a digitally born generation who are more inclined towards a convenient, customized, and cost-effective experience than the traditional theatre experience. Secondly, there has been an explosion of digital infrastructure growth in India that has made high-speed internet and streaming accessible even in Tier 2 and Tier 3 cities. Finally, there is the pandemic effect that has made direct OTT releases a new normal and binge-watching a major cultural phenomenon among the youth of India.

The impact of this shift is significant. There are the theatre owners who are struggling with a decline in footfalls and revenue. There are filmmakers who are learning to tell long-form digital stories. There are the distributors who are dealing with a breakdown of traditional release window models. There are the OTT platforms who are dealing with a highly competitive and crowded space. There are the advertisers who are shifting budgets to digital platforms. There are the policymakers who are dealing with cultural preservation, employment protection, and content regulation. The way forward is not to be in either cinema or OTTs; rather, it is to be in a space of intelligent coexistence between the two mediums cinema evolving as premium experiential destinations, OTTs taking regional content investments to the next level, and a futuristic national digital entertainment policy taking shape will be the stakeholders who will write the next chapter of Indian story-telling history

INTRODUCTION

The Indian entertainment scenario has always been ruled by the magic of cinema. The land of one of the biggest and most vibrant entertainment industries in the world, the cinematic experience for Indians has always been more than just an entertainment platform; it was a ritual, a social institution, a part of Indian popular culture, and a defining aspect of Indian social life for many years. From the grandeur of Bollywood films to the narrative richness of regional cinema, the cinema hall was a platform for Indians where stories came alive on the screen. However, in the past decade or so, a quiet revolution has taken place, which can be characterized as the rise of Over-the-Top (OTT) content platforms, which include Netflix, Amazon Prime Video, Disney+ Hotstar, and JioCinema, among others. This revolution in the consumption of content in India can be attributed to the proliferation of smartphone devices, cheap internet data packages, and the availability of a variety of

content, which has steadily gained the attention of the Indian audience, especially the youth in the 15-25-year age group.
The COVID-19 pandemic turned out to be a turning point for OTTs. As all cinema halls were shut across the nation, and people were forced to stay at home, OTTs became the main source of entertainment. Movies, which were originally intended for theatrical releases, somehow ended up on OTTs, making it a new normal. The shift from traditional entertainment to OTTs was extremely smooth for India's youth, who are already deeply embedded in digital spaces. The shift was not just smooth but also permanent. The convenience of watching content at their own time, coupled with the influence of social media and peer pressure, resulted in a new genre of entertainment, i.e., binge-watching. This study seeks to analyze the phenomenon of the increasingly rapid shift from conventional screen viewing to OTT platforms in the lives of young Indians in the post-COVID-19 pandemic scenario. The research is based on secondary research, relying on reports, academic publications, government reports, and media reports, and attempts to explore the significant factors behind this change in behavior, analyze the causes and patterns behind this phenomenon, and evaluate the implications of this phenomenon for the future of the Indian film and entertainment industry, from filmmakers and theatre owners to distributors and content providers. As India stands at this significant juncture in the evolution from traditional screen viewing to the OTT phenomenon.

PROBLEM STATEMENT

The COVID-19 pandemic has had a major impact on the entertainment industry in India, accelerating the shift from traditional cinema to OTTs among young people in India, belonging to the age group of 15-25 years. Although this shift was evident due to increased smartphone usage, affordable internet penetration, and the emergence of different genres of content, the COVID-19 pandemic acted as a catalyst for this shift, making it more normalized and changing the viewing habits of young people in India. The shift from cinema to OTTs is posing critical challenges to traditional cinema. The problem statement this study covers:
What are the major factors contributing to the popularity of Indian youth choosing OTTs over traditional cinemas in the post-COVID-19 pandemic, and what are its implications for the future of the Indian entertainment industry?

ANALYSIS

Domain 1: Media & Entertainment Industry
Indian media and entertainment have traditionally been built around the cinema business. With the largest film industry in the world, cinema releases were traditionally the main source of mass entertainment in India, in both urban and rural areas. In other words, cinema was not just a business; it was a culture deeply embedded in the social fabric of India. However, with the advent of OTT platforms, the traditional business of cinema has been significantly disrupted, with platforms such as Netflix, Amazon Prime, Disney+ Hotstar, and Jio Cinema becoming significant disruptors in the business, offering a new and exciting alternative for movie-goers, which is not only easily accessible and affordable but also offers a lot of variety in content. With the advent of regional content, stories in languages such as Tamil, Telugu, Malayalam, Kannada, Marathi, and Bengali have gained a huge audience across the nation and even the world, which was never possible with the traditional business of cinema.
Entertainment in India has thus become highly personalized and accessible. The audience is no longer a passive consumer of whatever is playing in the nearest multiplex. They are now active curators of their own experience, choosing what they want to watch that suits their language, genre, mood, and timing. This transformation has been accelerated by the COVID-19 pandemic in a very unprecedented fashion. With all theaters in the country being closed for nearly 18 months, big-ticket movies were being directly streamed on OTTs without any theatrical release. This included movies like Dil Bechara, Shershaah, and Laxmii. This has thus changed the audience’s expectations completely. However, even after theaters opened, a large segment of the audience, particularly the younger audience, has already changed their expectations towards online platforms, and the shift from theaters to digital post-COVID is thus irreversible for them.

Domain 2: Consumer Behaviour & Youth Psychology
The behavioral pattern of Indian youth belonging to the age group of 15-25 years has witnessed a major change in the post-COVID period. The underlying reason behind this change is their affinity for on-demand content. Unlike cinema, which is subject to time constraints, OTTs allow users to watch their preferred content at their

own time and place. This is particularly significant for young people who need to balance their hectic academic, professional, and social engagements. The loss of interest in time constraints has resulted in a rigid experience for movie-goers. The cost of watching a movie, including ticket costs, conveyance, and food, is not easily justifiable for entertainment purposes when users can subscribe to an OTT platform for a fraction of the cost.

The role of social media in the development of the viewing habits of youth cannot be overstated. Social media platforms such as Instagram, YouTube, Twitter, etc., are flooded with reviews, reactions, and recommendations pertaining to OTT platform content, which generates interest in the content in a much more efficient manner than conventional film marketing. The most significant change in the viewing habits of the youth is the development of binge-watching culture. The ability to watch multiple episodes of a web series in one go has led to the development of a completely new form of entertainment, which cannot be met by conventional cinema. In the context of the youth in India, binge-watching has become a social activity in itself, as the youth watch the same content at the same time through digital platforms, thereby developing a sense of belonging to the same social group as the viewers in the theater.

Domain 3: Technology & Digital Infrastructure

The rapid emergence of digital infrastructure in India has been the fundamental driver for the emergence of the OTT revolution. India has witnessed one of the fastest rates of digital infrastructure development in the world over the last decade, driven by a combination of policy initiatives, investments, and market competition. The widespread availability of smartphones in India has provided a high-quality streaming device in the hands of hundreds of millions of young consumers. Today, India is one of the largest smartphone markets in the world, and for a large proportion of youth, smartphones are their principal screen for consumption of entertainment.

Equally important has been the fall in the cost of mobile internet. The arrival of Jio in 2016 sparked off a data price war, making internet access affordable for even low-income households. Data is no longer a luxury but an essential service. The cost of data plans has ensured that OTT content is not only consumed by high-income youth in cities but has penetrated deep into Tier 2 and Tier 3 cities and rural India. The audience base for OTT has thus expanded exponentially.

The OTT space has also benefited from the increasing penetration of smart televisions. OTT content is no longer limited to the personal screen space of an individual's smartphone. As smart televisions become increasingly affordable and accessible, OTT content has moved from being a personal and individualistic space to being a social phenomenon. OTT content has brought families together in a way similar to movies. The OTT space has thus expanded its audience base exponentially. Together, these technological advancements have built an effective and scalable digital platform not only to promote but also to fuel the growth of OTT services among Indian youth and beyond.

IMPLICATIONS FOR STAKEHOLDER

1. Filmmakers & Content Creators- This is an excellent opportunity for filmmakers to explore and push the boundaries of their work beyond the traditional two-hour feature film format.The OTT revolution has also brought about a series of changes for filmmakers and content creators. Some of the implications of this shift include the traditional marker of a movie's success and its performance at the box office is no longer relevant. Filmmakers need to take note of OTT viewership and its associated success markers as equally important.There is a growing need for long-form storytelling in the Mid-budget and indie filmmakers can benefit greatly from OTT platforms. This is because they would not have been able to achieve this kind of visibility and reach through traditional means. The quality and originality of content have never been more important. This is because OTT viewers are highly discerning and well-informed. They will switch off if they do not find something interesting within the first few minutes of watching.
2. Theatre Owners & Exhibitors - Theatre owners are perhaps facing the most direct and existential threat from the OTT explosion. The implications are: Declining footfalls, particularly for non-blockbuster content, are causing tremendous financial strain for single-screen cinemas and smaller multiplexes that are already shutting shop. The reduced theatrical window of the pre-OTT exclusivity period is cutting down the time that theatre owners have to break even from a particular release. Theatre owners will need to innovate and create a new experience that justifies the cost and effort of a physical visit to a theatre. That means investing in premium large format screens, Dolby Atmos sound systems, recliner seating, F&B offerings, and experiences

that OTT cannot deliver at home. To survive in a post-OTT world, theatre owners will need to create a new narrative that theatre is not just a regular entertainment destination but a premium destination for a very few and very special cinematic events.

3. Distributors & Production Houses -The conventional distribution model, which has traditionally followed the theatrical run, regional release, and subsequent satellite rights, is being rewritten. Some implications are: Production houses are increasingly entering into OTT rights during the development phase, thereby shifting the risk from the theatrical performance to the OTT rights. The conventional release pattern, which traditionally followed the theatrical release, satellite release, and digital release, is being rewritten as many movies are bypassing the theatrical release altogether in favor of the OTT release conventional distributor needs to acquire the skills required to manage digital rights in order to stay relevant in this space, where the OTT platforms are increasingly becoming the producers as well as the distributors. The regional distributors stand to gain as the OTT platforms are increasingly looking at acquiring authentic regional content in different languages in order to cater to the ever-expanding base of their subscribers.
4. OTT Platforms - While OTTs are the biggest beneficiaries of these developments, they also face their own set of changing challenges: The high level of competitiveness among OTTs has led to a rise in the cost of acquiring content, as well as producing content, making profitability an ongoing challenge for OTTs, even established ones. Subscriber retention is becoming as important as subscriber acquisition. OTTs have to continuously invest in fresh, high-quality, and relevant content to retain subscribers in a market where the youth are highly fickle in their loyalties to OTTs. Regional content has emerged as an important differentiator for OTTs. OTTs that have meaningfully invested in Tamil, Telugu, Bengali, Marathi, and other regional language content have a huge competitive advantage in the linguatically diverse market of India. Data privacy, content regulation, and adherence to the Information Technology rules in India are ongoing challenges faced by OTTs.
5. Advertisers & Brands - The migration of youth audiences from cinemas to OTTs has serious repercussions for brands looking to reach out to specific demographics: While OTTs promise brands data-driven and targeted advertising capabilities much stronger than those offered by cinemas, in-content brand placements, sponsorships for new content, and co-brand content partnerships are being increasingly recognized as effective substitutes for traditional video ad formats such as pre-rolls. As youth audiences increasingly consume OTTs as opposed to cinemas, brands are increasingly looking to realign their advertising budgets from cinemas to OTTs.
6. Government & Policymakers -The structural shift from cinema to OTT also has structural implications, which the government needs to address in a proactive manner decline of single-screen theatres poses a threat to the employment opportunities available in the region-specific film exhibition culture. Subsidies or tax benefits may be required to save these theatres. The regulation of OTT content continues to be a contentious area. Balancing creative freedoms with responsible content guidelines is a challenge in OTT regulation. The government can look at the potential to use OTT as a platform to spread Indian culture, language, and soft power globally, especially with the rise in consumption of OTT content from India.

SUGGESTIONS

1. For Theatre Owners & Exhibitors - Reinvent the Cinema Experience Invest in premium large format screens, Dolby Atmos audio, and recliner seats to provide an experience that can only be offered in a cinema, making the cost of a ticket to a film justifiable to the youth audience. Develop innovative pricing models like discounts for students, week-day shows, and theater subscription models to make cinema more affordable for the youth segment between the ages of 15-25. Develop themed shows, fan events, live Q&A sessions with filmmakers, and cultural festivals to transform cinema into community experience centers instead of just places to screen films. Strategic Partnership - Develop a strategic partnership with OTT players to conduct exclusive premiere shows for digital originals, creating a new business model for theatrical releases as well as OTTs. Develop partnerships with F&B brands, gaming companies, and entertainment technology companies to develop a new experience in the cinema to meet the experiential needs of young audiences .
2. For OTT Platforms - Strengthen Content & Community increase the investment in regional vernacular original content in languages such as Tamil, Telugu, Malayalam, Bengali, Marathi, etc., to further penetrate the market in Tier 2 & Tier 3 cities. Develop interactive community features such as watch parties, live streaming, polls, etc., which replicate the community aspect of the movie-going experience in the digital space. Create micro-subscription options for students as well as pay-per-view options for the youth in lower-income

groups who cannot afford the monthly subscription fee. Strategic Partnership - Partner with telecom companies such as Jio, Airtel, BSNL, etc., to offer OTT subscriptions as part of their affordable data packages, thereby reaching the first-time digital consumer in rural/semi-urban areas.Partner with educational institutions/youth associations to not only inculcate digital literacy but also increase their customer base in the youth segment.

3. For the Government & Policymakers - Protect & Modernize the Film Ecosystem Offer targeted subsidies and infrastructure support for single-screen theatre owners in small towns and cities to prevent their closure and preserve India's rich regional film culture. Design a fair and consistent regulatory environment for OTTs that allows creators and platforms to have a sense of certainty and guidelines to follow, ensuring that creative freedom is not compromised. Design a national policy for digital entertainment that recognizes OTTs as a critical contributor to India's entertainment ecosystem and crafts a vision for India's entertainment future in a digital world. Strategic Partnership work in partnership with OTTs to showcase India's regional and diverse cinematic talent and cultural content to a global audience and establish India's position as a global leader in exporting digital entertainment. Work in partnership with OTTs and industry associations to design skill development programs for filmmakers and creators moving from traditional filmmaking to OTTs and digital content creation
4. For Advertisers & Brands Shift to Digital-First Engagement -Allocate advertising spends currently going to cinema screens to OTT platforms that can target youth audiences using their robust targeting and data-driven advertising options. Focus on creating brand integrations within original content series that can organically resonate with the content viewing habits of young audiences on OTT platforms rather than relying on traditional pre-roll ads. Strategic Partnership Partner with OTT platforms and creators to launch culturally relevant brand storytelling campaigns targeting young audiences.

CONCLUSION

The white paper makes a compelling case that the change in medium from cinema to OTT platforms among the youth of India is not a short-term trend, but a permanent change in the structure of the entertainment space, which was not only in the works for some time, but was certainly fast-tracked by the COVID-19 pandemic.
The essence of this transformation, however, can be attributed to the confluence of three factors: the behavioral characteristics of the digitally born generation, who prefer convenience, affordability, and personalization; the rapid development of India's digital infrastructure, such as the availability of affordable data, smartphones, and smart TV; and the COVID-19 pandemic, which in effect pushed both the audience and the industry to embrace the norm of OTT content consumption.
What makes this change particularly interesting is that it's not just a change in the platform for consumption of media; it's also changed the way people consume it. Youth audiences have moved from being consumers of whatever was playing at a multiplex to being curators of their own experience of a movie. Binge-watching and social media have changed what it means to watch a movie for the 15-25 age bracket.
For the industry, the implications run very deep, touching every segment, be it the theatres, the filmmakers, or the policymakers.
Ultimately, the paper concludes that neither cinema, nor OTT, holds the key to the future, but it's the reinvention, the coming together, that will ensure the survival of both.
Theaters will have to transform themselves into premium experiential spaces, not just movie halls. OTT will have to further invest in regional content, besides tackling the high degree of competition for viewership loyalty. The government will have to step in to ensure the rich regional content heritage of India doesn't die, while the digital revolution takes its course. In a nutshell, the post-COVID entertainment era in India is one of coexistence through transformation, and the stakeholders who are able to transform the fastest are the ones who are going to shape the future of Indian storytelling.

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