Patterns of over the top (OTT) content consumption among student population in India across genre and language

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ABSTRACT: In the past two years, there has been a sharp surge in the streaming of video content online globally. Although, In India, the adaptation to new online platforms that provide content was slower than other countries, India provides a huge potential market for this viewership. The increasing demand for faster internet connectivity, 4G data network and the unlimited data access packs have made content accessible and affordable. The Over the top platforms provide a variety of content from Original shows, to Original Movies, Television Shows and big screen movies. India has about 40 providers of OTT Media services constituting a market of Rs. 3500 crore as of 2019. 6 of these platforms constitute 90 percent of the market, These are; Netflix, Amazon Prime, Disney Hotstar, Alt Balaji, Voot, Zee 5 Original. This paper will attempt to explore the content preference of a major audience of these platforms, college students in the age group of 18-25, by evaluating each of them on certain parameters through primary data. Secondly, an attempt will be made to find which platform brand is most popular in Indian online streaming market. The primary data will be collected through a target sample of at least 384 Internet users who have subscribed to any Indian or foreign based digital streaming service for entertainment purpose in the last one year.
Keywords: Millennial Population, Binge Watching, Metro phenomena, Content Diversity, Content Affordability, Crime Thrillers, Female Centric Dramas, Sitcoms

I. INTRODUCTION

With stronger internet connectivity, enhanced network and a plethora of multimedia-service capable devices, the OTT platform viewership in India is surging day by day. The boost comes majorly from Tier 1 and Tier 2 cities. In all, about 30 percent of this audience is constituted by college students in these cities. The lockdown saw a sharp increase in the viewership of video content on these platforms by the student population in India owing to social distancing which led to increased use of these platforms. During the last few months, social media platforms witnessed development of communities as fan pages for a lot of English, Hindi and regional shows on these platforms. Youngsters took out to social media to discuss their favorite shows among peers, recommend shows, criticize or appreciate plots and storylines and develop actors as their idols. . Watching digital content on such platforms has become the most popular source of entertainment among Gen-Z and millennial population of urban India, accounting for about 70% of their entertainment needs. The increasing popularity of these platforms has led these companies to produce content increasingly suited to people's interests. There has been a surge in release of both Original and International content on these platforms in the Indian Market. Hence, the objective of this paper is to reflect watching habits and tastes of Indian Student Population over these platforms with respect to various genres.

Background and Review – The OTT Market in India

The market for OTT Content reached a mark of $68.5 billion in 2020 globally, according to data from reports. (Bizcommunity, 2018). This is a rise of nearly 28% from the $53.3 billion which were invested in the year 2017. India and China, being the most populated developing countries form the most lucrative markets with 430 million and 610 million subscribers respectively as of 2019. With major OTT players in India, including Netflix, Hotstar, ALT Balaji and Amazon Prime Video, pushing deeper into people's living rooms, the OTT video market in India is growing at a CAGR of around 23% as per PWC report (2018).

India has the second largest online Video audience, more than Brazil and USA although, the streaming ecosystem and audiences are still devel-

oping and are still in the nascent stage. While Urban India spends close to four hours of television per day, people in rural areas spend three hours thirty-five minutes (BARC, 2018).

Online Streaming Platforms are more expensive than the regular cable television owing to the additional cost of data. However, with the advent of international and national streaming service providers that disrupting the entertainment space, revenue from films is set to be offset by digital in the next two years, according to a jointly conducted research by EY India and FICCI.
Binge-watching, which is a popular trend among the millennial and Gen-Z population in India has taken the centre stage. With Covid-19 in the picture, the OTT platforms have witnessed a tremendous boost in terms of increased viewership, brand new subscribers and relatively new audiences are opting for on-the-go content.

According to the EY (2018) report, India had 250 million video consumers in 2017, and 190 million of those were in the age group of 15-34. In a price-conscious market like India, the likelihood of users holding multiple streaming subscriptions is low; attractive offers have been effective in tempting potential customers into subscribing.

A lot of OTT players in India are shifting their focus towards the localization of their platforms, to be able to connect with the Indian users, be it in terms of regional languages, geography or user experience. Predominantly, most OTT video streaming players are looking at English, Hindi, Punjabi, Tamil, Telugu, Marathi and Bengali as the most-preferred languages. Among the most popular platforms in the country, Netflix has its big-budget original movies and shows along with licensed content. Hotstar shows same-day Indian premieres of licensed US TV shows along with sports. Amazon Prime Video often has the newest Bollywood releases along with some of their own productions. Alt Balaji believes in offering global content. YouTube uses its massive database to target specific content in the form of a web-series and live streams. It is also interesting to note that Netflix has been increasing its regional library enormously and rapidly, while also acquiring indie regional films to cater to a very niche audience whereas Amazon Prime Video has a large number of US movies and TV shows available with regional subtitles and trivia. According to a recent TOI (2018) report, streaming services are reliant on licensing agreements to supplement their portfolio of syndicated content and original shows whereas the amount of original content produced by new OTT players is much less than the hours of programming done by bigger mainstream production houses. Except for the seven core regional content providers, including ALTBalaji, Sun NXT and Ullu and others, 21 other OTT players have English as a core content focus.

Despite the proliferation of OTT apps in the past 12-18 months, video-streaming in India remains largely a metro phenomenon. A recent consumer study by Counterpoint Research reveals that the top five metros account for 55 percent of OTT users in the country, while Tier I cities bring in 36 percent of the audience. Besides being a big-city trend, video consumption on OTT platforms is primarily a youth thing too, with a massive 89 percent of users coming from the 16-35 years age group. Salaried employees are the largest consumer group, followed by students, business owners, housewives, and others.

Research Gap

While there has been considerable market study about the segmentation of audience of these platforms in India, study about their relationship with content, and preference of genres is still in nascent stage. Moreover, about 30% of the OTT Content viewers in India are college students in the age group of 18-25, for whom, OTT streaming constitutes about 70 % of their entertainment needs. Hence this study aims to fill the gap of studying and understanding content preference among college students in India on these OTT platforms.

Research Objective

This paper aims to study patterns of over the top (OTT) Content Consumption among student population in India across various content demographics. Amidst the ongoing global pandemic, OTT platforms have cemented their place by providing on demand digital entertainment in the comfort of one's home. Watching digital content on such platforms has become the most popular source of entertainment among Gen-Z and millennial population of urban India, accounting for about 70% of their entertainment needs. The increasing popularity of these platforms has led these companies to produce content increasingly suited to people's interests. There has been a surge in release of both Original and International content on these platforms in the Indian Market. Hence, the objective of this paper is to reflect watching habits and tastes of Indian Student Population over these platforms with respect to various genres.

Type of Research

This research is essentially descriptive and cross-sectional in nature. It aims to describe a set of population through a representative sample.

Type of Research Design

The research procedure follows a **descriptive research design** and has been described below.

Population and Sampling Considerations

The sampling frame for this research consists of the student population in India with the following considerations.

- Currently pursuing either an undergraduate or a graduate degree in any discipline.
- In the age group of 18-26
- Possessing subscription of at least one over the top streaming platform among Netflix, Amazon Prime, Disney Hotstar, Voot, Alt Balaji, Zee 5, Sony Liv or MX player.

The data for this study has been collected first hand from across national colleges in India. National colleges are defined as those in which more than half of the student population represents at least 5 or more states across India. These colleges were chosen in order to make the sample representative of the total Indian Student Population. It is assumed that data from each college is a representative of collective taste of population from that college. The sampling technique used is '**Convenience Sampling**' since the questionnaire was filled by the respondents on a volunteer basis and hence involves a volunteer bias.

Population and sample size

The margin of error that has been decided for this study is 5 percent, and confidence interval is set at 95%. Based on population considerations mentioned above, the population size for this study is estimated to be 3 Million (which is 13.3 percent of the regular OTT Urban audience in India). Using Cochrane's formula which is as follows, the sample size calculated for the population is 385.

$$n_0 = \frac{Z^2 pq}{e^2}$$

Here, n0 is the sample size, Z is the z-score derived from the Z score table, 'e' is the margin of error, 'p' is the estimated proportion of population and 'q' is '1-p'.

Data Collection Method and Instrument

The data is collected by way of a questionnaire which was floated digitally across students in these national colleges.

Variables

In the questionnaire, the survey is divided into three parts. The first part aims to collect demographical data about the population. The variables of interest in the same are:

- Age
- Graduate Discipline

The second part collects data about 'Usage of OTT Platform'. The variables of interest identified are:

- Preferred OTT Platform on the basis of affordability.
- Preferred OTT Platform on the basis of Quality and Diversity of Content.

The third part of questionnaire collects data on demographics of content, genre and reasons for streaming content. Important Variables in this section are

- Preferred Genre
- Genre and Language of content recommended by student to another student.

The genre categories used are (Comedy, Horror, Sci-fi, Mystery and Suspense, Female Centric Content, Historical Period dramas). The language categories used are (English, Hindi, Regional and Not Pre-Determined).

Research Questions framed

1) Which genre of Indian Content holds popularity among Indian Students?
2) Which genre of Foreign Content holds popularity among Indian Students?
3) Which language of content is most popular among Indian Student Population?
4) Is there a correlation between graduate discipline and genre of content preferred?
5) Which platform is popular among the students with respect to 'Diversity and quality of Content'?
6) Which Platform is popular among the students with respect to affordability of content?
7) Which language of content do the majority of students tend to recommend to other students?
8) Which genre of content do the majority of students tend to recommend to other students?

Statistical Tools to be used

- **Pie Charts with percentages** shall be used to categorize population based

- **Cross-Tabulation** of variables of Population Demographics and Content Demographics, using Pivot Tables.

Scaling and Justifications

In order to systematically answer the 4th and 5th research question, a Sorting Scale has been used. This scale allows respondents to sort specifically chosen original shows into the categories of 'Must Watch, Don't Watch, Maybe Yes, Maybe No and Not Aware.

10 most streamed shows of Indian Originality in India 2019-20 and 10 most streamed shows of foreign originality across all platforms in India in 2019-20 are used as secondary data for this question frame. These shows are divided into genre categories, information regarding which is not known to the consumer. Genre Categories chosen are (Comedy, Mystery and Suspense, Female Centric, Thriller) These Genre categories are further cross-tabulated with the categories of the sorting scale for both Indian and Foreign Content.

II. DATA ANALYSIS AND INTERPRETATION

1. Language of content recommended by the majority of students to their peers.
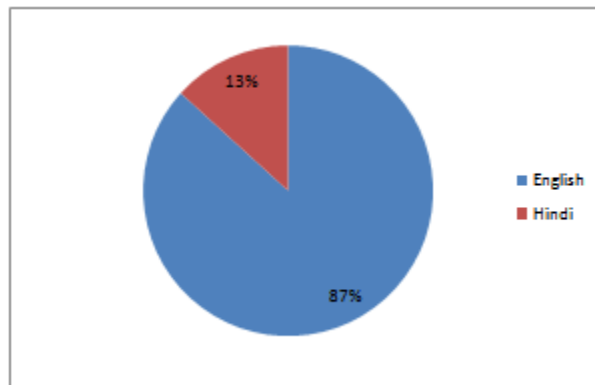
English is the most common language of content consumption among college students in the age group of 18-24. 334 out of 384 respondents prefer English as the go to language for streaming content. This is unlike the population in the age group 25 and beyond in India who majorly consume Hindi Content on OTT platforms as per reports. This systematically answers the 4th and 8th research questions.

**2. Genre of content recommended by the majority of students to their peers.**
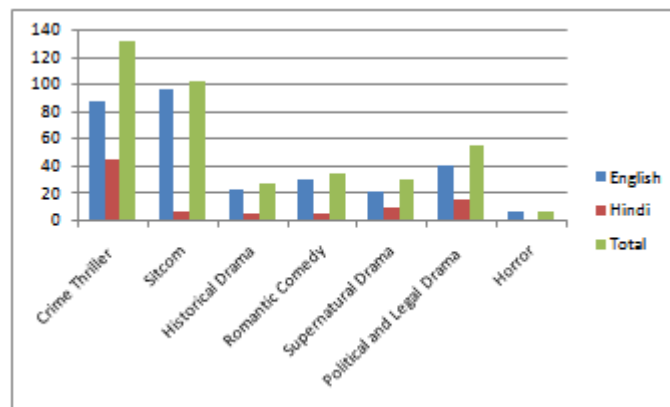
When asked about which show they would recommend the most to their peers, 78% of the respondents (302 out of 384) recommended English Shows and only 29% of them recommended Hindi Shows. Among both English and Hindi languages, Crime Thrillers were recom-mended the most with 135 out of 384 respondents, followed by Sitcoms and Political and Legal Dramas. In the English language, Sitcoms were the most popularly recommended category with 96 respondents followed by Crime Thrillers with 89 respondents. In the Hindi Language, Crime Thrill-

ers were recommended the most with 43 respondents followed by Political and Legal Drama with 15 respondents. This systematically answers the 2nd, 3rd and 9th research questions.

3. **Platform which is popular among the students with respect to diversity and quality of content.**
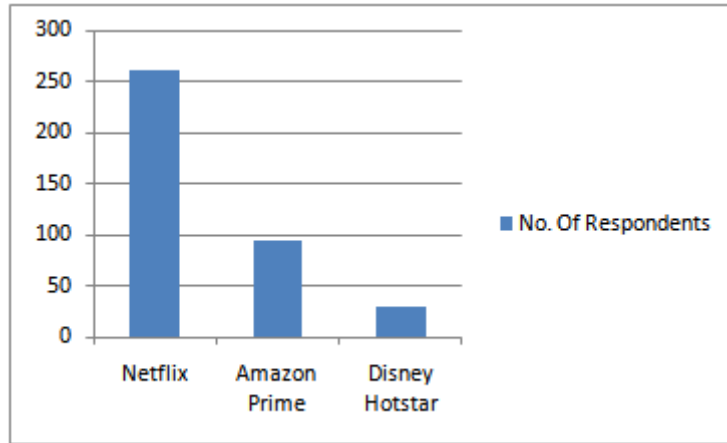
Netflix is the most preferred platform among students in terms of diversity and quality of content, with 262 respondents voting for it. 90 respondents voted for Amazon Prime and 32 respondents voted for Disney Hotstar. This answers the 6th research question.

4. **Platform which is popular among the students with respect to affordability of content.**
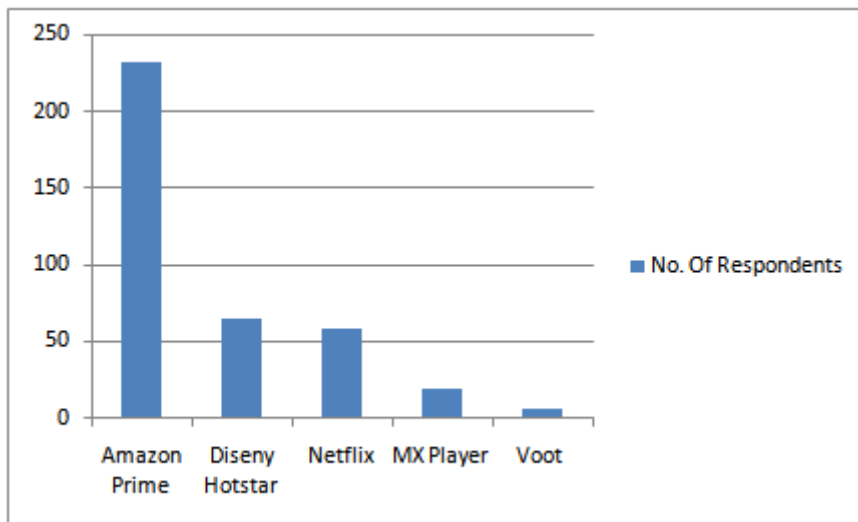
When it came to affordability of content, Amazon Prime was the most economical according to the students, followed by Disney Hotstar, Netflix, MX Player and Voot. This answers the 7th research question.

5. **Relationship of Genre with Graduate Discipline.**

There was not much variation seen in preference of a genre across academic disciplines. Female Centric shows are the least popular genre among each discipline and Comedy and Mystery and Suspense is the most popular.

	Female Centric	Romantic Comedy	Sci-Fi	Horror	Mystery and Suspense	Action and Adventure	Comedy

Arts and Humanities	3.8	3.8	26.9	3.2	26.9	3.8	31.6
Business and Commerce	1.3	3.9	27.8	6.7	28.2	2.6	29.5
Science and Enginnerig	1.6	4	28.2	3.2	28.2	0.9	33.9

(Figures represent percentage of students)

III. FINDINGS AND CONCLUSION

The majority of the urban student population in India in the age group of 18-25 are inclined towards English shows on OTT platforms. Comedy and suspense thrillers are the most preferred genres in English language category. Majority of students also tend to recommend English shows to their peers. Consistently, Netflix and Amazon Prime original are the most popularly subscribed platforms since they produce the highest concentration of original English content in India. In the Hindi language, the most popular genre category is Crime thrillers. There is an uptrend in the streaming of English and Hindi original shows on these platforms. The younger age groups from 18-35 definitely play a large role in shaping content for OTT services.

Further research scope

Bigger samples could be undertaken, as the sample for this research was relatively small when compared to the student population who has access to digital forms of entertainment. The segmentation of genre categories could be widened, and more diverse that could incorporate the preferences of content in a more detailed manner. A research structure like this can be applied to various age groups in order to generate more research material about the segmentation of OTT audience in India.

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