EVOLVING AUDIENCE VIEWING PATTERNS AND FUTURE BUSINESS SCOPE - RISE OF OTT PLATFORMS POST COVID-19 PANDEMIC

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ABSTRACT

Post Covid-19 pandemic, we have seen huge impact on digital content delivery system where content acceptance in OTT has seen a huge rise. Started initially as the only available platform during the lockdown, audience went through the phase where they understood the facility provided. Seeing the acceptance nature of audience, content providers went ahead with creating numerous platforms with brand specific channels and media delivery through OTT. Through this we saw many brands like SonyLiv, Zee5, Voot with Tier 1 content on them and grow like Netflix and Amazon Prime Video. The study explores newer opportunities to online advertisers to reach their target audience at a cost effective price and get newer leads reaching vast audience.
Media consumption habits have changed as a result of the remarkable global outbreak through COVID-19.This time saw the emergence of an indisputable trend: the use of OTTs. Numerous surveys demonstrate the expanding market and customer demand for the OTT platforms' selection of content. OTTs give consumers advantages they've never had before, like a variety of content, simple access, and device/medium options (handheld device, laptop, PDA, or television). The era of arguing over who got to use the family's only home appliance, the TV, to watch what are long gone. In this study, the researchers looked at how OTT is developing in India and the vibrant OTT industry. Analyzing certain majors including the release of blockbuster films on services like Netflix and Amazon, the revival of vintage programming like Mythological series from the DD period, etc.
As there is little regulation in the OTT arena, crucial to look at how increased content feeding across generations affected psychographics (Young people, adults, and seniors) in order to finish the study. With this background, the researchers concentrated on their objectives and made an effort to determine the pandemic's contribution to shifting OTT media consumption patterns; a qualitative mapping of the rise in OTT adoption in India before and after COVID 19;explore the underlying patterns of rising consumer interest in the medium; examine the psychographic effects on youngsters, adults, and the elderly; and identify the advantages and disadvantages of publicly accessible information with little restriction. The researchers combined their qualitative and quantitative methodologies to extrapolate the findings. A survey was also conducted to map and evaluate the audience. For the aggregation of major trends, information from news stories, industry research papers, and international journals was evaluated in addition to source data.

Keywords: Mobile media, OTT platforms, digital media, COVID-19, viewership, and lockdown

INTRODUCTION

The nation's news media and general entertainment sectors have undergone tremendous transformation over the past 10 years and beyond as a result of the internet boom. The way we consume material has changed as a result of the introduction and adoption of OTT (Over-the-top) businesses. According to a market study titled "Entertainment Goes Online" by The Boston Consulting Group (BCG), by 2023[1], it is expected that India's OTT content sector would generate $5.5 billion in sales. Numerous reasons have contributed to this quick rise, and over the past six months, the awful COVID-19 epidemic has benefited OTT gamers. A rise in travel for pleasure and business, rising family income, more exposure to global trends, tier II and tier III markets' embrace of the internet, acceptability of the material, and a wide range of issues pertaining to females and adult age group are all contributing factors are some other factors that have contributed to this growth. This study tries to comprehend the prevalent OTT developments in India and assess how they can affect different customer categories.

Understanding modern consumption trends and their impacts requires an understanding of the underlying relationship between mass media and its impact on the social fabric of society. Media such as advertising, cinema and other forms have always had an impact on society. Everything from drama to politics to sports to changing gender roles to revolutionary ideals to genuine issue-based issues to the mainstreaming of parallel film, content has altered throughout time to appeal to current preferences. From strictly regulated TV and cinema censorship to the present day of free internet-enabled OTT content, the new era of media has offered the consumer more freedom of choice.

The BCG research indicates that there is opportunity for a wide range of OTT models to coexist in India and other countries. Some of these models are SVOD (subscription-based platforms), AVOD (advertising-based platforms), and TVOD (transaction-based platforms). But first, let's quickly review India's media and entertainment industry's history.

Historical Background

India has always remained a center of exploration plus diverse artistic expression. Our civilization has always given great consideration to all sorts of craftsmanship, from singing to dance to painting. Hindustan has been a cultural melting pot of many art forms thanks to its rich past, which has warmed our hearts and astounded the globe with its variety. Our culture was affected by a wide variety of art styles from throughout the world as time went on and different eras emerged, like the Harappa Civilization, the Gupta Era,Mauryan Kingdom, a period of administrative unrest, the Mughal Kingdom, the British Raj, and the contemporary Indian Democracy.

Additionally, we continued to get richer and more interested in entertainment and the many ways it might be expressed.

Under British control in India, tools of mass communication were used to increase responsiveness. They were utilized to exchange ideas, inspire the populace to revolt, discuss our rights, and maintain the flame of the Indian liberation fight. Entertainment was a perk only afforded to a select few powerful people, primarily royalty. Live dance performances, athletic activities (both indoor and outdoor), and exhibitions of fine arts in the form of paintings, and other live events would be the main sources of entertainment. The media and entertainment sectors, however, have developed into thriving enterprises that include a wide range of genres including news, entertainment, sports, and more as periods have changed and our economic situation has improved. The television, print, and film industries are only a few of the many segments that make up India's media and entertainment sector. Smaller sub-segments including transistor, tune, outdoor advertising, simulation, games, and graphic effects are also featured. However, in order to keep the discussion current and focused on the adoption of TV, we would like to examine subtleties from a post-liberalization viewpoint. For the purpose of this study, we will refer to the post-1947 period of the Indian Republic.

A short history of Indian television

In India, television used to be a rare luxury that only a select few could afford. For the uninformed and underprivileged Indian public, one or two stations broadcast in black and white were sufficient to capture their attention and spark their creativity. Technology advanced throughout the years, expanding the creative space for theme investigation. Over the past 50 years, the television screen's function has changed significantly from being only a tool for disseminating information to being a companion for all hours of the day.

Table 1: Evolution of TV in India

Timeline	Progression concerning TV Reach and programming
1955s	B. B. displayed a television during an exhibition in the Madras (now Chennai) town of Teynampet. On September 15, 1959, an experimental broadcast in Delhi using a tiny transmitter and an improvised studio marked the beginning of terrestrial television in India[2].
1965s	The regular transmission, which is a component of All India Radio (AIR), began in 1965.
1975s	Then, in 1972, the television service was extended to Amritsar and Bombay. Up until 1975, television services were only available in seven Indian cities. The Satellite Instructional Television Experiment was a crucial step taken by India to employ television for progress (SITE). The majority of the programmes were produced by

	Doordarshan (DD), which at the time was an AIR member.
1985s	The 1980s were the era of DD with programmes like Hum Log (1984–1985), Wagle Ki Duniya (1988), Buniyaad (1986–1987), and comedy programmes like Yeh Jo Hai Zindagi (1984), in addition to the well-liked mythological dramas like Ramayan (1987–1988) and Mahabharat (1989–90) that kept millions of viewers glued to Doordarshan and later to Chandrakanta (1994–1996)
1995s	A number of economic and social changes were started by the national government in 1991 under Premier Narasimha Rao. The government has granted commercial and international broadcasters in India permission to take part in restricted operations under the new laws. This strategy has been employed consistently by all succeeding federal administrations. International networks like CNN and STAR TV as well as domestic commercial networks like Zee TV, ETV, Sun TV, and Asianet have begun to broadcast through satellite. With 41 sets and one channel in 1962, television in India has expanded to more than 70 million homes by 1995, providing a watching audience of more than 400 million people over more than 100 channels[4].
2015s	In 2016, there were around 857 channels in the country, of which 184 were paid channels.

(Source: Self)

India's use of OTT

While OTT has gained popularity, some people might find it difficult to comprehend that the technology is more than ten years old in India. In the year 2008[5], Reliance Entertainment introduced the country's first OTT platform. Following that, India received its earliest OTT portable app, “NextGTv”, which provided access to both live and on-demand content, including live streaming of IPL matches during the 2013–14 seasons, one of the most popular sporting events. When major players like Sony and Zee joined the market with Sony Live and Ditto TV (Zee), the medium experienced a surge in popularity. As Ditto TV continued to compile material from networks like Star, Sony, Viacom, Zee, and others, the platform's daily use increased.

Indian consumers may now access the services of more than 40 OTT providers, including regional and international juggernauts like, Eros Now, Disney, Amazon Prime, Zee5, Hotstar, and Netflix.

According to Price Waterhouse Coopers Global Entertainment and Media Outlook 2021-23, a reputable research organisation, the OTT market is expected to grow at a rate of 31.8% CAGR, from Rs. 5,464 crores in 2020 to Rs. 18,956 crores in 2024[6].

The FICCI-EY Report 2021 predicted that the market will increase to Rs 34 billion by 2022.To view content via OTT media; the customer must have access to an internet-enabled device, such as a new Digi TV, Internet phone, notebook, or PDAs. The younger generation is significantly more at ease using OTT platforms because to the basic necessity for digital access, but after COVID, reading and adoption have multiplied. According to the BCG research "Entertainment Goes Online[7]," There are three primary types of OTT consumers:

- **Traditionalists**: those who consume mostly on platforms other than OTT—and
- **OTT Experimenters**: those who consume significantly on both traditional and OTT platforms
- **Early Adopter:** While early adopters are currently more of an urban phenomenon, they will become more evenly dispersed in the future. Their primary consumption is on OTT platforms.

According to the 2021 EY media and entertainment study, by 2024 the amount of rural users in India is expected to rise from 48% to 58%[8]. This will undoubtedly have a significant impact on the language and content that has to be developed. Regional media frequently reaches out to the Indian Diaspora overseas as well as within India. Understanding the vernacular landscape of India, which encompasses all media genres, is crucial for putting this into context. The landscape of Indian vernacular media is shown in Table II.

Table II: The state of Indian vernacular media

152	Publications of newspapers in 32 regional languages
32	199 dialects and 32 languages were created by AIR.
288	Channels for movies, news, and entertainment in 23 regional languages
51%	Indians are aware that Hindi is their mother tongue.
7312	use different regional tongues as their mother tongue
15 – 18%	Only 8% of the English-speaking population watches OTT material in their mother tongue.

(India's OTT Market Landscape Report 2020, Inc42 report.)

The potential of regional languages, which are spoken all over the world, has been acknowledged by streaming networks For instance, viewers of the ALTBalaji Tamil programme featuring Maya Thirrai's were seen throughout the Central East, the US, and the UK, which are home to sizeable percentages of the Tamil population[9].

COVID's effects on TV viewing, particularly OTT

Experts in media and entertainment predict that non-TV forms of entertainment will predominate in the next millennium. We don't only mean the type and genre of content when we say "content of demand"; we also imply the choice of time, location, and device. If commercial broadcasters predominated in the 1990s and Doordarshan ruled in the 1980s,

OTTs are not just for audio-visual content; a sizeable portion of this industry is made up of audio-only material. While services like StoryTel and Audible are becoming more well-known, cutting-edge products like Graphy (by domestic digital unicorn

Unacademy) must still be classified as OTTs. It should go without saying that a large selection of cutting-edge products is constantly available in this industry. Players are exerting every effort to draw clients, grow their user base, and retain each one for longer than before[10].

According to estimates, Bollywood and cricket are the most popular OTT content among Indian customers. Blockbuster movies like Dil Bechara, with Amitabh Bachhan, Shakuntala Devi, and Gulabo Sitabo, and the late Sushant Singh Rajput, have been released on streaming sites like Amazon Prime and Disney + Hotstar, which has also started a new trend in B town. Despite the fact that this innovation arose out of necessity, market analysts who monitor the movie business are worried that if this trend changes consumer behaviour, it may be difficult to entice them back into theatres and that this may have a long-term negative impact on the viability of the medium in the country, particularly in urban markets.

These intricacies make it obvious that OTT uptake has greatly grown as a result of the COVID shutdown in India and other countries. This change in customer behavior is fascinating to observe and evaluate since it has a number of layers that need to be peeled back and understood from many angles. The type of content being consumed, the best times to watch different genres of content, the consumer's age and how much content they consume, whether to use TV channels or OTT providers, the effect of the medium on advertising patterns, creative offers and special packaging, and many other factors need to be taken into account. This research will also examine significant accomplishments and highlights that have come to symbolize OTT acceptability and success in order to analyze consumer consumption trends, particularly over the previous six months.

REVIEWOFLITERATURE

Understanding the OTT TV revolution

The development and growth of OTT platforms have been spurred over the past ten years by increased internet usage, access to, and availability of numerous screens and devices. High-quality video content that is streamed directly from the provider to a user's screen (a user's mobile device, tablet, laptop, TV, etc.) through Internet Protocol over a public network is referred to as over-the-top (OTT) TV. OTT platforms come in a wide variety of formats. What is vital to understand in this situation is how OTT gets beyond cable, broadcast, and satellite television platforms, the companies that frequently function as a controller or distributor of such content, democratizes content accessibility, and empowers the user in many ways. This fundamental contrast between the platform and medium, which emphasizes its B2C approach, is referenced in the majority of studies on the creation and adoption of OTTs.

There are many distinct types of OTT services, including OTT voice calling, OTT video calling, and OTT TV. OTT TV is becoming more and more popular as a result of its simplicity and ease. It is commonly referred to as digital television, streaming television, and an internet-driven TV platform. In contrast to a television signal that is transmitted from a terrestrial broadcast or satellite, this signal is received through the Internet or from a mobile phone network. In this scenario, the content distributor manages and controls the access to the material via an app or a separate OTT dongle or box that is connected to a computer, laptop, or smart television.

The biggest and most popular streaming service in the world, Netflix, made its debut in India in January 2016. The provider changed its legal status to a limited liability partnership (LLP) in the middle of the following year, in 2017, and started working with regional production companies to develop content for it. It generated a net profit of 2,020,000 in 2017. (or 2.02 million). Netflix generated 580 million in revenue for the 2018 fiscal year. According to Morgan Stanley Research, Netflix had about 20 million viewers in July 2018 but the highest average viewing time of more than 120 minutes. As of 2018, there were six million Netflix users, with 5-6% of them paid members. Hotstar invested INR 120 crore in the development of original content in 2019[11], including "Hotstar Specials." Drama, film, and sports programmes attract 80% of Hotstar's audience. According to Hotstar's India Watch Report 2018, videos longer than 20 minutes make up 96% of service users' viewing time, while 33% of Hotstar users watch TV shows. The extra services that companies provide are advantageous to customers, but the competition among OTT service providers is driving them to look for overseas markets.

With over 40 active video OTT firms, over 15 active music streaming OTT players, over 40 active podcast players, and more, India's vibrant OTT market sector represents the diversity of the nation. The top five regional languages preferred by customers (more than 30%) are Tamil, Telugu, Marathi, Bengali, and Hindi. Packaged content is still the most popular option for consumers even if subscription is the economic model that OTT firms utilize the most frequently. Short-form, original, and online series material are becoming increasingly popular with viewers[14].

Existing literature on the OTT space

Although OTT services have significantly altered the media and entertainment industry, the body of literature on the topic is still quite limited and biased. There are a few main themes that have emerged in studies thus far. First, several case studies demonstrate the development of OTT services. Second, it's vogue to talk about how the OTT services have spread to the traditional media industry. The competitive dynamics between OTT and traditional pay-tv platforms were predicted via specialist investigation. The results show how OTT solutions overlap with or exceed existing services on a competitive basis, providing insight into the effects of present systems. 15-16 established a Technology-Policy-Consumer (TPC) model to analyse how the introduction of OTT services has changed the consumer/culture, public policy, and technology/industry parts of the US media sectors. Studies of OTT services that challenge established production, delivery, and consumption processes usually offer a key viewpoint on understanding the most current traits and possible developments in the media industry brought on by OTT services[17]

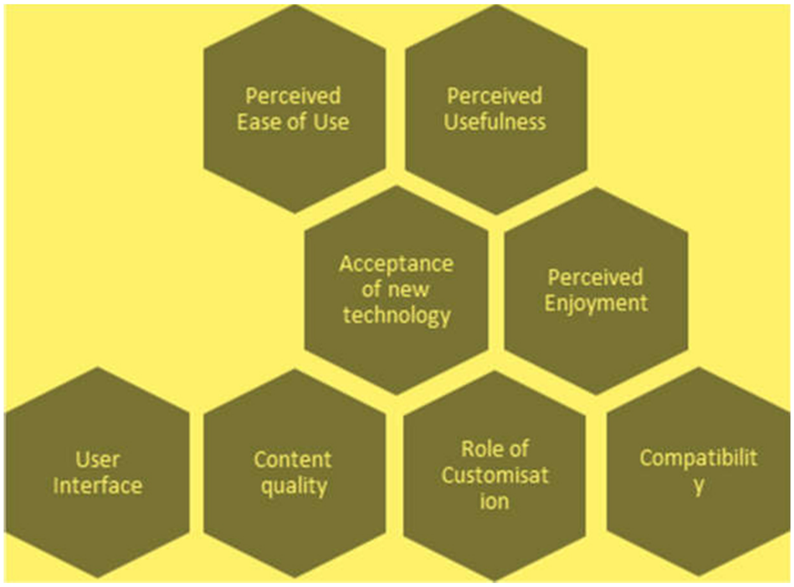
Third, a number of scholars have examined the factors that influence consumers' decisions to use OTT services. By examining the reasons individuals watch TV, Yi-Ning Katherine Chen (2016) looks at how OTT services can replace TV in Taiwan[18]. Last but not least, as different businesses continue to broaden their offerings to the online video streaming market, conversations about net neutrality legislation or proposals for how to govern the burgeoning industry are taking place. The local and international literature makes it abundantly evident that OTT has altered the way people consume information. The media and entertainment sector as well as the entire eco-system have been impacted by this, including content, creativity, formats, laws, telecommunications, the device market, including software and hardware, and last but not least, one of the most crucial puzzle pieces, the internet service providers.

Elements persuading the implementation of OTT TV

In order to comprehend and forecast consumer behaviour with regard to OTT uptake, researchers have studied consumer behaviour in several studies and evaluated hypotheses. Growing internet use and technology acceptance have been pointed to as obvious advantages for OTT growth during the past ten years worldwide. In order to examine and understand how consumers respond to new technology and to relate this behaviour to the adoption of OTT media, such as TV, voice, interactive, and other forms, many authors have used a variety of models, such as the Technology Acceptance Model (TAM), developed by Davis in 1989, the Theory of Planned Behavior (TPB), developed by Ajzen in 1991, the Diffusion of Innovation (DOI), developed by Roger in 1995, and the Theory of Reasoned Action (TRA). TAM is primarily used by several publications on the OTT platform, such as Cha (2013) and Cha and Chan- Olmsted (2012). People's willingness to adopt new technology is found to be significantly influenced by two key criteria: perceived utility and perceived ease of use.

Based on these key adoption and acceptance theories for technology, research was done to look at how key elements including apparent usability, apparent usefulness, and apparent enjoyment, the role of customisation, compatibility, content quality, and user interface affect OTT uptake (See Fig I - Factors impacting acceptance of new technology). Consumer attitudes about the adoption of OTT media have been shown to be significantly and favourably impacted by customization, user experience, perceived pleasure, and content quality. Content quality has been found to have the biggest impact on encouraging a receptive mentality toward embracing the OTT media platform. This shows that an important consideration is the quality of the material provided on the OTT media website. Furthermore, previous research has indicated that people switch from traditional media to over-the-top (OTT) media as a result of the excellent content quality that OTT media provides.

Fig. I: Elements affecting the adoption of new technologies



Favoured customer tastes and prevalent business methods

According to a market study conducted by BCG and CII and released in November 2021 with the title "The Trillion (and increasing) touch point narrative tackling the monetization problem," daily digital video data consumption climbed from 11 minutes to 24 minutes in the preceding two years. With internet data costs as low as INR 99 per month / INR 49 per month for regional players, nothing is preventing the OTT players from gaining further traction. However, with more competitiveness comes increased conflict between national and international players. It is only possible to scrape the surface of this enormous and incredibly diversified Indian market when it comes to content development, production, local content libraries, and regional market exploration. However, that is the only way to get this exceedingly price-sensitive Indian consumer through the doors of monetization. Traditional digital businesses are under a great deal of pressure from the growth of telco-backed companies like Reliance and Airtel as well as established DTH operators like Tata Sky and Dish TV.

According to Inc42's most recent study, "India's OTT Market Landscape Report 2022" the service providers and owners of OTT platforms have three main issues.

Challenge 1 (Paywall Vs Free Customers)

In 2018, just 18 million technologically adept individuals overall choose to access content behind paywalls, according to the Zee5 whitepaper. 310 million conventional digital users watched online video content for free or as part of a bundle with telecommunications and other distribution channels in 2018, so this is really underwhelming in comparison. Table III includes OTT video streaming players from India.

Indian OTT Video Streaming Players, Table III (Types of consumer breakdown)

Customer Type	**Apx. User Base in Min (2021)**	**Content preferences**	**Mode of Consumption**
Digital Sophisticates	10	International original shows &movies, typically behind a paywall	Tablet ISmartTVs Smartphone's
Digital Supporters	290	International original television and film, with a preference towards free content	Tablet ISmartTVs Smartphone's
Digital mainstream	430	Content that is free or included with a mobile or DTH subscription	Smartphone's
Peripheral customer	80	Mobile messaging and complimentary content bundle	Normal PhonesBasic Smartphone's

(Source:Zee5 Whitepaper)

II Challenge (Subscription Vs Free Vs Freemium Models)

The majority of players are trial out subscription-based video-on-demand (SVOD) business models even though there are far fewer paid subscribers than watchers of free content. The only players that support the on-demand video (AVOD) business model are the TVF and MX Players. Several players who offer material based on various models include:

- ✓ SVOD - Amazon, Netflix, Apple TV, BigFlix, Youtube, etc.
- ✓ AVOD - TVF, Arre, and MXPlayer
- ✓ Freemium - Hotstar, Eros, Zee5, and YuppTV , Sony Liv

Challenge III: For both the foreign and local markets, monetization vs packaged content

One significant obstacle is the use of Indian platforms. Individual subscription packs, in contrast to the bundled plans offered by telcos and DTH providers, are quite expensive and do not fit the budget of the typical Indian client. The bulk of players must change their techniques to make them more appealing to Indian customers and their wallets because this strategy does not appear to be working for them. Netflix initially provided a subscription option at INR 700 per month, but it was forced to change course. Similar to this, Telco's monetizes its own internet video streaming outlets while still supporting independent ones. For DTH service providers like Tata Sky, the same is true.

OBJECTIVES OF THE STUDY

The research that is now available indicates that OTTs have had a big influence on the media, entertainment, telecom, and IT industries. Even though many factors have contributed to its development up to this point, businesses have only just begun to tap into the potential of the Indian market. OTT adoption in India was prompted by the

COVID-19 pandemic incident, which affected both urban and regional markets. Similar to this, the fierce competition amongst the current participants is forcing changes to the rules, marketing strategies, and platform advertising. With all of these considerations in mind, the following components of this study will be examined:

- To examine the important trends surrounding OTT uptake in Karnataka as a result of COVID-19
- To integrate and research consumer views on the "likes and dislikes of OTT as a platform," To assimilate and study audience preferences and trends surrounding OTT streaming vs TV viewing.

RESEARCH DESIGN AND METHODOLOGY

The aforementioned study questions were addressed using a mix of quantitative and qualitative research analysis. To analyze consumer preferences and trends related OTT uptake, the researchers conducted in-depth primary research, which was backed up by secondary research. The researchers read studies from many organizations as part of secondary research, evaluated prior worldwide literature about OTT uptake and trends, and consulted white papers, newspaper excerpts, and countless other research reports. OTT adoption and content consumption were the subject of qualitative and quantitative primary research to better understand consumer thoughts and attitudes at COVID-19.It was crucial to know if individuals used OTT platforms to access content or if there were other factors that contributed to the development and acceptance. Only qualitative research that focuses on understanding the motivations for behavior can explain these subtleties. In order to analyze how consumption patterns and important trends relate to secondary data from journals, academic papers, and news stories, this primary survey attempted to understand these patterns and trends. Below are explanations for each area, along with statistics and insights.

Method used:

The primary research was conducted using the survey approach. Given that social mobility was constrained and that this research was carried out in September 2022 amid the post COVID-19 panic and caution, a comprehensive consumer study was undertaken using a digital survey approach.

Sampling:

Since this was a broad-based study using a random sample technique, the age range of 18 to 60 was considered for the research. A sample of 80 respondents completed the whole survey over a two-week period; this sample was evaluated for the study.

The instrument used to gather data:

A systematic questionnaire containing 14 closed-ended questions and 1 open-ended question was conducted using a google form. In order to gauge respondents' attitudes on significant issues such OTT adoption, rationale, timelines, dissonance reasons, etc., the questionnaire includes crucial questions.

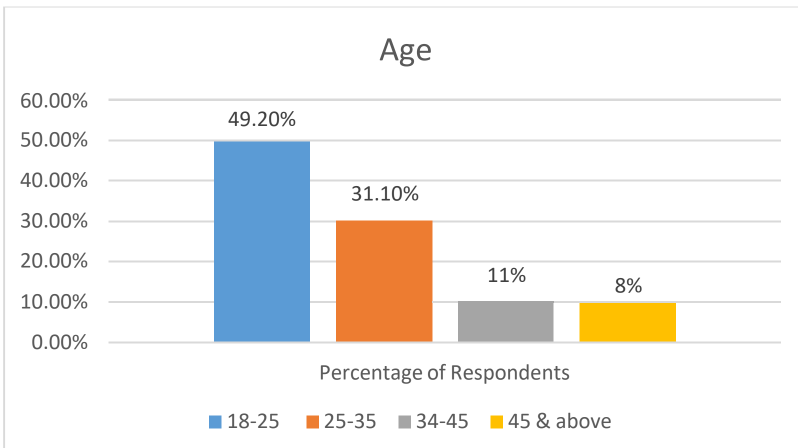
DATA INTERPRETATION AND ANALYSIS

The researchers have attempted to grasp the complex patterns in OTT viewing based on the primary consumer survey that was done throughout Karnataka. For the study, a thorough analysis was conducted, and the data was personally assessed in order to gain a deeper knowledge of these patterns. Topics covered included content choice, deadlines, growth appraisal, and comprehending pros and disadvantages.

A. Age and Gender representation: This section provides a general overview of the respondents' ages and gender.

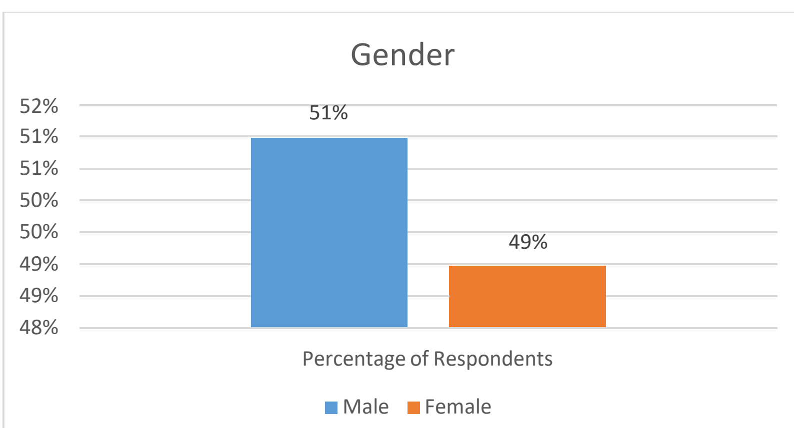
The age group of viewers who are mostly younger, especially those who are between the ages of 18 and 35

- ❖ 49.2% of respondents were between the ages of 18 and 25.
- ❖ 31.1% of those in the 25–35 age range came next.
- ❖ 11% of people in the 35–45 age range
- ❖ 8% of those aged 45 and older were affected.



(Source: Primary survey)

Gender: The study had a balanced representation of gender, with 51% female respondents and 49% male respondents.



(Source: Primary survey)

Inference: This study had a fairly even distribution of respondents by gender, however the bulk of them were between the ages of 18 and 35.

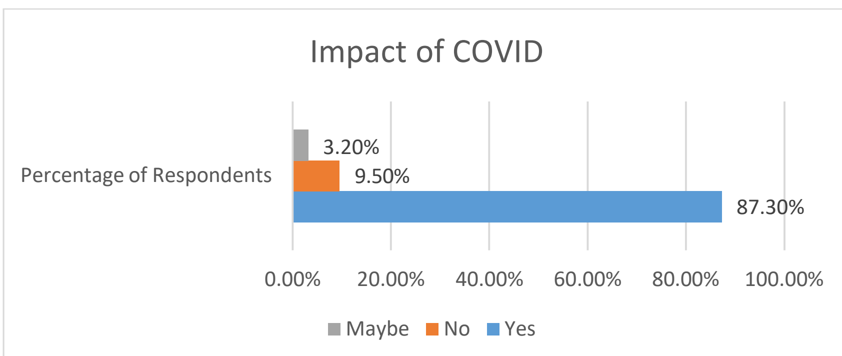
B. The effect of COVID lockout on the use of AV content

This section goes into great length about the impact of the COVID lockdown on screen time, when people consume things, and other factors outside simply having more free time.

COVID's effect on screen time

Due to the lockdown and restrictions on social mobility, people were forced to stay at home and conduct their business from locations with strict controls. As a result, individuals started to avoid buying physical newspapers from neighborhood sellers and shifted to audio-visual modes for news consumption, which also reduced the mode of amusement and news consumption. Over 87.3% of respondents in the poll said they thought their screen time increased individually and as a family after COVID, according to the researchers, while 9.5% said they saw no major difference. In this regard, about 3.2% of respondents were unable to make any significant observations and hence were unable to declare whether or not their screen usage had grown.

Chart 1: COVID's effect on screen time

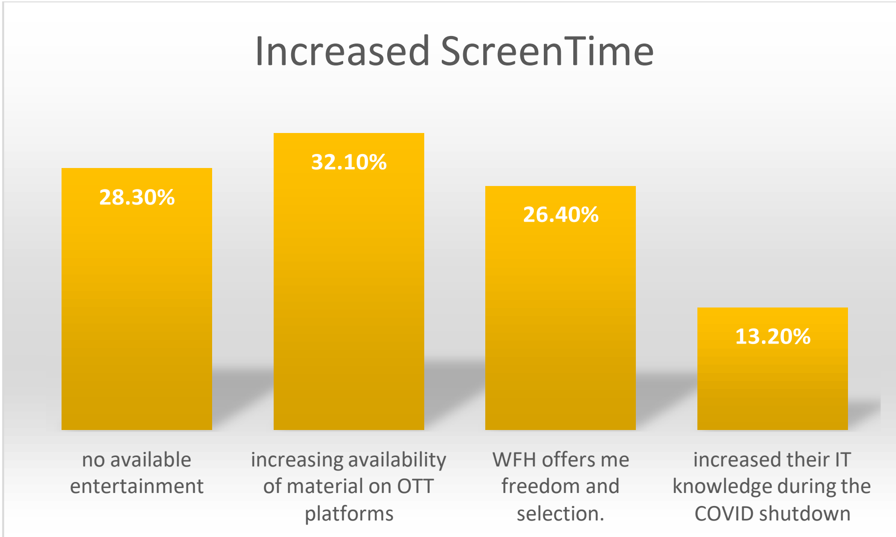


(Source: Primary survey)

Rational for increased screen time:

- An increase in OTT platform content availability (32.1%)
- Few possibilities for amusement - 28.3%
- I have options and freedom with WFH—26.4%
- Improved tech skills during the COVID lockout - 13.2%
- Children interested – NA-
- Elderly paternities interested - NA-

Chart II: Rational for increased screen time



(Source: Primary survey)

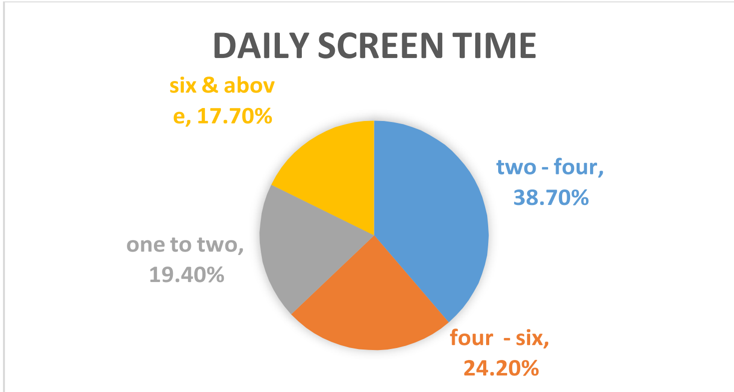
Implication:

The respondents' time spent on screens increased substantially during the COVID lockout. The majority of respondents attributed their increased screen time to the availability of more entertainment options via OTT material, but they did not attribute it to the need to keep young children or senior members of the household occupied. People chose to limit social mobility and used home delivery services and e-commerce for all of their daily requirements since they had more time. As a result, their demand for amusement increased, but they were unable to partake in outside activities like sports, leisure activities, going to the movies or theatre, etc. More and more respondents used screens including Television, PDAs, Laptop, and cell phones to view digital content. Additionally, it is a characteristic of human psychology that, when faced with corporal limitations, we turn to our creative side and use our imaginations to aid in our travels.

Estimated daily screen time:

- Two to four hours: 38.7%
- Four to six hours: 24.2%
- One to two hours: 19.4%;
- Six hours or more: 17.7%

Estimated daily screen time (Graph III)



(Source: Primary survey)

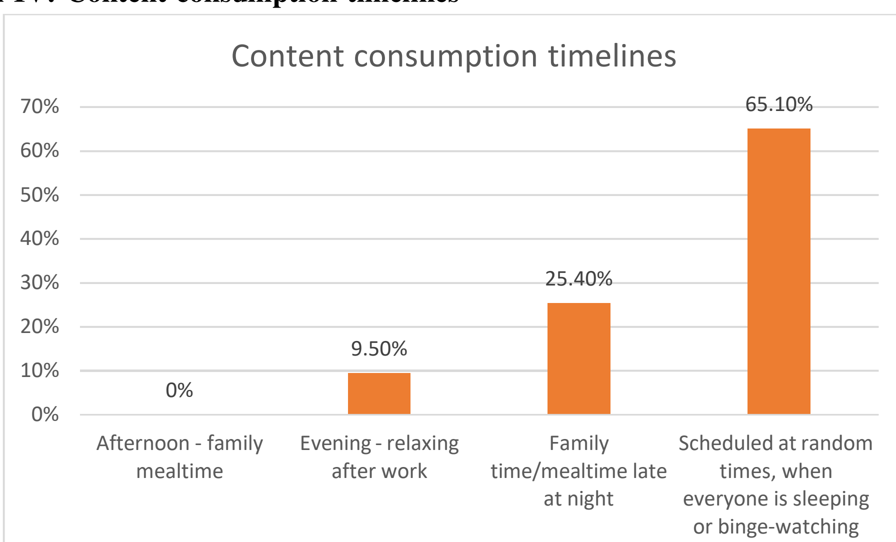
Inference:

Consumers spend 4 to 7 hours a week or extra online, intense information for leisure and enjoyment, according to a number of studies and the findings of this poll. According to study findings, more than Eighty percent of respondents admit to routinely consuming material for at least two hours.

The most popular time of day for content consumption:

- Afternoon - family mealtime - NA
- Evening - relaxing after work - 9.5%
- Family time/mealtime late at night: 25.4%
- Scheduled at random times, when everyone is sleeping or binge-watching - 65.10%

Graph IV: Content consumption timelines



(Source: Primary survey)

Implication:

Although some could counter that the frequency of content consumption does not always point to a trend, it is becoming more and more obvious that the accessibility and flexibility of material are fostering addiction. The survey indicates an unusual finding: as a result of the lack of regularity caused by WFH or digital schools, a rising percentage of respondents are consuming information throughout the day at erratic periods. After a long day at work, the propensity towards evenings or late nights weakens discipline and promotes inactivity, leaving content consumption as the only alternative for enjoyment.

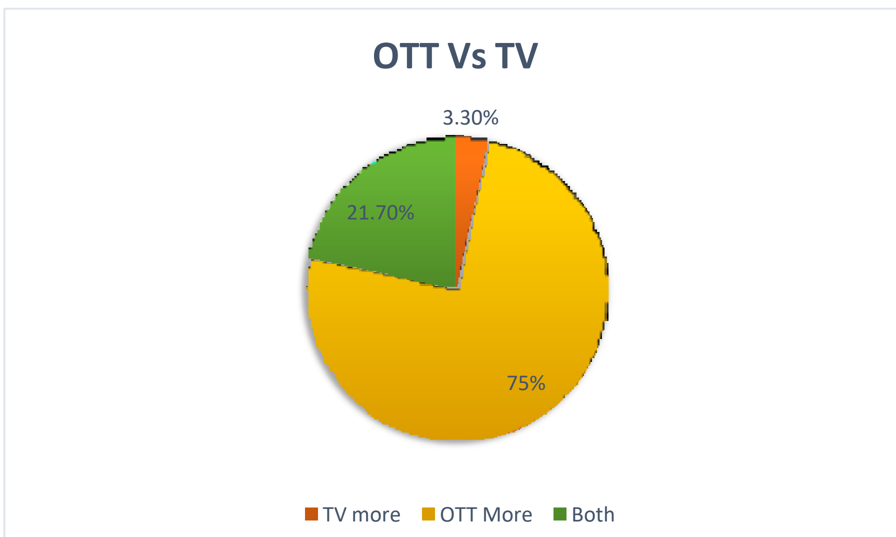
C. Television vs. OTT: The Battle Royale

Even while OTTs are being adopted steadily and their user base is fast growing, it is important to evaluate this growth in the context of the Television audience and determine how it relates to Television or impacts the audience of the medium.

Favorite kind of content: Television vs. OTT

- 75% prefer OTT to Television
- Similar to OTT and Television, 21.7%
- OTT Television usage: 3.3%

Comparison of OTT and Television preferences in Chart IV



(Source: Primary survey)

Inference:

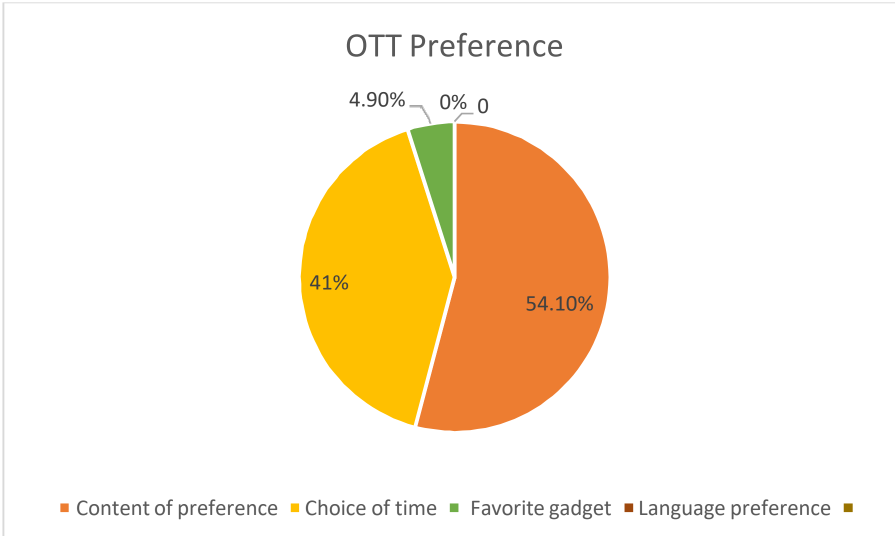
Given that this poll is limited to metro locations, it is evident that OTT exposure and adoption are rising. Additionally, OTT love and like are far greater than for television. Even if a substantial proportion of people like watching on both platforms, the purpose and kind of content consumed may differ.

The justification for choosing OTT

- Content of preference: 54.1%
- Choice of time: 41%

- Favorite gadget: 4.9%
- Language preference: NA

Chart V: The justification for choosing OTT



(Source: Primary survey)

Inference:

The public adores OTT platforms most for their extreme flexibility and simplicity. Everything from timing to content selection to the ease of signing in from any device contributes to the medium's and platforms' expanding user bases. With 54% of respondents citing "variety of material" as their main reason for favoring OTTs, content is still king, but being able to watch anytime, on any device, comes in a close second and third.

The OTT war – pros and cons:

Access to the OTT platform is more expensive than using television as the conventional audio-visual medium. Accessing the experience is also made considerably more challenging by the requirement of a suitable gadget and a fast internet connection.

Top4 OTT stands

- Netflix - 72%
- YouTube - 12%
- Amazon Prime - 8%
- Hotstar - 8%

Do you find it annoying to pay more for OTTs?

- Yes - 60%
- No - 20%
- Maybe - 20%

OTT positive and negative:

• **Negative:** High membership fees, diversions (content overload), requirement for high-speed internet, may be addicted, no censorship.

• **Positive:** variety of material, portability, trendy, ad-free, user friendly.

Inference:

Despite the fact that the benefits and downsides, or loves and dislikes, of OTT platforms are a very broad issue and need for substantial research in and of themselves, it is true that the diversity of content and formats has opened up a new area of entertainment for Indian viewers. While the exponential surge in popularity is a clear indicator of the same and has been sufficiently explored, there are disadvantages to OTTs that are also freely recognised. The study's participants have highlighted a very interesting dichotomy: on the one hand, they see ad-free entertainment as a major plus, but they also see distractions in the form of information overload as a clear drawback. In the near future, marketers might wish to investigate this trend. The complete lack of viewer discretion and censorship is another aspect of social evaluation since it has a significant psychological impact on the impressionable young audience.

KEY CONCLUSIONS:

- ❖ More than 87% of respondents believed their screen time increased after COVID, whereas just 9.5% saw a discernible difference.
- ❖ The two main factors driving an increase in OTT screen time were expanding OTT content availability (32.1%) and the absence of any other forms of entertainment (28.3%).
- ❖ Contrary to common assumption, entertaining young children or elderly family members was not the stated justification for greater screen usage. Instead, more than 26% of those polled identified the ability to work from home as an additional advantage of accessing OTT platforms at any time of the day.
- ❖ A daily screen time of two to four hours was reported by 38.7% of the population. More over 40% of those surveyed acknowledged that they monitor screens for more than four hours every day.
- ❖ Regrettably, more than 65% of respondents do not adhere to any schedules for screen use and instead choose to binge watch.
- ❖ Despite the fact that 75% of respondents prefer OTT over TV as a platform, there are still more than 20% of respondents who like both TV and OTT equally.
- ❖ The two primary factors driving OTT preference are content selection (54.1%) and time convenience (41%) with preferred devices (4.9%) rounding out the list.
- ❖ In that order, Netflix (72%), YouTube (12%), Amazon prime (8%), and Hotstar (8%) are the top 4 platforms used.
- ❖ More than 54% of respondents expressed anxiety about the increased OTT cost, while 27.9% said they were unconcerned with it.
- ❖ Despite the rising popularity of OTTs, respondents expressed worries about their high membership costs, diversions (content overload), and necessity for high-speed internet, addictive nature, and lack of censorship.
- ❖ Nevertheless, users like diverse material, portability, modern, ad-free content, and user-friendly platforms.

CONCLUSION

Any type of information consumption entails actions that eventually become habits. Diverse content has always been in high demand among Indians. The ingenuity of young India was restricted by a standard household television with limited channels. Young India had the option to watch anything they wanted because to the flexibility of accessing a range of content on personal devices, such as smart phones and tablets. OTT players utilized and effectively explored this idea during COVID 1

OTT companies have just been able to scratch the surface of the regional Indian market, so there is a tone of room for expansion in the years to come. This medium has been able to establish a new market in urban India with the support of just 40 OTT sites and a tiny amount of localized content. COVID-19 has significantly benefited the broad usage of the media in metropolitan regions, where people have better purchasing power than in semi-urban or rural India.

Because they are seen as an aspirational form of content consumption and because of all the publicity they are receiving in the right circles, OTTs are swiftly gaining the trust of cautious consumers across age groups and demographic areas. Now COVID-19 introduced some elements that have since become the new norm, working from home has seemingly given many individuals more scheduling flexibility. The role of a chance walk and cup of tea with a coworker has been replaced by a 20 to 30 minute short episode of one's favorite series that is accessible on an OTT platform. Each year, individuals watch more video material for longer durations of time, according to all research, and COVID-19 has been identified as a turning point in this habit shift.

SCOPE FOR ADDITIONAL RESEARCH:

- OTT platform commercialization research and international best practises
- Find out if OTT platforms like narrowcasting have a place for innovative and specialised advertising.
- Examine how the democratisation of material is impacted by the digitalization of media and entertainment.
- Study the psychological consequences of over-the-top (OTT) material on young people, especially how "the availability of uncensored OTT content contrasted with the prohibition on pornographic sites" affects young people (reverse parenting)

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