

CLOUD OTT ENTERTAINMENT – INDIAN CONSUMER – 2020

OTT platforms have been boosted due to the pandemic, but as the next normal continues with increasing economic concerns, holding on to viewers will become critical.



A Mintel Analyst, Global Analyst



Report Content

EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Market context

- OTT reach driven by cheap smartphones, accelerated by lock-down
- Using flexible options to keep new viewers, post-COVID
- Opportunities to expand OTT reach to new cohorts
- Opportunities to expand ad reach by OTT content type
- Opportunities to offer more flexible subscription packages
- Demand for bold 'reality' and stress-busting escapism

What consumers want, and why

- The key consumer cohorts
- What are consumers viewing
- Consumer attitudes towards streaming videos

Opportunities – New content for new consumers

- Offer flexible content packages to suit more viewers
- Enhance consumers' viewing experience
- Focus on content as the key to building retention

Opportunities – New, discrete advertising reach

- Take inspiration from terrestrial TV to re-create experiences
- Use brand placement within streamed content
- Bring cinema-style experiences to consumers' living rooms

Opportunities – New value subscription packages

- Help OTT viewers with flexible payment options
- Brand activation strategies
- Promote OTT as a means to ease isolation

THE IMPACT OF COVID-19 ON OTT ENTERTAINMENT

- The outlook for the OTT industry
- Offer flexible packages to help consumers' budgets
 - Graph 1: Consumers' biggest current concerns, 29 April 2020

- Promote how OTT platforms provide a 'much needed break' for middle-aged consumers
- Small towns take to OTT streaming
- The impact of COVID-19 on OTT – Strengths & Weaknesses
- The impact of COVID-19 on OTT – Opportunities & Threats
- Appeal to homemakers on their own terms
- How behaviour varies as per content being streamed
- The marketing mix
- The marketing mix – Placement
- The marketing mix – Promotion

KEY DRIVERS

Key platforms in the market

- OTT platforms: free and subscription models
- OTT platforms – hybrid and co-branded models
- Top platforms by consumption in India
- Low-cost data and smartphones
- Audiences seek convenience
- 'New age' content drives aspiration
- Streaming videos influence consumer choice
- Offer combinations of local and global content to meet widening viewing tastes

WHAT CONSUMERS WANT AND WHY

- What you need to know
- The video streaming consumer

Promotion-driven OTT viewer

- Promotion-driven OTT viewers
- Content and pricing flexibility important to promotion-driven consumers
 - Graph 2: Reasons for streaming videos – select, by OTT viewer type, Dec 2019
- What are these consumers watching
- Power of influencers
- Blur the lines of the 'ad vs subscription' model

Apprehensive OTT viewers

- Promote OTT as an accompaniment to traditional TV
 - Graph 3: Employment and family status of apprehensive OTT viewer, Dec 2019
- Help people navigate the mass of content

Cloud OTT entertainment – Indian Consumer – 2020

- Graph 4: Consumption of streaming content – select, by OTT viewer type, Dec 2019

- Promote the convenience of streaming to lure apprehensive viewers
- Utilise social media to communicate with the apprehensive viewers
- Incentivise consumer reviews

Aspirational non OTT viewer

- Aspirational OTT non viewers
- Brands and platforms could club subs with shopping to attract homemakers
 - Graph 5: Consumption of OTT platforms, by working status, Dec 2019
- Introduce homemakers to the streaming world
 - Graph 6: Employment status of aspirational OTT non viewers, Dec 2019
- Brands can take the lead to guide senior consumers to streaming videos
- Highlight safety and education to attract parents
- Leverage content not on terrestrial TV to lure audiences
- Don't forget local heritage and family-centric content

What are they watching?

- What are consumers streaming online
- Entertainment preferences by regions
- Consumer profiles – by choice of entertainment

Bollywood movie viewers

- Consumer demographics of those who have viewed Bollywood movies
- What else are Bollywood movie viewers watching?
 - Graph 7: Content watched by those who have watched Bollywood movies, Dec 2019
- Hand-hold Bollywood movie lovers to find content
- Use social media to reach Bollywood movie lovers

Hindi TV show lovers

- Consumers who watch Hindi TV shows
- What else are Hindi TV show viewers watching?
 - Graph 8: Content watched by those who have watched Hindi TV shows, Dec 2019
- Leverage the network of women to increase viewership of Hindi shows and associated brands
- Promote 'me time' provided by streaming platforms

News viewers

- Consumers streaming News
- Work around ads associated with news
- What else are consumers who watch news streaming?
 - Graph 9: Content watched by those who have watched News, Dec 2019

- Gain authenticity through user reviews

Attitudes towards streaming

- What attracts consumers to streaming videos
 - Graph 10: Key reasons for streaming videos, by age and gender, Dec 2019
- OTT content reflects consumers' changing tastes
- Use content to reflect changing gender roles
- Position OTT platforms as a way to relax
- Promote OTT as a complement to traditional TV
- Highlight the value proposition to increase penetration in low-tier cities
 - Graph 11: Reasons for streaming videos, by city tier, Dec 2019

KEY LAUNCHES AND INNOVATIONS

- Recent launches in the OTT space
- OTT takes a new route to counter lock-down: Movie premiers
- Some new-age 'original' content launched across platforms in India
- Global launches
- Australians can gather if they stay in their cars – Impact of COVID-19

APPENDIX

- Consumer survey methodology

About Mintel India Consumer

Access our reports now and we'll tell you how major trends are affecting India. We also hone in on the regional differences from socio-economic groups to demographics such as age, gender and household composition. We research consumers in Metro and Tier 1 to 3 cities across the 4 main regions and in 6 local languages.

In each report, we're analysing the trends and the innovations, the behaviours and the influencers of consumers across India. Our local expert analysts then examining the primary research and consumer data and translating it into what it means for you.

- ✔ Find out what Indian consumers want, what they need and what influences their purchasing decisions.
- ✔ Understand the Indian market and see how it fits into wider trends on a local and global level.
- ✔ Take advantage of the gaps and opportunities that exist today, tomorrow and beyond.

How Mintel Indian Consumer will help your business grow:

01

Segment consumers across India according to their regional and demographic differences so you can target them more effectively.

02

Analyse the latest trends and innovations and see how they fit at a local level to identify opportunities for your next big idea.

03

See action-oriented summaries to understand an area quickly or investigate the data to get an in-depth understanding of your market.

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