

# 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

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- 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

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