

Understanding the Indian online video consumer- Survey Methodology

Survey Methodology

For the purpose of this report, a survey was commissioned across 1,458 OTT users in 16 cities of India, to ascertain the usage of OTT platforms by consumers. The cities chosen were across different tiers as outlined below

- Metros – Delhi, Mumbai, Kolkata
- Tier 1 – Bengaluru, Hyderabad, Pune, Ahmedabad, Jaipur
- Tier 2 - Ludhiana, Panipat, Nagpur, Madurai, Coimbatore, Bhubaneshwar, Jamshedpur, Patna

The survey was based on a questionnaire which was conducted in person at each of the centres. The questionnaire was designed to gain insights around the OTT usage behaviour of the respondents across the following key aspects

- Duration and frequency of content consumption
- Content categories and genres consumed
- Preferences of users in terms of language of content consumed
- Long form vs. short form content consumption
- Movie consumption behaviour
- Day and time band analysis of content consumption
- Number of platforms used by respondents and subscribed to
- Reasons for subscription and non-subscription
- Propensity for cord cutting and reasons governing the same
- Consumption across distribution modes such as direct vs. telco-based
- Brand perception of key OTT apps

Summary of the key insights from the survey

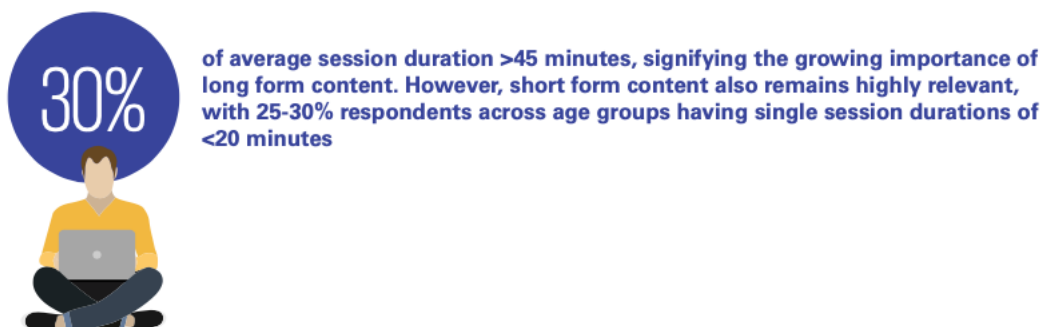
Online video platforms are truly going mass in terms of frequency and duration of consumption. While the customer sets are fairly heterogeneous, there is a trend of homogeneity that was observed in terms of consumption frequency and duration across consumer categories



Indians continue to love their movies and movie related content. Original content is also emerging in a big way with a reasonable preference by respondents as compared to the supply of original content on platforms currently.



Long form content is gaining traction, while short form content continues to remain relevant, especially to cater to the millennial audience



The preference for content consumption is significant in the native languages across large parts of the country, with south India observed to be the most loyal to their native tongue



Non Hindi & English

of respondents prefer watching content in languages other than Hindi and English. Native language preference highest in South India with Tamil, Telugu, Kannada and Malayalam the most preferred languages in the respective centres



The mobile first nature of online video in India makes it a truly 'Anytime, Anywhere' phenomenon



Of the respondents consumed content on their mobile phones. Although small, an interesting 5% of respondents consumed content on their Internet-enabled smart TVs, which could be an important growth avenue in the future



29% of the respondents watched online video even during office hours, outlining the 'Anytime, Anywhere' nature of online video

Telecom platforms have emerged as a key distribution medium for OTT platforms, with a reasonable number of respondents accessing content through the telco apps on their phones

3 out of 10

respondents consume OTT content through telco platforms, outlining the importance of this distribution medium

Viewers are increasingly discerning in terms of the quality of content, when it comes to choosing or uninstalling OTT platforms



of the respondents install a app considering the quality of content. Freshness and uniqueness of content the key determining factors for installation and uninstallation of apps, as well as respondents subscribing to platforms.

OTT video could usher in cord cutting sooner than expected



Of the respondents could consider cord cutting in the future as they responded to their entertainment needs being fully met online

