



A WHITEPAPER BASED ON AUDIENCE RESEARCH CONDUCTED IN 2022

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## **English Content in India: No Longer Niche**

An Ormax Media report on the 124% increase in English content consumption on Indian streaming platforms since 2020

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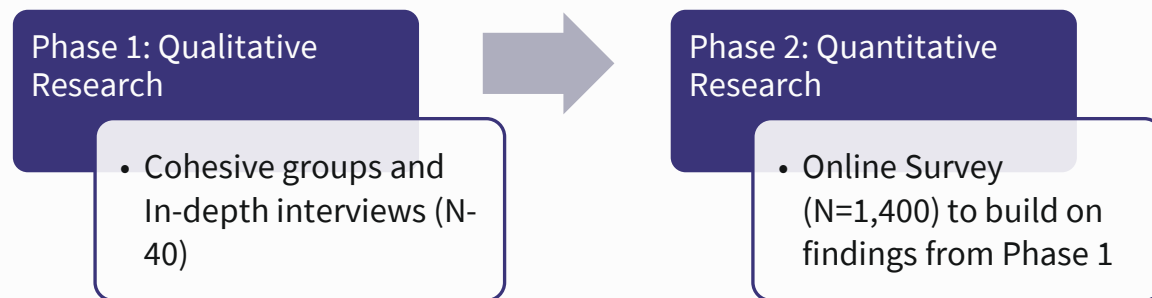
# Executive Summary

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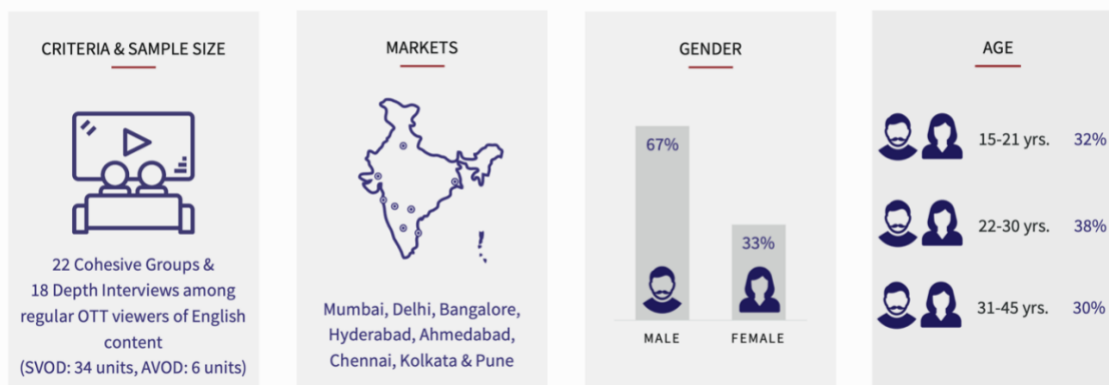
1. There's been a staggering 124% growth in the English content SVOD audience in India since the start of the pandemic.
2. 65% of urban Indian SVOD audiences (15 years and above) are watching English content, in English or in a language of their choice. The availability of English content in Indian languages has fuelled its consumption over the last two years.
3. English content features high on the list of subscription drivers, highlighting its ability to drive SVOD subscriptions & retention.
4. A segment of young audience, "Lockdown Millennials", have started watching English content on OTT in the last 2-3 years, and are sampling a wide variety of formats and genres, beyond just tentpole properties.
5. Nine English SVOD originals crossed the 10 Mn viewer mark in India in 2022, compared to 5 in 2021.

# Research Design

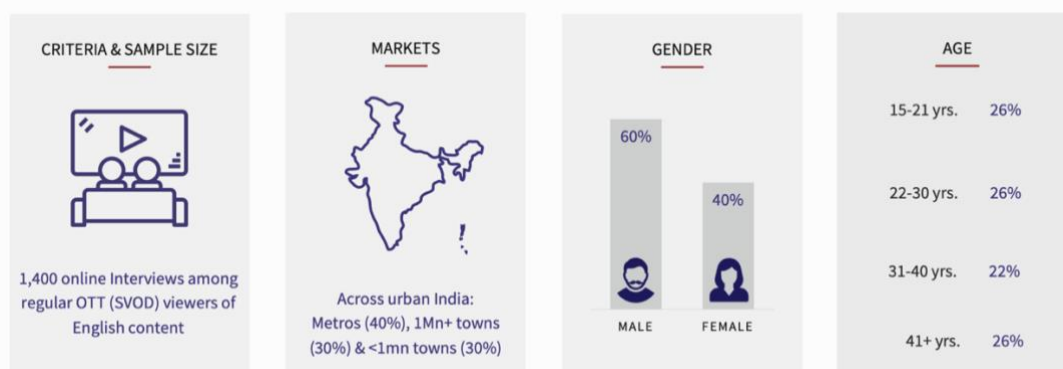
The consumer research was conducted over two stages:



## Research Design: Stage 1 (Qualitative)



## Research Design: Stage 2 (Quantitative)



# Market Size & Growth

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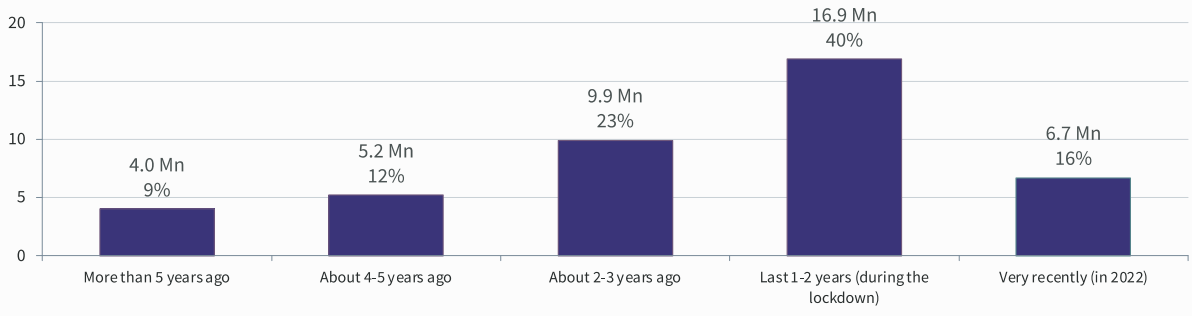
**The Ormax OTT Audience Profiling Report 2022** estimates that there are a total of 85.2 Million English adult (15+ yrs.) content viewers in Urban India, excluding kids.



This universe is equally split between SVOD (42.7 Mn) and AVOD (42.5 Mn) audience. The 42.7 Mn audience base constitutes 65% of the urban Indian SVOD audience (15+ yrs.), who watch English content, in English or in a language of their choice.

## Growth in English SVOD Audience in India

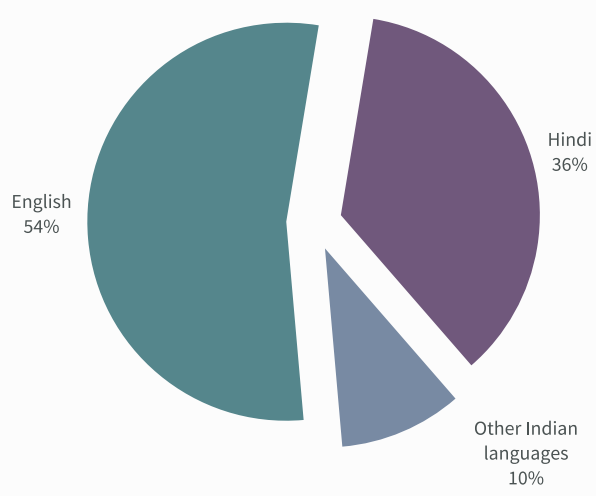
How has the audience base for English SVOD audience grown in India in recent years? To understand this, audiences were asked when they first started watching English content on OTT platforms. They were asked to pick one out of the five options given to them. The results can be seen in the chart on the following page.



The English content SVOD audience base in urban (15+ yrs.) India has increase from 19.1 Mn pre-pandemic, to 42.7 Mn now, i.e., **a huge growth of 124% in just two years**. The lockdowns saw an inflow of audiences into the OTT category in general, but also increased the audience’s consumption of content outside their native languages, benefiting English content consumption in India immensely.

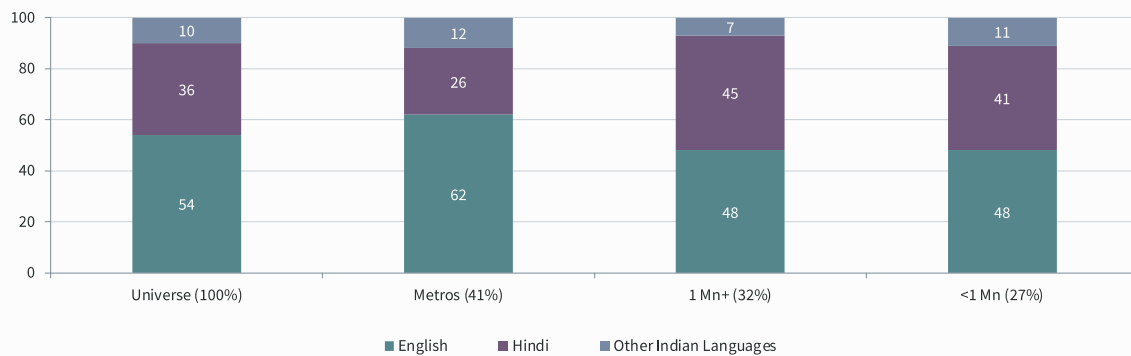
### Language Profiling

English SVOD audience were asked about their preferred language for watching English content, if it is available in original as well as dubbed versions in multiple languages. The chart below captures the findings.



46% of SVOD audience of English content prefer to watch it in an Indian language. Content available in Indian languages has led to a massive surge in viewership for English content, and will continue to be a key factor for further growth, via greater access and engagement.

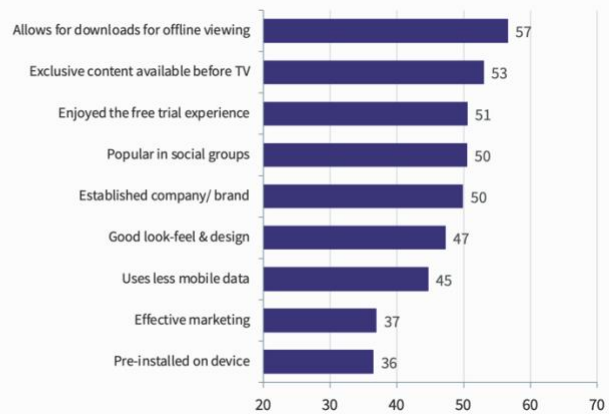
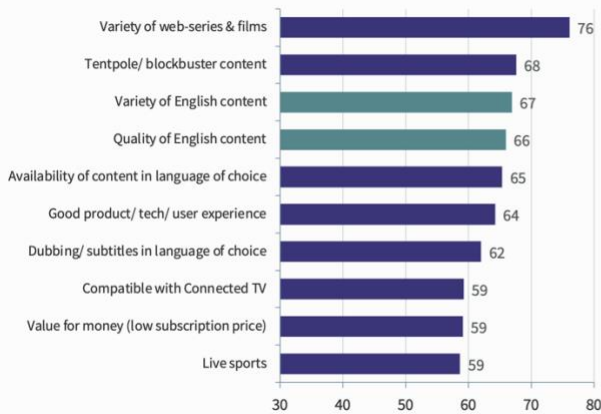
### Language Profiling by Town Class



While there isn't much difference between mini metros and small towns in terms of their preferred language, metros show higher preference towards English, which is a function of the higher exposure to the English language as well as an outcome of three of the six metros being in South India, where Hindi is not well understood.

# Role of English Content in Driving Subscriptions

Does English content have the ability to bring new subscribers to OTT platforms? To understand this, audiences were asked to rate 19 subscription drivers individually, based on how important each one is in influencing their decision to subscribe to an OTT platform. The charts below capture the results:



English content features very high on the list, 66-67% SVOD viewers of English content identify English content as being an important aspect of their decision to subscribe to a platform.



**“** I started watching superhero films first. **Marvel’s movies** like *Avengers*, *Iron Man* & *Thor* were the first English movies I saw. My brother is a *Marvel* fan, and he recommended them to me. They were so good that I soon became a fan too



**“** The first show I ever watched was **Game Of Thrones**. That show was so unexpected. After that, I saw **Breaking Bad**. These are the top-rated IMDb shows, so I started watching them out of curiosity



**“** I started with **F.R.I.E.N.D.S.** because everyone around me used to talk about it. It used to come on TV for a while so I started watching there, and later downloaded all the episodes and watched

## Drivers of International Content Consumption

Six key drivers of International content emerged from the research, especially when compared with Indian content.

### Graphics, VFX, Scale & Production Quality

- *Men In Black was made in the 90s, but its VFX is better than Hindi movies coming out now*
- *Indian action is more about crime and guns. They have not been to evolve beyond that because they don't have budgets for VFX like Hollywood*

### Unique & Imaginative Concepts

- *The concepts of International content are very unique. In Indian, it is always about some crime or gangsters, but when you watch something like an Avatar, that entire world is unlike anything we have seen before*
- *There is a show called Dark where they have shown the concept of time travel and meeting the same people in different eras. Just that idea is so mind-boggling. Our minds can't imagine such things till we see them*

### Meticulous Detailing

- *Look at how they created the Marvel Cinematic Universe. So many things there are interconnected between the movies, but it seems logical and not forced*
- *There is only Bahubali in India where you can say that they have watched Hollywood in creating a full universe*

### Intelligent & Unpredictable Plot Points

- *In Hollywood, they come up with new plots in their thriller films and shows, and those plots are then copied here. So, while watching English shows, there is always an anticipation about what will happen in the story*
- *In Prison Break, the way they plan their escape is awesome. They would tattoo the prison plan on the body, their ways of escaping were very intelligent. Indian makers cannot think like this*

### Realistic Storytelling & Action

- *Indian shows and films have emotions, but the logic often seems to go missing. Stories revolve around the main lead, who always win. The stories in English content are far more realistic and plausible*

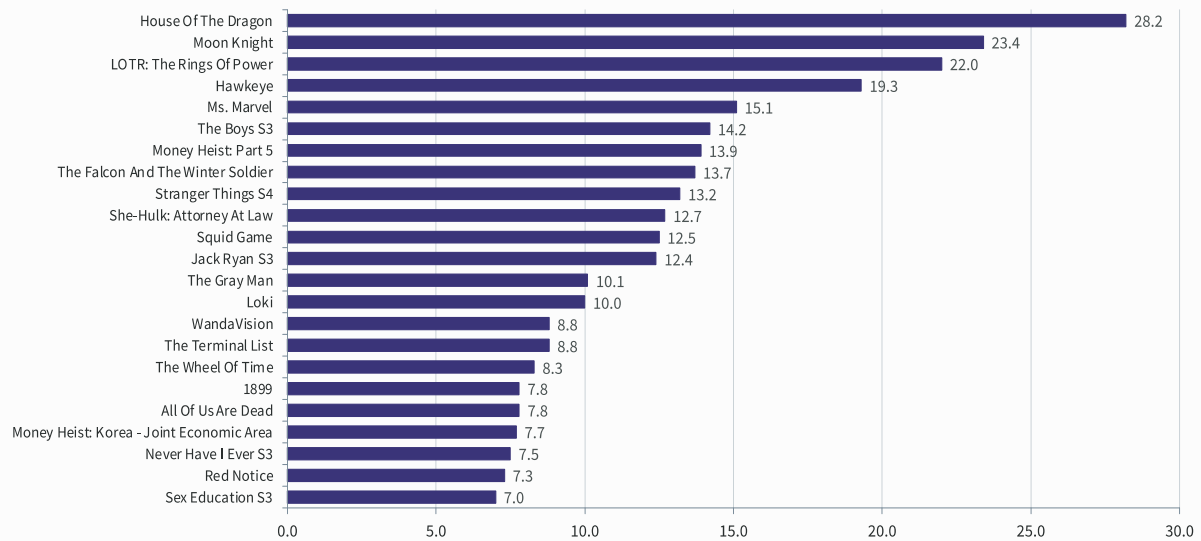
### Consistency across Seasons

- *Money Heist has five seasons, Game Of Thrones had eight seasons, but every season was of similar quality. Indian shows still need to learn this. Sacred Games 1 was good but season 2 was very ordinary, so there is a lack of consistency*



## English Content: Viewership on the Rise

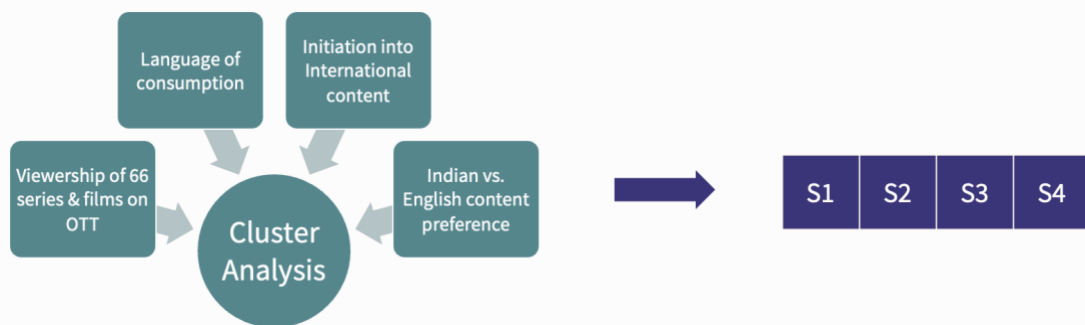
The growing importance of English content for SVOD users is also reflected in the viewership of English/ International content in India. The chart below lists the top English/ International content launched in 2021 & 2022, based on estimates using **Ormax Stream Track**, which is a weekly tracking tool that used primary research conducted among OTT audiences in India.



14 English language originals have crossed the 10 Mn viewership mark in India since Jan 2021. Only 5 properties crossed the 10 Mn mark in 2021, while 9 managed to achieve the feat in 2022. This trend indicates that we can expect further growth in the English SVOD audience universe in India in 2023.

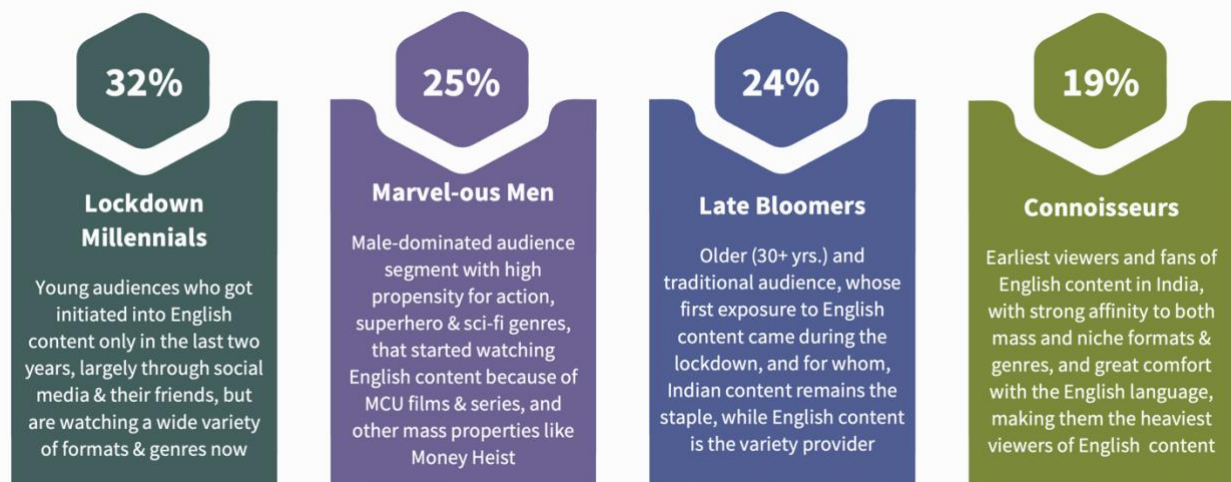
# Audience Segmentation

Audience data from 69 parameters in the research was used to segment the English content SVOD audience, and capture distinct segments based on viewing behaviour and taste.

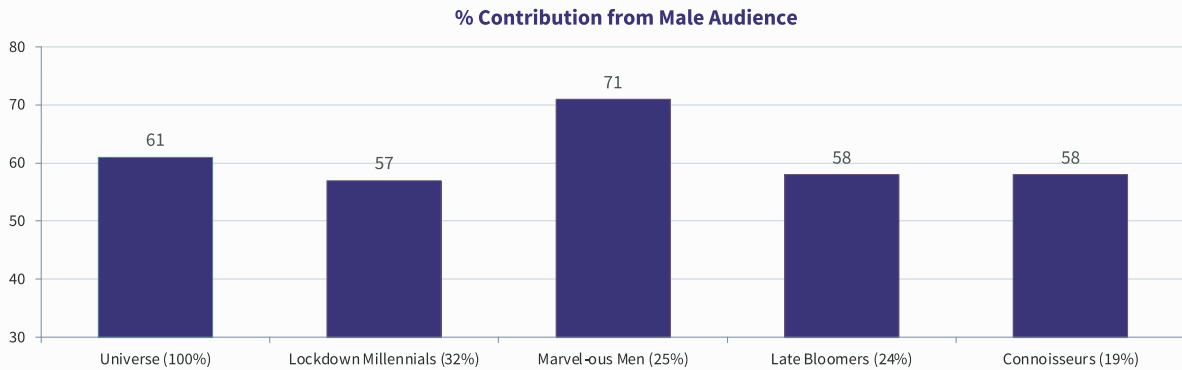


## Four Audience Segments

As a result, four audience segments emerged, which have been summarised below:

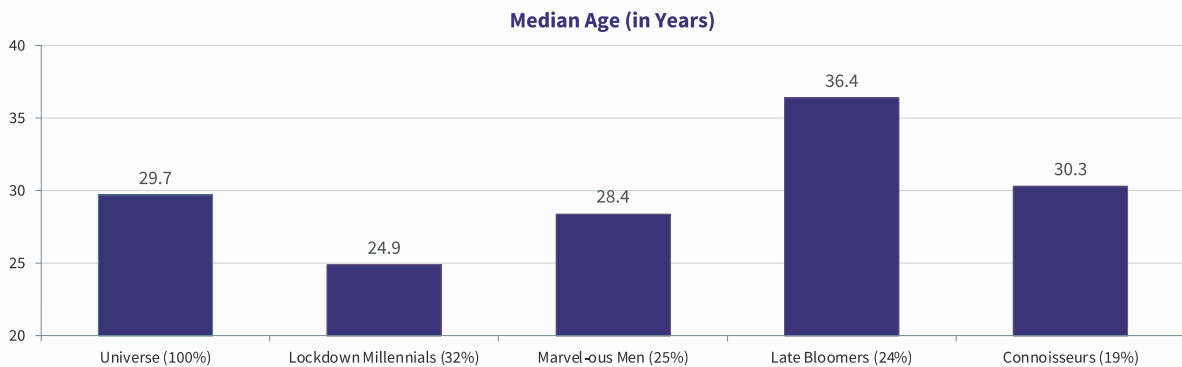


### Audience Segments: Gender Profiling



Marvel-ous Men is a male-dominated segment, while the gender breakup of the other three segments mirrors the universe, i.e., about 60% male audience.

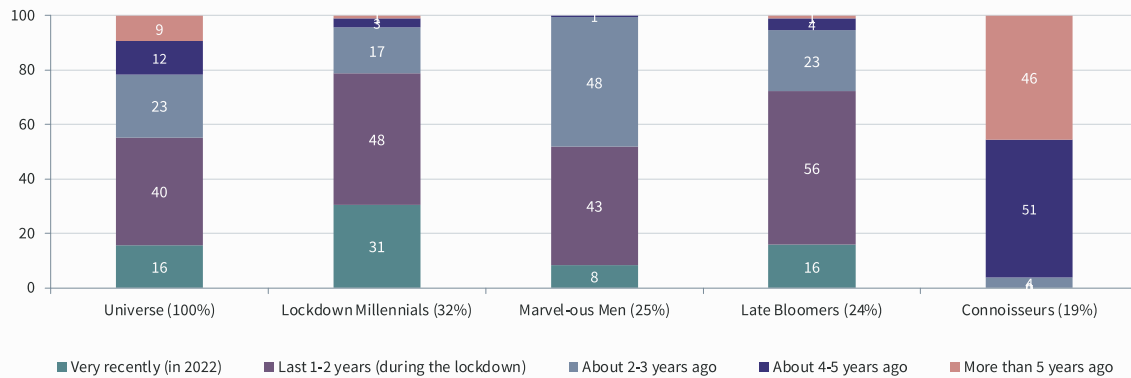
### Audience Segments: Age Profiling



The lockdown saw two segments, the youngest (Lockdown Millennials) and the oldest (Late Bloomers), being initiated into English content. Hence, the overall median age of English content OTT consumers in India has remained the same at around 30 years.

## Initiation into English Content

When did each segment start watching English content? The data seen at an all-audience level on Page 6 has been analysed by segments to understand this.



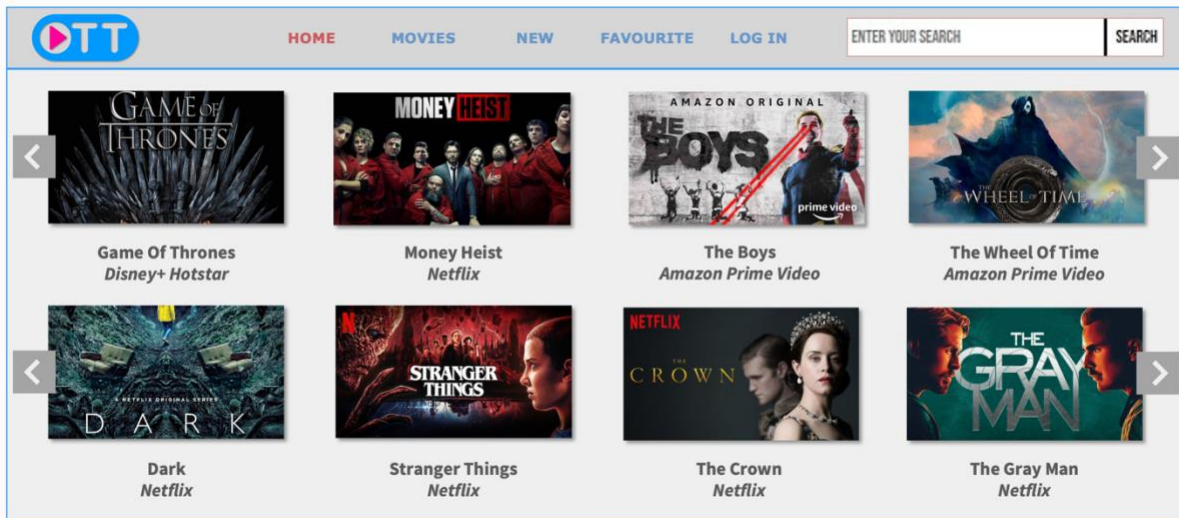
Apart from Connoisseurs, all other segments have a majority contribution from the pandemic period, highlighting how the growth of OTT in India since 2020 has accelerated English content consumption.

## Lockdown Millennials: The New Kids on the Block

While new to the category, Lockdown Millennials display high variety-seeking behaviour, being open to alternative formats, often more than Connoisseurs, especially for reality shows and cartoons/ anime, as seen in the **Format Appeal** differences in the table below:

Format	Universe	Lockdown Millennials	Marvel-ous Men	Late Bloomers	Connoisseurs
Recently-released web-series	74	67	80	69	82
Recently-released films	71	64	75	71	77
Direct-to-OTT films	67	60	76	63	73
Theatrical films	62	60	65	58	66
Older web-series	51	49	54	48	54
Cartoons/ Anime	47	55	51	38	42
Older films	45	50	44	42	44
Documentaries	40	46	36	35	44
Reality shows	38	44	35	38	29

While new movies and shows are popular across all four segments, the diversity and variety-seeking propensity of Lockdown Millennials is also evident in their list of defining OTT originals, i.e., shows and direct-to-OTT films that are over-indexed on this segment:



# Epilogue

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by Shailesh Kapoor, Founder-CEO, Ormax Media

Over the last two decades, there has been a popular perception in the Indian media & entertainment industry that English content is niche, and targets only a segment of the audience within the upper echelons of the socio-economic spectrum. Till about 3-4 years ago, this perception was indeed a reflection of reality.

However, the last few years, especially the pandemic, has changed it all. The growth of dubbed content consumption has made the 'language factor' virtually non-existent. Signs of this are evident in both theatrical and streaming industries, where content is traveling far and wide, including within Indian languages. The language barrier was the biggest hurdle towards consumption of English (and other foreign language) content in India. The growth of the Indian streaming market has taken that factor out of the equation. It's now time for good content to prosper. And the results, as evident from this report, are already reflecting that!

Perceptions, however, take time to change. This report, hence, offers a reality check to all stakeholders who still consider English content as niche. That's a view from the television lens. The post-pandemic world is one where that view is archaic, and dangerously so. English content (even when consumed in Indian languages) is here to stay. And grow. And compete with the best from India.