

Storytelling: Challenges and Opportunities

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ABSTRACT

India has the largest entertainment industry in the world. Being the second largest population of the world, the consumption of the content produced by the entertainment industry is high. However, India has diversified market in terms of languages, culture and it has its own pros and cons.

In recent years, OTT platform is the became new horizon for the entertainment industry and has also become a threat for the television industry. Primarily its target audience is in the range of fifteen to thirty five year age group. With the growth of the mobile industry and development of internet speed OTT platform will reach to the audience, which was till now untapped, it also created new business opportunities. This has attracted foreign investors and business tycoons.

As every business has its own opportunities and challenges, story telling OTT platform has its own. Cinema, Television industry is linear when its comes to release the programs, movies, TV serials. However, OTT platform is nonlinear platform.

It has generated content and served to the audience at the same time. In last few years web series has played key role in the success of OTT platforms. Content generation and storytelling for web series has its own challenges as there is no scope for the improvement after its release. Today, Netflix, Amazon, Hot Star, Voot, ALT Balaji are the key payer in the market.

This research paper will focus on the key areas of storytelling challenges and opportunities for the OTT platform.

Media and Entertainment Industry: Story telling

Media and entertainment industry has seen major substantial swift in the last couple of years. Technological innovations and internet and digitization has played a crucial role in changing the dynamics of Radio, Television, Cinema, Music and Print industry. Dissemination of information has gained a tremendous speed today.

India has the second largest population in the world and has vast scope of the Media and Entertainment industry to grow. Television channels in India are increased to 877, out of which 389 channels are news channels and others are mix of entertainment, music, sports channels.

Around 300 channels are paid channels and 577 channels are free along with estimated 60,000 Cable channel operators. Penetration of television has increased to 64% in the last year. Around 183 million households has television sets and TV's viewership is increased by 21%. On one side in the last year television industry has grown on the other side OTT platform came as a promising entertainment provider with huge content creation and capturing the young minds.

As per the World Economic forums report the global middle class will grow, which will create demand for new media services, focussing on premium content, education, video on demand. On the entertainment side, Indian film industry is a world's largest film producing industry, which produces around one thousand films every year. Regional films are majorly produced in Telugu, Tamil, Kannada, Malayalam and Marathi.

Cinema, Television and OTT platforms are primarily generated and disseminating content for the audience. A recent report reveal that there is a massive changes are occurring in the consumption of the content of Television. The audience is started shifting from TV to watch the content on and video's on a smartphone. As per the prediction on Ericsson lab for the consumer that by in next two years content viewing on mobile is going to be double while audience for the TV screen is going to be half. Around the world content viewing on mobile is increased by 85% since 2010. On global scenario India ranks second in terms of telecommunication subscriptions, internet subscribers and app downloads. Majorly around seventy percent of Indian population stays in rural areas where telecom penetrations are around fifty eight percent.

The access of digital devices such as mobile phones as various age group and availability of high speed internet enables people to access the information, content anywhere and anytime, consuming content on-the-go. This is a fundamental shift in consumer behavior. Globally the smart phone owners expected to reach to 4.6 billion by 2020. Indian Media and entertainment industry are having a high growth rate of 13%, but is small as compared to global markets.

In September 2016 Reliance Gio 4G network launched with affordable data package which led to six times more video consumption in the first half of 2017. 4G is expected to contribute around 58% of mobile traffic data in India by 2020. Which has given a super boost to for new entertainment power houses.

The internet has given enormous power to social media. You tube's daily viewership is closing on TV's 1.25 billion hours per day, as television viewrship falls every year. One in every five minutes on mobile is spent on Facebook's apps and services. Every minute 65,900 videos are posted on instagram, 3 billion snaps are created each day on the snapshot.

Indian governments 'Digital India' promotion is also expected to be instrumental in driving demand for 4G. In the next three years government will invest 70 billion rupees for 4G rollout. In 2017 India became second after USA in terms of downloads. Cinema, Television and OTT platforms as a main source of storytelling, all these medium's has their own advantages and challenges.

Media and Entertainment industry has blend of art, craft and technology, quantity and quality. A few years back cinema celebrated its first century. In these years, cinema has seen various developments in terms of story telling formats and the changed in the technology of making films. From silent film to Dolby sound, from black and white to color film, from analog to Digital film.

Due to digitalization, technical quality of visuals and sound has improved. Digital threats are increasing all over India, which is also tapping the untapped market in small sections of rural pockets. Which has increased the audience based and forced filmmakers to think more about making films with the local content. Which brings the new trends in storytelling.

A. To study and storytelling challenges in OTT platform as compared to Cinema, Television, following points need to be considered

1. Audience watch cinema in one go from one to three hours, where story content needs to be presented in a structured format with a three act structure.
2. Television content is showcased in a tv series in episodes, it gives an opportunity for the improvisation till the next episode telecast
3. OTT platform is binge watching, where all episodes need to be powerful to capture an audience, so that the audience can hook for the next episode

Around the world the main players in over-the-top market are Hulu, FilmOn.Home Bos Office, Roku, Amazon, Netflix, Goole, Direct TV now and Apple. The main success of these companies is because of the younger generation as they consume maximum content on mobile every day.

Amazon and Netflix has the largest share of the global market, having viewership more than two hundred countries. Netflix spent more than six billion dollars on content generation in 2017. The rapid growth and demand of content generation has created opportunity for content owners and studios. By next year, it is expected that India will have a second largest position in the world in video viewing audience globally.

Amazon Prime video, Netflix, Voot, Hotstar, ALT Balaji, BigFlix, VIU, Sony Liv, Eros Now and Zee5 are the top ten OTT platforms in India today. Three main factors play crucial role in the success of over-the-top platforms i.e Smart Phone, High Speed Internet and Good content. Two years back, India has an internet user base of 445.96 million that was second highest in the world and just behind China. Out of that eight one percent accessed the internet via broadband and ninghty five percent accessed it wirelessly. Seventy percent of the total users are from urban India. Uttar Pradesh state has the highest number of internet users.

Total Unique Visitors User Age Group Gender Access Point			
65.21% Male - 34.79% Female 92.29% Mobile - 7.71% Other			
Total Users 273.30 Million	15 to 24 Million	105.60	Male - 71.17 Million
			Female - 34.43 Million
	25 to 34 Million	84.61	Male - 59.81 Million
			Female - 24.80 Million
	35 to 44 Million	43.75	Male - 26.31 Million
			Female - 17.44 Million
	45 + Million	33.42	Male - 19.40 Million
			Female - 14.02 Million

Total Digital Visitors across digital platforms, March 2018 (Data Source: ComScore MMX Multi-Platform Report, March 2018)

According to survey done in 2018 ninghty five internet users, used internet for the entertainment purpose.

Total visitors on mobile			
	Mar 2017	Mar 2018	Percentage change
Internet Audience	169,247	225,227	49%
Entertainment	153,989	240,134	56%

Data Source: comScore MMX Mobile Metrix Report, March 2018

YouTube is the market leader in digital space which takes forty eight percent of the space, followed by Hotstar and Voot. More than sixty percent of the content on YouTube is in short film format and popular programs are from the entertainment and comedy, Fashion and beauty, Music, Technology and Food sectors. Youtube regional language users are mainly from Hindi, Telugu, Tamil, Kannada, Malayalam. YouTube has two subscription models SVOD and AVOD. I.e Subscription Video on Demand and Advertising Video on Demand. More that 65 % viewers subscribe channels and 90% of consumptions happens in local language.

Indian market is diverse and the demand in different region is different from the content. On You Tube Bengal region's perverse movie content more where as in Punjab music programs consumption is mor

Top 10 Web-Series in India as on November 2017

Channel Title	Web Series Title	Viewership
Beingindian	Mumbai On	41.07 million
Shitty ideas Trending	Men The Reak Victims	36.86 million
The Virak Fever Videos	TVF's Permanent Roomates	31.32 million
Y Films	Sex Chat with pappu & Papa	30.31 million
VB on the Web	Twisted	28.08 million
Y Films	Bang Baaja Baaraat	25.11 million
Y Films	Ladies Room	24.83 million
VB on the Web	Maaya	22.19 million
East India Comedy	EIC Vs Bollywood	21.69 million
The Viral Fever Videos	TVF Tripling	19.29 million

Source: Social Blade

YouTube is the largest OTT company in India. Hulu and Vevo media corporations provide content for YouTube as a part of the partnership, majority content is uploaded by individuals. The content viewership is of age group between 16-34 years old

Apart from regular YouTube channel, it also provides content through You Tube Red as premium streaming, paid channel which is ad free, however it is not yet available in India.

Netflix is a major player and has 291 original shows with 2500 movies and 1500 syndicated content. Its first streaming movie is "Love per square foot" released in Feb 2018. And its latest series "Sacred Games" created huge buzz. It might create the possibility of setting up rules for the streaming content in the Indian continent as this series has featured full frontal nudity. Netflix in India features in four languages, mainly Hindi, Tamil, English and Bangla.

Initially Netflix aimed to serve the international content to Indian audiences, however, it changed its approach as other players like Amazon prime and hotstar gained more subscriber base than Netflix. It has seen the sudden sweep of 839% in mobile consumption between March 2017 to 2018. For creating content for Kids, it is partnered with Green Gold Animation and with Red Chillies Entertainment for the production of the original series in multilingual. It has also acquired streaming rights of SS Rajamouli's "Bahubali; The Beginning and Bhaubali 2.

To grab more audience base it has partnered with telecommunication and internet provider companies such as Vodaphone, Videocon and Airtel along with direct to home service provider Tata Sky. There are popular shows such as '13 Reasons Why, Defenders, Orange in the New Black, Stranger Things and Narcos' which are basically American content.

Hotstar: Hotstar is a subsidiary of Star India Pvt Ltd and one the leading content producer has a user base of 14.41 million to 75 million subscribers with total 170 million downloads. Catering to regional languages such as English, Kannada, Tamil, Telugu, Malayalam, Marathi, Bengali, Gujarati and Hindi It debuted the satirical comedy and stand-up comedy of AIB, other popular shows were Tanhaiyan and Cineplay. Streamline the ICC World Cup 2015 gave a big push to Hotstar app and 5 million downloads were done.

Sport content has been the key driver for the Hotstar. Hotstar also launched Watch N Play game to test user knowledge about cricket. Ninety six percent of Hotstar watch is interestingly from the videos are out more than 20 minutes, which also proves it is quality content that works best. It has a collection of more than 3000 movies, with more collection of Malayalam films than Hindi films, which made major user base in Kerala. It is partnered with Airtel for its customers and Zaor Lab to allow users to connect their mobile to TV screens.

New features launched of Virtual Reality and 3D sound in IPL 2018. It has popular shows such as "Ye Rishta Kya kahalata hi", Bigg boss, Game of Thrones, Parasparam (Malayalam), Khokababu (Bengali) OTT platform has created a new generation of users, who need is catered round the clock with good content. It creating new hope and challenges in front of markets to engage this new audience with new consumer habits. This is challenging to the DIKW pyramid as users are responding to access to the available date at affordable prices.



Zee5: It is owned by Zee Entertainment Enterprises based in Mumbai with 9.93 unique users with average minutes/visitor 42.2 minutes. 1.25 lakh hours of content, 500 series, more than 2000 movies catering to Hindi, Bengali, Telugu, Tamil, Oriya, Bhojpuri, Martahi, Gujarati and Punjabi audience. “Zee5 is aiming at tier-II and tier –III cities with strong language content”- Amit Goenka, CEO

Popular programs on ZEE5 are Life Sahi Hai hai, DID Lil masters, Tamil – America Mappillai, Doctor –X, Pablo Escobar Zee 5 has strong technological foundation and built innovative and state-of-the-Art features in their app.

Voot – Has 50,000 hours of content with 11 original series, 450 series, 550 movies in eight languages. Voot’s performance is shot up in Oct 17 with the launch of flagship program Big Boss 11. It crossed 70 million views in the first ten days. Its popular programs are Untag, Stupid man, Smart phone, Ye ke Hua Bro, MTV splitsvilla. Content innovation such as the content around content, network ecosystem and original content creation worked for Voot.

JIO TV – Jio TV has unique features such as live TV and catch up TV up yo 7 days with 583 channels and catering to 15 languages. It has maximum 100,000 hours syndicated content. Reliance Jio offers a suite of apps JioCinema, JioTV and Jio Music

Sony Liv – 40,000 hours of content, 18 live channels, 4000 hrs of food content, 700 movies, 550 short films catering to Music,Kids,LIVFIT, Sports.

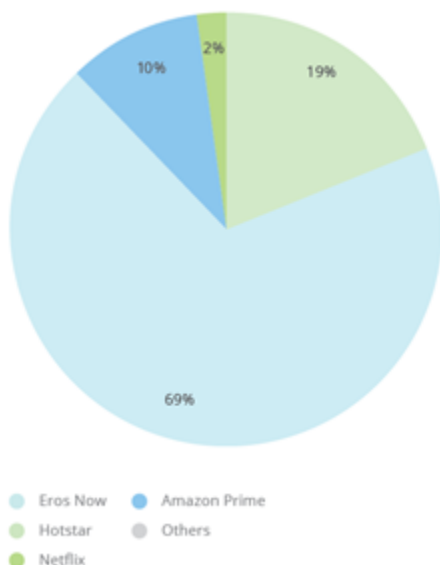
Sony Liv partnered with Arre, Web Talkies for the prodcution original content for the regional viewer.

Its popular shows are The Kapil Sharma show, Porus Yeh U Dinon Ki Baat hai. Sony Liv’s premium content includes 9 Indian and 9 International live channels. Liv Fit offeres its first of its kind health and wellness content in Indian OTT platform. Popular shows on Sony Liv are Love Bytes,The Kapil Sharma show,Married Woman Diaries,Hous Proud,Porus

ALT Balaji: 5 million subscribers with 1.2 paid users, 11 million app downloads, 19 general shows with 150 hours of content It has 15% of regional content of total show. It caters to three audiences – female viewership with its drama series, male viewers and Urban viewers. After the launch of within six months ALT Balaji ranked top three in revenue grossing. Its popular series are Romiland Jugal, Hum, I am because of us, Ragini MMS, Bewafa Sii Wafa ,Karale tu bhi Mohabbat, Bose: Dead/Alive and Dev DD

Amazon Prime Video: 6.37 million users, with 50 million downloads, 63 Original series, 4000 movies, 1200 seasons Signed a five year deal with Salman Khan home production for streaming upcoming films before the premiere it on television. Amazon has signed a deal with Disney India for seven upcoming international titles.

Tie ups with ash Raj Films, Dharma Productions, T-series, Shree Venkatesh Films and Everest Entertainment, Dream Warrior Pictures, Tie up with Vodafone for audience base, Its major deal with 14 popular Inian stand-up popular comedians such as Biswa Kalyan, Kenny Sebastian, Rahul Subramanian, Rath, Kanan Gil



Males Age Geroup	Total mobile	Females Age Group	Total Mobile
18-14	2208	18-24	483
25-34	1358	25-34	668
35-44	1423	35-44	NA
45+	NA	45+	NA
All Males	4.989	All Females	1,383

Eros Now: Owned by Eros International, 7.0 million subscribers, 10 million downloads, 139k unique users. Movies are across genres Comedy, Devotional, Animation, matures, sports, kids, action along with old movies. It also offers Pakistani channels, shows primary TV and HUM TV Eros also claims to have the largest collection of films in OTT platform in India.

Eros partnerd with Reliance Jio t make it content available on Jio phones

The lightning fast growth of first time internet users is the result of the influx of cheap mobile devices coupled with attractive low-cost data plans both in rural and urban areas. The new generation of internet in India is high speed, broadband and wireless.

With internet dark areas catching up with first time internet usage, the next wave of growth in India's internet population will come from tier II and tier III cities. With 22 languages, 450 plus dialects, India has a unique positioning. Currently 45% of the users consume regional language content and this percentage is expected to increase with the growth of internet users.

One of the key challenges for large players is this regional diversity and preference for local language content. Global players like Netflix and Amazon have started investing in regions with low per capita income with curated local content. The growth will be supplemented with low-cost smart phones, low rates of data plans, increased adoption and awareness in rural India.

VoD platforms have created extensive opportunities for consumers who now have greater control over what, when and how they watch content.

Media & Entertainment content is at the cusp of Art and Technology, Quality and Quantity, Message and Data; these new possibilities have changed the way M&E industry functions.

Conclusion

The story telling on OTT platform has advantages as well disadvantages from the perspective of content consumer, content producer, storyteller, promoter, advertiser. Mainly the content consumer of the OTT platform is young audience. Which is also called Generation "M", where "M" includes millennial, multicultural and Mobile. It is found that this generation is motivated for the binge watching for relaxing, catching up with current trends, cultural inclusion. The development of technology and mobility of gadgets is motivated binge watch. Also, they could be motivated to feel included in their social groups by contributing to social conversation. It is beneficial proposition for the media companies who are in video on demand streaming business, production companies, content development, and advertising companies to plan strategies for the advertising campaign.

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