

A Review on The Impact of Covid-19 on Media Consumption in India

Dr Saravanan MP

Associate Professor, Jain College-Vasavi Campus, Bengaluru

Dr Naveen Kumar CM

Principal, Jain College-Vasavi Campus, Bengaluru

Abstract - Purpose of the study: COVID-19 pandemic, has forced billions of people to stay home, leading to a drastic change in media consumption patterns. This paper tries to review the existing literature on the impact of COVID-19 on media consumption and its diverse dimensions.

Methodology: Articles were retrieved from various online databases, e-journals on the topic of media consumption in the last 5 years (2015 – 2020). After thoroughly reading the articles, 20 articles were found to be very relevant for the present study based on the relevance of the content to the topic under study. The collected information was classified as per the major themes.

Main Findings: Much research has been conducted on the measurement of media consumption in India, but studies on the impact of COVID-19 on media consumption are found to be fewer. Among the various studies influencing the media consumption, no much emphasis has been laid on the key role of behavioural, psychological, and sociological factors on media consumption remains uncharted.

Applications of this study: This paper will be useful for researchers who wish to explore the impact of COVID-19 on media consumption. The decision-makers and experts in the area of media will be able to improve the effectiveness of their business policies and strategies.

Novelty/Originality of this study: This review paper explores the impact of COVID-19 on media consumption. It would aid as a preliminary point for further in-depth studies on the impact of COVID-19 on media consumption habits in India. The paper also suggests probable areas for further research in the field of media consumption.

Keywords: *Media Consumption, Impact of COVID-19, Recent Trends in media consumption, media consumption determinants, Work from Home*

I. INTRODUCTION

COVID 19 had made times tough unlike anything else all over the world. The lockdown imposed has made people bounded within their homes and the way they consume media. People during this time kept themselves engaged by resorting to media like news, movies, music, throwback sports events, pre-recorded reality shows. The media consumption has massively increased during the lockdown period. Media has evolved in the past decade and the evolution of media has been countered with problems. It has been constantly accused of bias, mind control and poor quality regularly. All these barricades did not prevent social media from developing and evolving into a knowledge hub. Mass media can be news on the internet, television radio or print media. They can be either international or national or local. The available choices are huge.

We discuss the various factors that have impacted media consumption during the pandemic. This paper starts with (1) introduction, (2) research methodology, (3) history of various media in India, (4) Current trends in media consumption, (5) Change in consumption pattern (6) Results and Discussions, and conclude by giving the (7) limitations of the study and stating out scope for further research.

II. METHODOLOGY

For literature review on media consumption, various e-journals and media reports were considered. The keywords used for retrieving the articles were 'impact of COVID-19 on TV Viewership' or 'impact of COVID-19 on social

media usage' or 'impact of COVID-19 on mobile usage' or ' COVID-19 and internet usage'. Only articles in English language were considered.

History of Media

Print Media

In the early times and even now newspapers remain as a source of information about the day to day happenings. The idea of newspapers first originated in Boston. Between 1830 and 1860, the introduction of advance machinery resulted in a large number of printing of newspapers, which made newspapers available to everyone, becoming the first media of mass communication and as a knowledge resource. In today’s times due to the surge of various means of communication, and media consumption, the role played by newspapers has significantly fallen. Print media earned \$44.9 billion in ads in 2003 but less than \$16.4 billion from ads in 2014. Given the unlimited forms of alternative forms of news, many of which are free, the newspapers subscriptions have drastically fallen. Various newspaper companies now maintain both an internet presence and a print for their survival. Some newspapers to stay profitable, they have turned to social media, like Twitter and Facebook. The end of the newspaper era has not yet arrived. Due to concerns about digital well-being many people still prefer Newspapers. It is because of these people, the newspaper still holds its stand.

Radio

Radio was first introduced to the public in the 1920s. The National Broadcasting Company(NBC) was the first to run sponsored news programs, comedy shows and various drams. Religious shows and educational shows followed. By 1940 around 90% of households had a radio. Roosevelt was the first president to deliver a speech on the radio. Live commentary of the happenings in World War II was responsible for the boost of the importance of Radio. In 1990, Sirius Satellite Radio started a satellite radio. By 2001 two satellite stations have been authorised for broadcasting.

Technological advancement has given people several ways to access piling information. However, the radio still plays a vital role in today's world. More importantly, radio is easy to use, it's humane for more than 80 years radio has survived and it still will survive in the coming years.

Television

Television evolved combining the best attributes of radio and pictures and brought about a significant revolution in media forever. The first broadcasting was done by the BBC under Royal Charter. The size of the television and the picture resolution is constantly under development even today. Even though digital consumption across various platforms is on the rise in India, televisions continue to score in terms of penetration. According to the Broadcast India Survey (BI-2018), the country has 197 million TV homes in 2018, up from 183 million in 2016.

Emerging Media Trends

The invention of cable in the 1980s and the expansion of the Internet in the 2000s unveiled several options for media consumers like never before. Viewers can view almost everything just by hitting a button, record programs of curiosity and bypass commercials. Social media, like Facebook and Twitter, has placed journalism in the hands of the civilians. Social media gives users a global view of things happening around them. They serve as ready to access the knowledge hub.

Newspapers played a crucial role during the War. It was the only way to reach out to people during those times. The modern print media is fighting to have its stand amidst other online news platforms. Most families had radios by the 1930s, making it an easy way for the officials to reach out to the citizens. With the increased use of television the popularity of radio has drastically declined. Although social media and the internet pave a direct way of easier and faster communication the television still has its ground.

Table 1. TV penetration in India

TV Penetration	
2013	54 %
2016	64 %
2018	66 %

Source: *Barcindia*

Table 2. States having more than 90% TV penetration in India

States with over 90% TV Penetration	
Tamil Nadu	97 %
Karnataka	96 %
Andhra Pradesh/ Telengana	94 %
Kerala	93 %

Source: *Barcindia*

No of smartphone users in India

More than 50 crore Indians are now equipped with smartphones, there has been an about 15% increase from 2018 mainly due to a brand like Realme and Xiaomi which keeps bringing new users into this ecosystem. Based on market analysis by a research firm techARC, India had around 502.2 million smartphones users as on December 19, which means more than 77 per cent of Indians have no access to wireless broadband via smartphones. Samsung leads the smartphone market by 34 per cent, followed by Xiaomi at 20 per cent, Vivo at 11 per cent and Oppo at 9 % respectively.

“After a slow migration rate from feature phones to smartphones for a couple of years, it’s good to see that the market has started to expand again”, Faisal Kawoosa, Founder and Chief Analyst, techARC said in a statement. Though markets do not offer any options for the entry of non-smartphone users, most of the users prefer to start their smartphone pursuit with the basis segment (INR 5,000 to 10,000). OnePlus, Vivo and Realme are the leading smartphone brands in terms of percentage net addition to the user base in 2019. Realme elevated its user base by 49%, Vivo 44% and OnePlus by 41%. Other major brands like Samsung, Xiaomi and OPPO increased by 9 per cent, 25 per cent and 36 per cent based on the user base in 2019.

“The main reasons driving the smartphone user growth are the presence of affordable smartphones, the betterment of 4G/LTE networks and the availability of offline as well as online channels of buying. The next objective of the smartphone must be to enhance services where they could consistently make profits from their existing customers. At present, smartphone companies can generate \$0.5 to 1.5 a monthly from the users relying on what all services they offer inclusive of advertising.

Realme, OPPO and Vivo will be the main profiteers in 2020 in terms of increase in the net user base, forecasts the tech insights report,” Realme could enter in top five brands by installed user base displacing Lenovo MGB (Lenovo + Motorola) brands. Xiaomi will continue to exhibit growth in user base while Samsung could start showing off a decline in its user base or grow with a low percentile”, the report added.

The Rise of OTT Platforms During Covid-19

In the first quarter of 2020, global streaming platform Netflix added an astonishing 15.8 million paid subscribers, as lockdown audience switched to the platform due to the absence of other entertainment options. Based on a report framed by Reuters, Netflix’s global total has hit 182.9 million from January to March, with the audience binge-watching shows like Money Heist and Love and Blind. Various other video streaming platforms like Amazon Prime, HotStar and ZEE5 have also seen a considerable spike in the number of users, instilling a feeling of optimism in the growth of the industry regarding the future of OVER-THE-TOP (OTT platforms). Just as the name proposes, these platforms grant content directly to the viewers over the internet. The present Covid-19 pandemic and the nationwide lockdown has not just caused turbulence in the day to day industrial and economic activity, but they have also led to a significant change in the behavioural and psychological patterns in people, including that of digital consumption.

Shift in consumption patterns

One of the heavily impacted sectors today is Media and Entertainment (M&E), which extremely relies on advertisements and on-ground events. If it is not for the OTT platforms, the media sector would have simply been wiped out by now. Based on research conducted by KPMG, there has been a significant rise in media consumption during the past few weeks, even though at present monetisation is a tough challenge. The sector keeps getting funded by advertising spends from FMCG, financial services, automotive, real estate and e-commerce companies, which are recovering from the recessionary impact of the Covid-19. The subscription fees of OTT platforms and

various digital media are on the rise as home-bound consumers seek for quality and high definition content. Based on a survey conducted by Counterpoint Technology in 2019, Hotstar, with its curated collection of regional content and sports featured at the top, followed by Amazon Prime, SonyLiv and Netflix.

The greatest advantage of OTT platforms is the variability of content it offers – from Oscar-winning Korean film “Parasite” (released on Amazon Prime Video) to the recent Irrfan Khan starrer “Angrezi Medium” (released on Disney+Hotstar), these platforms cover the whole spectrum. Besides these films, there is also regional content that is streamed, making it excellent for all kinds of audiences. A latest Nielsen report found that the lockdown currently imposed could lead to almost 60% rise in the quantity of online content consumed by people.

Catalysts in the growth of OTT

Based on research conducted by Ormax Media, the quantity of the Indian streaming audience (number of people over 15, who watch online content for a minimum of two hours a week on at least one OTT platform) is more than 76.5 million. That is not all – OTT is expected to grow at the rate of 22% a year to reach Rs 12,000 crore in the coming four years, that is by 2024. A crucial reason is the ability of the smartphone, on which the OTT content is mostly viewed. According to research done by ASSOCHAM and PwC, the number is more likely to rise to 859 million by 2022. No amazement, the number of OTT platforms are increasing and developing day by day- from only nine in 2012 to more than 35 in 2019. Movies, that were previously only displayed via cinema halls, are now finding various new ways to make a mark and gain a stand on these video streaming platforms.

The thing that makes the OTT perform so well and develop is that they offer personalised content to the viewers. Through this technology, they track user’s likes, dislikes, and their temperament and suggest relevant content.

Trends to watch out for

YouTube and video-streaming giant Netflix were the toppers in global app spending in Q1 2020, according to App Annie surveys. Netflix also saw a surge in its stock price. This year, viewers in India were also introduced to Disney+ content with the service finally launched in India via Hotstar (which was acquired in 2019). A few other OTT platforms are offering extended free period as a marketing strategy to increase the number of subscribers in the wake of Covid-19 crisis. On the whole, the digital subscriptions revenues are more probable to see a surge, gaining to form a “habit formation”, which is presently happening now. OTT audio bases like Ganna and Spotify also did see a rise in their profits. As of now, their main focus is to increase the number of paid users to about more than six per cent of the total user database.

Audio platforms like these in India primarily function on three money-making models. Advertisements based model and pack model are the fundamental source of revenue for OTT audio platforms. Moreover, there is a growing focus on subscription-based models for better finance.

The future

A study by KPMG states that “digital consumption will see rapid incremental growth with India’s ‘digital billion’ trajectory likely to accelerate materially”. It also emphasised that the OTT consumption in India would start experiencing a transition from the mobile screen to the large screen of the television “owing to the lockdown effect with broadband internet”. Current offerings of maximised free periods to increase subscriptions could result in a new normal and high paced accelerated growth in the consumption and monetisation!

Change in consumption pattern

A nationwide lockdown that has been for more than five weeks has seen Indians getting a hold on to a quieter life. The cacophonous physical world outside has been forced to come to stand still, only to be substituted with a vibrant digital life-experiences accessed via broadband, cables and 4G. News, comedy, crime, mythology, and music awaiting the homebound Indians

unlimited choices to be always updated and entertained at the same time escaping the rough times and uncertainties of one of the most chaotic times in memory.

Table 3. Impressions – DD(mn) in 2020

DD Impressions in million	
Jan 11 -31	32
March 28-April 3	1564.9
April 4-10	1910.5
April 11-17	2680.2

Source: BARC INDIA

On the return of old, classic serials like Ramayana, Mahabharata and Buniyaad, for the first time since 2015, the state-run DD has become the most-viewed channel in the nation. DD’s audience engagement has only grown week after week. Who would have thought that amid the plethora of slickly produced sitcoms, movies and originals, mythological shows produced in the 1980s would keep a nation spellbound in these difficult times? “Retreating into the world of Ramayan and Mahabharat is not just about viewing and entertainment. It is a combination of therapy, nostalgia and remembering god amid an unprecedented crisis,” says Santosh Desai, CEO, Future Brands.

People have been engaging themselves in equipping themselves with essential goods for a while. India is a country where people consider buying TV for homes is considered more essential than building a toilet. People magnetism towards media has only been accelerated by increasing smartphone usage (50 crore-plus mobile phones) and internet connections (more than 72 crores).

The news viewership has seen a massive jump. Around 219 percentage of the content viewed is news, followed 73 per cent of movies, 52 per cent of youth programmes, 50 percentage of infotainment 43 per cent of kids content. The viewing surge is being dominated by the kids. The viewership of the age group 2 – 14 during lockdown is 46% more than the viewership before the lockdown. The viewership of the age group 15 – 21 during lockdown is 38 per cent more than the viewership before the lockdown. The viewership of age group 23 – 30 during lockdown is 33 per cent more than the viewership before lockdown. The viewership of people aged more than 61 is 31 percentages than the viewership before the lockdown.

The overall television viewing surge has been increased by 38 per cent during the lockdown. Before COVID weekly viewing minutes was 887 billion minutes. The weekly viewing minutes during COVID has increased by 336 billion minutes that is 1223 billion minutes. Just in the same way as weekly viewing minutes, there is a considerable change in the percentage of people who watched TV seven days a week.

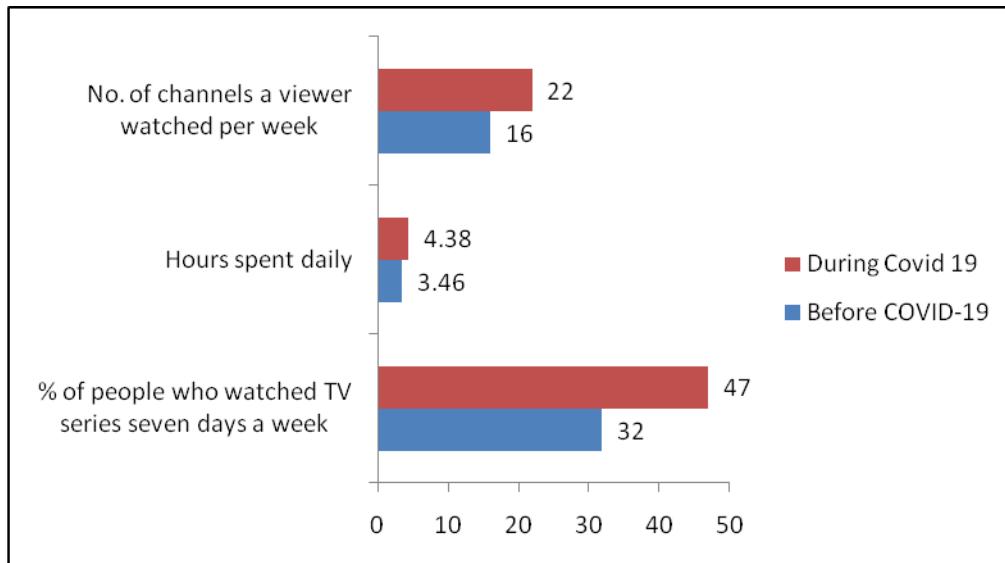


Figure 1. TV viewing in IndiaSource: Barc India

Before COVID it was 32 and during the lockdown, it has risen by 15, that is 47. The hours spent daily viewing content on TV has increased sharply. Before COVID it was 3.48 and now it is 4.38. The number of channels a viewer watched per week has been increased by 6 to 22 when compared to before and during the lockdown. On the whole, the rise in viewing minutes of TV is more than women. The rise in viewing minutes of men is 43% while that

of women is 33%.

A digital life which takes precedence is a pleasure for marketers and social engineers. The lump sum flow of terabytes of information, comparatively efficient to measure, can grant an unparalleled insight into human behaviour, the constantly changing patterns and uprising trends.

Not astonishingly, various outfits – from research institutions such as Nielsen, BARAC and Similar – Web search tech giants like Google to payment platforms in India like Razorpay. Nielsen (data in smartphone) and BARC (for TV data) have been publishing in-depth reports every week since the lockdown started, segmenting the data to know the insights and to understand the shift.

III. RESULTS AND DISCUSSION

The time spent on both mobile phones and TVs has gone up, having the TV getting the maximum share in both context time and variety, viewers keep seeing more and more content. Average weekly viewing minutes on TV has increased by 38 percentages, even the average channels watched by an individual has increased from 16 to 22. Some are self-evident, like the spike (79 percentage) in the non-prime time as against prime time (which saw only 5 percentage rise) viewing, even though the weekly advertising time decreased by 26% to 20 million seconds. Having people staying at home, TV watching time is now spread throughout the day. Content satiates emotional and mental needs as anxiety and panic have risen. We have seen a huge growth of DD and non-prime time viewing,” says Sunil Lulla, CEO, BARC India. DD’s growth has come from a wide range of economical classes, while the upper class having the playing hand. “Appeal of DD’s shows cuts across segments with very sticky viewers,” he says. The viewership of Ramayana is greatly propelled by co-viewing (22 percentage of kids are watching with their grandparents) where families get together. PrasarBharati CEO Shashi Vempati says, “The viewership growth for DD is across segments. What we are witnessing here is the calculus of segmentation being turned on its head, with wholesome family viewing returning. Many decades back, TV was the glue that brought families together. That is happening again with the epics.” For DD, the lockdown strategy was plain. “We wanted to engage the families so they can stay at a home safe”, he says. Motivated, it has launched the DD Retro on a theme to create a throwback as a channel to revive the nostalgia. Overtime the viewership of news has grown steeply(219%), followed by movies (73%). “We have seen a viewership surge. Morning viewing time is getting extended into the afternoon. It is also about fresh content. Unlike general entertainment channels (GEC) and sports, the news is the only category that can generate fresh content under lockdown,” says MK Anand, MD, Times Network. (It is owned by Times Group, which issues Times of India newspaper.) GEC saw only a minimalistic rise in viewership by 7%. Smartphone usage researchers offer various in-depth knowledge in India.

“The biggest thing that struck me is how both men and women have taken to digital news at every level of socio-economic strata in metros and non-metros,” says Dolly Jha, country head, Nielsen India. Families have been facing tough times to practise social distancing. As they are forced to cut off physical interactions, they are setting it up in the digital world. “The share of time Indians spent on calling and chatting is 29% as against 12% in the US,” says Jha.

Covid-19 is in everyone's thoughts. More the 1 out of every 10 respondents used the AarogyaSetu app released by the government in the very first week of its launch. 40 out of 100 searches on Google were related to Covid-19, says Nielsen. The average time spent on using the smartphone for chatting and VoIP(19 percentage on average, with the women hitting higher at 22 percentage) dominates the smartphone usage, followed by 15 percentage of networking, 14 percentage of video streaming and 9 percentage average on gaming (while 15-21 year old spend 11 per cent of their time). SantanuBasu, the founder of ‘Lets Game Now’, a gaming platform, has seen the spike in their user base of gamers from 17,000 before lockdown to 50,000 now. According to the data on SimilarWeb, WhatsApp, Instagram, TikTok, which saw a steep rise. “The sweaty energy that TikTok exudes is a good representative of what is happening in the society at large,” says Desai.

Table 5. TV viewing in India

Top 5 downloaded apps in India	Number
ZOOM	14,500,000
TIKTOK	14,100,000
AROGYA SETU	13,400,000
LUDO KING	9,500,000
UVIDEO	8,600,000

Source: Sensor Tower

He also says that the bandwidth of content in TikTok around Covid-19 is a way richer than other platforms. YouTube search trends also echo some of these changes. "News, gaming, at-home workouts and recipe searches for dishes like panipuri saw a big spurt", says Kaushik Das Gupta, group head, insights and partnerships, Google India. MX player an OTT player which released seven new shows in March, has seen a surge in viewers and the time spent on its platform jump by 2.5 times when compared with the pre-lockdown times. "Our offering of Hollywood films like Baywatch and Transformers, dubbed in Hindi, is doing well," says Karan Bedi, CEO, MX Player.

Beyond the Lockdown

When the world gets back to normalcy, most of the shifts might prove to have been temporary. But some can become a habit or accelerate trends that were already existent. OTT addiction is one of them. Virtually a spike in the user base is seen by all the major streaming platforms. Most of the users may not resign from it after the lockdown.

In the same way, digital payments and transactions have witnessed quite interesting shifts. A recent study by a financial tech company Razorpay, based on pre-lockdown cash transactions, shows that the payment for entertainment and media, IT and software, payment for utilities saw a surge of 25 per cent, 32 per cent and 73 per cent, while travel-based sectors declined by 87 per cent. "Demonetisation was a short-term event. Lockdown will lead to long-term shifts. The behavioural change will be a lot stickier," says Razorpay co-founder Harshil Mathur.

Limitation and scope

Only direct keywords were used for the search of the present literature. Published papers which would have used other synonyms like pandemic may not be reviewed. Since this is an ongoing event the scenario will change accordingly, like the discovery of a vaccine. Further studies can be conducted with specific demographic variables.

VI. CONCLUSION

The major objective of the paper was to give a detailed view of the change in media consumption pattern and emerging new trends in media consumption caused by COVID-19. We make some interpretations through this paper. There is a huge change in the way we use technology and it is rapidly adapting. This has a huge effect on the media consumption pattern adding to the impact of COVID-19. The pandemic has provided a huge opportunity for the OTT platforms and will deeply affect the other business like a movie hall. The social distancing norm is here to stay and the business owners to succeed have to modify their current business models. Cheaper data, affordable smartphones combined with the network capacity will safeguard the social well-being of the society.

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