



## Cinema: Mass entertainment or luxury item?

Findings of Ormax Cine Sense: 2023 suggest that movie-going, at least in the language, may not be as mainstream a phenomenon as is popularly believed

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### Summary

- Only 22 million Indian urban who watched three of more Hindi films in a theatre in 2022
  - Even if one odds rural India, kids and all other languages, not more than 4% of India's population falls in the 'regular movie-goers' category
  - Using findings from Ormax Cine Sense (Hindi): 2023, the author argues that movie-going is clearly not as mass as many believe it is, especially when it comes to Hindi cinema
  - Outdoor entertainment in India is a luxury item to begin with, and movie-going is no different, the author posits
  - If the Hindi film industry can come to terms with its premium positioning, they can go all out and target only the 20-30 million people who really matter, and leave the rest to consume the content at their homes
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Just 22 million (or 2.2 crore). That's the number of Indian urban adults who watched three or more Hindi films in a theatre in 2022. Add kids and rural audience to it, and the number will still struggle to cross the 30 million mark.

This single data point, from our new report **Ormax Cine Sense: 2023** (read more [here](#)), brings a lot in perspective to how mass (or not) 'Bollywood' is. The equivalent of the 22 million number was about 35 million in the pre-pandemic years. It hovered around that mark through the period from 2013 to 2019, for which this data is available with us.

In effect, we are talking about only about 2% of India's population going to movie theatres to watch a Hindi film at least once in 3-4 months. The equivalent numbers for the four South languages add up to about 25 million, and the all-India (unduplicated) number may look closer to 50-55 million, which is only about 4% of India's population.

Ormax Media's **Sizing The Cinema: 2023** report (read more [here](#)) estimates that about 122 million went to a theatre at least once in 2022. If we see that figure in conjunction with the 50-55 million number above, about 70 million Indians visited a theatre only once or twice in 2022. These light or irregular viewers cannot be called theatre-goers by habit. But even after including them, penetration of movie theatres is only 8.6% of the country's population.

Movie-going is clearly not as mass as many believe it is.

Over the last decade or so, the growth in box-office business, especially Hindi, has been fueled more by rising ticket prices than by footfalls ([see](#) our annual box office report for

more). In effect, cinema-going habit has become more and more elusive. With a wide range of alternatives to watch movie content being available, including OTT and linear TV channels, there is very little incentive for an average Indian in the Hindi-speaking markets to visit a movie theatre. And once the habit is broken, it is a tough ask to reinstate it.

It's not as if films themselves are niche as a content type. Theatrical films routinely outperform high-profile OTT originals on streaming platforms. Despite being a huge theatrical success, Pathaan has managed viewership numbers not very different from those of Amazon Prime Video's biggest hit series in recent times, Farzi. And this is despite theatrical and paid streaming categories showing a sizeable audience overlap, to the extent of about 75%.

Over the last couple of decades, there has been a lot of talk about India being an "underscreened" market. But when most of India's existing 9,000 odd screens are operating at less than 15% occupancy for at least 40 weeks in a year, opening new screens is a proposed 'solution' that's far removed from the consumer's reality.

Outdoor entertainment, by its very nature, is a luxury item in the budget planning of most Indian families. A single trip to a theatre for a family of four can cost them most than annual subscription of three OTT apps. That's why, the youth (15-30 years), driven by social needs, have been the dominant target group for Hindi film consumption since the multiplex era started about two decades ago. But even with India's young population, the numbers are not sizeable.

So, is this a 'problem'? In what may almost seem like a contrarian view, I don't think so. If the Hindi film industry can come to terms with its premium positioning, they can go all out and target only the 20-30 million (2-3 crore) people who really matter, and leave the rest to consume the content at their homes. This will lead to sharpening of focus at various levels. For example, you do not actually need traditional media to target these audience, almost all of whom are active on digital platforms. Or the entire debate about ticket prices will become irrelevant, once you identify a target audience who is willing to pay a premium for their outdoor entertainment.

But that's not to say that the content needs to be 'elitist' too. Ormax Cine Sense (Hindi): 2023 reveals that SS Rajamouli, Rohit Shetty, Sanjay Leela Bhansali and Rajkumar Hirani are the top four favourite directors for these 20 million people. Escapism is still a dominant need that drives their decision to buy a movie ticket in the first place.

Outside South India, movies may be a 'mass' content form in India, but movie-going is certainly not. It's about time the industry gets comfortable with this idea.

*This article first appeared on the author's [column](#) in MxM India, in April 2023*