



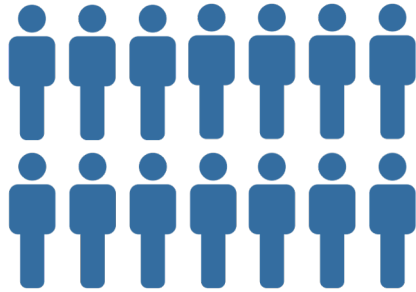
Sizing The Cinema

An Ormax Media Report on India's Theatrical Audience Reach



ORMAX
MEDIA

Research Design



Sample size: 5,600 (6+ yrs.)
Period of data collection: Jan-Mar 2020



Methodology: Computer Assisted
Telephonic Interviews (CATI)



All states & UTs except J&K and Ladakh
(Urban & Rural India coverage)

Demographic proportions applied as weights for
gender, age & market, based on Census 2011 &
National Commission of Population 2019 report

Executive Summary (1/2)



- An estimated 145.7 Million (14.6 Cr) Indians watched a movie in a theatre in the calendar year 2019, i.e., a theatrical penetration of 10.5%
- This universe contributed to 1030 Million footfalls in 2019, i.e., an average 7.1 films per capita per annum (across languages)
- Urban India contributes 31% to India's population but 58% to the theatrical universe
- Theatrical penetration reduces with town size, being the highest in the six metros at 37.3% and the lowest in Rural India at only 6.5%
- South India is easily the most-penetrated zone, at 21.8%. As a result, it contributes 44% to the theatrical universe, more than twice its contribution to India's population at 21%

Executive Summary (2/2)



- 52% male population of India contributes 61% to the theatrical universe. The contribution of males to the Urban theatrical universe stands at 56%, vis-à-vis 67% for the Rural theatrical universe
- Median age of a theatre-goer in India is 27.5 years. While the 15-30 yrs. age group has higher penetration, the contribution of the 41+ yrs. age group is sizeable at 26%, because of their high (31%) proportion in the population
- Hindi (51%), Telugu (21%), Tamil (19%) and Hollywood (15% across languages) are the top 4 languages in which films are watched in theatres in India
- An average Indian theatre-goer watches films in 1.4 languages, with Kerala (1.7) and Maharashtra (1.6) showing the highest multi-language incidence

Theatrical Audience Universe

Sizing The Cinema

An Ormax Media Report on India's Theatrical Audience Reach



ORMAX
MEDIA

India's Theatrical Audience Universe



Definition: Number of people in India who watched at least one film (any language) in a theatre in the last one year

145,733,139

145.7 MM
14.6 Cr



Theatrical Universe by Geography

Sizing The Cinema

An Ormax Media Report on India's Theatrical Audience Reach

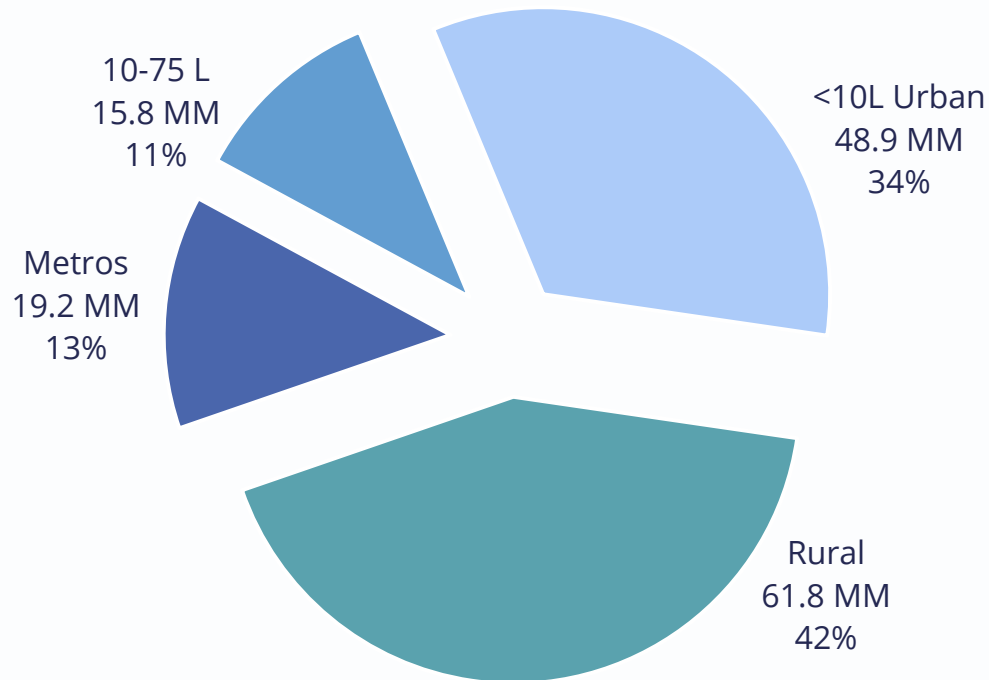


ORMAX
MEDIA

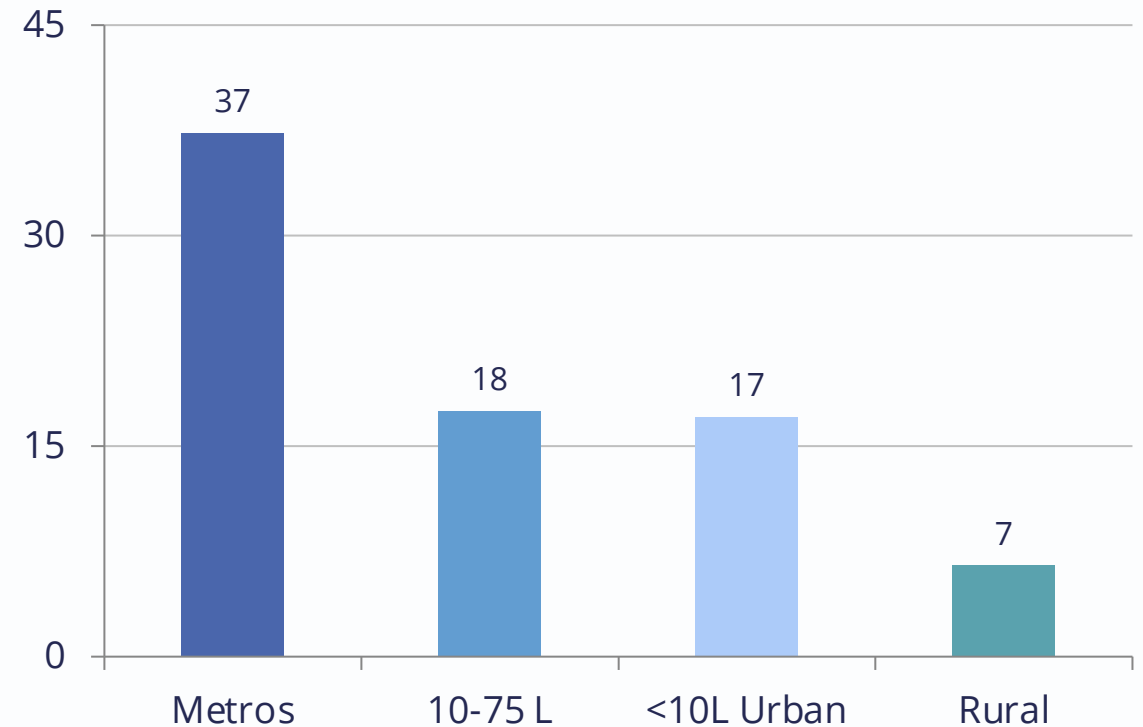
Theatrical Universe by Pop Strata



Universe Size (MM) & Contribution %



Penetration %



Despite low penetration, rural India and small towns contribute to a sizeable 76% audience because of their vast population. Contribution to BO will, however, be significantly lower because of lower ATP and viewing incidence. Also, rural audience may often watch films in neighboring towns.

Theatrical Universe by Pop Strata



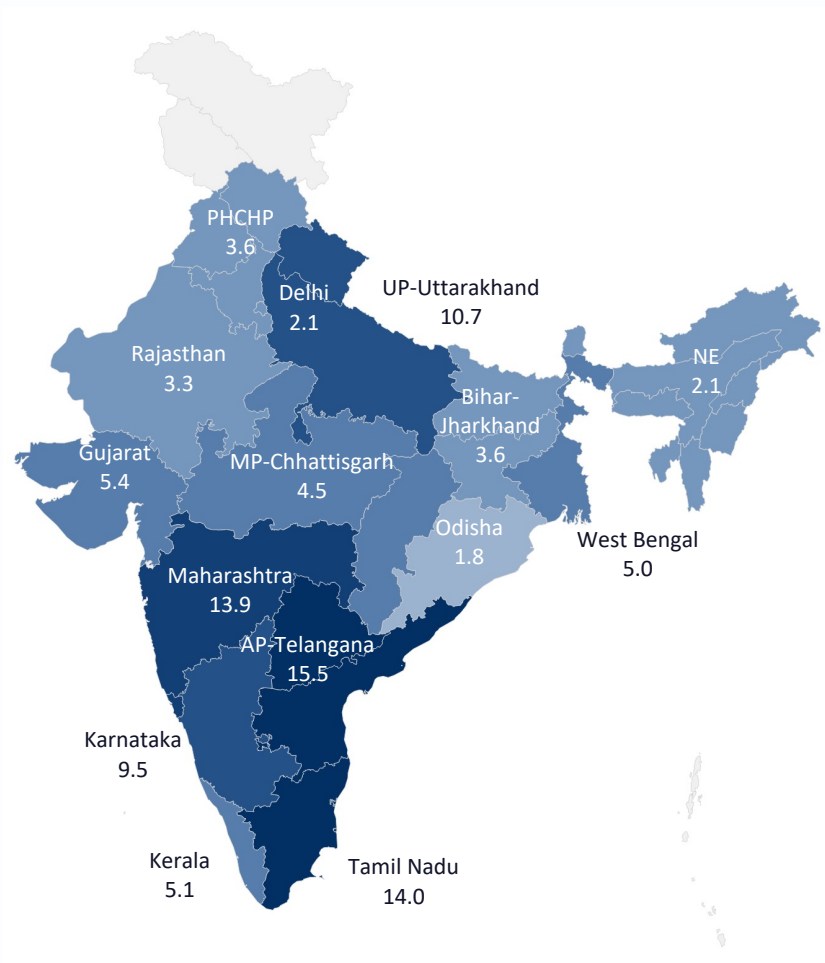
Pop Strata	Population (2020 Estimate* in MM)	Theatre Goers (MM)	% Penetration	% Contribution
Metros	51.5	19.2	37.3	13.2
10-75 L	90.4	15.8	17.5	10.8
<10L Urban	285.3	48.9	17.1	33.6
Rural	954.7	61.8	6.5	42.4
Total	1381.8	145.7	10.5	100.0

*Based on Census 2011 & National Commission of Population 2019 report

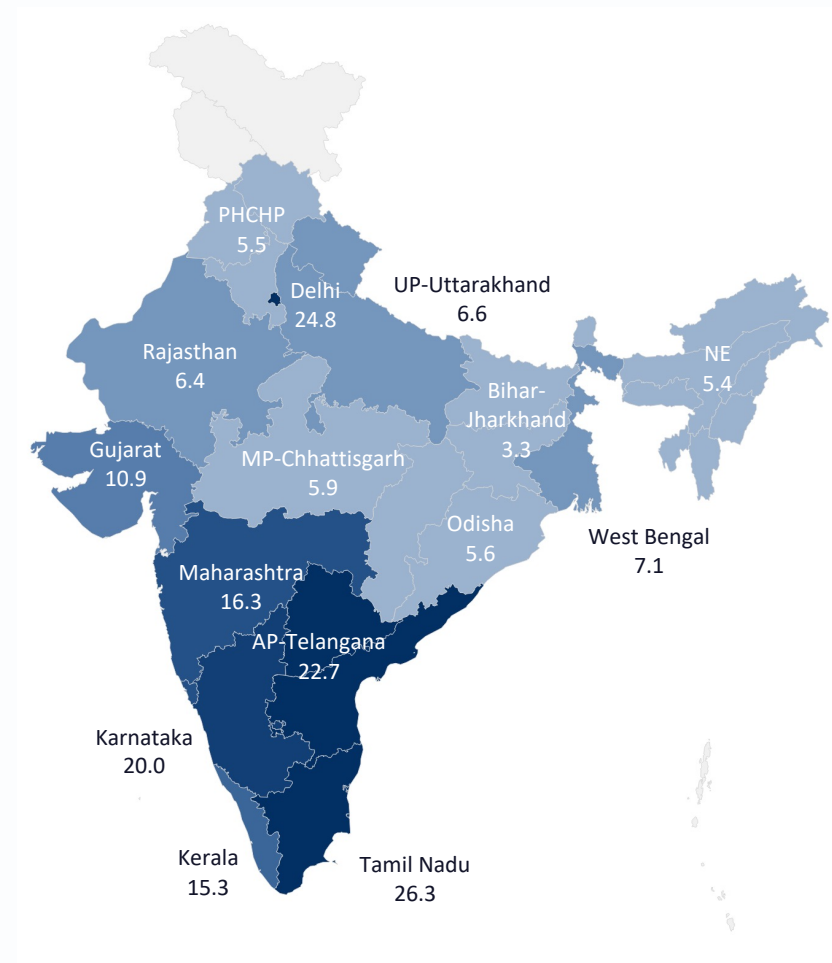
Theatrical Universe by State: Summary



% Contribution to Universe



Penetration (% of State Population)



Theatrical Universe: South India



State	Population (2020 Estimate in MM)	Theatre Goers (MM)	% Penetration	% Contribution (to All India)
AP-Telangana	99.0	22.5	22.7	15.5
Tamil Nadu	78.0	20.5	26.3	14.0
Karnataka	69.4	13.9	20.0	9.5
Kerala	48.5	7.4	15.3	5.1
Total	294.9	64.3	21.8	44.1

South India contributes only 21.3% to India's population, but its contribution to the theatrical universe is more than double of that at 44.1%. Higher theatrical penetration (21.% vs. the national average of 10.5%), driven by higher screen penetration and a strongly-entrenched movie-going culture, leads to this skew.

Theatrical Universe: West India



State	Population (2020 Estimate in MM)	Theatre Goers (MM)	% Penetration	% Contribution (to All India)
Maharashtra*	124.7	20.3	16.3	13.9
Gujarat	71.4	7.8	10.9	5.4
Total	196.1	28.1	14.3	19.3

*Includes Goa

The two Western states have higher penetration and contribution compared to North, East & Central India. Maharashtra is the most-penetrated theatrical state outside South India and Delhi.

Theatrical Universe: North India



State	Population (2020 Estimate in MM)	Theatre Goers (MM)	% Penetration	% Contribution (to All India)
UP-Uttarakhand	237.0	15.6	6.6	10.7
Punjab-Haryana-Himachal Pradesh	96.6	5.3	5.5	3.6
Delhi	12.5	3.1	24.8	2.1
Total	346.1	24.0	6.9	16.4

While the metro state of Delhi has the second-highest theatrical penetration in India after Tamil Nadu, the rest of North India is particularly poor on theatrical penetration. As a result, UP-Uttarakhand contributes only 10.7% to the theatrical universe, despite its much-higher population contribution at 17.2%.

Theatrical Universe: East India



State	Population (2020 Estimate in MM)	Theatre Goers (MM)	% Penetration	% Contribution (to All India)
West Bengal	102.8	7.3	7.1	5.0
Bihar-Jharkhand	155.4	5.2	3.3	3.6
North-East	54.1	2.9	5.4	2.1
Odisha	45.0	2.5	5.6	1.8
Total	357.3	17.9	5.0	12.5

Bihar-Jharkhand emerges as the poorest in terms of theatrical penetration, with only 3 in 100 people having visited a theatre in the last one year. Kolkata's 26% penetration is at par with Mumbai (30%) & Delhi (25%), but significantly lower than that of the South metros (Hyderabad 54%, Chennai 50% & Bengaluru 47%). Rest of West Bengal, however, is poor at just 6% penetration.

Theatrical Universe: Central India



State	Population (2020 Estimate in MM)	Theatre Goers (MM)	% Penetration	% Contribution (to All India)
MP-Chhattisgarh	111.0	6.6	5.9	4.5
Rajasthan	76.5	4.9	6.4	3.3
Total	187.5	11.5	6.1	7.8

Central India states mirror the poor penetration levels of the Hindi heartland states. Hence, this zone contributes only 7.8% to the universe, significantly lesser than its 13.6% population contribution.

Theatrical Universe by Film Territories



Territory	Theatre Goers (MM)	% Contribution	Territory	Theatre Goers (MM)	% Contribution
Nizam-Andhra	28.5	19.6	East Punjab	5.3	3.6
TN-Kerala	27.9	19.1	Bihar-Jharkhand	5.2	3.6
UP (part of Delhi-UP)	15.6	10.7	Rajasthan	4.9	3.4
Mysore	11.2	7.7	Mumbai City (part of Mumbai)	3.7	2.5
CP Berar	9.0	6.2	CI	3.6	2.5
Gujarat (part of Mumbai)	7.8	5.4	Delhi City (part of Delhi-UP)	3.1	2.1
West Bengal	7.3	5.0	Assam	2.9	2.0
Maha. Rest (part of Mumbai)	7.2	4.9	Orissa	2.5	1.7

Theatrical Universe by Gender & Age

Sizing The Cinema

An Ormax Media Report on India's Theatrical Audience Reach



ORMAX
MEDIA

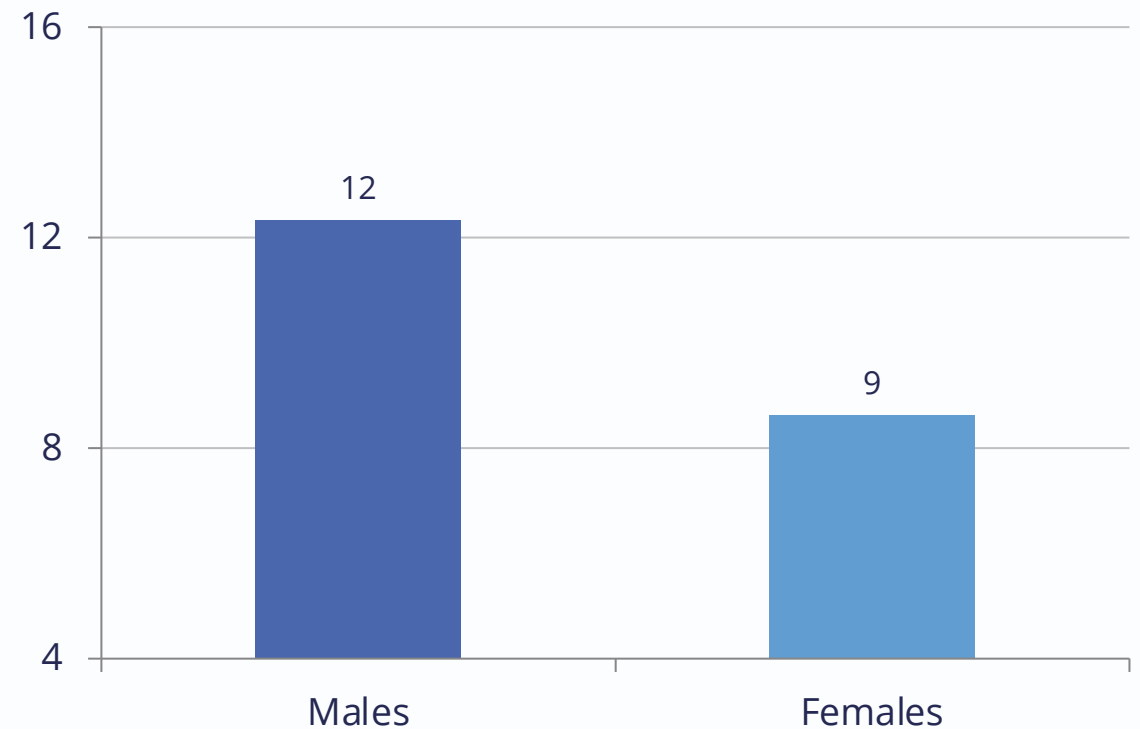
Theatrical Universe by Gender



Universe Size (MM) & Contribution %



Penetration %

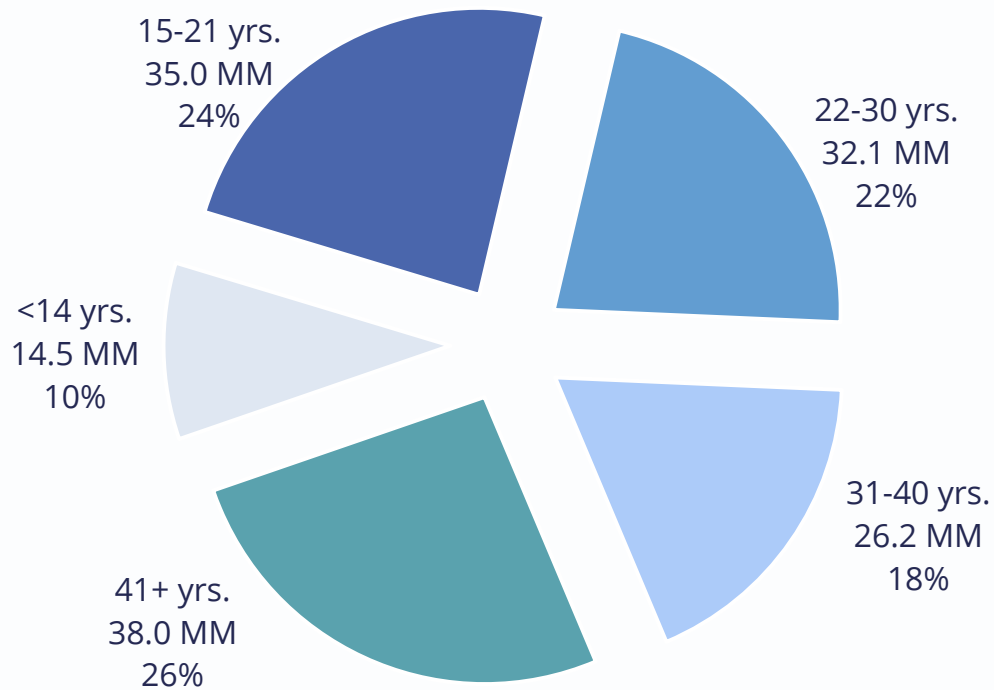


61% of theatrical universe comes from the 52% male population of the country. The contribution of males to the Urban theatrical universe stands at 56%, vis-à-vis 67% for the Rural theatrical universe.

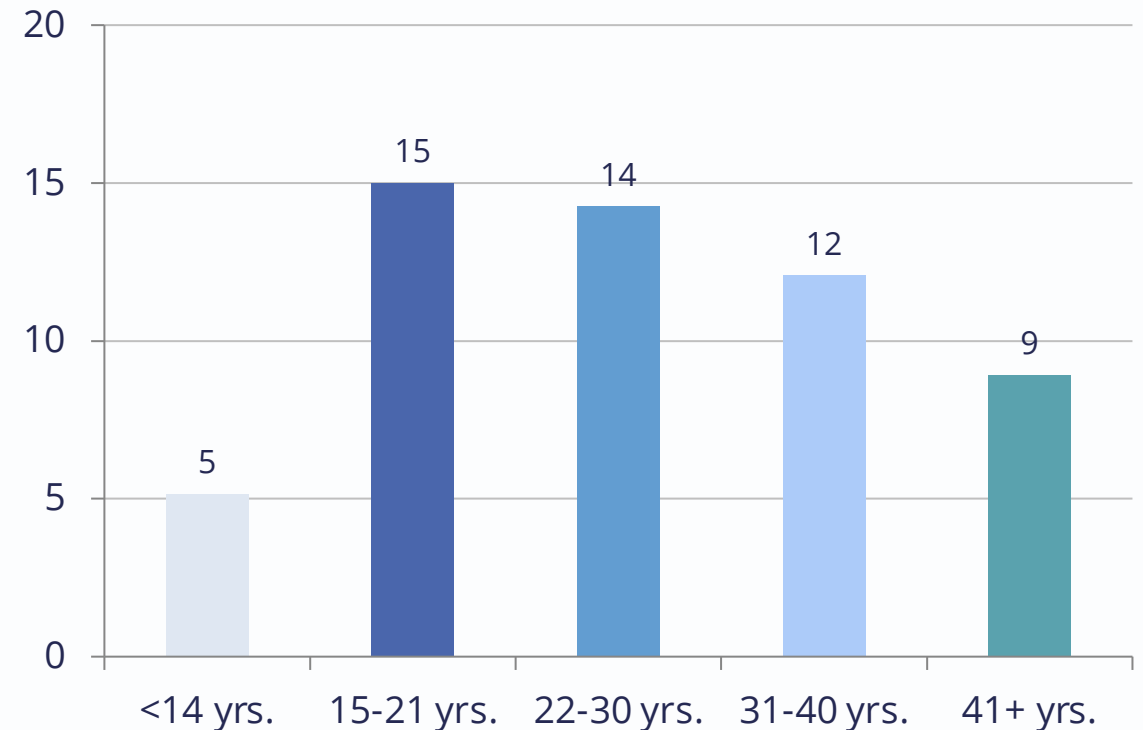
Theatrical Universe by Age



Universe Size (MM) & Contribution %



Penetration %

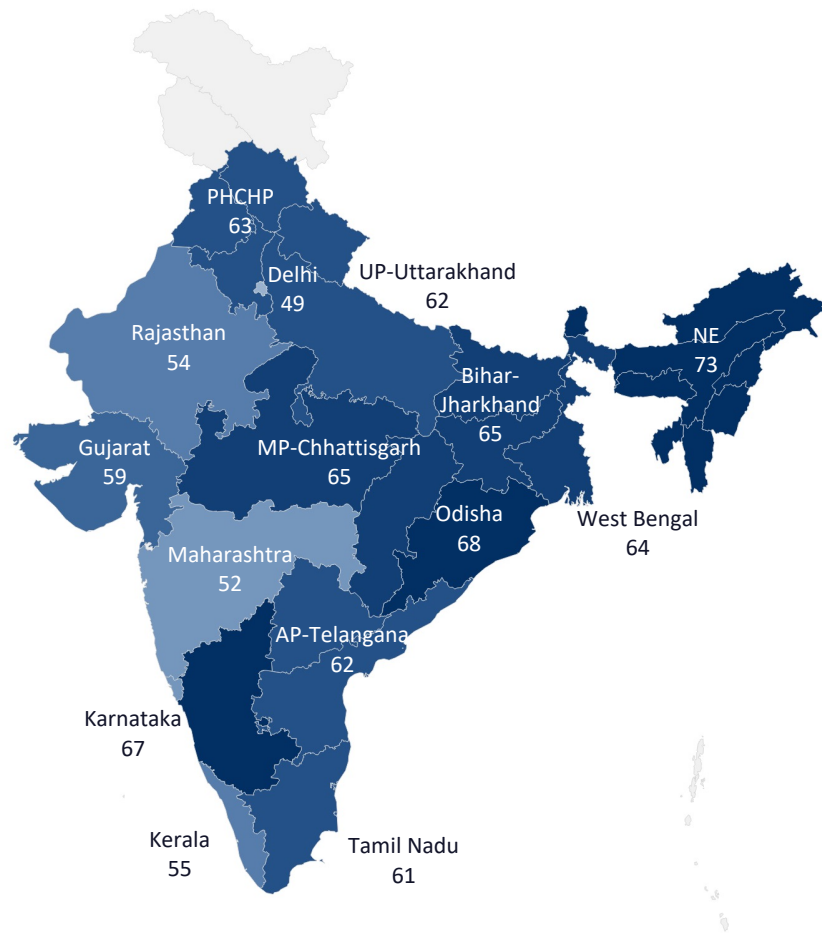


Median age of a theatre-goer in India is 27.5 years. The penetration peaks in the 15-30 yrs. age group. However, the contribution of the 41+ yrs. age group is sizeable at 26%, because of their high (31%) proportion in the population.

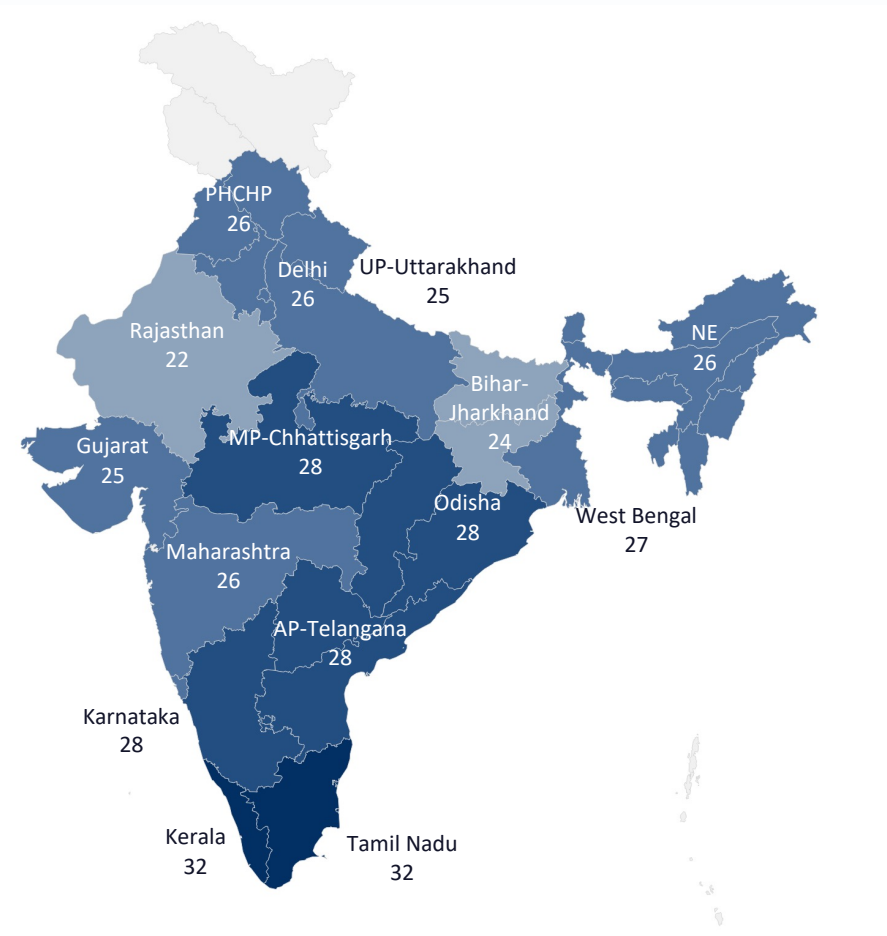
Gender Proportion & Median Age by State



% Males



Median Age (Years)



Theatrical Universe by Language

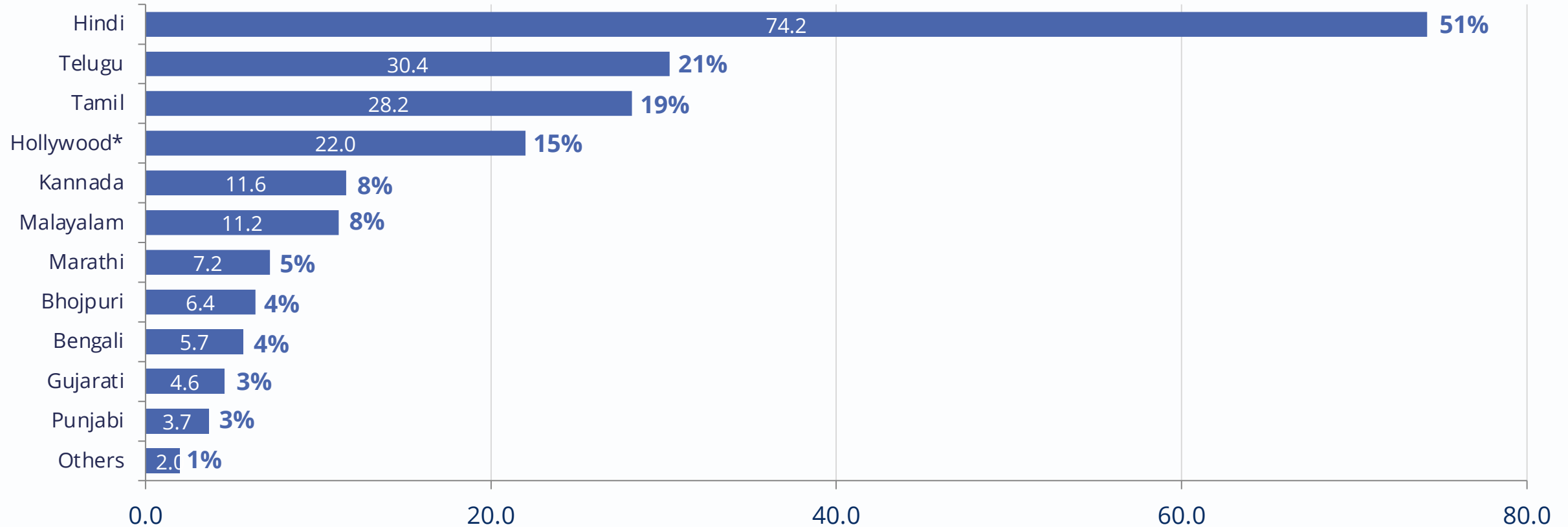
Sizing The Cinema

An Ormax Media Report on India's Theatrical Audience Reach



ORMAX
MEDIA

Theatrical Universe (Size in MM & Contribution %) by Language



Hollywood universe includes viewers of all language versions

An average Indian theatre-goer watches films in 1.4 languages, with Kerala (1.7) and Maharashtra (1.6) showing the highest multi-language incidence.

Theatrical Universe vs. Footfalls

Top Languages



Language	Theatrical Universe (MM)	2019 Footfalls* (MM)	Avg. number of films watched pr annum
All (Unduplicated)	145.7	1029.5	7.1
Hindi	74.2	341.1	4.6
Telugu	30.4	182.3	6.0
Tamil	28.2	193.9	6.9
Hollywood	22.0	98.4	4.5
Kannada	11.6	72.6	6.3
Malayalam	11.2	81.8	7.3

*Ormax Box Office Report 2019

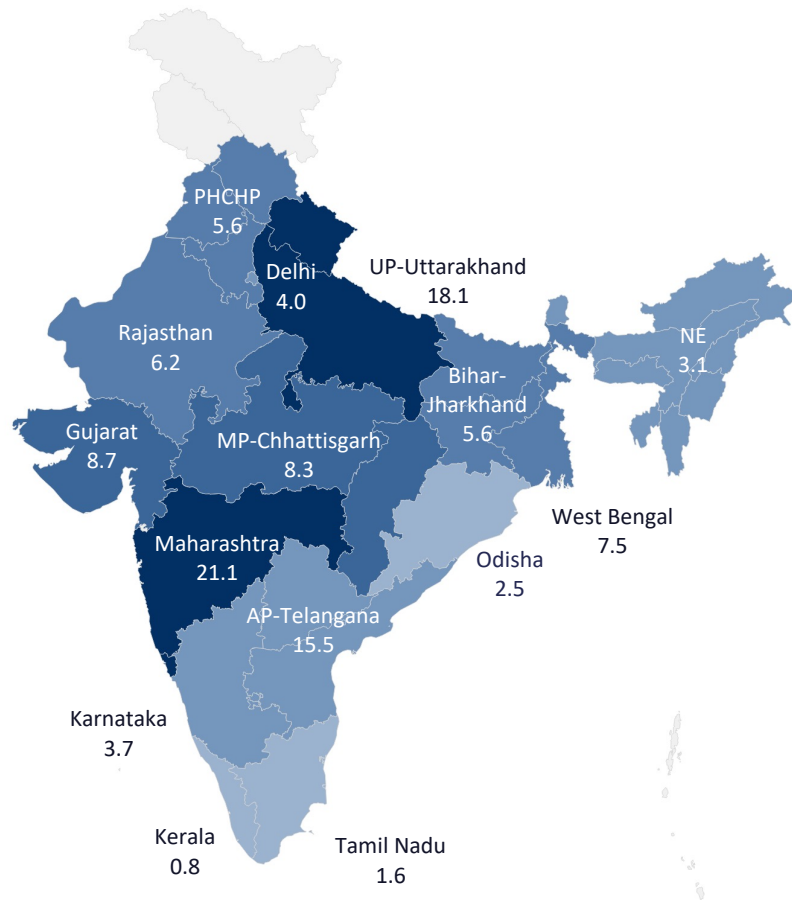
Per capita average consumption in a year is higher for South languages than for Hindi or Hollywood. All other languages except Punjabi score low on per capita consumption (<2.5 films per year), indicating that they are secondary languages of consumption for their respective audience bases.

Hindi Theatrical Audience by States

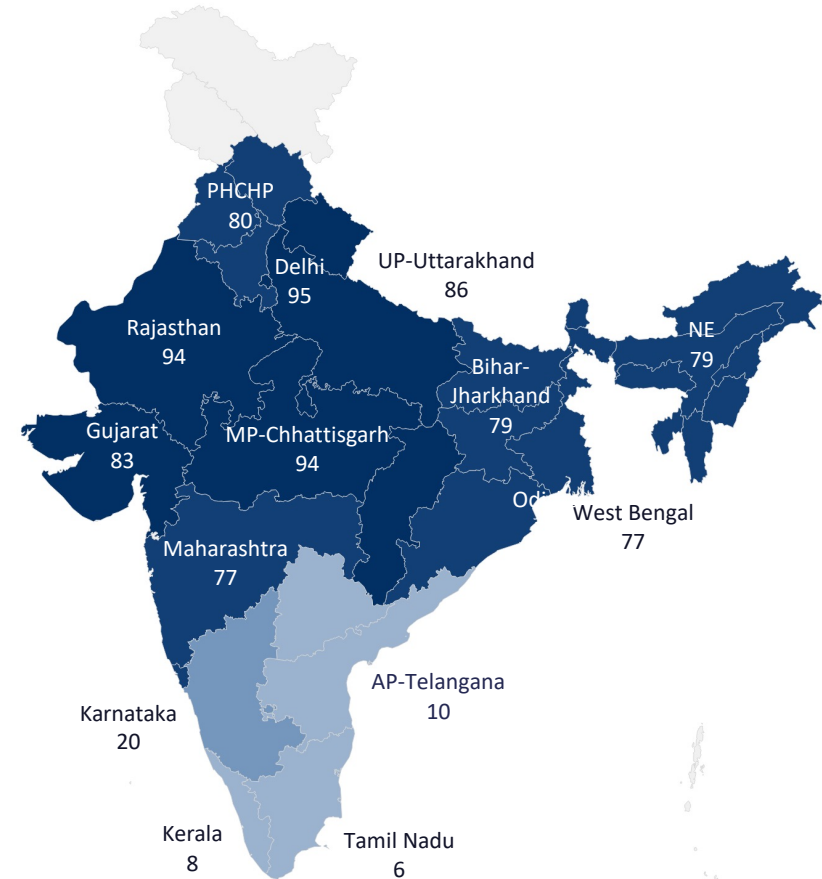
Base: 74.2 MM Audience



% Contribution to Hindi Universe



Hindi Penetration (% of Total Theatrical Universe of the State)



Hindi Theatrical Universe by Film Territories



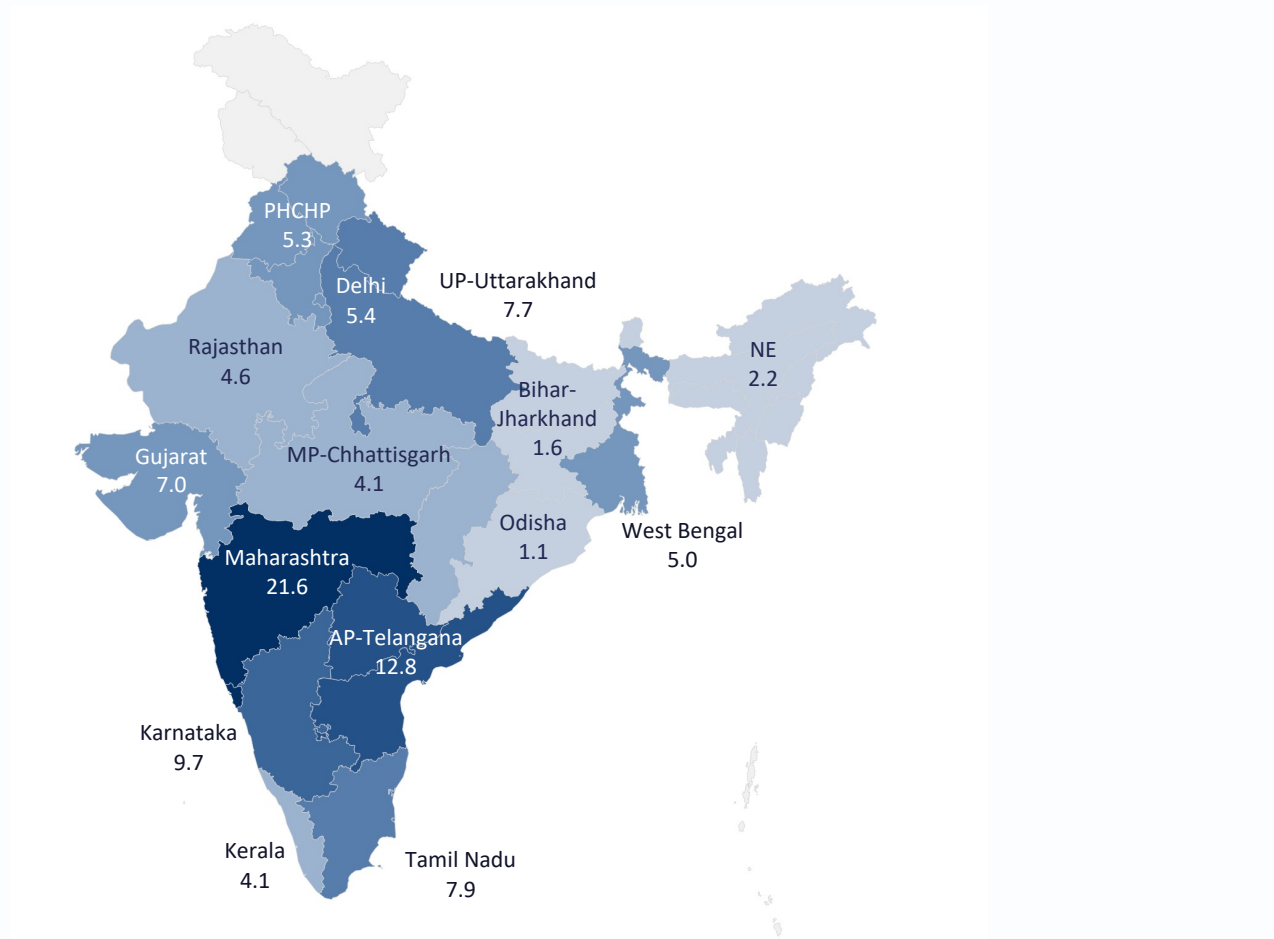
Territory	Hindi Theatre Goers (MM)	% Contribution	Territory	Hindi Theatre Goers (MM)	% Contribution
UP (part of Delhi-UP)	13.4	17.8	East Punjab	4.2	5.7
Gujarat (part of Mumbai)	6.5	8.8	Bihar-Jharkhand	4.2	5.7
Maha. Rest (part of Mumbai)	5.8	7.8	Mumbai City (part of Mumbai)	3.3	4.5
CP Berar	5.6	7.5	Delhi City (part of Delhi-UP)	2.9	3.9
West Bengal	5.6	7.5	Mysore	2.3	3.1
CI	5.0	6.7	Assam	2.3	3.1
Nizam-Andhra	4.8	6.5	Orissa	1.9	2.6
Rajasthan	4.6	6.2	TN-Kerala	1.8	2.4

Hollywood Theatrical Audience by States

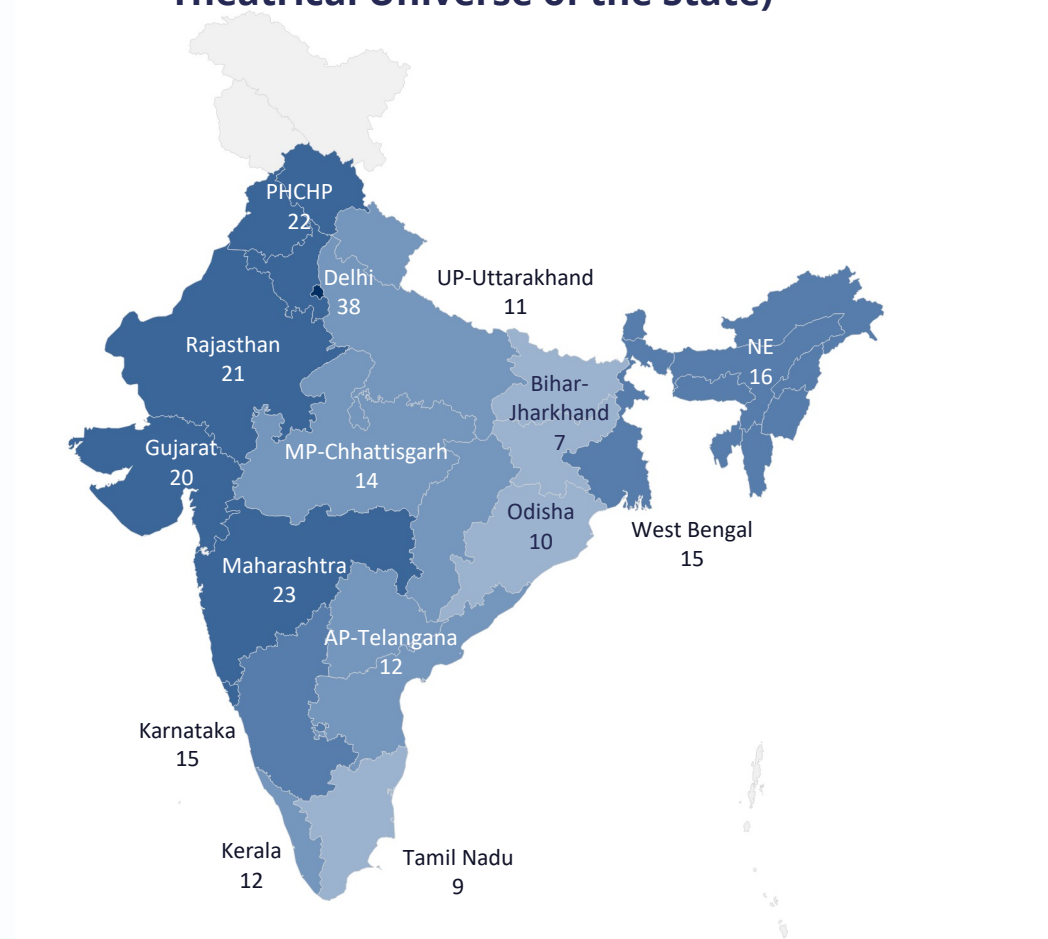
Base: 22.0 MM Audience



% Contribution to Hollywood Universe



Hollywood Penetration (% of Total Theatrical Universe of the State)



Hollywood Theatrical Universe by Film Territories



Territory	Hollywood Theatre Goers (MM)	% Contribution	Territory	Hollywood Theatre Goers (MM)	% Contribution
Nizam-Andhra	3.6	16.4	East Punjab	1.2	5.5
TN-Kerala	2.7	12.3	West Bengal	1.1	5.0
Maha. Rest (part of Mumbai)	2.1	9.5	Rajasthan	1.0	4.5
Mysore	1.7	7.7	CP Berar	0.8	3.6
UP (part of Delhi-UP)	1.7	7.7	CI	0.8	3.6
Mumbai City (part of Mumbai)	1.6	7.3	Assam	0.5	2.3
Gujarat (part of Mumbai)	1.5	6.8	Bihar-Jharkhand	0.3	1.4
Delhi City (part of Delhi-UP)	1.2	5.5	Orissa	0.2	0.9

Language Profile: Southern States

% Theatre Goers in Each Language



State	Telugu	Tamil	Kannada	Malayalam	Hindi	Hollywood
AP-Telangana	98	9	3	3	10	12
Tamil Nadu	14	96	6	14	6	9
Karnataka	21	16	69	5	20	15
Kerala	12	41	2	94	8	12

In AP-Telangana, Tamil Nadu & Kerala, the native language is the dominant language with 94%+ theatre goers watching films in that language. However, this is not the case with Karnataka, where only 69% theatre-goers watch Kannada films. Tamil is a strong second language in Kerala.

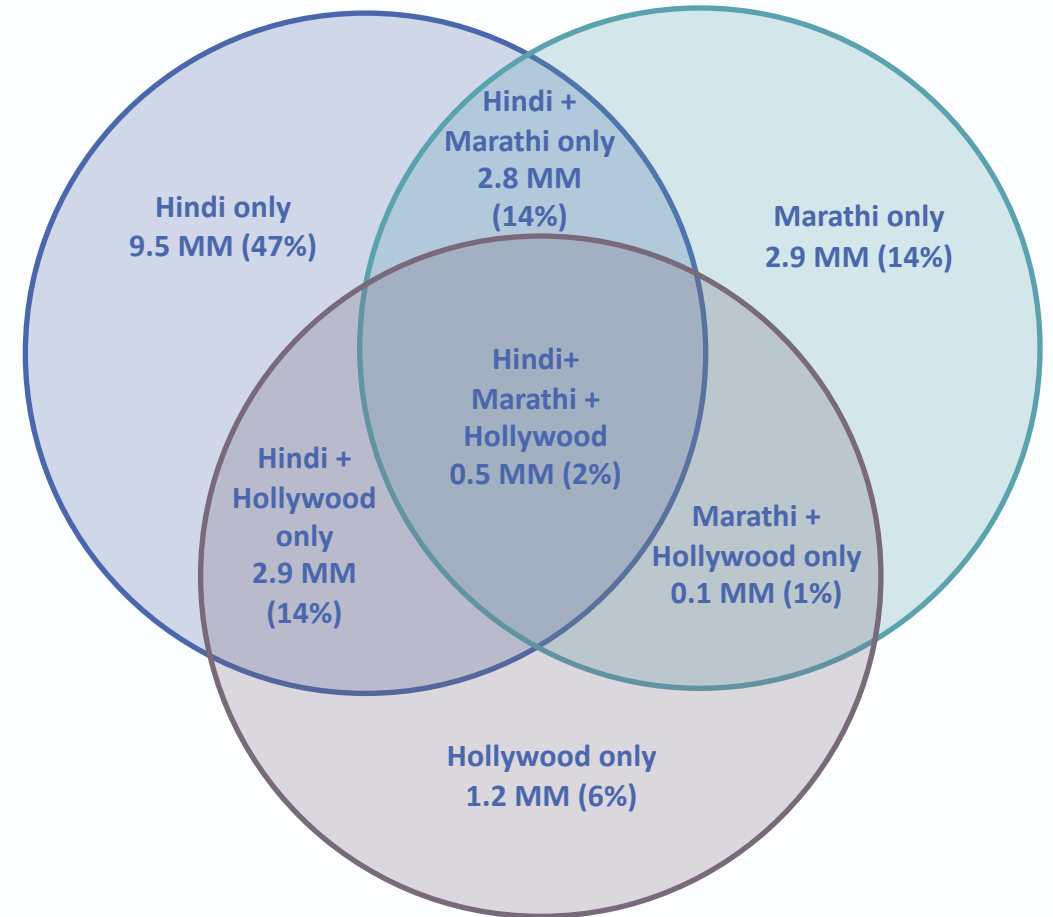
Language Profile: Maharashtra

Base: 20.3 MM Audience



Language	Theatre Goers (MM)	% of Total Theatre Goers in Maharashtra
Hindi	15.7	77
Marathi	6.3	31
Hollywood	4.7	23
Telugu	2.4	12
Gujarati	1.8	9
Tamil	1.2	6
Others	0.6	3

98% Maharashtra theatre-goers watch films in at least one of the three languages: Hindi, Marathi & Hollywood.



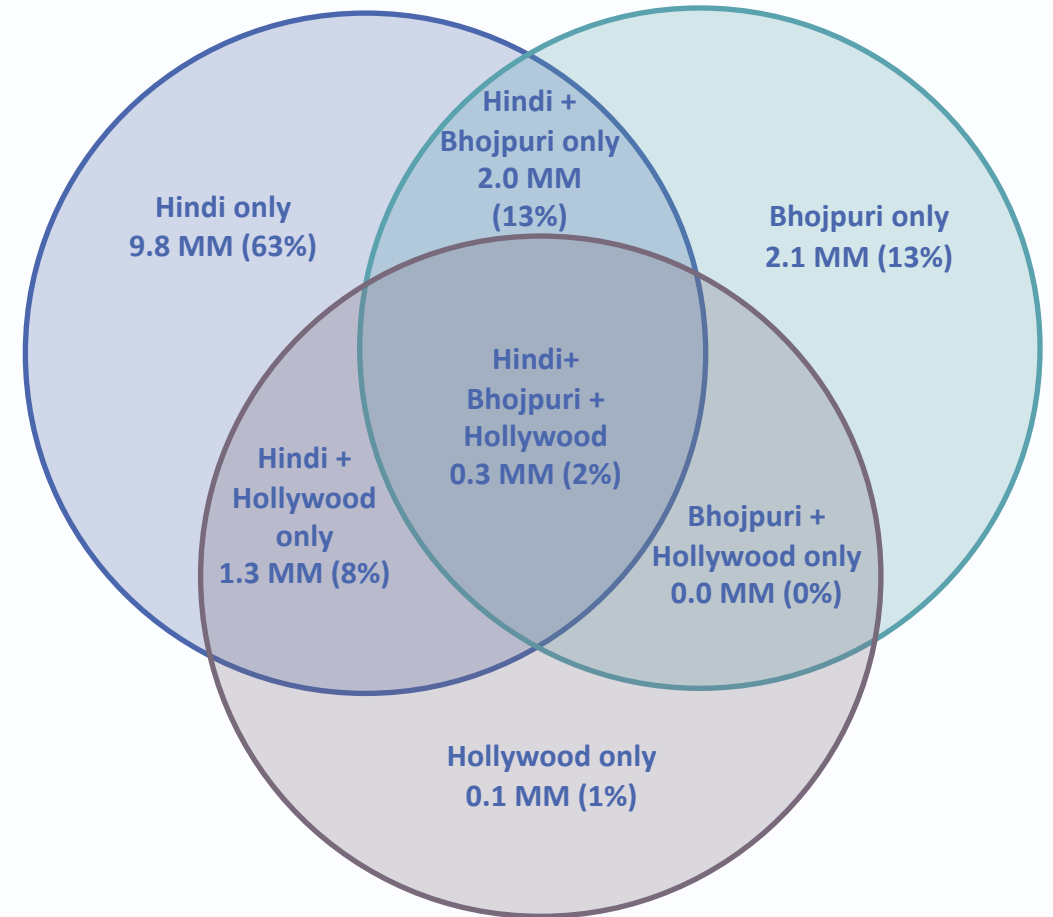
Language Profile: UP-Uttarakhand

Base: 15.6 MM Audience



Language	Theatre Goers (MM)	% of Total Theatre Goers in UP-Uttarakhand
Hindi	13.4	86
Bhojpuri	4.4	28
Hollywood	1.7	11

While Bhojpuri language has stronger presence in Eastern UP, the UP-Uttarakhand cluster, as a whole, is dominated by Hindi, with 63% Hindi-only theatre-goers.



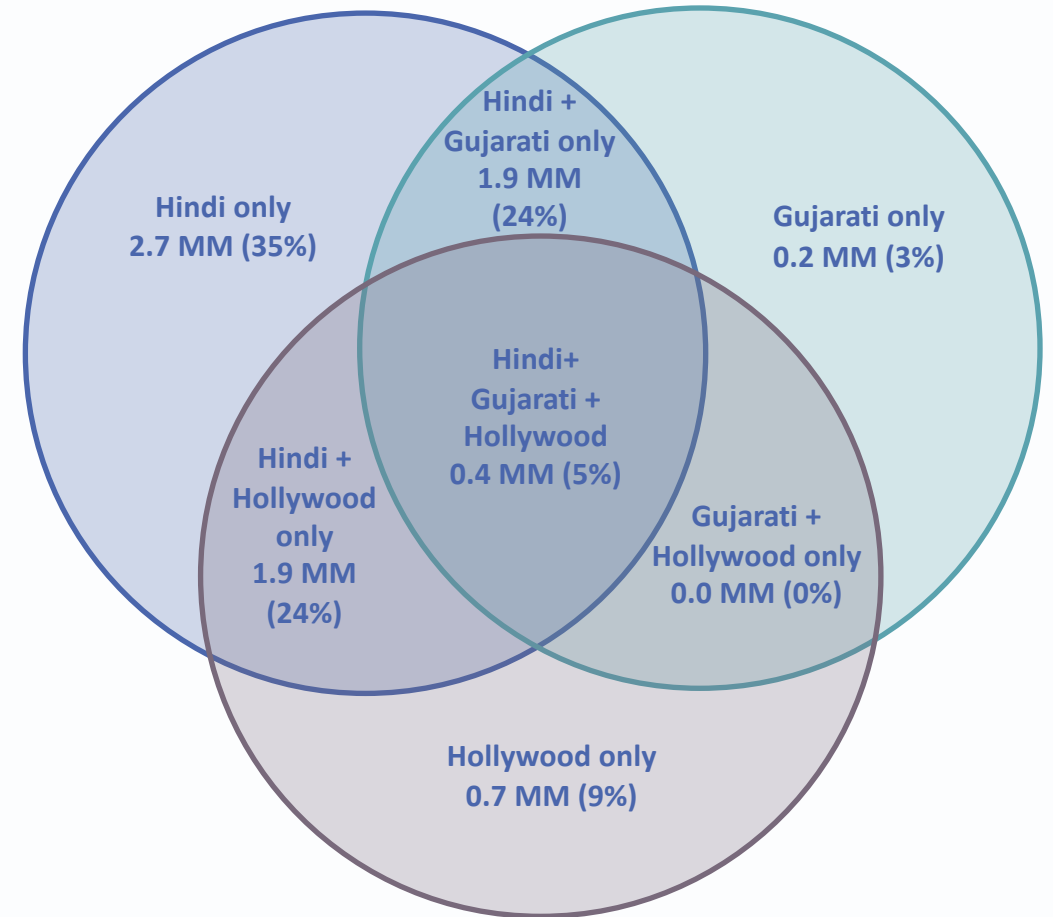
Language Profile: Gujarat

Base: 7.8 MM Audience



Language	Theatre Goers (MM)	% of Total Theatre Goers in Gujarat
Hindi	6.5	83
Gujarati	2.7	35
Hollywood	1.5	20
Marathi	0.5	6

60% Gujarati theatre-goers are from the state of Gujarat, while the remaining 40% hail from Maharashtra. Gujarati is clearly the second or third language of choice, with only 3% exclusive audience base.



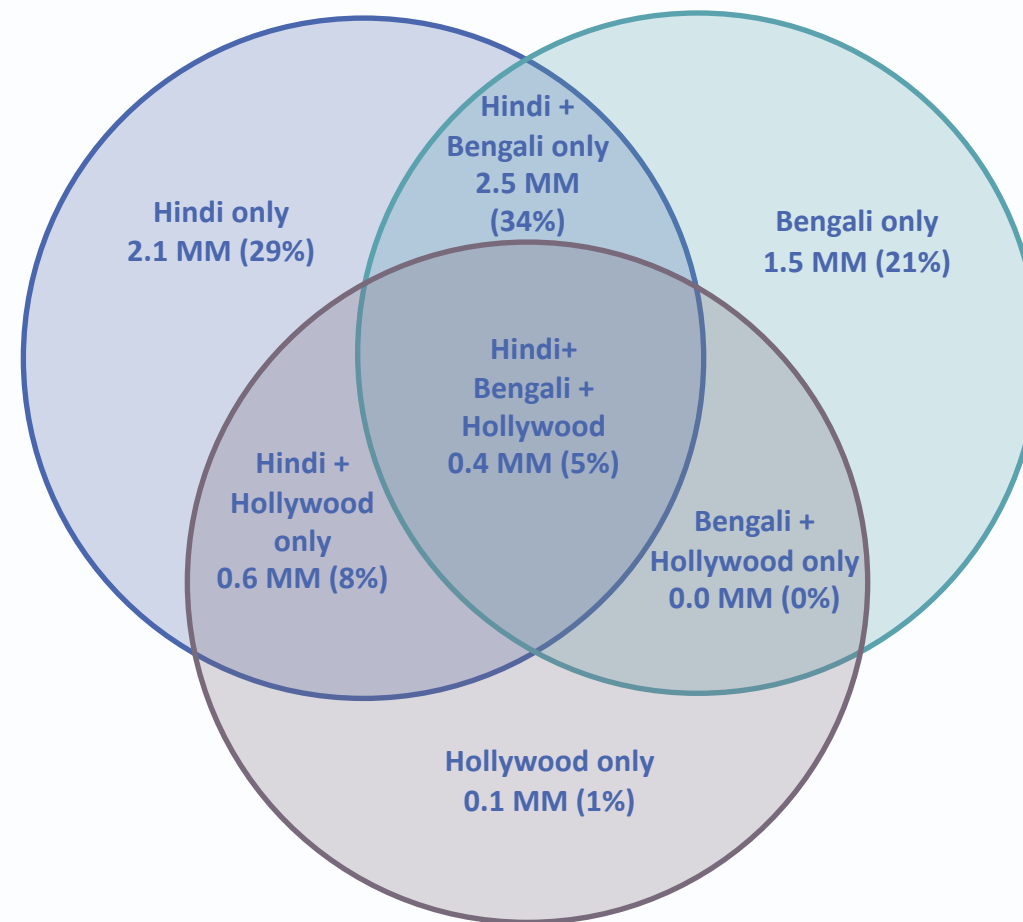
Language Profile: West Bengal

Base: 7.3 MM Audience



Language	Theatre Goers (MM)	% of Total Theatre Goers in WB
Hindi	5.6	77
Bengali	4.4	60
Hollywood	1.1	15
Others	0.1	1

West Bengal emerges as a state with two strong languages in Hindi & Bengali, which also show high duplication, with 39% visiting theatres for films in both these languages, compared to just 16% for Hindi & Marathi in Maharashtra.



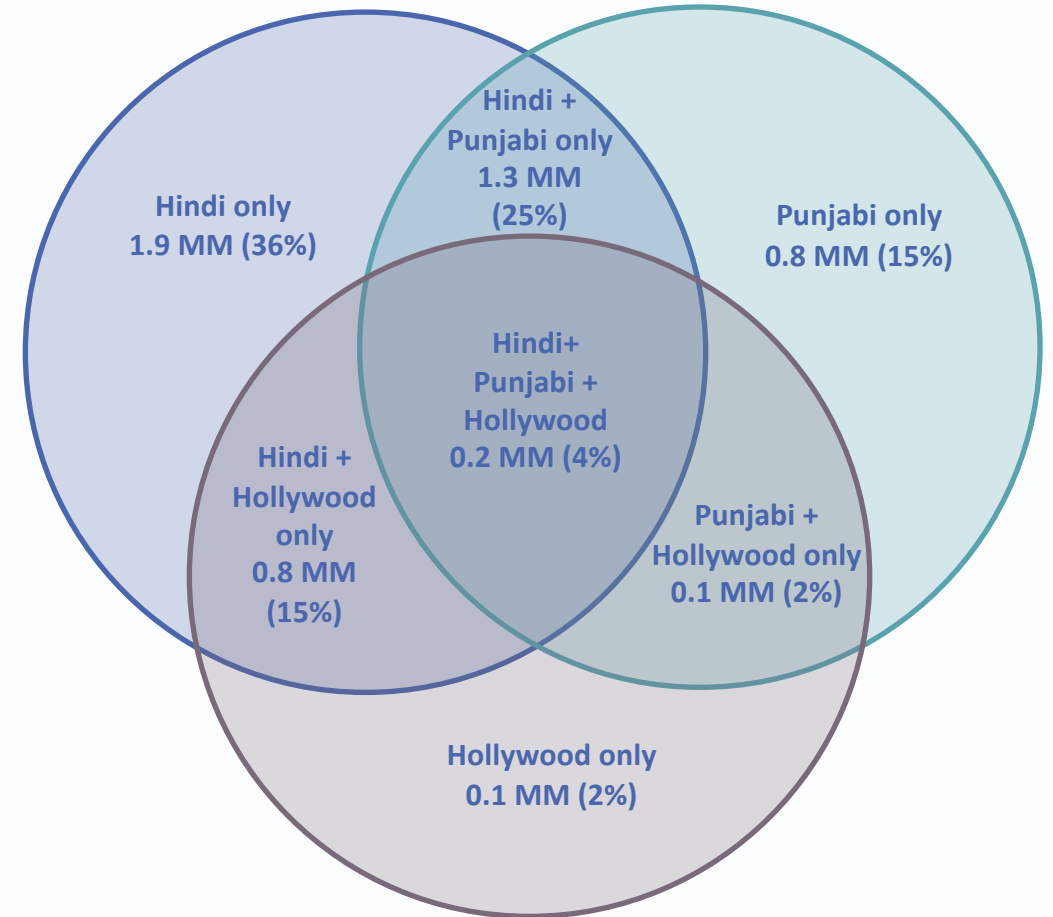
Language Profile: PHCHP

Base: 5.3 MM Audience



Language	Theatre Goers (MM)	% of Total Theatre Goers in PHCHP
Hindi	4.2	80
Punjabi	2.4	46
Hollywood	1.2	22
Others	0.1	1

Hollywood's prominent presence in this market is driven by the cities of Gurgaon, Chandigarh & Faridabad. 66% of theatre-goers in Punjab state watch Punjabi films, but the overall average is brought down by Haryana & HP.



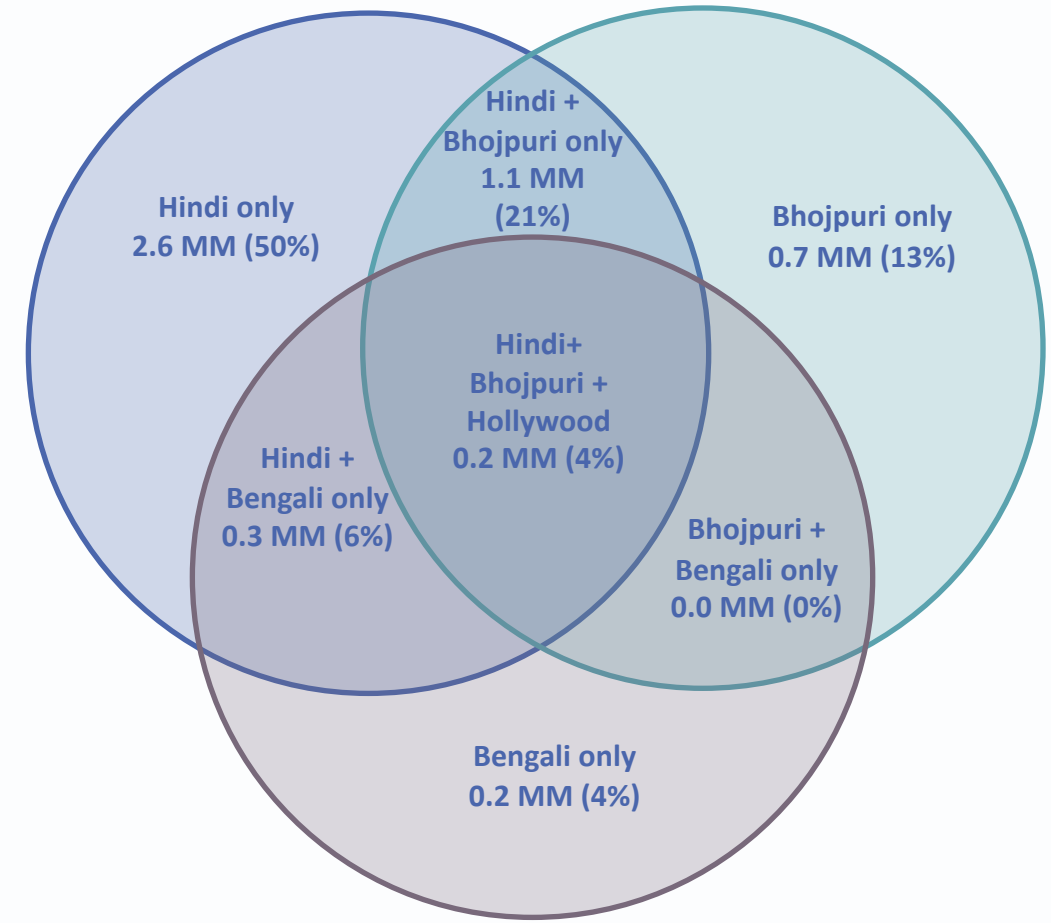
Language Profile: Bihar-Jharkhand

Base: 5.2 MM Audience



Language	Theatre Goers (MM)	% of Total Theatre Goers in Bihar-Jharkhand
Hindi	4.2	79
Bhojpuri	2.0	38
Bengali	0.7	13
Hollywood	0.3	7
Others	0.1	1

Hollywood has marginalized presence in the Bihar-Jharkhand market, accounting for only 7% (0.3 MM) of the total audience. This is the only market outside South India where Hollywood is not in the top 3 languages.



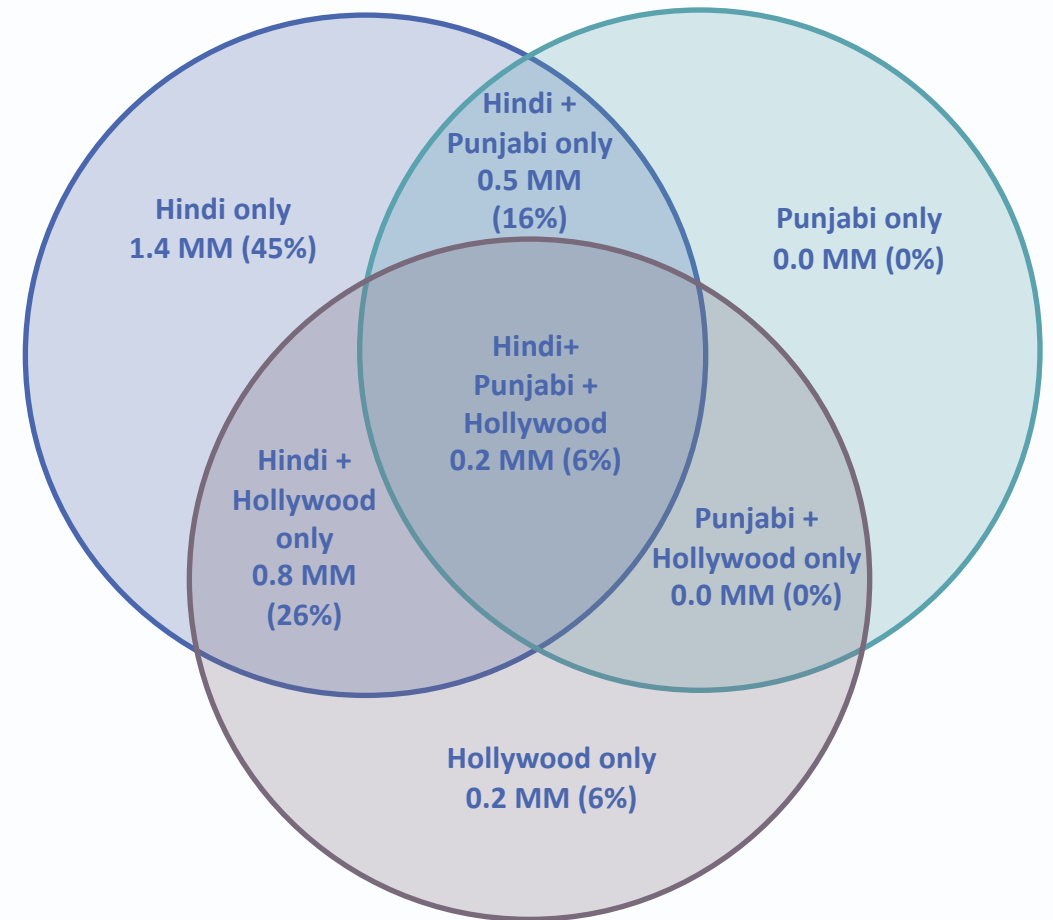
Language Profile: Delhi

Base: 3.1 MM Audience



Language	Theatre Goers (MM)	% of Total Theatre Goers in Delhi
Hindi	2.9	95
Hollywood	1.2	38
Punjabi	0.7	21
Others	0.0	1

With 95% Delhi audience watching Hindi films, there is no exclusive Punjabi audience and minimal (0.2 MM) exclusive Hollywood audience in the capital city.





@OrmaxMedia

Sizing The Cinema

An Ormax Media Report on India's Theatrical Audience Reach

