

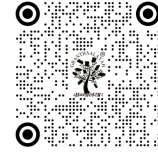
Original Article

THEATRICAL VIEWING VS. DIGITAL ALTERNATIVES: A COMPARATIVE STUDY OF CINEMA-GOING PATTERNS, AUDIENCE PREFERENCES, CONSUMPTION HABITS, AND FILM VIEWER EXPERIENCE IN KERALA

Neeraj V. R. ^{1*}, Renjith R. ²

¹ MA JMC Student, Department of Visual Media and Communication, School of Arts, Humanities and Commerce, Amrita Vishwa Vidyapeetham, Kochi Campus, Kerala, India

² Assistant Professor, Department of Visual Media and Communication, School of Arts, Humanities and Commerce, Amrita Vishwa Vidyapeetham, Kochi Campus, Kerala, India



ABSTRACT

The relationship between audience and cinema in Kerala is undergoing its most consequential transformation in the medium's history. What was once a singular, communal social ritual anchored in the physical space of the film theatre has fragmented into a layered landscape of competing platforms, each offering a different version of the same piece of cinema at a different price. This study examines that fragmentation, mapping the specific economic, experiential, and psychological factors that shape how the 18 to 40 demographic in Kerala decides where and how to watch a film.

The research is structured around four primary objectives: evaluating the role of technical fidelity in theatrical satisfaction; determining the economic thresholds governing cinema attendance; investigating whether service deficits in legal platforms are a stronger driver of piracy than financial cost; and examining the moral perception of unauthorized content consumption among digital natives. Data was collected through a structured quantitative survey administered to 143 respondents across Kerala, with responses drawn from urban, semi-urban, and rural localities spanning eleven of the state's fourteen districts.

The findings challenge several assumptions that dominate industry discourse. Technical quality emerges as the primary anchor of theatrical satisfaction, with 67.9% of respondents rating it as important or critical. Yet 84.6% simultaneously report dissatisfaction with the premium infrastructure in their immediate area, revealing a state of latent underservice. The study identifies a hard psychological price ceiling at Rs. 300, beyond which willingness to pay collapses to just 5.6% of the sample. Most significantly, financial cost accounts for only 15.4% of stated piracy motivations, while service failures account for 67.2%, establishing a four-to-one ratio between service failure and economic necessity as piracy drivers. The study concludes that piracy in Kerala is not a pricing problem but a legitimacy problem rooted in the industry's own structural failures.

Keywords: Cinema Consumption, OTT Platforms, Digital Piracy, Audience Behaviour, Theatrical Experience

INTRODUCTION

For over a century, the traditional cinema theatre functioned as the primary social and cultural site for cinematic consumption. Kerala, with its high literacy rates and deeply entrenched tradition of theatrical film appreciation, has historically maintained one of the most engaged cinema cultures in India. The local film industry depended on a strong network of single-screen and multiplex theatres, and that dependence went largely unchallenged until the intersection of broadband expansion, falling mobile data costs, and the global emergence of subscription streaming fundamentally restructured the media economy.

*Corresponding Author:

Email address: Neeraj V. R.

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The transition from theatrical dominance to a fragmented digital landscape did not happen instantaneously. Television introduced the first consistent alternative in the latter half of the twentieth century, establishing the home as a secondary site of cinematic consumption. Physical media formats, from VHS and VCD to DVD and Blu-ray, extended this domestic culture while sustaining a product-based market logic. Netflix's 2007 pivot from physical distribution to on-demand digital delivery marked the inflection point: cinema began transitioning from an object that a person could own into a data-driven service that a person could only access.

By 2026, this transition has reached a critical juncture in Kerala. The rapid spread of 5G infrastructure and the wide availability of digital alternatives have fundamentally altered how audiences consume cinema. Simultaneously, the theatrical sector has raised prices and concentrated premium infrastructure in a handful of urban centres, while the streaming sector has progressively dismantled its own convenience proposition through advertisement reintroduction, subscription fragmentation, and content exclusivity wars. The result is an audience that has not abandoned cinema but has abandoned a market that no longer competes on the audience's terms.

RESEARCH GAP

A review of existing literature reveals several critical voids that this research addresses within the specific context of Kerala. Global studies extensively cover the platformisation of media, but there is a significant lack of academic focus on how the cultural eventization of cinema in Kerala interacts with a rapidly growing digital-first population. Most existing research treats digital piracy as a purely legal or criminal issue, failing to examine it as a functional response to market fragmentation and consumer frustration. There is also insufficient scholarly data defining the specific maximum willingness to pay for the 18 to 40 age group in the regional context, and scholarly discourse on subscription fatigue has not been adequately applied to viewers navigating both global and niche local OTT platforms simultaneously.

RESEARCH OBJECTIVES

This study is structured around four primary research objectives:

- 1) To evaluate the functional experience of cinema across platforms by analysing how technical standards like resolution and audio fidelity influence viewer satisfaction.
- 2) To investigate whether the service deficit in legitimate platforms acts as a more significant trigger for piracy than the actual financial cost of content.
- 3) To determine the maximum willingness to pay for a theatrical experience and identify the price thresholds and hidden costs that lead to the abandonment of cinema visits.
- 4) To examine the moral perception of the audience regarding digital piracy and determine if ethical guilt influences consumption choices.

HYPOTHESES

The study tests four hypotheses:

(H1) The perceived technical superiority of a theatre is a stronger motivator for attendance than the ethical desire to support the film industry

(H2) A definitive psychological price ceiling exists beyond which theatrical attendance declines significantly regardless of film quality

(H3) The primary driver for digital piracy is not financial cost but the superior utility and absence of friction on unauthorized platforms

(H4) The perceived inconvenience of legal platforms successfully neutralizes the audience's moral guilt over piracy.

THEORETICAL FRAMEWORK

The study draws on four established theories. Uses and Gratifications Theory explains the active choices audiences make when selecting between theatrical and digital platforms, framing viewers as rational agents seeking specific need-satisfactions from each medium. Neutralization Theory accounts for the psychological mechanisms through which viewers engage in piracy without significant guilt, including denial of injury and denial of victim. Deterrence Theory examines why the near-zero certainty of legal consequence for end-user piracy renders anti-piracy legislation functionally irrelevant. The Theory of Planned Behaviour connects Kerala's high digital literacy to an elevated perceived behavioural control over accessing pirated content, strengthening the intention to pirate relative to the intention to pay.

LITERATURE REVIEW

The shift from physical cinema attendance to digital alternatives represents a major transformation in media sociology and audience behaviour. Historically, the movie theatre held a cultural and economic monopoly over film distribution, functioning as a vital communal ritual [Eichler \(2019\)](#). However, the rise of widespread high-speed internet and on-demand streaming networks has systematically transitioned cinema from an investment in physical ownership to an access-based digital utility [Deep \(2023\)](#).

In regional contexts like Kerala, which boasts a deeply embedded history of film appreciation and active film societies, this transition has created distinct market friction. Recent empirical scholarship highlights a sharp audience migration toward home screens, driven by daily convenience and the perceived cost-effectiveness of streaming ecosystems [Abhinand and Anuji \(2025\)](#). Conversely, physical movie theatres retain competitive value strictly through their sensory scale, relying heavily on advanced audio-visual environments to justify attendance [Fleming \(2014\)](#).

A significant debate exists regarding the decline of traditional moviegoing. While some industry scholars blame a collapse in audience etiquette and smartphone disruptions within the exhibition hall [Shoard \(2025\)](#), others argue the issue is structural, highlighting that technical presentation standards dictate consumer choice far more than narrative elements. However, existing regional studies often overlook the localized infrastructural gaps that exist outside central urban hubs, which actively underserve secondary tiers and weaken venue loyalty.

Furthermore, traditional media literature frequently views digital piracy as a fixed legal infraction caused purely by financial limitations. This perspective fails to address contemporary environments where piracy operates as a functional convenience utility. Recent research into digital native behaviours shows that systemic service failures—such as platform fragmentation, paywalls, and abrupt advertising friction on premium apps—serve as more powerful catalysts for unauthorized streaming than the direct cost of tickets or subscriptions [Hastings \(2026\)](#). High-literacy audiences consistently use internal cognitive frameworks to neutralize ethical guilt, balancing a macro-level awareness of industry harm against immediate personal convenience.

METHOD

RESEARCH DESIGN

This study employs a descriptive research design within a strictly quantitative framework. The descriptive approach was selected because it provides an accurate and detailed profile of the current media consumption landscape in Kerala, allowing for the measurement of audience attitudes and behavioural trends across a large sample without experimental interference. The quantitative framework converts human behaviour into measurable data, ensuring objective, replicable findings that can be generalized to the broader target demographic.

POPULATION AND STUDY AREA

The target population comprises active cinema consumers within the state of Kerala between the ages of 18 and 40. This demographic was selected because it drives the modern media economy and is highly integrated with digital technology. The study adopts a statewide perspective across all 14 districts of Kerala rather than limiting itself to a single urban centre, capturing diverse habits from major hubs such as Ernakulam and Trivandrum as well as smaller semi-urban localities. Kerala's distinctive combination of full literacy and among the highest mobile internet penetration rates in India makes it an analytically rich environment for this research.

SAMPLING

Purposive sampling, a non-probability technique, was employed to ensure respondents possessed direct experience with the variables under investigation, specifically familiarity with theatrical pricing, streaming platform functionality, and digital content availability. The study aimed for a target sample of 200 participants. Final usable responses numbered 143, distributed across urban (48.3%), semi-urban (39.2%), and rural (12.6%) localities.

INSTRUMENT AND DATA COLLECTION

The primary instrument was a structured questionnaire of 48 items, administered through Google Forms. The questionnaire was organized across eight thematic sections: Demographic Profile, Viewing Preferences and Habits, The Rise of Cost, Convenience and Comfort, Service Quality and Experience, Illegal Digital Downloads, Specific Viewing History, and Reflections. The instrument combined five-point Likert scales for attitudinal items, numerical rating scales for measuring intensity of experience, single-response and multiple-select closed-ended items for behavioural questions, ranking questions to establish priority ordering, matrix grid questions for longitudinal viewing history data, and one open-ended item inviting qualitative reflection on changing consumption patterns.

A pilot study with a small group was conducted prior to full distribution to test question clarity and instrument reliability. All responses were collected anonymously in compliance with standard ethical research protocols. No personally identifiable information was collected. Participation was entirely voluntary.

DATA ANALYSIS

Quantitative data was processed using Microsoft Excel. Descriptive analysis using percentage frequency distributions was employed to summarize general trends. A bivariate analytical framework compared independent variables, specifically theatrical cost factors, platform utility, technical quality, and social factors, against dependent variables including cinema-going frequency, digital consumption habits, piracy engagement, and viewer experience ratings. Cross-tabulation of demographic subgroups with key attitudinal variables enabled comparative analysis across age, employment status, and residential locality. Qualitative responses from the open-ended item were analysed thematically, with recurring patterns coded and interpreted alongside the quantitative findings.

RESULTS

DEMOGRAPHIC PROFILE

The sample of 143 respondents exhibited a broadly balanced gender distribution, with 56.6% identifying as male and 42.7% as female, alongside 0.7% preferring not to specify. The largest age cohort was the 25 to 34 bracket at 45.5%, followed by the 18 to 24 group at 35%, with the 35 to 40 cohort comprising the remaining 19.5%. Together, the two younger groups account for over 80% of the sample, a concentration that reflects the digital-native character of the study population.

Table 1

Table 1 Demographic profile of respondents (N = 143)			
Variable	Category	Frequency	Percentage (%)
Gender	Male	81	56.6%
	Female	61	42.7%
	Prefer not to say	1	0.7%
Age Group	18-24	50	35.0%
	25-34	65	45.5%
	35-40	28	19.5%
Residence	Urban	69	48.3%
	Semi-Urban	56	39.2%
	Rural	18	12.6%
Employment	Employed/Self-Employed	86	60.1%
	Students	50	35.0%
	Homemakers	7	4.9%

Geographically, Ernakulam dominated at 41.3% of responses, followed by Thrissur at 17.5% and Trivandrum at 14.7%, with the remaining 26.5% distributed across eight additional districts. The concentration in these three districts reflects the presence of the highest density of multiplexes and high-speed internet infrastructure in Kerala. The residential profile, with 87.5% of respondents in urban or semi-urban localities, confirms that the sample population has genuine and regular access to both theatrical venues and broadband-quality streaming, making their consumption choices reflective of preference rather than constraint.

Employment status introduced an important dimension of price sensitivity into the sample. The 35% student population, representing a cohort with limited and largely dependent income, is the demographic most likely to find theatrical ticket prices prohibitive and to rationalize piracy as a rational rather than deviant response to access barriers.

THEATRICAL ATTENDANCE PATTERNS

Table 2

Table 2 Current Frequency of Theatre Visits		
Attendance Frequency	Frequency	Percentage (%)
Weekly / Twice a month	25	17.5%
Once a month	37	25.9%
Only for 'Event' films (Big Star/Big Budget)	64	44.8%
Rarely / Never	17	11.9%

Cinema attendance within the sample has undergone a pronounced bifurcation. Only 17.5% of respondents attend theatres weekly or twice a month, and 25.9% attend once a month. The dominant pattern is event-selective attendance: 44.8% now visit theatres exclusively for high-budget productions with major stars or significant production scale. An additional 11.9% attend rarely or never, confirming that a measurable segment has functionally withdrawn from the theatrical market.

OBJECTIVE FINDINGS OBJECTIVES, FINDINGS, AND INTERPRETATIONS

Objective 1: To evaluate the impact of technical presentation quality and regional infrastructure gaps on physical theatre attendance.

Figure 1

How important is "Technical Quality" (Sound effects, 4K Visuals, Dolby Atmos) in your decision to visit a theater?

143 responses

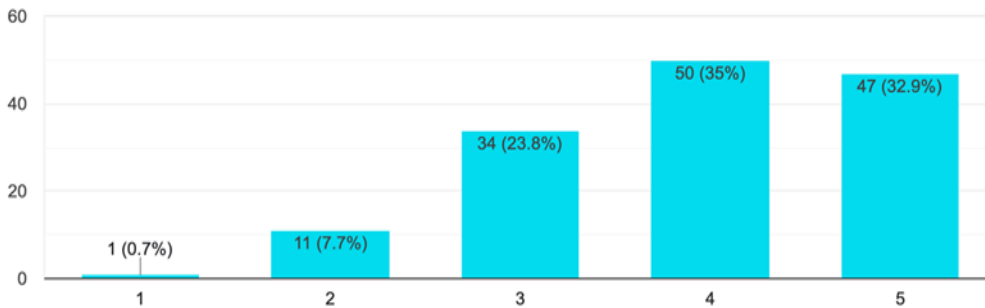


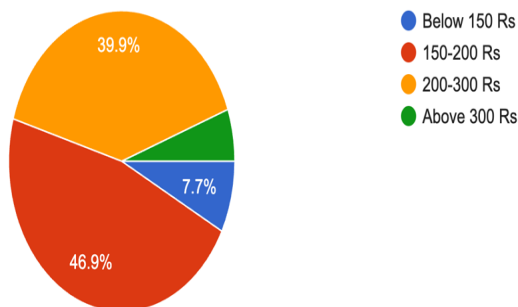
Figure 1 Importance of Technical Quality (Sound, 4K Visuals, Dolby Atmos) in Theatre Selection Decisions (N = 143)

- The Empirical Finding: Premium audio-visual presentation serves as the main anchor for physical cinema attendance, with 67.9% of viewers prioritizing top-tier 4K visuals and Dolby Atmos sound. However, a major infrastructure mismatch leaves 84.6% of the audience completely dissatisfied with their regional exhibition options. Because advanced formats like IMAX are missing outside central hubs like Ernakulam, 51.0% of the audience actively loses enthusiasm for local screens.
- The Theoretical Interpretation: Under Uses and Gratifications Theory, movie theatres no longer survive on content alone; they survive strictly on the sensory spectacle they offer. When local municipal infrastructure fails to provide that premium environment, it creates latent audience underservice. This breaks venue loyalty and drives digital native populations to replace poor local cinema trips with high-quality home downloads.

Objective 2: To identify the economic thresholds and psychological price boundaries of contemporary theatre consumers.

What is the maximum amount you are willing to spend on a single theater ticket?

143 responses



Maximum willingness to pay for a single theatre ticket (N = 143)

- **The Empirical Finding:** Cinema attendance faces a hard psychological price ceiling, with public willingness to pay dropping off sharply to just 5.6% the moment a single ticket crosses the ₹300 mark. This pricing resistance is heavily multiplied by heavy ancillary costs like travel fuel, parking, and food, which push the total cost of a single visit to a ₹500–700 range. These combined financial pressures have forced 44.8% of the audience to skip regular theatrical runs completely, saving their money exclusively for high-budget visual event films.
- **The Theoretical Interpretation:** This represents a massive shift in audience spending. Cinema has transitioned from an affordable weekly hobby into an occasional luxury. The steep decline in consumer willingness to pay past the ₹300 point, combined with high total costs, creates an "Event-Only" consumption model. This effectively leaves regular mid-budget regional dramas and narrative-driven Malayalam cinema financially abandoned in the theatrical market.

Objective 3: To compare the influence of systemic digital service deficits against direct financial constraints in driving audience piracy adoption.

Table 5

Table 5 Primary Catalysts for Choosing Unofficial Sources Over Paid OTT Platforms			
Catalyst Category	Specific Reason	Frequency	Percentage (%)
Service Deficit	Content unavailability (not on any platform)	38	26.6%
Service Friction	Speed / No advertisements	33	23.1%
Fragmentation	Content on an unsubscribed platform	25	17.5%
Economic	High financial cost of subscription	22	15.4%
Non-Users	Does not use unofficial sources	25	17.5%

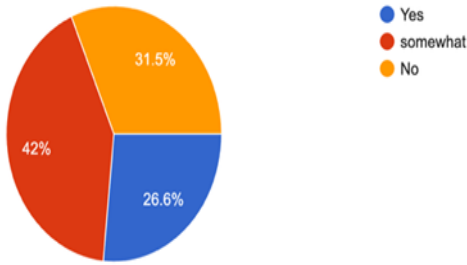
The Empirical Finding: Unauthorised distribution channels are deeply embedded in regional viewing habits, with 82.5% of the sample using these networks. Traditional industry assumptions that financial limitations cause piracy were disproven, as direct costs account for just 15.4% of usage. Instead, a combined 67.2% of piracy adoption is triggered by legal service deficits, establishing a 4-to-1 ratio where platform fragmentation (17.5%), delayed content releases (26.6%), and intrusive ads on paid tiers (23.1%) drive users toward unofficial channels far more than pricing.

The Theoretical Interpretation: Applying the Theory of Planned Behaviour, high digital literacy grants users complete control over their media environment. Piracy in Kerala does not operate as an economic crime driven by poverty; it operates as a functional convenience utility. Unauthorised channels like Telegram do not compete with the legal market on cost. They compete on utility by delivering an ad-free, consolidated, and frictionless user experience that corporate streaming platforms fail to deliver.

Objective 4: To analyse the psychological accountability gap and mechanisms of moral neutralization regarding digital copyright infringement.

Do you believe watching a movie via Telegram/Torrents hurts the Malayalam film industry?

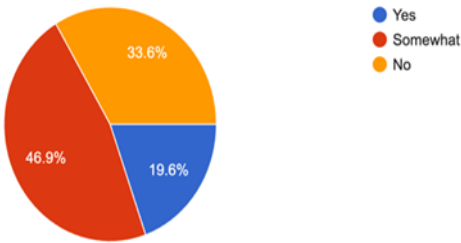
143 responses



Perception of piracy as hurting the film industry (N = 143)

Does watching a movie on Telegram/Torrents feels less like stealing?

143 responses



Perception of piracy as equivalent to stealing (N = 143)

- The Empirical Finding: A distinct psychological disconnect exists among regional viewers. While 68.5% of the sample openly acknowledges that piracy actively hurts the regional film ecosystem, only 19.6% view personal streaming or downloading as actual theft. The remaining majority operates within a space of moral flexibility 33.6% say it does not feel like stealing, and 46.9% view it with situational moral ambiguity ("somewhat").
- The Theoretical Interpretation: This perfectly validates Neutralization Theory and Deterrence Theory. Because users face near-zero tracking or legal penalties under current setups, the legal deterrent effect is absent. Viewers resolve their internal ethical tension by shifting blame onto platform deficiencies, framing piracy as a logical, defensive reaction to a predatory commercial market. Traditional anti-piracy campaigns based on moral shaming are completely ineffective because the audience has successfully minimised its personal guilt

HYPOTHESIS TESTING SUMMARY

All four hypotheses were supported by the data. H1 was supported: 67.9% prioritise technical standards as their primary theatrical driver, while only 19.6% view unauthorized consumption as stealing, confirming that functional demand for high-fidelity experience is a statistically stronger motivator than moral or ethical obligation. H2 was supported: willingness to pay collapses to 5.6% beyond the Rs. 300 mark, confirming a hard psychological abandonment threshold. H3 was supported: financial cost motivates only 15.4% of piracy, against 67.2% attributable to service failures, validating the premise that piracy is a service problem rather than an economic one. H4 was supported: the clear disconnect between industry harm awareness and personal guilt categorisation confirms the operation of Moral Neutralization as the mechanism through which audiences resolve the ethical tension of unauthorized viewing.

Hypothesis	Focus	Primary Finding	Result
H1	Technical Anchor	Tech immersion is the primary theatre driver (67.9%)	Supported
H2	Economic Threshold	Attendance collapses after the Rs. 300 price point (5.6%)	Supported

H3	Service Deficit	Utility/friction drives piracy 4x more than cost	Supported
H4	Moral Neutralization	Service friction overrides ethical responsibility	Supported

OTHER EMPIRICAL FINDINGS

PRIMARY MOTIVATIONS FOR HOME VIEWING MIGRATION

When consumers were asked to isolate their top two reasons for choosing a home viewing environment over a physical movie theatre, economic and comfort variables stood out. The high cumulative cost of theatre ticket pricing and ancillary expenses was selected by 62.2% of the sample. The sheer flexibility, physical comfort, and immediate playback/pause control of the home environment followed closely, being selected by 58.7% of respondents as a primary driver.

DIGITAL DEVICE DOMINANCE

The hardware preference data shows a distinct trend toward personal, portable screens for digital media consumption. Laptops and personal computers lead as the primary device used to watch movies digitally for 41.3% of the sample. Smartphones and mobile devices follow closely at 35.0%, highlighting the strong hold of mobile viewing. Home Smart TVs account for 18.2%, while tablets make up the remaining 5.5%.

ADVERTISING FRICTION: THEATRES VS. OTT PLATFORMS

The survey monitored consumer irritation levels toward advertisements using a 1-to-5 scale (where 1 is "Not at all" and 5 is "Highly Irritating"). For physical movie theatres, 42.7% of respondents rated onscreen commercials at a highly irritating level of 4 or 5, noting frustration with delayed movie start times. However, irritation peaked sharply within subscription streaming environments; a massive 73.4% of respondents rated OTT advertisements as highly irritating (scores of 4 or 5), expressing deep frustration with unskippable mid-roll ad breaks on platforms they already pay for.

BASELINE PIRACY PENETRATION

When asked directly, "Have you ever used unofficial platforms (Telegram channels, Torrent sites, unofficial websites) to watch a movie?", a massive 82.5% of respondents answered Yes. Only 17.5% stated they have never used these channels. This confirms that accessing unofficial networks is an established baseline habit for the vast majority of media consumers in the state.

PRIMARY DRIVERS OF UNOFFICIAL PLATFORM CHOICE

When users were asked, "When you choose an unofficial source over a paid OTT platform, what is the primary reason?", systemic platform issues heavily outweighed cost:

26.6% cited content unavailability or regional streaming release delays.

23.1% cited intrusive commercial advertisement friction.

17.5% cited platform fragmentation (the burden of managing too many individual apps).

Only 15.4% cited direct financial constraints/subscription cost barriers. (Note: The remaining 17.4% represents absolute non-users of pirated channels).

SUBSCRIPTION FATIGUE AND OVERWHELM

The data reveals widespread consumer frustration regarding market distribution. When responding to the statement, "I feel overwhelmed by the number of monthly subscriptions I have to manage and pay for," a combined 72.1% of participants expressed active agreement (41.3% strongly agreeing and 30.8% agreeing). Only 9.1% actively disagreed, showing deep subscription fatigue across the demographic.

HYPOTHETICAL LEGAL COMPLIANCE TRADE-OFFS

To test consumer loyalty, the survey asked users to rate their agreement with the statement: "If a movie is available on a paid OTT platform (like Netflix), but also available for free on Telegram in High Quality, I would still prefer to pay and watch legally." Only 19.6% of respondents Strongly Agreed. The remaining 80.4% expressed neutrality, disagreement, or active rejection, proving that when technical quality is equal, convenience and zero-cost systematically override legal compliance.

GENRE-BASED VENUE PREFERENCES

When asked, "For a mid-budget drama or comedy (non-action/mass movie), where would you prefer to watch it?", the response was overwhelmingly digital. A substantial 76.2% of respondents stated they prefer to watch mid-budget genres at home via digital or OTT formats. Only 23.8% preferred watching these smaller-scale narratives in a physical movie theatre.

DISCUSSION

OVERVIEW OF MAIN FINDINGS

This study set out to map the specific economic, experiential, and psychological factors governing cinema consumption among the 18 to 40 demographic in Kerala. The findings, taken together, establish a coherent picture of an audience that is not disengaged but is engaged on terms the existing market structure is failing to meet. The data does not describe a population that has abandoned cinema out of indifference. It describes a population that has developed a precise, hierarchical set of demands and continues to patronise whichever platform, authorized or otherwise, most consistently meets them.

The four research objectives converge on a single central argument: the theatrical sector and the streaming sector have each, through distinct and compound failures, accelerated their own audience displacement. The theatrical sector has raised prices while concentrating premium infrastructure in a small number of urban centres, creating the latent dissatisfaction documented in the technical quality analysis. The streaming sector, which initially succeeded by eliminating the friction of physical distribution, has progressively reimposed the very conditions, namely advertisements, fragmented content libraries, and escalating costs, that justified its own existence as an alternative. The audience has not moved past cinema. The market has moved away from the audience.

TECHNICAL FIDELITY AND THE INFRASTRUCTURE GAP

The finding that 67.9% of respondents rate audio-visual quality as a primary driver of theatrical attendance confirms a structural shift in the terms on which cinema justifies itself to a digitally literate population.

For much of the twentieth century, the theatre's case rested on monopoly access: it was simply where new films were. That monopoly has been dissolved. In the current landscape, the theatre must compete on the quality of experience it delivers relative to alternatives.

This study's data shows that audiences have internalized this logic precisely: they demand that the theatre deliver something the home environment cannot replicate, and they evaluate attendance decisions accordingly.

The critical implication of the 84.6% aggregate dissatisfaction rate regarding premium screen access is that this demand is not being met for the majority of the sample. Latent dissatisfaction of this kind is strategically dangerous for the theatrical sector because it does not manifest as visible boycott but as habitual selective attendance.

The audience in semi-urban Kerala does not stop going to the cinema. It stops going to the local cinema for anything other than films whose scale demands the largest available screen. The mid-budget, the character-driven, the experimental, all migrate to digital. The theatre becomes an event-only venue by default rather than design, and the cultural breadth of the theatrical experience narrows accordingly.

This finding aligns with global trends identified in the literature, including Bijli's documentation of the eventization of Indian cinema and the r/IndianCinema community's strategic segregation model, in which the theatre is reserved for spectacle while the everyday film-watching experience has migrated entirely to streaming.

What this study adds is the regional specificity: the eventization in Kerala is being accelerated not only by the availability of alternatives but by the failure of local theatrical infrastructure to deliver on the technical promise that the multiplex era established.

THE RS. 300 THRESHOLD AND THE ECONOMICS OF ABANDONMENT

The identification of Rs. 300 as a hard psychological abandonment threshold is, on its own, a data point with immediate practical value for the exhibition sector. But the more significant finding lies in the relationship between the ticket ceiling and the total cost of attendance. The ticket price does not represent the total financial exposure of a cinema visit. Travel, parking, and concession purchases compound the effective outlay to Rs. 500 to Rs. 700 for a typical outing.

This is the figure the demographic is actually calculating against, and it is this total that fails the value-utility test at the point where any individual component, ticket, snacks, or travel, pushes the aggregate over the audience's psychological tolerance.

The 44.8% event-only attendance rate is the behavioural expression of this calculus. The audience has not concluded that cinema is overpriced in the abstract. It has concluded, through repeated experience, that cinema is overpriced for most films. The event-only strategy allows the audience to maintain its relationship with the theatrical format while radically limiting its financial exposure to it. The practical consequence for the industry is the one documented in the literature by Long Live Cinema and Ganeshan: mid-budget

films, which do not trigger the event threshold, cannot generate the theatrical revenues needed to justify their costs, accelerating their migration to digital windows and reinforcing the very pattern the industry is attempting to reverse.

The concession pricing dimension of this finding deserves particular attention. Ancillary revenue, primarily food and beverages, has become structurally central to the multiplex business model as average ticket prices have been constrained by market resistance. The consequence is a compressive dynamic: as the industry attempts to extract higher total revenue per visitor through ancillary charges, it simultaneously increases the total cost of attendance to levels that trigger avoidance, reducing the frequency of visits the ancillary charges were designed to capture. This is the mechanism that a flexible ticketing strategy, such as monthly passes or significant weekday discounts, could potentially interrupt by converting event-only visitors into habitual ones at a lower per-visit revenue but higher total lifetime revenue.

PIRACY AS A SERVICE PROBLEM

The finding that service failures account for 67.2% of piracy motivations against 15.4% attributable to financial cost represents the study's most consequential finding from a policy and industry strategy perspective. The four-to-one ratio between service failure and economic necessity as piracy drivers directly contradicts the dominant framing of the piracy problem in industry and regulatory discourse, which consistently emphasises price as the primary lever.

The three service-failure categories that dominate the motivation data tell a specific structural story. Content unavailability, cited by 26.6% of respondents, reflects the windowing gap during which a film has completed its theatrical run but has not yet appeared on any streaming platform the respondent subscribes to.

This gap, which the industry maintains to protect theatrical revenue, functions in practice as a demand generator for piracy rather than a protective period for legitimate consumption. Platform fragmentation, cited by 17.5%, is a direct consequence of the competitive dynamics of the streaming market: as platforms seek exclusive content to differentiate their catalogues, the audience's cost of accessing any given film on a legitimate channel increases. The viewer who pays for three platforms and discovers that a film they want to watch is available only on a fourth faces a subscription wall that the pirated version of the same film does not erect. Advertisement friction, cited by 23.1%, represents the most direct failure of the streaming sector's value proposition. Viewers who originally migrated to streaming platforms to escape the commercial interruptions of linear television now encounter the same interruptions on services they pay for. The unauthorized channel, in this context, is not competing on price. It is competing on the elimination of a user experience failure that the legitimate market has reintroduced.

These findings are consistent with the theoretical framework established at the outset of this study. Uses and Gratifications Theory predicts that audiences will select the platform that best satisfies their defined needs, and the data confirms that a consolidated, frictionless, advertisement-free experience is the need that the unauthorized channel is uniquely positioned to satisfy among the alternatives currently available. Hastings' characterization of contemporary piracy as a service problem rather than a pricing problem, and Gabe Newell's formulation that piracy is a service problem rather than a pricing problem, are empirically supported by the specific proportions established in this study.

The practical implication is significant: anti-piracy strategy premised on reducing the financial cost of legitimate alternatives will not produce proportionate reductions in piracy behaviour, because cost is not the dominant motivation for the majority of piracy users within this demographic. Strategies capable of achieving meaningful behavioural change must address content availability, platform consolidation, and advertisement policy on paid services. An aggregated subscription model that consolidates multiple platform libraries under a single payment interface would directly address both the fragmentation and availability motivations that collectively account for 44.1% of piracy cases in this sample.

THE ACCOUNTABILITY GAP AND THE FAILURE OF MORAL DETERRENCE

The Accountability Gap documented in this study, the distance between recognising that piracy causes harm (68.5%) and categorising the act as stealing (19.6%), represents the operationalisation of Neutralization Theory within Kerala's digital piracy landscape. The majority of respondents who pirate content do not do so under a sense of moral licence or indifference to harm. They do so under a sense of justified grievance, having successfully reframed the act not as theft from a specific creator but as a rational consumer response to a market structure that fails them.

The specific neutralization mechanisms at work align with the conditions documented elsewhere in the findings. The high ticket pricing and hidden costs identified in the willingness to pay analysis provide the audience with a credible Denial of Victim narrative: if the industry charges what the audience perceives as exploitative prices, it has forfeited the moral standing to claim injury from unauthorized consumption. The service failures identified in the piracy motivation analysis provide a Denial of Injury justification: if the audience's willingness to pay is being met with advertisements, fragmented libraries, and windowing gaps, then accessing the content through an unauthorized channel is a corrective response rather than a criminal one. The combination of these two

justifications with the near-zero certainty of detection for end-user piracy, as explained by Deterrence Theory, produces the stable equilibrium of mass piracy with residual guilt but no behavioural change that this data describes.

The theoretical implication is that the Accountability Gap will not close through awareness campaigns or legal threats. It will only close when the conditions that produced it are addressed. As long as a viewer must subscribe to four platforms to access the films they want, endure advertisements on services they pay for, and spend Rs. 600 on an outing to watch a film on an average screen, the moral case for paying will remain abstract and the practical case for piracy will remain concrete. The gap is not a failure of audience ethics. It is a market failure rendered legible through the mechanism of moral justification.

The findings have important implications for how industry stakeholders and policymakers understand and respond to the piracy problem. Moral shaming campaigns, which assume that awareness of harm is the binding constraint on behaviour, are targeting the wrong variable. The data shows that awareness of harm is already widespread. The binding constraint is the perceived legitimacy of the legal alternative, and that legitimacy will only be restored by improvements in technical access, pricing structure, and service quality across both the theatrical and digital sectors.

COMPARISON WITH EXISTING LITERATURE

The findings of this study are broadly consistent with, and in several respects extend, the existing literature on theatrical-to-digital transition. YouGov's 2022 survey of urban Indians, which found that 69% of respondents had reduced cinema-going frequency with convenience of streaming as the primary driver, is corroborated by this study's attendance data. Krishna's documentation of surge pricing in Kerala multiplexes as a structural deterrent to habitual attendance aligns with the Rs. 300 abandonment threshold identified here. Rejo and Ramadevi's 2024 study of OTT consumption in Ernakulam, which found convenience to be the primary driver of platform adoption, is consistent with the service-friction motivation data that makes the unauthorized channel competitive.

Where this study extends the literature is in the quantitative specificity of its findings and in its treatment of piracy as a demand-intelligence signal rather than a legal problem. The four-to-one ratio between service failure and economic necessity as piracy motivations is a finding with no direct precedent in the regional literature. The precise identification of Rs. 300 as a hard psychological ceiling, and the documentation of the Accountability Gap as a stable psychological equilibrium rather than a transitional state, contribute empirical granularity to theoretical frameworks that have previously been applied to this context at a more abstract level.

LIMITATIONS

The study acknowledges several methodological limitations. Self-reporting bias is an inherent risk in research on unauthorized consumption: respondents may have under-reported piracy behaviour to avoid social stigma, and over-reported theatrical attendance or legal streaming habits to project a pro-industry identity. The cross-sectional design captures a moment-in-time snapshot of audience behaviour in a landscape that is changing rapidly, and the findings may not represent behaviour across different points in the annual calendar, particularly in light of seasonal patterns driven by major festival releases and examination cycles. The sample's concentration in Ernakulam and the urban-semi-urban dominance limit the generalizability of findings to rural populations and districts outside the study's geographic concentration. The absence of income-variable cross-referencing means that the economic threshold findings represent general behavioural observations rather than financially stratified analyses. The study also does not measure the influence of promotional activities, social media spoiler dynamics, or companion-driven viewing decisions, all of which may modify the consumption patterns that price and service variables predict.

RECOMMENDATIONS FOR THE THEATRICAL SECTOR

The theatrical sector's most immediate and tractable intervention is the geographic expansion of premium exhibition infrastructure. Dolby Atmos and 4K projection should not remain exclusive to Ernakulam and Trivandrum. The 84.6% latent dissatisfaction rate identifies an unmet demand in semi-urban districts that is currently driving audience loyalty away from local theatres toward digital alternatives. A structured re-evaluation of the total cost of attendance, particularly concession pricing, is essential: the current dynamic in which ancillary costs push the effective cost of an outing into the Rs. 500 to Rs. 700 range is the single most visible mechanism converting habitual viewers into event-only ones. Flexible ticketing models, monthly passes and weekday discounts in particular, offer a route to converting the event-only majority back into regular attendees for a broader range of films.

FOR THE OTT SECTOR

The streaming sector's most direct intervention is the development of an aggregated subscription model that consolidates multiple platform libraries under a single interface and payment. The fragmentation motivation accounts for 17.5% of piracy cases in this sample and is entirely structural: it is produced by competitive platform dynamics rather than consumer preference.

Eliminating or significantly reducing advertisement interruptions on paid tiers is the second priority, given that ad friction on legal platforms was identified as a stronger piracy trigger than subscription cost for 23.1% of the audience. A reduction in windowing periods between theatrical and OTT release would reduce the Social FOMO-driven demand for pirated copies during the theatrical exclusivity gap.

Eliminate Premium Ad Friction: Address the severe 73.4% ad-irritation metric by removing unskippable mid-roll ads from premium paid accounts. Introduce rigid policy caps that restrict advertising strictly to pre-roll formats to prevent rapid user migration toward ad-free unofficial copies.

Build Consolidated Billing Bundles: Directly counter the 72.1% subscription overwhelm metric by partnering with telecom networks to aggregate fragmented content libraries into unified, single-billing digital subscription packages.

FOR POLICYMAKERS

Anti-piracy strategy should be reoriented away from moral shaming campaigns and toward structural interventions that remove the service and economic conditions that justify unauthorized consumption. Piracy data should be treated as demand intelligence: spikes in unauthorized consumption should be read as signals of where legitimate access is failing, not as a measure of criminal activity requiring prosecution. Policy frameworks that incentivize OTT platform consolidation and regulate predatory concession pricing in theatrical venues would address the specific consumption conditions that this study identifies as the primary drivers of market displacement.

CONCLUSION

The findings of this study do not signal the death of cinema in Kerala. They document the conditions under which a highly engaged, technologically literate, and cinematically invested audience has been progressively pushed out of the legitimate market by the compounding failures of both the theatrical and digital sectors.

The 18 to 40 demographic that this study maps is not an audience that has lost interest in cinema. It is an audience that grew up inside it, that distinguishes intuitively between a Dolby Atmos hall and a smartphone screen, and that still chooses the theatre when the conditions justify it. The problem is that those conditions are met with declining frequency. The theatrical sector has responded to digital competition by raising prices and concentrating its best assets in the fewest locations. The OTT sector, having built its legitimacy on the promise of convenient, comprehensive, interruption-free access, has progressively dismantled each element of that promise through commercial expansion. The audience has not abandoned cinema. It has abandoned a market that no longer competes on the audience's terms.

The Accountability Gap documented in this study will not be closed by awareness campaigns or by legal threats directed at the end user. It will close only when the conditions that created it are addressed. As long as a viewer must subscribe to four separate platforms to access the films they want, endure advertisements on services they pay for, and spend Rs. 600 on an outing to watch a film on an average screen in a hall without premium audio, the moral case for paying will remain theoretical and the practical case for the unauthorized channel will remain concrete.

The future of Malayalam cinema's relationship with its audience depends on whether the industry chooses to compete with the unauthorized channel on the channel's own terms: consolidation, convenience, and genuine value. The data in this study shows what the audience is willing to pay, what experience they are willing to travel for, and what failures they are using to justify the choices the industry least wants them to make. The information is available. What the industry does with it is a choice it has yet to make.

Kerala has a historically celebrated culture of high film literacy, film societies, and deep appreciation for narrative nuance. The ironic twist your study uncovers is that this very literacy is what drives the migration to digital platforms and alternative networks. Because the audience is highly analytical, they demand absolute technical perfection (Dolby Atmos, 4K resolution, exact audio calibration). When regional theatres fail to provide this premium setup, the audience's high film literacy causes them to reject the subpar theatre experience entirely in favour of pristine, high-bitrate digital files at home. They aren't abandoning cinema; their high standards are outgrowing local infrastructure.

Historically, a small or mid-budget Malayalam film could start with a weak opening Friday and recover over two weeks through positive word-of-mouth. Your data on economic thresholds proves that this "cushion" is functionally dead for the theatrical market. Because a single theatre outing now triggers a rigid ₹500–700 cost barrier per person, consumers completely refuse to take financial risks on unverified content. Word-of-mouth no longer saves mid-budget films in theatres; instead, it simply tells the audience: "This is a great movie, I can't wait to stream it next month." The theatre space has become a high-stakes arena reserved exclusively for sensory, big-budget spectacles.

The most profound conclusion your data offers is that digital piracy in Kerala is not a legal or moral failure it is a clear signal of an inefficient legal market. By exhibiting a 4-to-1 ratio where platform service friction outpaces cost, the data shows that digital natives are entirely willing to pay, but corporate streaming platforms are failing them. When platforms split content libraries across

separate paywalls, introduce intrusive ads on paid tiers, and delay regional releases, they create artificial barriers. Unofficial networks like Telegram are succeeding because they operate like an ideal open market: a single, frictionless user interface that provides immediate access. Piracy will only decline when legal platforms match the functional utility of the unofficial networks.

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