

# Beyond Bollywood: An Analysis of the Growing Influence of Regional Cinema in the Indian Film Market

**Dr. Meera Shirodkar**

Assistant Professor, Times School of Media,  
Bennett University, Greater Noida, India.  
[dr.shirodkarmeera@gmail.com](mailto:dr.shirodkarmeera@gmail.com)

**Dr. Pritha Chakraborty**

Assistant Professor, Times School of Media,  
Bennett University, Greater Noida, India.  
[prithachakraborty712@gmail.com](mailto:prithachakraborty712@gmail.com)

## ABSTRACT:

This paper provides an in-depth analysis of the rising demand and growing influence of regional cinema in the Indian film market. It examines the cumulative Gross Indian (domestic) Box Office collection from January 2024 till October 2024 to gain a better understanding of the growing prominence and demand of regional language films among Indian audiences. The paper investigates this phenomenon, its contributing factors, content of the regional films and their long-term implications of their increased consumption on the socio-cultural and economic tapestry of the Indian film market.

**Key words:** Indian Regional Film, Bollywood, Market, Box Office, OTT

## 1. Introduction

Bollywood or Hindi language films have always been considered the dominant mainstay of the Indian film market. However, a rapidly emerging shift toward Indian regional film content is prominently visible in the Indian film industry landscape. The year 2024 provides an interesting study for this transformation, as the months from January to October 2024, represent the cumulative gross box office revenue collections across Indian languages.

### Top 10 releases of 2024 (Jan-Oct), based on Gross Domestic Box Office across all language versions (₹ Cr)

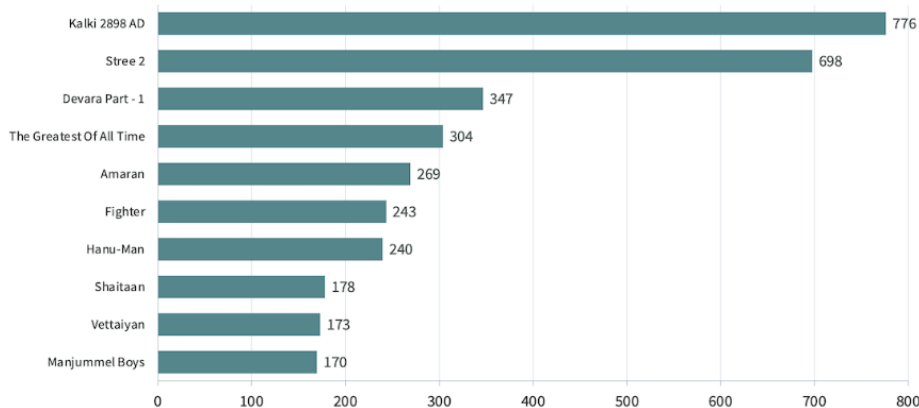


Figure 1.

(Source: Ormax Media. (2024, October 18). The India Box Office Report: October 2024. <https://www.ormaxmedia.com/insights/stories/the-india-box-office-report-october-2024.html>)

The above statistics are reflective of a transformative pattern in the consumption and reception of regional film content by the Indian audience. The dominance of Hindi language films or Bollywood as it is popularly referred to has been seeing a steady decline among the Indian masses. In contrast, the films coming from the Indian regional film industries have far exceeded the expectations of their commercial returns. Giving rise to a phenomenon that is challenging the national and international recognition and prominence of Bollywood. Indian regional films in languages such as Malayalam, Tamil, Telugu, Kannada, Marathi and Bengali have been moving beyond their perceived scope of catering only to regional audiences in local pockets of India. However, the increasing viewership garnered by these regional language films have crossed over state, national and even international borders.

There are several significant aspects that have contributed to this new trend. Over the years the creation of Indian cinematic content has been witness to several phases and movements. The set, almost standardised template of big budget Bollywood films focussed on action, romance and family dramas slowly patterned a certain predictability among

audiences. Regional cinema's gravitation toward exploring diverse and more complex socio-political themes offered a more attractive alternative

to Hindi language mainstream cinema. Combined with a fresh approach toward production, technical and storytelling techniques led to the creation of more authentic and relatable content. The advent and meteoric rise of streaming platforms since the pandemic has provided wider distribution channels for regional content, breaking geographical barriers and reaching global audiences (Kumar & Juvvigunta, 2022). This shift is not only enriching the Indian film industry as a whole but also

challenging the hegemony of Bollywood, leading to a more inclusive and representative cinematic landscape that better reflects the multifaceted nature of Indian society and culture (Kumar & Juvvigunta, 2022).

This paper provides an analysis of the major top 10 releases at the Indian Box Office based on their Gross Box Office earnings in 2024, from the month of January till the month of October. It will provide an in-depth examination of the commercial earnings within this time frame, the changes in the overall audience reception patterns, genre, production and thematic considerations as well as the overarching impact of these factors on the Indian film industry. An understanding of the stated factors are relevant indicators of the current and future practices and trends within the landscape of Indian entertainment. The paper will also elucidate what gross box office earnings entail and mean, in order to garner a better understanding of their implications. Mapping the growing trajectory of Indian regional films is crucial to gauge the content consumption among audiences as well as the ways in which they influence the creation and production of new content.

## 2. Review of Literature

The Indian film industry has witnessed a significant shift in recent years, with regional cinema gaining prominence alongside Bollywood. This growth in regional cinema reflects India's linguistic and cultural diversity, with numerous regional markets developing distinct identities (Neyah & V. M., 2020). The restructuring of film industries along linguistic state lines since the late 1960s has led to the consolidation of new cinematic geographies (R. Radhakrishnan, 2021). Regional cinema serves multiple purposes in the Indian context. It acts as a marker of difference from Hindi cinema, which is one of the biggest film industries in the world, contributing to the plurality of Indian national cinema (R. Radhakrishnan, 2021). Additionally, it plays a crucial role in preserving cultural heritage and promoting language revitalization efforts (Rimma Quadros, 2023).

Several factors have contributed to the popularity of regional cinema. Firstly, non-Hindi cinemas mark regional differences and aspirations for nationhood (Radhakrishnan, 2021). This linguistic diversity allows filmmakers to cater to specific regional audiences, addressing local issues and cultural nuances that may not be fully captured in mainstream Bollywood productions. Government policies such as subsidies, tax concessions, and exhibition mandates have shaped regional cinemas (Srinivas, 2015). These policies have provided financial incentives and support for regional filmmakers, enabling them to produce high-quality content and compete with larger productions. The practice of dubbing South Indian films into Hindi has boosted regional film industries, increased actors' popularity, and spread cultural features across linguistic boundaries (Kumar, 2020). This cross-linguistic exchange has facilitated the exposure of regional cinema to wider audiences, breaking down language barriers and fostering cultural exchange. Regional cinema has been used to promote nationalist ideologies, as seen in Marathi filmmaker Bhalji Pendharkar's representation of Shivaji (Benei, 2008). The growth of regional cinema has challenged the dominance of Hindi cinema and contributed to a more diverse Indian film landscape. This trend has been further accelerated by the rise of OTT platforms, which have altered content production and consumption patterns (Aggarwal, 2023). These digital platforms have provided new avenues for regional filmmakers to showcase their work to a global audience, bypassing traditional distribution channels and reaching viewers directly. The COVID-19 pandemic has had a significant impact on the Indian film industry, including regional cinema. The industry faced a 72% drop in global box office revenue in 2020 (Selvalakshmi & Rm, 2022), leading to a shift in business models and increased reliance on digital platforms for movie releases (Rammal et al., 2023). The closure of theatres and restrictions on public gatherings forced filmmakers to explore alternative distribution methods, accelerating the adoption of digital platforms. Despite these challenges, the industry has shown resilience by adapting to new strategies and exploring alternative distribution methods (Rammal et al., 2023). Regional filmmakers have embraced digital technologies, experimenting with virtual production techniques and remote collaboration tools to continue creating content during lockdowns and social distancing measures.

The rise of OTT platforms has enabled continued content delivery and may potentially speed up recovery (Selvalakshmi & Rm, 2022). These platforms have provided a lifeline for regional cinema during the pandemic, offering a direct-to-consumer model that allows filmmakers to reach audiences even when traditional theatrical releases are not feasible. This shift has also opened up new opportunities for regional content creators to experiment with different formats, such as web series and short films, catering to changing viewer preferences. Furthermore, the increased accessibility of regional content through OTT platforms has led to a growing appreciation for diverse storytelling styles and narratives. This

exposure has not only broadened the audience base for regional cinema but has also influenced mainstream Bollywood productions, leading to more inclusive and diverse storytelling in Indian cinema as a whole.

The success of regional cinema has also attracted investment from major production houses and international streaming platforms, further boosting the quality and reach of regional content. This influx of resources has enabled regional filmmakers to produce high-budget, technically sophisticated films that can compete with mainstream Bollywood productions on a

national and international level. The growth of regional cinema in India represents a significant shift in the country's film industry. It reflects the linguistic and cultural diversity of India, challenges the dominance of Bollywood, and contributes to a more pluralistic national cinema. Despite facing challenges, particularly during the COVID-19 pandemic, regional cinema continues to evolve and adapt to changing market dynamics. The industry's resilience, coupled with technological advancements and changing viewer preferences, suggests a promising future for regional cinema in India. As it continues to

grow and innovate, regional cinema is likely to play an increasingly important role in shaping the narrative of Indian cinema on the global stage.

### 3. Discussion

Based on the available sources, statistics and literature, this study investigates the definition of gross box office earnings and the box office performance of earmarked top commercially viable Indian films. This data provides important insight into the way film production and audience viewership has transformed, which may be indicative of the far-reaching consequences of the same.

#### 3.1 Indian Box Office from January - October 2024

To understand Gross Box Office collections, one needs to take certain parameters into consideration. Box office collections are defined as the revenue films generate from the sales of tickets through their release in theatres across India. The 'gross' amount collected through ticket sales is inclusive of GST, entertainment tax and other taxes levied by state and central governments. The profit generated by a film needs to keep the net box office collections in mind. This amount is calculated by studying the amount remaining after the deductions of taxes and other charges, which amount to 70-80% of the gross collections. This profit is also representative of the earnings of producers, distributors, and exhibitors. (Vijaya Patil et al., 2022) The gross box office collection figures considered for this analysis looks at the overall commercial performance of the films released in theatres across India from January and October 2024.

Taking net box office collections into account would open this study to various specific variables of the films, which could include production overheads, promotions, distribution costs, star value and so on, that would vary considerably from film to film. Hence, we take the objective revenue into account. Figure 1 represents the top ten gross box office collections of films at the Indian box office from January-October 2024, in which the number of Hindi language films are four. The Hindi language films belong in positions: 2, 6, 7 and 8, *Stree 2*, *Fighter* and *Shaitaan* respectively. The remaining six films are regional *Kalki 2898 AD* (Telugu), *Devara Part- 1* (Telugu), *The Greatest of All Time* (Tamil), *Hanu-Man* (Telugu), *Amaran* (Tamil), *Vettaiyan* (Tamil) and *Manjummel Boys* (Malayalam). Of the regional films, *Kalki 2898 AD* is the top grossing film at 776 crores, *Stree 2* earned 698 crores and in the third place *Devara Part-1* earned 347 crores. It is significant to note that *Manjummel Boys* is a small budget Malayalam language film made within 20 crores and earning approximately 170 crores at the box office. This is indicative of a high revenue return on the investment into the film. It demonstrates a greater potential for smaller scale, independently made regional films having the capacity to achieve significant commercial success.

#### 3.2 Decoding the success of Regional Films

There are several factors that may have influenced the success of regional films among audiences across the country. It is noteworthy that the commercial films represented in Figure 1., have extended to international markets as well. This extensive reach and scope draw attention to many interconnected factors. The exploration of diverse socio-political and cultural themes, highlighting specific regional contexts is significant to understanding the success of regional cinema in recent times. *Amaran* (2024) & *Manjummel Boys* (2024) are based on actual incidents and real-life characters, thereby bringing engaging and inspiring stories to the audience. *Vettaiyan* (2024), portrays socially relevant themes, whereas *Devara Part-1* and *Hanu-Man* draw inspiration from historical and mythological sources.

The growing appeal of science fiction narratives helmed by a star-studded cast, accompanied by grandiose sets, with state of the art graphics and animation and extensive promotional activities gave a definite edge to *Kalki 2898 AD* (2024). The major success of the horror-comedy film *Stree 2* (2024) and the supernatural *Shaitaan* (2024) is suggestive of the audience's preferences for off-beat subjects and approaches in storytelling. The choice of using native languages and

regional locales lend more authentic representations of the local experiences. These portrayals are also ably supported by respected filmmakers with keen and skilled production capabilities. High quality cinematography, production design, cast, writing and postproduction, have all aided the appeal and success of the films. In addition, the prevalent use of sophisticated animation, graphics and visual effects has become almost commonplace across the Indian media industry. The national and international reach of social media and streaming platforms have simultaneously worked to augment the pan-India reach of the films. OTT platforms play a pivotal role in transcending regional boundaries by making it accessible to a much wider audience. Facilitating the dissolution of geographical barriers and exposing viewers to diverse regional films through OTT platforms has also enabled repeat viewing as well as a more organic reach.

#### 4. Conclusion

The rise of regional cinema in India is observed as one of the most significant shifts in the Indian film industry in the recent decade. This in turn has shifted India's cultural landscape and draws a critical insight of the consumer's entertainment consumption pattern. For the first time the dominant glitz and glamour of Bollywood film industry has taken a step back and regional cinema especially those from the southern states of India has delivered sweeping box office numbers. This shift highlights the expansion of pluralistic national cinema. Multiple factors are seen to have contributed to the rise. Nuanced storytelling, casting, high quality of cinematography and the growth of OTT has significantly contributed to the shift in the

market. This shift in consumption behaviour enriches the country's film culture and also provides consumers with a wider range of content that reflects their local languages, traditions, and experiences. The analysis and statistical box office performance from January to October 2024 which reveals six out of the top ten grossing films coming from regional industries is a stark revelation of a trend that seems more permanent than ever before. This trend is reflective of the fact that consumers are increasingly becoming aware of the diverse content in the offering and are showing positive reception towards it based on the content that resonates with them regardless of linguistic barriers. Regional films such as *Kalki 2898 AD* and *Devara Part-1* have outperformed major Hindi releases in box office collections.

Consumer behaviour is also evolving in terms of content preferences. Data suggests that audiences prefer more 'slice of life content' and films that explore complex socio-political themes with a twist in storytelling unlike those commonly observed in Hindi language cinema. This shift may be attributed to a desire for a different, authentic, and relatable content that is also reflective of variety and acceptance of diverse content by the audiences. The consumption patterns are further influenced by the wider distribution of regional films through OTT platforms, making them more accessible to a broader audience. Dubbing in multiple languages has also made the acceptance of diverse content effortless. This accessibility has likely contributed to the growing popularity and commercial success of regional cinema. The market's response to small-budget films like *Manjummel Boys* demonstrates as one such example. Audiences are increasingly judging films based on content quality and storytelling rather than solely on production scale or star power, leading to high returns on investment for well-crafted regional films.

This shift in consumer behaviour and market dynamics is prompting a transformation in the industry. The traditional dominance of Hindi cinema is seen to be challenged. Producers and filmmakers may need to adapt to these evolving consumer preferences by offering more diverse, authentic, and culturally rich content. The success of regional films across linguistic and geographical boundaries also indicates a potential for global appeal. This could open up new markets and opportunities for Indian cinema as a whole, with regional films playing an increasingly significant role in shaping audience preferences and industry trends on an international scale. As the market continues to evolve, it presents both challenges and opportunities for filmmakers, producers, and distributors to cater to this new landscape of consumer expectations. The future of Indian cinema appears to be moving towards a more balanced representation of its diverse regional voices, promising a richer and more inclusive cinematic experience for audiences across the nation.

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