

CONSUMPTION PATTERN OF OTT PLATFORMS IN INDIA

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Abstract

India is a potential country standing at an inflexion point for the growth of Over-The-Top (OTT) platforms responsible for the new evolution of the media and entertainment sector. This has contribution from population belonging to both urban and rural background where access to smart devices has exponentially increased due to lower prices and cost-cutting data packages. Internet penetration, enhanced supply of an assortment of quality content in foreign and regional languages, ad-free shows and binge watching have altogether resulted in the rise of OTT in the country. Favourable demographics, relevant engaging content, free content and the range of subscription plans for premium content show more scope for growth in the future. The broadly distributed population have access to their favorite content across multiple screens and spend almost one-eighth part of the day in watching their favourite drama, TV show or movie. The global and national players along with regional players have built different models for supplying content and generating revenues. The future has a lot more reliability over virtual platforms where there has been a major shift in the customer touch-point. The production houses in India have even shifted to these platforms for launching their movies and shows where they need not wait for Fridays. They spend millions for launching web series' episodes or dramas because this shall be the heir of the traditional television, direct-to-home operators and smart or cable television. It is a brilliant alternative to movie theaters and multiplexes keeping in mind the viewers' comfort and consumer-driven relationship.

Key words: OTT; TV; smartphone; content; entertainment; viewers; subscribers

Introduction

Digital India and Evolving Landscape

KPMG "India-media-entertainment-report-2019", has recorded a 26% increase in Digital Advertising accompanied by more than 520 million smartphone users country-wide. The time spent on digital media consumption and social media hovers around 17 hours/week as mentioned by Ministry of Electronics and IT Report on India's Trillion Dollar Digital Opportunity. A 2X growth in digital media and ditching of Television content has been responsible for bringing a drastic change where millennials stand to be the major contributors. The next wave of OTT users is sure to evolve from rural India and will have a greater contribution (52%) and the urban population shall contribute to a comparatively smaller proportion (48%) with 650 million users, altogether by the end of financial year 2020.

The Rise of OTT Platforms:

Over-The -Top media services have been gaining popularity worldwide with Netflix and Amazon Prime being the front runners. Startup Stories (2019) has talked about a different scenario for the similar kind of platforms in India, such as, Voot and SonyLIV which are gaining popularity and are giving a healthy competition to the foreign platforms. Zomato Originals from the well known food delivery application, Zomato has also contributed to the participation in the OTT digital streaming entertainment media services for more profits.

The Indian OTT Market:

According to the Startup Stories (2019), the Indian OTT platforms are investing in original and exclusive content for they have seen the audience behavior towards the global platforms' web series and its success stories. In 2017, the OTT revenue had reached around Rs.2,019 crores and is expected to touch the bar of

Rs.5,995 crores by the next two years, in 2022 where it would be securing a rank among the top 10 in the global OTT market. The Indian audience has a hunger for engaging into original content which encourages the platforms for more investment in return for increased revenues.

Clear Bridge Mobile (2015) mentions that the global OTT market was expected to generate \$31.6 billion revenue subscription by the financial year 2019.

ETBrandEquity (2019) mentions about the KPMG reports where global players like Netflix and Amazon Prime planned to invest Rs.6 billion per year for original content and Rs.22.3 billion (in the year 2017) for the coming years, respectively. The variety of OTT platforms include:

- Subscription-only: Netflix and Amazon Prime Video
- Hybrid Models: Hotstar and ZEE 5
- Multi-format Models: MX Player

In today's scenario, all OTT players are competing against one another to grab their share of market and reach their ultimatum of millions of subscribers in India. It even mentioned that, it is expected from the OTT players as a whole to broaden their base in India to 55 - 65 million direct subscribers by the financial year 2024. This would only be possible when they ensure upgraded content for the viewers that is consumable for a diverse set of audiences.

Tarun Katiyal (2020), CEO, Zee 5 India, mentioned in a report about the transformative impact of OTT over the Media and Entertainment industry with remarkable shift in consumer behavior by providing an immersive engaging experience. An Indian spends an average of 180 minutes every day on their smartphones with 30% of the time interval spent on entertainment. According to an EY and FICCI report, titled "Billion screens of opportunity", it was expected to touch Rs. 17 billion in the financial year 2019 and by 2021, it shall hit Rs.24 billion.

A Game-Changer for the Film Industry:

ETBrand Equity (2020) mentions that the entertainment sector has been disrupted where the users are deprived from going out for work or shopping and has led to drying up of content line due to production halts, except for online streaming via OTT platforms due to the pandemic. The number of OTT subscribers has climbed up the ladder with a transition of the average time of content consumption from 20 minutes to 60 minutes and even more in a day.

The Need of the Hour with a Silver Lining:

The revolution caused by the pandemic in March 2020 resulted in extended lockdown, turning OTT platforms to evolve as the sector of entertainment in order to get adopted to the new normal. They have a reach of millions of potential customers with cheap subscription plans where production houses may choose to release their movies and shows, even exclusively, if provided.

Censorship for OTT Platforms:

ETBrand Equity (2019), highlights some findings from a survey conducted by YouGov regarding the need for content censorship streamed across OTT platforms where shows have strong language and offensive content, at times. Out of a 1,000 respondents and more, 57% of them were in favor, 27% of respondents were against the topic and the remaining 16% were unsure. It mentions that, Gen Z were least interested into the censorship and its implications whereas Gen X were in firm support for content regulation.

A 5:3 ratio determines that, the censorship shall lead to better and upgraded content quality whereas, on the

other hand, three-eighth of the respondents say that, it might hamper the content quality and show a drop in viewership. The Indian Government is looking into the matter and the Centre is taking advisory steps for regulating the featured content.

A Threat to Cable TV:

According to the KPMG report, "India's Digital Future: Mass of niches - 2019", a decline of 12 to 15 million active subscribers was observed for cable and satellite connections in the fourth quarter of the financial year. The factors playing backstage of this tragedy were alternative entertainment sources like OTT and the non-renewal of the previous subscriptions and higher bills. The IPSOS Predictions (2020) mentions about the preference of 70% of the urban population towards Video-on-Demand services despite the traditional Cable TV.

The primary driver of viewers towards these platforms is the genre of content that can be consumed by all age groups and accessed through multiple screens. It has recorded that factors like offline downloads, mobile access and consumption of minimum data for viewing content reveal the demand of the Indian consumers.

Objectives

- To study the reasons behind viewers replacing conventional or linear TV with OTT platforms.
- To find the average time devoted towards online streaming platforms and the devices used for accessing content.
- To have a look at the increasing pace of OTT and the most popular brand as per viewers' choice.
- To bring out the genre of content that drives the numerous viewers across the country.

Literature Review

Chun-Mei-Chen (2019), studied the rise of OTT platforms due to the increase in data availability and usage. It has always proved to be a great advantage for people by ensuring them with a personalized digital life due to the collaboration of telecommunications operators and the OTT service providers, like, Amazon, Reliance, and Eros International. Initially, the OTT services had brought about a turning point in phone calls and text messages of the telecommunications operators as it provided all of these for free through the Internet along with media related content. Internet penetration has eliminated the additional assistance provided by these operators with the Internet population rate crossing over 70% in India and other countries, as well.

A sample of the top 41 global telecommunication operators has been collected to study the growing wireless broadband data usage with regard to the development of the telecommunications industries. The DEA-meta frontier approach and the SBM super-efficiency model are adopted for detecting the best operators which ultimately concludes that, telecommunication operators can cooperate with OTT platforms for self-produced content and better returns.

Scott Fitzgerald (2019), noted that India is a battleground for Amazon and Netflix and shall emerge to be territory for the expansion of OTT video platforms. YouTube has been an open platform for major Indian broadcasters containing media libraries for all sorts of video content. The journal depicts the birth of a new global Internet TV network across numerous countries with millions of subscribers worldwide. The three types of OTT apps in the Indian market include: communication services, application ecosystems and audio and video content. Several regional content entertainment channels have expanded the OTT sector and media economy in the country including global leaders and major broadcast network-backed platforms, VOOT and OZeeTV. The digital infrastructure with respect to pipes, data, devices and habits have increased the video consumption, and by 2021, the total number of mobile connected devices shall reach to 59% from the current 35% with fee-based subscription model. As a result, we have seen consolidation of television and film via digitalization in the

Indian media economy and shall develop its own unique business model.

Indian (OTT) Platforms Report (2019) reveals a wide assortment of OTT players in the Indian market with a detailed study of each of them highlighting the platforms, geographical locations, devices, genre and viewership used for accessing content. It highlights the drastic fall in the cost of accessing content and higher bandwidth availability. The digital domain in India has been growing at a fast pace thereby generating a push for the language content creators with offerings that include movies, sports, new, kids and business categories. It highlights that the OTT platforms are a symbol for the future survival of the traditional linear television and will generate \$51.4 billion by the financial year 2022. It reports a descriptive study of various OTT platforms, whether it is global or national or regional in origin and nature and shows the increase in consumer spend growth for accessing content across the top Video Streaming Apps. The OTT platform consumers are global Indian consumers with highly engaged young people indicating a huge transition for the content market and shall redefine the linearity consumption with series seasons being realigned.

Yi-Ning Katherine Chen (2019), has conducted a study to compare the OTT TV and the Cable TV in Taiwan on the basis of various dimensions, with the most appropriate one being the mode of delivery and convenient access of content through multiple screens. It states that, International OTT brands like Netflix have played a major role in converting the traditional TV viewers and reshuffling the market competition. The high mobility, portability and flexibility, quality program content, better lifestyle and adaptations to the trends happening around have always shown a paradigm shift like that from radio to television, then to VCR, followed by MP3 and so on.

The viewers' gratifications have been segmented into release of emotions, entertainment, relaxation, value reinforcement, companionship, information acquisition and social interaction amalgamated with the niche theory. Out of all these, the most significant one from the viewers' point turned out to be companionship. However, the results show a strong influence of OTT online streaming platforms centered on a few Western OTT brands despite the local ones with predictive gratification towards dramas and movies.

Jungwoo Shin, Yuri Park and Daeho Lee (2016) have studied the preference of consumers for OTT services' attributes and analyzed the change in market penetration ratio with regard to the change of market strategy for each and every OTT service provider. The Federal Communications Commission in the US have referred to these services as Multichannel Video Programming Distributor. It mentions that, for the purpose of establishing an OTT business model, there is a strong need for a user-centered strategy with a consideration for the traditional broadcast services by maintaining a good bond. As per the estimation results, a user-centered OTT strategy is suggested to grab a leading position in the trending OTT market. According to the mixed-rank ordered logit model, the serial order for the most preferred service turned out to be real-time broadcasting service, terrestrial TV content, followed by the newest movies/broadcasting and Video-On-Demand services.

Min Sung Kim, Eun Kim, ShinYoung Hwang, Junghwan Kim and Seongcheol Kim (2017) have conducted a study to find out the acceptance rate and the willingness to pay among the Chinese and Korean consumers towards the leading global OTT service provider offering online streaming content, Netflix. There is a probability that, for Netflix to succeed in the Asian market, it is necessary to study the pricing strategies in these test markets due to the size of population, growth potential and market reach of China and the Korean IT industry which shall bring in more opportunities for these service providers. Hence, the subscription fees is taken to be a competitive factor. A random utility model structure was adopted for the conjoint analysis to find the willingness to pay for OTT services thereby, resulting a \$3.4 and

\$3.1 willingness to pay by the Chinese and Koreans, respectively. It would provide recommendations for improvement along with innovative and creative offerings in the form of video services.

Tae-Yang Kima and Dong-Hee Shin (2017) mention about the product placement in the digital world for the success of branded content in the OTT market. The fundamental attitude of the respondents towards the branded content were recorded and studied. For the analysis portion, the areas of interests and Q-methodology was

applied to study the pragmatism, conservatism and nationalism of the consumer respondents. In a nut shell, it was derived from the study that, the physical places for the consumers' visual attraction with regard to the brand should be identified by the researchers for they find it difficult to track intentional exposure towards branded content and thus formulate psychological strategies for that.

Junghwan Kim, Seongcheol Kim and Changi Nam (2016) strike out Netflix to be responsible for changing the market scenario, but the Korean video market brings out something different when it comes to a battle between the linear TV and the OTT video streaming services. This highlights a clash between the old and new media consumption and the effect of the upcoming video consumption trend over the people in terms of existence and displacement of key players in the market. The gratification and media consumption pattern are recorded and studied showing that there does not exist any kind of severe competition between the traditional TV and the OTT platforms in the Korean market. Rather, the former has a better position than the latter with YouTube turning out to be an exception for it has overcome all the Korean video platforms when it comes to the level of gratification.

Adesegun Oyedele and Penny M.Simpson (2018) have conducted a study regarding the consumers' value towards online streaming applications. It mentions about YouTube being the largest platform streaming videos with 800 million users followed by Netflix having an aggregate of 75 million global subscribers for videos streamed. The valid point emphasized in the research comprises of the value derived from entertainment streaming applications since the genres of content whether it is drama, TV shows, sports, news, music or web series. It talks about the applications which present our "self-identity" in the digital world in a similar manner like that of our possessions and loyal brands.

The results conclude that, self-identity is expressed through emotional experiences and behavior and that consumers will be more in touch with those smart platforms that provide a self-identity.

Quresh Moochhala (2018) has displayed the future of OTT Platforms in the sector of Entertainment Services which is undergoing a rapid change due to the sudden surge of online video consumption in India. The reason behind this is the accessible and affordable 4G and LTE internet connectivity through mobile networks. Moreover, these platforms do not have any such advertisements to fill up shows, do not require any kind of censor board and the viewers are provided with the liberty to choose from a plethora of genres. As an outcome, this has reportedly shown a paradigm shift from cable TV and cinema to OTT platforms, due to advantages of binge watching and content quality and availability of Localized Regional Content.

Methodology

An online survey was conducted by sharing a questionnaire in the pattern of Google Forms which comprised of 40 questions to carry out this study. It was majorly circulated through cross-platform messaging, like, WhatsApp for a couple of days. An ultimate of 120 responses were collected in total. Primary data was collected from the sample survey and non-probability sampling was carried out. Better say, convenience sampling was carried out by the researcher for it provides with more reliable data and simple interpretation from the same.

A ranking analysis was carried to assign the platforms with a specific rank according to the ratings of the participants.

A chi-square test was conducted to test the independence of attributes like, the mostly used platforms in the last three months and the content type consumed over the OTT platforms of the respondents' choice.

Some basic demographic variables collected from the participants were their age, gender and family income bracket. Out of these, age and the monthly family income were used as independent variables to carry out a regression analysis against dependent variables such as, the purpose served by OTT platforms, multiple screening pay per month, platform used to access content, reason of consumption and the preference for content to come out with a significant correlation.

On the other hand, the correlation between age of respondents and the type of content consumed and, secondly, the correlation between the OTT platforms and the most preferred content were carried out.

The respondents were asked to mentioned their respective residential towns, cities and states so that the consumption pattern of Tier - I,II and III towns and cities can be studied. This helped in conducting the study of OTT consumption and its reach through every rural and urban corner of the country.

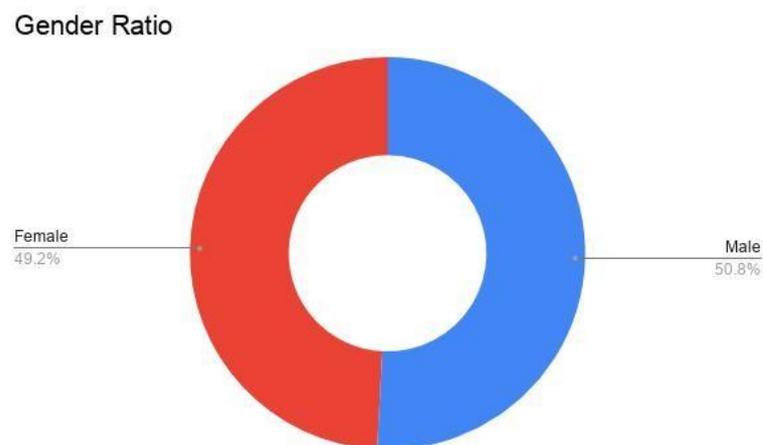
Analysis

Table Number: 1

Gender	Frequency
Male	61
Female	59

Source: Based on author's data

Graph Number: 1



Source: Based on author's data

Inference: Out of 120 respondents who have contributed towards the results of this study, consisted of 61 (50.8%) males and 59 (49.2%) females.

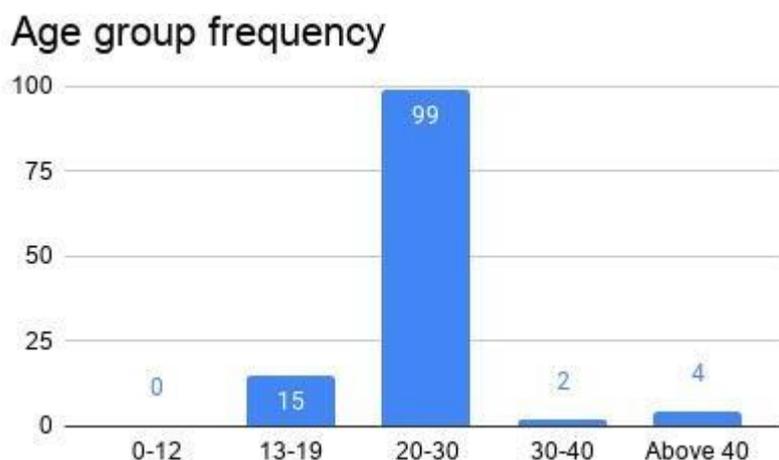
Table Number: 2

Age	Frequency (f1)
0-12	0
13-19	15
20-30	99
30-40	2

Above 40	4
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Source: Based on author's data

Graph Number: 2



Source: Based on author's data

Inference: More than three-fourths (82.5%) of the respondents belonged to the age group ranging between 20 years to 30 years, and the remaining (17.5%) was distributed among the remaining age groups of range 13 years to 19 years (12.5%) having 15 respondents, the above 40 years group (3.3%) having 4 respondents and the 31 years to 40 years age group having the least number of respondents (1.7%).

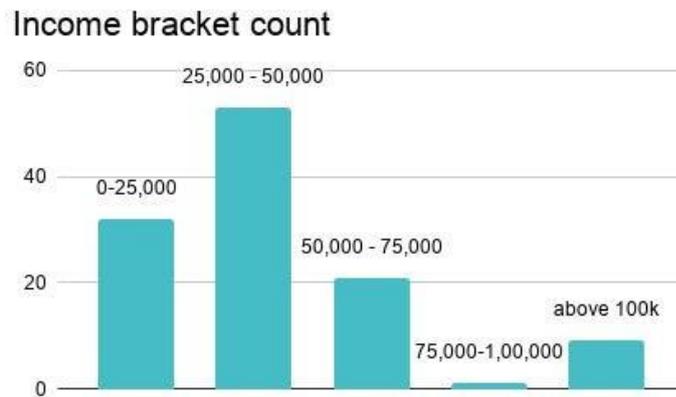
A major chunk of them belonged to the student category covering the age groups of 13 years to 19 years and 20 years to 30 years.

Table Number: 3

Income bracket	Frequency
0-25,000	32
25,000 - 50,000	53
50,000 - 75,000	21
75,000-1,00,000	1
above 100k	9

Source: Based on author's data

Graph Number: 3



Source: Based on author's data

Inference: The income category limited to Rs. 20,000 had 78 respondents (65%), followed by the group with income range between Rs. 40,001 and Rs. 60,000 which comprised of 16 (13.3%) respondents and the income bracket between Rs. 20,001 and Rs. 40,000 comprised of 11 (9.2%) respondents. The income bracket between Rs. 60,001 and Rs. 80,000 had 9 (7.5%) respondents. The rest of the two groups comprised of the remaining respondents equally distributed between the duo.

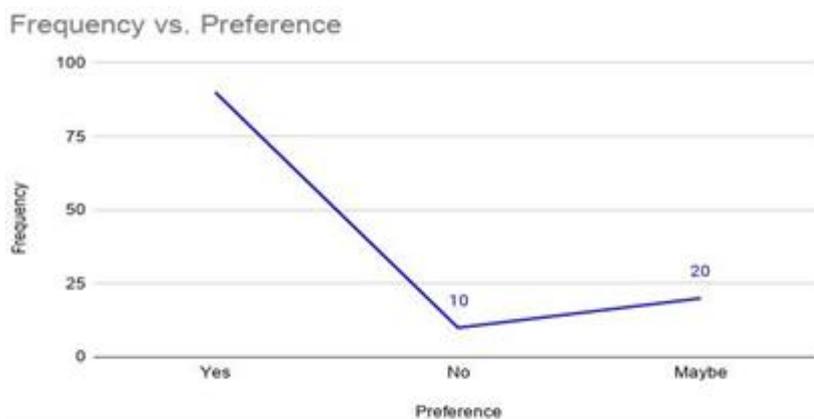
The survey had responses from people belonging to different towns/states/cities of India, such as, West Bengal, Telangana, Odisha, Karnataka, Jammu and Kashmir, Maharashtra, Assam and many more in the list. The reason behind collecting this was to see the outreach of internet services and video platforms.

Table Number: 4

Preference	Frequency
Yes	90
No	10
Maybe	20

Source: Based on author's data

Graph Number: 4



Source: Based on author's data

Inference: 75% of the respondents preferred watching content online, whereas the rest 25% of them were dicey

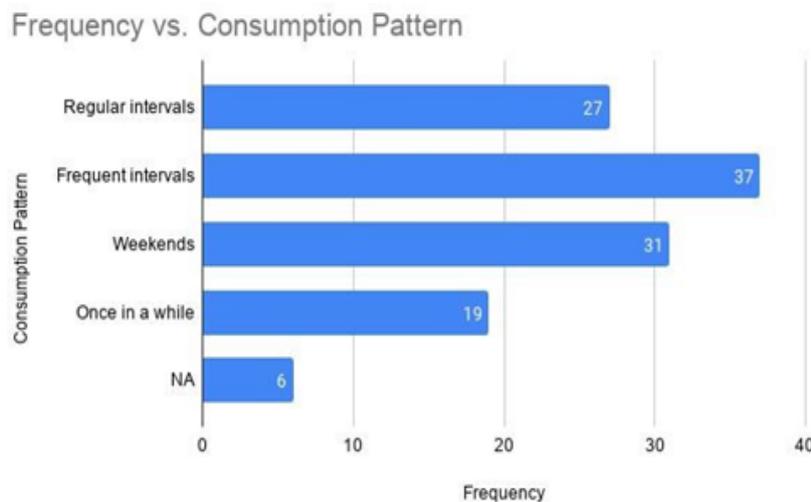
or did not prefer online content.16.7% of them were not sure about their choice between traditional TV and OTTs and the remaining 8.3% of respondents preferred clinging to conventional TV content.

Table Number: 5

Consumption Pattern	Frequency
Regular intervals	27
Frequent intervals	37
Weekends	31
Once in a while	19
NA	6

Source: Based on author’s data

Graph Number: 5



Source: Based on author’s data

Inference:The consumption pattern varied among the respondents where a majority of 30% of them watched content on frequent intervals, 25.8% of the participants reported to watch videos on weekends, 22.5 % of them watched content regularly and 15.8% of them watched content once in a while.The rest 6% of respondents do not prefer watching content published online.

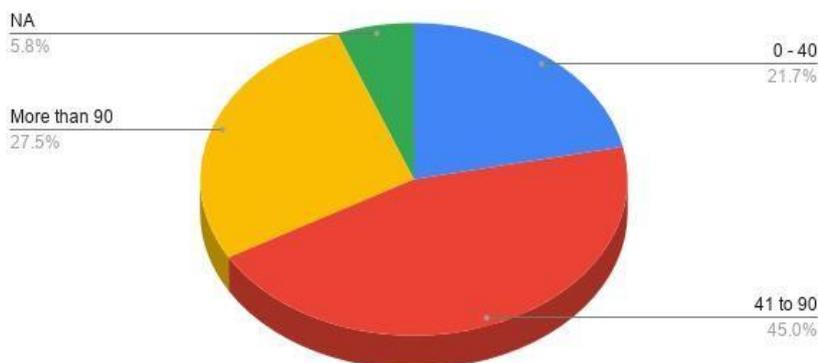
Table Number: 6

Regular Content Consumed (minutes)	Frequency
0 - 40	26
41 to 90	54
More than 90	33
NA	7

Source: Based on author’s data

Graph Number: 6

Frequency vs. Regular Content Consumed (minutes)



Source: Based on author's data

Inference: Around 54 respondents spend 41 minutes to 90 minutes per day streaming content across these platforms. 33 respondents spend more than 90 minutes on an average during regular days, 26 respondents spend a minimum of 40 minutes on an average and the rest do not watch content on regular basis.

It was found that, these platforms provide a lot more engaging content than the conventional TV and are a good alternative to multiplexes.

The OTT platforms were rated on a linear scale and were assigned with positions with regard to the ranking system.

Table Number: 7 [Ratings of OTT Platforms]

OTT Platform	Rating 1	Rating 2	Rating 3	Rating 4	Rating 5
YouTube	69	22	3	4	22
Netflix	54	25	16	13	12
Amazon Prime	38	41	8	16	17
Voot	13	23	43	26	15
BIGFlix	9	10	35	33	33
Sony Liv	17	18	43	28	14
Zee 5	9	26	36	28	21
Hoichoi	22	11	33	20	34
Ditto TV	8	14	27	27	44
MX Player	25	20	47	10	18

Source: Based on author's data

The chi-square test was conducted by creating a contingency table between the top five ranked online streaming platforms and the genre of content consumed, such as, movies, original/exclusive content, web series, news, sports and TV shows. The null hypothesis (H_0) taken into consideration was that, the attributes are independent of each other. The chi-square value was compared to the critical value.

Table Number: 7(a) [Contingency table to test the independence of attributes]

OTT platform	Movies	Original/Exclusive Content (Web series, Short films)	News	Sports	TV Shows	Total 1
You Tube	15	26	0	2	2	45
Netflix	3	27	0	2	3	35
Amazon Prime	6	13	0	1	2	22
MX Player	2	1	0	0	0	3
Voot	0	0	0	0	1	1
Total 2	26	67	0	5	8	106

Source: Based on author's data

The linear regression analysis for age and income bracket coupled with other dimensions of OTT platforms provided the researcher with 'r' values derived from scattered graphs and data plotting.

Table Number: 8 [Regression Analysis of independent and dependent variables; 'r' values shown in table.]

OTT Dimensions					
Demographic variables	OTT Purpose	Multiple screening pay/month	Platform used to access	Reason beyond content consumption	Content Preference
Age	0.12	0.12	0	0.3	0.24
Income bracket	0.36	0.81	0.98	0.14	0.14

Source: Based on author's data

A correlation was conducted between the age of respondents and the genre of content consumed.

Table Number: 9 [Frequency of Age and Genre of Content]

Age	Frequency (f1)	Content	Frequency (f2)
0-12	0	Movies	30
13-19	15	Original/Exclusive Content	69
20-30	99	Sports	5
30-40	2	TV Shows	8
Above 40	4	NA	2

Source: Based on author's data

Similarly, the major platforms mentioned in survey were correlated to the genre of content streamed through.

Table Number: 10 [Frequency of OTT platforms and the Genre of Content consumed]

OTT Platform	Content Consumed	Frequency of OTT Platform	Frequency of Content Consumed
Youtube	Movies	51	44
Netflix	Original/Exclusive Content	35	62
Amazon Prime	News	22	17
MX Player	Sports	3	22
Hoichoi/Sony Liv/Zee 5	TV Shows	5	22
Others	Indoor games	3	18

Source: Based on author's data

Findings

The output received (Refer to Table Number:7), concluded YouTube to be in the first position, followed by Netflix and Amazon Prime in the second and third position, respectively. The fourth position was occupied by MX Player, Sony Liv in the fifth, followed by Voot, Zee 5, Hoichoi, BIGFlix, in order along with Ditto TV securing the tenth rank.

Table Number: 11 [Ranking of OTT Platforms]

OTT Platform	Total	RANK
YouTube	472	1
Netflix	456	2
Amazon Prime	403	3
Voot	353	6
BIGFlix	289	9
Sony Liv	356	5
Zee 5	334	7
Hoichoi	327	8
Ditto TV	275	10
MX Player	384	4

The value of chi-square (Refer to Table Number: 7(a)) turned out to be 22.45, with 16 as the degree of freedom. However, the critical value noted from the chi-square distribution table was 26.29.

The critical value for chi-square turned out to be greater than the calculated value from the observed and expected frequencies of the attributes. As a result, the researcher had to reject the null hypothesis and conclude that the attributes are dependent upon each other. In other words, the genre of content consumed is dependent on the platforms over which they are streamed. It often happens that, branded platforms acquire more subscribers and users even if their content might not be that pleasing to the viewers and vice versa.

It has been noticed from the regression analysis (Refer to Table Number: 8) that the platforms used for accessing content are strongly correlated to the demographics, age and income of respondents in contrast to the correlation among other attribute values. The correlation coefficient for age of respondents and the platforms used to access resulted in the value of 'r', where $r = 0$ and that for income and the platforms used to access turned out to be $-r = 0.98$.

The range for 'r' lies in between -1 to +1. So, we can easily notice the proximity of the values of 'r' with regard to the range mentioned. This shows that, among all the affordable devices in market, mobiles and smart phones are mostly used to access these content and that respondents from almost all income brackets can avail the devices for viewing content.

The correlation coefficient for the distribution of age and content type (Refer to Table Number: 9), results into $r = -0.24$ reflecting a weak linear relationship between the attributes. This shows that, viewers belonging to any age group are not confined to specific content barriers. There is no such existence of content barriers with the privilege of multiple screening at affordable pay packages.

The correlation coefficient for the distribution of OTT Platform and content type (Refer to Table Number: 10), results into $r = +0.74$ reflecting a quite strong linear relationship between the attributes. Hence, the brand of OTT and the genre of content have a good relation to keep the viewers engaged.

Conclusion

Entertainment is the key driver on digital platforms that draws the attention and generates interests among the widespread urban and rural viewers. The App Annie State Of Mobile, 2020, Kantar iCube 2019, MMA GroupM Mobile Marketing Ecosystem Report 2020, talks about 84% of Active Mobile Internet users in India. The researcher also observed similar preference for accessing content with 72.5% of the respondents using smart phone.

The online video platforms are promising enough in bringing a lot more opportunities for business expansion and growth of the bottom line. Enriched and qualitative touch points amalgamated with technological investments and impacted

branding will assist the online video streaming platforms in building a critical mass. Deeper brand connect and stronger affinities have led to successful consumer engagement with the right content.

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