

Comparative Study of Viewers' Behaviour Over Traditional Television Channels And Over Ott Video Platforms In Maharashtra

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Abstract

The great digital revolution has brought so many changes in all aspects of our lives including the way we buy products, the way businesses are done, the way products are marketed, the way we search for the information etc. Traditional television channels are going through the major disruptions. Television industry has witnessed many changes all these years such as VCRs (Video Recorders) in 1970s to DVRs (Digital Video Recorders) to DTH in Early 2000s. Over The Top facilities are defined in various ways by various people, the most elementary denotation of OTT is 'All types of services-for the users over internet directly without any contribution of mediators like in case of old-style or traditional modes.' OTT video platforms are considerably becoming part of viewers' entertainment time and they are giving tough competition to traditional modes. Time and place convenience, availability of efficient and cheap data connectivity, penetration of smart phones, availability of cheap and even free access to OTT video platforms, sheer breadth of content to choose from and quality of content are some of the major factors affecting viewers to shift towards the OTT Video Platforms.

Keywords: *OTT Video platforms, Traditional Television channels, Frequency Variables, Over-The-Top services*

1. Introduction

The great digital revolution has brought so many changes in all aspects of our lives including the way we buy products, the way businesses are done, the way products are marketed, the way we search for the information etc. One of such big change which we are observing is into the field of entertainment. The traditional modes of entertainment are on way disruption and people are choosing modern way of entertainment. Television viewing is moving from family device of the drawing room to the personal devices such as hand held mobile phone or laptops or personal computers etc. Broadcast television channels are quickly being replaced by over the top video platforms. Rather than waiting for their favourite programme to get telecasted people are choosing freedom to choose the time and place to watch their favourite programme. Apart from time and space convenience, sheer breadth of content available and quality of video is major point of attraction for people to choose OTT video platforms over the traditional television channels.

Traditional television channels are going through the major disruptions. Television industry has witnessed many changes all these years such as VCRs (Video Recorders) in 1970s to DVRs (Digital Video Recorders) to DTH in Early 2000s. In all this time televisions have standstill but this time television channels are competing with OTT video platforms which has been a major point of attraction especially for the youngsters. Youngsters are quickly moving towards the modern modes of entertainment which is providing them large amount of contemporary data to choose from, to choose the time when to watch the television, where to watch television and that too with personalised experience. Advancement & penetration of smart phones, high speed data, and price affordability of internet data have substantially contribute to the acceptance and growth of OTT video platforms.

I. WHAT IS OTT?

Over The Top facilities are defined in various ways by various people, the most elementary denotation of OTT is ‘All types of services- for the users over internet directly without any contribution of mediators like in case of old-style or traditional modes.’ It is only a expertise substitute that permits for the duplication of the old-style home entertainment “stack” of customer value propositions in a digital context. OTT services aren't measured by any mediators like in case of outdated mode of content distribution.

The Federal Communications Commission (FCC) of the U.S. describes an OTT as an online provider of video content via the Internet (FCC, 2013).

‘Service providers of an OTT can be well-defined as a facility provider presenting ICT (Information Communication Technology) services, but neither functions a system nor rents system capacity from a system operator. Instead, OTT providers trust on the worldwide internet and contact network speeds [ranging from 256 Kilobits for messaging-Megabits (0.5 to 3) for video streaming] to spread the user, hence going “over-the-top” of a telecom service provider’s (TSP’s) network.’ - 2015 TRAI (Telecom Regulatory Authority of India). In technological words, OTT is the distribution of video content done and fixed/mobile broadband internet connections instead of over there broadcast TV spectrum or dedicated cable, fiber, or satellite networks. In many ways, OTT is equivalent to a traditional set of consumer video services.

OTT video platforms almost operate in the same way as the traditional mode of entertainments. They only differ in the way the content is distributed to the viewers. In traditional mode there is a mediator such as cable operator or broadcast networks which control entire content distribution including the time, duration, platform, quality etc. While in case of OTT video service there is no mediator and the content is directly distributed to the viewer over the internet and the viewer control the time, place, quality and other details.

If we look at the broad OTT Video industry there are various categories of OTT Video Platforms.

- a) **Advertisement Sponsored OTT Video Platforms:** These OTT video platforms are advertisement sponsored and hence available free of cost to the viewers. This means viewers do not have to pay additional subscription fees to view such platforms. YouTube is the most popular platform in this category. In fact Christen Steinkamp (2010) in his study stated that people prefer free OTT video platforms more over the paid one.
- b) **Subscription Supported:** Such OTT video platforms are available to viewers with some subscription fees. OTT video service providers offer different plan to customers ranging from monthly plan to annual plan. Moreover they also vary in terms of quality and content limit. To order price sensitive customers they have low priced plans with limited content access. We have recently observed this change that many viewers are preferring to buy plan for such OTT video services rather than to recharge for their cable TV. Netflix, Amazon Prime, ZEE5, ALTBalaji etc are the popular OTT Video service providers in this segment.
- c) **Transaction Supported:** Opposite to the subscription based, transaction based OTT video platforms allow user to own or rent a particular content for one time use. These platforms are mostly used for movies but apart for movies users also use it for web series of other programmes. This type of platforms attracts people who do not want to invest in long time subscription either because of financial or time constraint. Amazon Instant Video, iTunes, Vudu, Google Play are some of the famous OTT video platforms in this segment.

II. OTT VIDEO MARKET IN THE WORLD AND IN INDIA

OTT Video platform market is continuously growing in a significant manner and this is catching attention of lot big of players at world level like Apple, Disney, Warner Media apart from Amazon and Netflix and these new players will challenge the business of Netflix and Amazon. OTT Video platform market grew by 11.61% in the year 2019 (businesswire, October 2019) OTT Video market will grow almost double between 2019 to 2029 and will represent 72.8 billion industry by 2023 and will grow with almost 14% CAGR. (PwC, Global Entertainment and Media Outlook report 2019). The report also suggests that Asia Pacific countries will overtake OTT Video Market by the year 2010 than the North American Countries. The report also forecasted that US Traditional TV Market will keep on declining and will observe -2.3 growth rate per year. Over-the-Top Services (OTT) Marketplace viz Online Gaming and Music Streaming and VoD and Communication form and Monetization Model viz. Subscription-based, Advertising-based, and Transaction-based and Streaming Device, Vertical, and Region is expected to grow from USD 81.6 billion in 2019 to USD 156.9 billion by 2024, at a CAGR of 14.0% during 2019–2024 as per - Global Forecast to 2024. (Markets and Market Press Release of 6th January, 2020.) These figures are the result of inception of OTT video application such as Netflix, amazon, hotstar supported by high speed internet data and it has triggered the consumption of digital video. OTT Video applications are the most used application among the smart phone users after chatting, social media and ecommerce applications.

North America and Canada holds the most dominating place in the world OTT Video service reason being they are the most developed and established economies and promotes investment in new technologies freely.

Top Global players of OTT video platforms are Amazon, Netflix, Hulu, You tube, Apple, facebook watch, HBO, and Disney.

India's first OTT video platform was BIGflix by Reliance entertainment launched in 2008. Then in 2010 Digivive launched first OTT Video platform which could be accessed through mobile phone called nextGTV which served both live TV and video on demand. nextGTV was the first OTT video platform to live stream IPL in the year 2013 and 2014. It was in the year 2013 when Ditto TV by Zee and Sony Liv was launched, people started turning their heads to Indian OTT market. Launch of hotstar in 2015 gave a huge boost to the number of OTT viewers in India. Hotstar is the most downloaded OTT application with 350 million downloads as of 2018. (Gaurav, 2019 and MoMagic Survey 2019). But it was a real turning point for the Indian OTT industry when in 2016, American OTT players such as Netflix and amazon was launched with huge collection of movies and original shows in India. It all together changed the taste and preference for kind of content viewed on OTT platforms in India and especially among the youngsters.

As many as 55 percent of the Indians prefer to watch entertaining content on OTT Video Platforms but 41 percent still prefer to watch DTH. (MoMagic Survey, August 2019). OTT will follow the path of mobile however brands and marketers cannot cut down the DTH. DTH is currently performing more than forty percent and it's still a long way to link up with the Other parts of India which presents an market opportunity for companies to tap on. In future we expect that OTT will grab extra share but DTH will proceed to be applicable." Said *Mr. Arun Gupta, CEO and Founder MoMAGIC Technologies*. Indian OTT market is expected to grow 10 times by 10 times to reach from \$500 million to \$ 5 billion from 2018 to 2023 (BCG report, 2018). India's OTT Video industry is expected to grow at 21.82 % CAGR and will reach Rs. 11.977 crores by 2020 which will be highest among all the sectors (PwC report, 2019). Worldwide, India is the fastest growing entertainment and media market which is expected to keep that impulse. In the next five years, India will indicate a rise in over-the-top (OTT), online gaming and Internet advertising. Increase in these sub-sectors is due to increase in demand for personalization on digital platform," said Rajiv Basu, partner and leader – entertainment and media, PwC India. As many as 40 OTT players are already operating in India. Moreover, studies also predict that India will have more than 550 mn online video subscribers by 2023. (KPMG report, September 2019). The same report also states that India holds second highest consumption of digital video in the world.

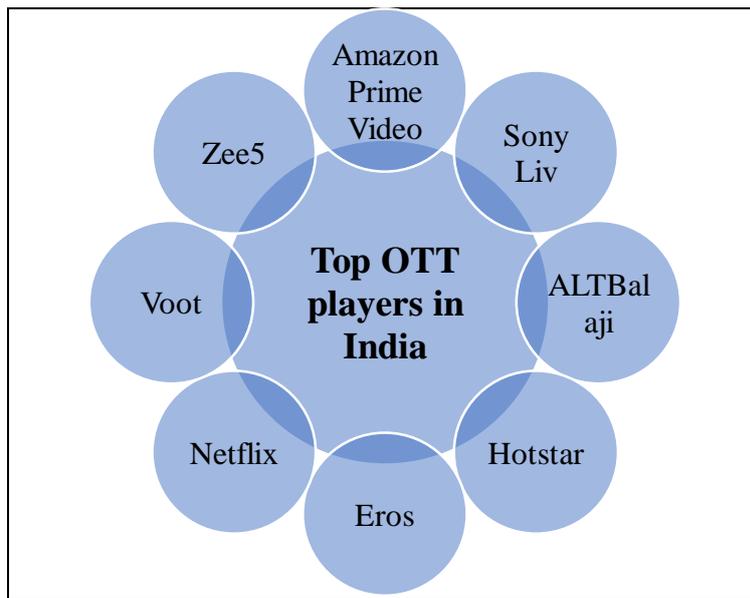


Chart: **Top OTT players in India**

III. LITERATURE REVIEW

‘TV to OTT: Analyze Netflix's development, it's impact on Television industry in Hong Kong’ (May 2016). The objective was to study the business model of Netflix and To Study how netflix is changing consumer viewing habit and challenging television industry. Method included survey of users and interview of industry experts. The study concluded that television viewing is still preferred by viewers in Hong Kong but the Young viewers below 35 years are adopting new modes of entertainment. Quality of programme is the most significant factor in the choice of mode of entertainment. People prefer to watch OTT video platforms but hesitate to pay subscription fees.

Singh, P , ‘New Media as a Change Agent of Indian Television and Cinema: A study of over the top Platforms’(June, 2019) study was conducted to know how Indian Television and Cinema are changing due to new online platforms and how youth is using these new digital platforms for video content watching. It was found that youth prefer to watch web series and movies on OTT. On an average viewer spend 2 hours on OTT and most prefer time to watch OTT is night time. OTT is preferred over television among youngsters because of service, personal medium and availability of International content.

Brett Hutchins in August 2019 written in Over-the-top sport that live streaming services will change coverage rights markets and the growth of media sport portals. Live Sports OTT Platforms such as Tensent, Amazon Prime Video and DAZN are establishing new norms concerning how media sport is accessed and curated and, as such, their arrival marks a past shift in the global market for sport coverage rights and the media systems through which live content circulates.

Velhino A. ‘Field trial of a new iTV approach: The potential of its UX among younger audiences’ (2019) with the help of Niche theory, this study tried to understand the intensity of competition between OTT video platforms and television in Korean market. The Study concluded that this competition is not as intense as in American market and television is still a preferred mode of viewing.

Mohanvelu, K. S., ‘DTH service-challenge from internet’ (2016). The TV industry, in general and DTH service, in particular needs to evolve a suitable response to remain relevant in the coming years. DTH architecture and programming content is based on broad viewership and needs to transform itself into both broad based as well as individual viewing.

Streaming TV is a multisited, quasi-iterative, and rapidly developing marketplace, in which inheritant pattern prevail alongside and often in rivalry with new styles of production, transmission, and consumption - Sanson K., 'Hulu, streaming, and the contemporary television ecosystem' (2019).

Second screen usage are becoming progressively favorite in research and technical use, from well-known examples such as Netflix, Amazon Prime Video or YouTube to applications that enable novel uses cases and have the potential to change the current usage behaviour of the content on the first screen.

Abreu J., 'Viewer behaviors and practices in the (new) television environment' (2013), the results provide a detailed insight about the habits, dynamics and behaviors of spectators regarding the actual scenario of television. It's allowed to identify the most related criteria considered by viewers when determining what to watch on TV. Out of all important one is the program type followed by the state of mind (mood), individuals who share the couch with and the time available to watch TV.

Michael L. Wayne, 'Global streaming platforms and national pay television markets: a case study of Netflix and multi-channel providers in Israel'(Nov, 2020) Data was collected through open ended interview with 10 Israeli television industry executives and secondary data such as industry documents, press coverage, and executive interviews in the public record. The study nullifies the prenaution that OTT is affecting the business of traditional television channels and suggest that in Israel television industry is not significantly affected by netflix and both coexist.

Krishna Jaykar & Eun-A Park, 'Emerging frameworks for regulation of Over-The-Top services on mobile networks: An international comparison' (April 2014). The study aimed at comparative analysis of regulations proposed for OTT services provided over the mobile networks, examine terms of access, interconnection and pricing for OTT service and suggest best practice for OTT services. A proper framework for OTT service does not exist in any of the nations of study and study proposed some principles to regulate the OTT services.

Over-The- Top (OTT) Market Outlook 2020 (May, 2019).People prefer to watch OTT Video platforms on Mobile Phone the most rather than smart TV, laptops or tablets as Mobile phone device provide high personalization compare to other devices which is one of the most important factor that viewers are switching from traditional television channels to OTT video platforms. One of the key drivers for increasing market share of OTT video platform is penetration of Mobile computing devices (Businesswire, October 2018)

IV. RESEARCH METHODOLOGY

This research was aimed at understanding the changing viewers' behaviour in terms of their choice of platform, content, surroundings etc. Data was collected around 110 viewers to understand the subject matters. Data was collected through the structured questionnaire which was distributed online. Collected data was analysed using statistical software such as SPSS and Excel.

A) Research Objectives

1. To study shift of viewers from Traditional Television channels to OTT Video Platforms.
2. To explore and understand the factors affecting viewers to shift from Traditional Television channels to OTT video platforms.
3. To compare and understand viewers' behaviour over traditional television channels and over OTT Video platforms.
4. To understand viewers' behaviour among different age groups and Gender.

B) Frequency Variables

To understand the viewing behaviour of participants, they were asked how much time they spend watching OTT and Traditional television. They were also asked about what kind of content they prefer to watch on OTT platforms and on television, which OTT platforms they regularly watch, and major reasons to watch OTT platforms. Participants were also asked what kind of platforms they prefer most in terms of monetary involvement i.e. free, medium fees or premium subscription with premium fees. In order to understand and compare viewer behaviour over OTT and Traditional Television, a set of statements were prepared and on the same set of statements respondents were asked to give their opinion in terms of OTT Video platforms and Traditional Television Channels.

C) Demographic Variables

In order to understand whether viewer's behaviour varies significantly with different demographic variables or not, demographic information of participants such as gender, age group, occupation and income were collected. However in this research we have only analysed gender and age group as a demographic variable.

V. ANALYSIS & FINDINGS

Out of 110 respondents 56 (50.91%) are males and 54 (49.09%) are females. About 50% of the respondents will fall in the age group of 20 to 40 years and majority of the respondents fall into the service group. About 56% of the respondent watches television for less than 1 hour and only about 4% respondents spent more than 3 hours watching the television. While if we analyse the OTT watching viewing behaviour of respondents as many as 25% of the respondents spend more than 3 hours watching OTT video platforms and 45% respondent spend between 1 to hours. So this clearly suggests that respondents comparatively spend more time watching OTT video platforms than the traditional television channel. Drama and Comedy is the most preferred program to watch on OTT video platforms. While sports and news is the most preferred program to watch on television channels. This fact can be very well linked to the some of the other findings that when people want to watch something with friends or family they prefer television more while when they want to enjoy some program alone they prefer OTT Video platforms. Sports and news are something that people want to enjoy with family and friends. Web series are the most watched content on OTT Video platforms. As literature and also our research suggest, young generation is the most influenced age group with the invent of OTT videos. And we observe a kind of great craze among the youngsters about the web series. (Which is original content developed by OTT video platforms). After web series movies and television programs are most preferred content.

When it comes to the most popular OTT video platforms You Tube tops the list followed by Hot Star, Amazon Prime Video, Sony Liv, Voot, ZEE5, Netflix, YuppTv and Jio Cinema. One interesting finding also suggests that people in India prefer free or low priced OTT video platforms more. This is why perhaps Netflix is struggling in India compared to the cheaper alternatives such as Hotstar, Amazon Prime, and Voot etc. Realizing this Netflix also has come up with a lower price variant with limited services.

When the same set of statements were asked for OTT and Televisions viewing behaviour, some drastically different behaviour were observed. OTT is giving freedom to respondents to choose the time and place to watch the content which is not possible in case of television. OTT is preferred to watch in alone time while television is preferred to be watched with friends and family. OTT give feeling of control to the viewers which they don't feel in case of Television channels. OTT video

platforms have scored a little higher for passing the time of viewers and let them forget about the other things. In case of feeling of relaxation, getting entertained, and learning something about the self, viewers' behaviour is almost same with some minor changes.

H1: There is a correlation between Traditional Television channels and shift of viewers towards OTT Platforms.

The objective here is to understand that whether there is any relation between traditional television channels and shift of viewers towards OTT Video platforms. As displayed in the figure no. 1 correlation Coefficient between the variable is 0.902 which is significantly high with the p value = 0.00. So rejecting the null hypothesis, we reach to the conclusion that there is high correlation between viewers' television watching behaviour and shifting towards the OTT Video platforms. So we can say breakthrough features of OTT video platforms such as facility to choose the time and place for watching a programme, having feeling of control, breadth of content available to choose from, contemporary and quality of content etc. are attracting viewers towards the OTT Video platforms which they miss on traditional television channels.

Correlations				
			Time_of_Watching _TT	OTT_Video_Platforms
Kendall's tau_b	Time_of_Watching_TT	Correlation Coefficient	1.000	.902**
		Sig. (2-tailed)	.	.000
		N	87	87
	OTT_Video_Platforms	Correlation Coefficient	.902**	1.000
		Sig. (2-tailed)	.000	.
		N	87	110
**. Correlation is significant at the 0.01 level (2-tailed).				

Figure 1

H2: There is a significant difference in the content watched on traditional television channels and OTT video platforms.

In order to understand viewer's behaviour in terms of choice of content, we analysed content watched on traditional television channel and on OTT Video platforms. As displayed in the figure no. 2 p value= 0.00. This suggests that there is a significant difference in the kind of program viewed on OTT video platforms and on Traditional Television Channels. People prefer to watch programs like sports and news which they want to enjoy in the company of friends and family on television channels. While they prefer to watch drama and movies on OTT video platforms and they prefer to enjoy it in the alone time.

Correlations				
			program_watch_on_TV	program_watch_on_OTT
Kendall's tau_b	program_watch_on_TV	Correlation Coefficient	1.000	.873**
		Sig. (2-tailed)	.	.000
		N	87	87
	program_watch_on_OTT	Correlation Coefficient	.873**	1.000
		Sig. (2-tailed)	.000	.
		N	87	110
**. Correlation is significant at the 0.01 level (2-tailed).				

Figure 2

H3: Difference in age group is affecting the selection of OTT Video platforms.

In order to understand that whether different age groups behave differently in the choice of OTT video platforms, we applied Chi-square test as illustrated in the figure no. 3. Since $p\text{-value} = 0.000 \leq 0.05 = \alpha$, we reject the null hypothesis. That means different age groups select different kind of OTT video platforms.

Test Statistics ^{b,c}			
			Preferred_Platform_OTT
Chi-Square			100.590
Df			4
Asymp. Sig.			.000
Monte Carlo Sig. Sig.			.000 ^a
	99% Confidence Interval	Lower Bound	.000
		Upper Bound	.000

Figure 3

H4: Gender of the customer is affecting on the selection of OTT Video platforms.

Here, the aim is to understand whether male and female behave differently in terms of their choice of OTT platforms. Mean rank of male (33.00) and Female (78.83) as illustrated in figure no. 4 is significantly different. Whitney test statistic was applied further to understand the intensity of the difference. As displayed in the figure no. 5, Z score = -8.065 with p-value of .000. This is less than 0.05 alpha value so the null hypothesis is rejected. Hence we can say male and female behave very differently in terms of choice of OTT Platforms.

Ranks				
	Gender	N	Mean Rank	Sum of Ranks
Preferred_Platform_OTT	Male	56	33.00	1848.00
	Female	54	78.83	4257.00
	Total	110		

Figure 4

Test Statistics^b			
			Preferred_Platform_OTT
Mann-Whitney U			252.000
Wilcoxon W			1848.000
Z			-8.065
Asymp. Sig. (2-tailed)			.000
	Sig.		.000 ^a

Figure 5

VI. CONCLUSION

OTT video platforms are considerably becoming part of viewers' entertainment time and they are giving tough competition to traditional modes. Time and place convenience, availability of efficient and cheap data connectivity, penetration of smart phones, availability of cheap and even free access to OTT video platforms, sheer breadth of content to choose from and quality of content are some of the major factors affecting viewers to shift towards the OTT Video Platforms. However, traditional television channels will not be entirely replaced by OTT Video platforms, at least in the near future and they will coexist. Traditional Television channels still have a chunk of viewers loyal to it, with some modification in the quality of content and strategies they can still attract consumers and survive in the competitive era.

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