

OTT IN COVID ERA AND BEYOND

Debastuti Dasgupta

Assistant Professor

Department of Journalism and Mass Communication
Asutosh College, Kolkata

And

Priyanka Roy

Assistant Professor

Department of Journalism and Mass Communication
Asutosh College, Kolkata

Abstract

The COVID pandemic has changed the consumption pattern of media and entertainment. With cinema halls being closed for uncertain time, Over the Top Technology (OTT) is trying to take that place. OTT is any streaming service that delivers content over the internet. This new medium although had showed its presence in pre COVID era, audience started embracing it in a big way during lockdown. OTT space is dominated by big players like Netflix, Amazon Prime, Disney Hotstar and upstarts like ZEE 5, Sony Liv, Voot and many more. The immediate success of web series on Amazon and Netflix paved the way for more diverse contents. Later OTT became the medium of choice for release of mainstream Hindi cinema and regional movies. Several national and international releases are taking place in OTT in the current situation. This new medium has several merits and demerits like any other medium. This chapter deals with the rise of OTT, its pros and cons and discusses the future of OTT in an elaborate manner.

Keywords: Over the Top Technology, Video On Demand, audio streaming, web series, COVID

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Introduction

The quarantine days have altered our lives in ways like never before. This COVID pandemic is unique as it has not only caused considerable loss of human life but also exposed to unprecedented economic hardship and rising unemployment. Social distancing norms worsened prospects in almost all fronts where the film industry is not the exception. It has been severely hit sector, still grappling with the impact of the pandemic. The pandemic not only has stalled many upcoming releases but jeopardized the lives of many associated with the industry. As cinema hall

is the last to open in pandemic situation, the question of how this major entertainment industry recovers is a serious concern.

Understanding the unprecedented impact of the pandemic, people are trying to look for an alternative pattern of consumption of products and service offerings. The shift in the way people consume is evident on a massive scale and will surely have a long-term effect on the functioning of several industries. The media industry is one amongst them. Menon (2020) states that restrictions imposed in the wake of Covid-19 pandemic profoundly transformed media and entertainment consumption pattern also. Digital media consumption has increased considerably because of people constantly confined to their homes. With movie theatres closed, film industry too started finding multiple avenues to cope with the situation. Over the Top Technologies (OTT) is one such platform which has gained enormous popularity in the recent days. This chapter will examine the new trends that OTT has brought in.

Over the top technology refers to any streaming service that delivers content over the internet. There are many definitions of OTT as defined by different groups and organizations.

Investopedia defines Over the top (OTT) as “..... film and television content provided via a high-speed Internet connection rather than a cable or satellite provider” (Investopedia, 2019). It further clarifies that “OTT can be accessed directly on a computer, but it is often watched on a Web-enabled television or through an Internet-enabled device, such as a Roku or Apple TV, connected to a conventional television”.

Similarly, a technology blog titled *techterm* defines OTT as “....movies and television shows that are delivered directly to users. Instead of requiring a cable or satellite television subscription, OTT content can be downloaded and viewed on demand...” (Techterm,2016).

Likewise, *Clevertap* defines OTT as- “... services that went “over” the heads of cable providers, specifically streaming services. The term OTT has since been applied to many other products and services that stream content to users using the internet as a replacement for pre-existing infrastructure” (Clevertap, 2020).

The OTT service providers deliver audio, video content which bypasses traditional operator’s network. Consumers around the world, on one hand, had already started embracing OTT to satisfy their need to consume content at any time and at any place, and on the other hand, operators too could generate revenue from video on demand, interactive applications. While the term OTT revolves around the concept of video on demand (VOD), this technology covers a wide range of other web-based content like video, audio, messaging etc.

Video streaming is the most popular version of OTT media. VOD allows users to pick and watch content from their collections whenever they want. Netflix, YouTube are examples of this. There is a thin difference between OTT and VOD. VOD that requires traditional cable connection does not come under the category of OTT. OTT content is delivered directly through an internet

connection. OTT messaging includes Skypye, VOIP etc. Audio service of OTT is music streaming services through platforms like SoundCloud, Gaana and many more.

OTT in India

Some major global players in the field of OTT are turning their attention to other overseas countries, such as India following stagnancy in US. Rising Internet & broadband penetration, reducing data charges, the spread of internet-enabled mobile phones, tailoring of content and affordability are all important drivers driving the growth of the VoD industry in India (Sundarave&Elangovan, 2020). A joint report by IMAI and Kantar published in June 2021 the number of active internet users in India are expected to reach about 900 Mn by 2025. The report also highlights that, the mobile phone has been a major driver of internet expansion in this country. Mobile phones are used by all active internet users to access the internet. The most popular online activities among internet users in both urban and rural India are entertainment, communication, and social media.

The media landscape all over the world has changed and is continuously changing especially after the COVID event. In India, after HD and 3D revolution, people's desire to watch content in different devices irrespective of time and place paves the way for OTT invasion. In the context of Indian Industry, the OTT model has gained huge popularity in the last two-three years with contents like Sacred Games, Lust stories ushering in and getting appreciated in the country. BigFlix, launched by Reliance Entertainment, in 2008 was the first independent Indian OTT platform. As of July 2020, Disney Hotstar is the most heavily subscribed OTT platform in India. Netflix, Amazon Prime, Sony Liv, Zee5, Voot are also some of the popular OTT platforms in India. A report by the Business Standard published in January 2022 mentioned that in India's \$27 billion M&E industry, OTT now has a 7-9 % market share. However, by 2030, it is predicted to have a market share of 22 % to 25 %. The number of Indian households with a Pay TV subscription, has essentially stagnated, expanding at a rate of only 2%. However, the number of households having a subscription-based video-on-demand service, or SVOD, has surged by 51% in India. Bhushan (2016) in this context, highlighted the fact that India can afford to become a hub of local content generation for OTT platforms as Indian content attracts 60% viewership across television and OTT platforms. Observers are of the view that because of the availability of local content India holds the market superiority in terms of OTT platforms. Research firm Kantar's report published in 2019 on OTT consumption showed very interesting data regarding trends of OTT consumption in India in the pre COVID scenario. According to the report, in the last two years, the growth of OTT in India is stupendous. With the proliferation of smartphone and cheap data costs, audience especially women, have shown interest in OTT (Malvania, 2019).

Soumya Mukherjee, vice-president, revenue and strategy at Bengali streaming service Hoichoi said, "Our thought is very clear, the market in India is unique and every platform has its loyal

user base. Our focus on one language helps us provide more value to our customers.” OTT video services such as Neestream (Malayalam), Planet Marathi, Chaupal OTT (Punjabi), and Hoichoi (Bengali) claimed they want to increase their investments and content slates next year. However they admitted not having the financial resources of Netflix, Amazon Prime Video, and other international companies. Akshay Bardapurkar, a Marathi film producer and the founder of the OTT service Planet Marathi, acknowledged that the following year will see their platform release movies with higher production values, as well as improve its product experience with new features. *Pondicherry, Sunny, Sahela Re, MiPunhaYein, and Badlee* are among the next titles from Planet Marathi, which expects to release 25 web programmes and 10 movies in 2022.

"Once you break the one-inch-tall barrier of subtitles, you will be introduced to so many more fantastic films," stated filmmaker Bong Joon Ho. In an earlier interview with Mint, Charles George, the CEO of Malayalam-focused OTT provider Neestream, said regional OTTs prioritise regional consumers by offering them with high-quality vernacular content, that rather than considering themselves as competitors to multinational firms. Aha (Telegu) is a relatively new platform, launched just prior to lockdown had has around five million downloads and over one crore users. Koode, which was launched in December 2020 by Studio Mojo, is a relatively new OTT platform which broadcast Malayalam content that is also gaining wide popularity. In October 2020, Ahmedabad-based lifestyle media business CityShor.com started its web streaming platform. It claims to be the world's first Gujarati-only OTT platform, offering original web series and films.

Pros and Cons of OTT

There are several benefits experienced by the consumers, creators and advertisers since the advent of OTT, as the media consumption culture has taken unprecedented shift since the COVID pandemic.

A study which compared media consumption behaviour of people in regards to traditional media and OTT in Maharashtra revealed that 56% of the respondents spent less than one-hour watching television, and 4% of the respondents spent more than 3 hours a day watching traditional television. However, 25% of the respondents reported watching digital contents in OTT platforms for more than 3 hours a day (Madhani, and Nakhate, 2020).

Therefore, the finding suggests that people are spending much more time on OTT platforms compared to traditional television channels. The study points out several reasons for such a radical shift towards OTT platform. The foremost reason for this shifting media consumption can be attributed to the fact that OTT is providing the freedom to people to choose the time and place to watch any media content. Moreover, the viewers have the flexibility either to watch it alone or with their family and friends. Therefore, OTT provides greater control to the viewers, which traditional television cannot provide. The study also points out that OTT platforms provide better passing of time thereby allowing a user to forget about other things as compared to traditional

media. Besides, the study points out other factors like the ability to choose from a breadth of contents, greater freedom and quality of contents, which has caused the behavioural change in viewing pattern from television to OTT.

The benefits of OTT have not only been reaped by the consumers alone as even the content creators and advertisers are finding OTT platform to be more lucrative than television.

According to Strategust (a leading organization working on digital advertising), *“Choosing OTT advertising means taking control of who you target when you spend and knowing how your efforts perform”*.

The organization points out two major benefits of OTT advertising.

The first benefit is that it gives greater control over the content in the hands of users, which translates as the users willingly, engage with the brands being advertised. According to an article posted in Strategust website *“The users are choosing to be entertained and consume video at that moment, and are more receptive to viewing an ad before the main feature. OTT advertising content isn’t skippable. Meaning, the brand message will resonate with viewer audience profiles, fulfilling user interests and needs, making it more of a personal experience than random television ads that may not touch on any aspect of a viewer’s lifestyle”*

Similarly, the second benefit of OTT as per Strategust is the ability to track the success of a campaign. Through the OTT platform a marketing campaign can measure video completion rate to determine the duration of engagement in advertising. Additionally, marketers can also measure how consumers are interacting with the content and can compare ad placement performance with different OTT platform.

The website mentions, *“After a sale or online engagement, we retrace our steps. We dig into behavioural insights and attribution tracking data to determine what made that viewer take action so we can re-create the most popular calls-to-action and touchpoints in your future campaigns”*.

Similarly, according to KOB advertising (a well-known name in OTT advertising), OTT has a wealthier and a more engaging audience, who are not available in the traditional television viewing audience. Besides, OTT also provides advertisers to know demographic data like who is watching, what they are watching, when they are watching and what device they are using.

Although there are countless advantages of OTT, some think that OTT can be counterproductive for a number of reasons. One of the major disadvantages pointed out by experts is that OTT is posing a severe threat to multiplex and movie theatres in India.

On 14th May, 2020, a reputed multiplex cinema theatre in India came up with a press release expressing dissatisfaction over producer's decisions to release movies directly in OTT platform by completely bypassing cinema theatres.

A portion of the press release mentions "Cinema and content creators have always been in a mutually beneficial partnership, where one's action provided fillip towards another's revenues. INOX has been investing heavily towards adding world-class quality screens, across the country, only to provide more eyeballs to great content being produced. This partnership has endured for decades and has provided succor to each other. In these troubled times, it is disturbing to see one of the partners not interested in continuing the mutually beneficial relationship especially when the need of an hour is to stand together and bring the industry back to its vibrant best".

Such press release by one of the major multiplexes in India points towards the fact that the traditional relationship between content creators and multiplex owners are dwindling as content creators are being pushed to release their films online on OTT platform.

Similarly, Kamal Gianchandani, CEO of PVR Pictures, in a conversation with HuffPost India, stated that they are disappointed with Gulabo Sitabo being directly released on the OTT platform.

Therefore, the falling relationship between the multiplex owners and content creators is a cause of worry as a huge amount has been invested in developing cinema multiplex. Additionally, around two lakh people are earning their livelihood from the multiplex industry, which will decline if this trend continues.

Similarly, other disadvantage of OTT platform includes reliability and availability of high speed internet. As the digital divide still prevails in India, OTT platforms might not be available in remote areas where internet penetration is weak.

Another disadvantage of OTT is a high subscription fee. Although a single OTT platform might be cheaper than the traditional cable or DTH, when a user has to purchase multiple OTT platforms, it might get expensive. Many creators choose to release their content on a single platform, thereby disallowing viewers to watch their favourite film in a single OTT platform of their choice.

History of OTT

Since the streaming of first live radio streaming event by ESPN in 1995, multimedia technology has transformed giving users the flexibility and the creators the ability to actively engage with its audience.

Since the advent of internet penetration and continuously increasing broadband speed, content creators in the entertainment industry and technology firms have always dreamt of streaming video content online for their audience.

However, it was extremely challenging for the technology firms to develop a streaming service given that large video-based files were extremely difficult to stream in the available low broadband. A new era of streaming began in mid-2000 when Adobe came up with flash player utilizing the web and streaming media for the first time. However, the old problem of limited internet bandwidth did not allow flash to scale up as its reach was limited.

In 2007, another important milestone was achieved in the streaming industry as a company named Move Networks introduced a technology which was called HTTP – based adaptive streaming. The capability of this technology allowed delivering the media file in small chunks, which would automatically adjust the streaming quality based on the strength of the broadband.

This new technology allowed the content creators to scale their contents, and also reduced the constantly buffering problem faced by the consumers.

Since then there has been a series of new development in streaming technology. In 2008 Microsoft developed smooth streaming technology and Netflix developed ‘Watch Instantly Streaming Service’. In 2009, Apple also developed ‘HTTP ` Live Streaming’ for iOS devices.

With the advent of these technologies high profile live sporting events streaming became popular and extremely common with the streaming of the London Olympics, Wimbledon etc.

With the success of streaming these live events, the streaming industry was presented with a bright opportunity to expand and scale its operation to every corner of the world.

The increasing popularity of live streaming led the industry leaders in streaming business to come up with specific standards to guide the quality of streaming services and also to resolve conflict, which would hinder the growth of the industry. In April 2012, these standards were finalized and were known as 'MPEG Dash', which was drafted with the involvement of 50 companies including Microsoft, Netflix and Apple.

However, MPEG Dash quickly went into a problem as it was too ambiguous for organizations to adapt. To address this issue, the organization involved in developing the standards immediately formed a group called ‘ Dash Industry Forum’ to promote the adoption of the guidelines. The dash recommends streaming operators to have features such as HE-AAC v2 audio codec, ISO base media file format, SMPTE-TT subtitle format, and MPEG Common Encryption for content protection (DRM) to ensure the quality of contents is not sacrificed in streaming services (Guardian, 2017).

From streaming live on radio to providing quality content streamed across the internet, OTT platforms have become a household apparatus for entertainment. It is estimated that India alone will have more than 500 million subscribers on OTT platforms by 2022 (KPMG, 2019). It is also estimated that videos alone will contribute 77% of internet traffic by 2022 (KPMG, 2019). The majority of the audience in the OTT platform was found to be below 35 years of age which accounts for 89% of the total audience (CMS, 2019). Similarly, 55% of the users were from the top 5 metro cities and 36% of the users were from tier 1 cities.

The steady growth of OTT subscribers in India according to the KPMG report can be attributed to various factors. The contributing factor is that India has the second-highest per capita consumption of online video in the world (KPMG, 2019). Moreover, the high number of online video consumption can be attributed to the fact that India has the cheapest mobile data in the world averaging to INR 18.8 per GB (KPMG, 2019). Furthermore, internet penetration in rural areas of the country witnessed a steady growth. (KPMG, 2019). Similarly, the KPMG report also states that smartphone users in India reached 340 million in 2018 from 200 million in 2013. Likewise, the average data consumption per subscribers per month was at 8.7 GB in 2018, whereas in 2016 the average data consumption per subscribers per month was at 0.88 GB in 2013. Similarly, the growth in average mobile data download speed was at 9.93 MBPS in Nov 2018 (KPMG, 2019). From the supply side, OTT platforms grew from 9 service providers in 2012 to more than 30 service providers in 2018 (KPMG, 2019).

Similarly, a report titled 'Entertainment Goes Online' by the Boston Consulting Group predicts exponential growth of OTT platform revenues in India. According to the report, the size of OTT market will be as big as 5 billion dollars by 2023 (BCG, 2019). The report also highlights several revenue models for OTT platforms like Subscription Based Platform (SBP), Advertising based Platform (AVOD), and Transaction-Based Platform (TVOD) that has huge potential to succeed in the market.

The report further classifies Indian OTT consumers into three categories, which are:

1. Traditionalists:

They are consumers who seldom consume OTT platforms and primarily consume other platforms other than OTT like television or radio.

2. OTT Experimenters:

These consumers consume both OTT as well as other platforms in a significant manner.

3. Early Adopters:

They consume OTT on a regular basis are mostly from urban areas.

Types of Content Watched by Indian Audience in OTT platform

The KPMG report surveyed more than 1400 respondents across 16 cities of India to identify the types of content the audience preferred in OTT platform.

The report suggests that the most preferred content category was full-length movies followed by TV contents available as catch-ups, Music Videos, Sports and Online Original Series. Music videos were more popular among young people aged between 15-24 (KPMG, 2019).

Similarly, the report also categorized the viewer's preference according to the genre of the content. According to the report, the most popular genre in OTT platforms was comedy followed by drama, action, thriller, horror, devotional, and adult.

Similarly, 30% of them responded in the survey said that they prefer other language than English and Hindi (KPMG, 2019). Although Hindi was the most preferred language, many OTT users in India also preferred contents in their vernacular languages (KPMG, 2019).

The preference of the language according to the survey is as follows (KPMG, 2019):

1. 64% of the respondents preferred content in the Hindi language
2. 11% preferred OTT contents in the Tamil language
3. 6% preferred to consume OTT contents in English
4. 4% of the respondents preferred the Kannada language
5. 5% preferred Telugu
6. 4% preferred Bengali
7. 3% preferred Marathi

The KPMG report also explored which devices were used by the respondents to consume OTT contents. The survey showed that 87% of the respondents were using their cell phones to access OTT content. The second most popular device to access OTT content was internet enabled TV (5%) followed by laptop (4%) personal computers (2%) and tablets (1%).

Similarly, the preferred time slot across professions was as follows (KPMG, 2019):

1. Self employed people in small business preferred to watch OTT contents between 10am-6pm.
2. Self employed people in large business preferred to watch the content during 6pm-8pm.
3. People working in public and private sector preferred watching OTT contents during 11pm-7am
4. Unemployed people preferred watching OTT platform between 7 am to 10 am.

OTT during COVID

The natural consequences of COVID-19 and the subsequent lockdown period extended over a long period of time have caused to be a catalyst in the adaptation of OTT over other entertainment platform in India and the world. Forbes in its website reports that OTT platform in India has witnessed the surge in subscriber's base by 80% during COVID-19.

According to a report titled "Impact of COVID on Media and Entertainment, US alone has seen a surge in OTT by 38% (Capgemini, 2020). In the US the seven largest OTT platform saw an average of 75% increase in subscribers' base. For example, Disney's signups were more than 225%. Similarly, Netflix gained 16 million subscribers during the pandemic (Capgemini,2020).

A study titled 'Growth of OTT in India – the COVID factor' concludes that the pandemic, lockdown and the travel restriction has been a blessing in disguise for OTT operators as people have more time to consume media through these platforms. Even though the platform was poised for growth in the coming years, the pandemic created a surge in its growth (Bhattacharya, 2020).

Similarly, the Chairman of Media and Entertainment Committee of PHD Chamber, ShriMukesh Gupta says, " Due to strict national lockdowns around the world people have been forced to stay at home, changing consumer behaviour on a large scale. As movie theatres, museums, events, and other external entertainment consumption models have been banned, social lives have moved online, and entertainment consumption has increased significantly for online gaming and over-the-top (OTT) services" (PHD Chamber, 2020).

With the opportunity provided by the pandemic and the shift in media consumption behavior of the public, the content creators have been adapting to the radical behavioural shifts by releasing their movies on OTT platforms like Netflix, Amazon Prime, Hotstar, Alt Balaji etc.

Impact

The landscape of video based contents such as cinema and serials has changed since the adoption of OTT platform both by the consumers and the content creators. The adoption of OTT has provided an opportunity for new stars like RadhikaApte, Jaideep Alhawat, Pankaj Tripathi etc.

For viewers, OTT has made movie watching more convenient as they can access content with their smartphones from anywhere in the world. According to an article in economic times OTT will even continue to grow post COVID, which will impel directors to adapt to the new normal of releasing their films in OTT platform (Economic Times, 2019). The article quotes, "OTT can help content reach millions of potential consumers at the fraction of the cost of a formal release and traditional ad promotions. The launch of a new movie on DTH and OTT simultaneously can

garner over millions of viewers across the globe. The production house could potentially make millions within the first weekend of release by monetizing their online ads”.

Movies in OTT have been earning a good amount through different revenue model in OTT platforms. An online entertainment website filmfare.com reports that film like ‘Gulabo Sitabo’ was sold for 65 crore on OTT platform. Similarly ‘Shakuntala Devi’ was sold for 40 crore, and Sadak 2, Lootcase and DilBechara was sold for 70 crore, 10 crore and 40 crore respectively (filmfare, 2020).

Therefore, the future of OTT looks bright as both the demand side and the supply side of new and emerging content seems to be lucrative.

Besides, content creators in OTT platform are providing new and fresh content churning out a new audience with series and movies like Sacred Games. This new style of storytelling has also given rise to young and new talents, which traditional Bollywood movies would not cast. The traditional Bollywood which has been mired with the controversy surrounding nepotism, sexism and casting couch has created an outrage in recent times. OTT platforms on the other hand have been providing its audience with fresh contents with deserving actors fulfilling the role perfectly as required by the story and the script.

However, the success of OTT platform also means the decline of traditional style multiplex where masses were entertained in cinema theatres. Therefore, new content creators need to be aware about the recent shift of preferences of the audience to watch movies in their private space and private time. To this end, many Bollywood directors, producers and movie stars have already started adapting to the trend with actors like Saif Ali Khan, Ayushmaan Khurana etc transitioning on OTT platform. However, the concern of the multiplex owners also cannot be ignored as millions of rupees have been spent on upgrading the capacity of multiplexes with new technology to entertain the masses.

Multiplex owners need to realize that the recent shift might make cinema viewing an experiential-based luxurious recreational activity. Therefore, to keep up with the ongoing trend multiplex owners need to make cinema halls more experiential by adding new technologies and customer experiences.

The entire shift in technology and preferences in the rise of OTT can be summarized as an inevitable event which was bound to happen in any event. However, the lockdown and the travel restriction imposed by governments of the world have only made the process even faster by creating an astronomical increase in OTT subscribers.

However, creators also need to be wary of the fact that in developing economies like India digital divide is highly prevalent. Therefore, to make cinema accessible to everyone like the traditional

theatres, the OTT creators must also work with Governments, data providers and telecommunication partners to increase the depth and width of internet penetration by scaling up connection and increasing broadband speed.

This will be beneficial to the content creators in the OTT platform as they will not have to compromise their streaming quality and maintain high satisfaction among the viewers of films in OTT platforms.

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