

Trends and Technology In The Era of Post TV- The Rise of OTT Platforms

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ABSTRACT

Media convergence through the interlinking of computing and other information technologies, media content, media companies and communication networks have arisen as the result of the evolution and popularisation of the internet as well as the activities, products and services that have emerged in the digital media. The paper discusses the latest impacts of new media vis-a-vis digitisation on media and entertainment industries. The paper collates information from secondary sources to give an analysis of the impact of new media ecologies on viewership and programming trends. The Over-the-Top (OTT) video segment is a prime example of how digitisation is making a transformative change in the overall media and entertainment industry. The latest trends in OTT industry are discussed in relation to politics of new media economy.

Keywords: New media, OTT, Media ecologies, Post TV

INTRODUCTION

Digitisation, media convergence and the coming of Prosumer culture on New media platforms has changed the way Television consumption, distribution and production takes place leading to the concept of Post TV. Technology is called the new driver of the entertainment industry, it has impacted the industry in many ways e.g. Terrestrial Broadcasting shifted to Cable and Satellite Broadcasting (feed to satellite, satellite to earth at MSO, Multi System Operator to Cable Operator, Cable Operator to Home using cable then to DTH – Direct to Home, Feed to Satellite, Satellite to home using dish and set top box combination at home. Then came IPTV- Internet Protocol Television with feed to server, Streamed to home using excess capacity of broadband lines and TV set top box at home. IPTV offers the ability to stream the source media continuously. As a result, a client media player can begin playing the content (such as a TV channel) almost immediately. The most recent trends in the entertainment industry being OTT- Over the Top platforms, feed to server, to mobile device using an application installed in the phone, which acts as the set top box using wireless broadband connectivity. Companies like Netflix, Hotstar among others, are becoming popular and this is impacting media and entertainment today and in the future. In the Prosumer culture a consumer of these media messages can think of an approach of launching his/her own OTT channel and simultaneously use Amazon Web Services, Amagi or Muvi platform, planning application process interface where customer experience dynamic bandwidth. These dynamics are leading to the era of Post Television with primary focus on the potential implications of these changes for the channels, distributors, and aggregators.

NEW MEDIA RHETORICS

Each generation of technology (telegraph, telephone, radio, satellite to cable TV) had an increasingly rapid rate of diffusion. Key is it reaches 'mass' or majority (60% or more) of consumers. Internet has farther reach and impact in comparison to other technology thus proving to be the fastest technology in rate of social adaption. New media has changed the way we work. It has accelerated space time compression; convergence of media and distribution allows greater efficiency of control and communication. It is much cheaper to sell via internet than in person (1/100th cost per transaction) with average person now estimated to spend more hours a year on line. Social transformations of the internet is hereby connected to Utopic visions because it allows user control over media selected, compiled and used. It provides new forms of social connection beyond limitation of space. Based on this new communities of interest are formed (beyond borders) which can become targets for niche program marketing. This also implies cultural domination wherein dominant paradigms reinforce and extend it's narratives (US controls 65% share of world Internet server hosts).

Together with other technologies it allows development of artificial intelligence/body/intelligence augmentation. New media is also capable of keeping its user in 'invisible walled gardens' (Winseck, 2002) and has enabled social predation leading to new market intelligence aggregating in unprecedented scope: data shadows and on line surveillance. While reverse flow of communication through alternative media has been possible on new media platform, commercial search engines in some cases bury them so they are difficult to find. Thus an authoritarian political economy is continued and not a democratic one. Media conglomeration and cross ownership has thus led to emergence of little known 'Netscapes of Power' (Pavlik, 2000; Winseck, 2002; 2007; 2011). So though the ideology of the internet is that of electronic freedom foundation, Neo-liberal/New media, egalitarian/classless e-society which is decentralised, there are existent Media Oligopolies (Inescapable Media) which could be autonomous and anarchic (Campbell et al., 2014).

The Boston Consulting Group (BCG) in 'The Value of Content' state that owing to advancement of online and mobile content delivery, a more accurate definition of this process would be "professionally produced long-form video content that is delivered across a variety of traditional and digital or mobile pathways and consumed on devices from television sets to smartphones, tablets, and PCs, both in- side and outside the home". Thus, the industry is made up of three key segments: content owners, and rights holders; Free to Air (FTA) and Subscription TV channels; and distributors and aggregators. BCG report states that the three key forces have enabled the emergence of the new online- content value chain are:

1. The development of technology infrastructure
2. Increased availability of high-quality online content, including professionally produced television entertainment
3. New and cheaper models of online content creation that are driving large audiences assisted by a new breed of industry player, the multichannel network; the most successful YouTube series, for example, have a given "episode" reach several million viewers for a cost.

These forces have led to significant change in consumers' viewing behaviours driven by serialised entertainment, consumers are increasingly viewing time-shifted, non-linear content. Thus an increasing share of TV ad money and consumer spending is moving into the online value chain where content creators are capturing a slightly larger percentage of industry value with enhanced bargaining power. Content value is shifting away from commoditised, second-run content to compelling mass entertainment and sports and high- engagement niche programming entertainment and sports and high engagement niche programming. Players across the value chain are diversifying their portfolios to position themselves around key content assets to drive future value, manage content cost, or both (BCG, 2016). Content creators and rights holders, which have relied on strong TV buyers to grow revenues and promote their content assets, are now gaining new buyers and new business models to monetise their content over an increasing number of platforms and forms of content usage.

EMERGING AND FUTURE INDUSTRY SCENARIO

Multi-platform navigation with cross-platform content-navigation capability serves as the entry point to all video and the key asset to acquire customers. BCG reports that exclusive content, where platform-exclusive high-profile content (for example, sports or original entertainment content) are the key content assets acquired exclusively by distributors to differentiate in a multi-platform world and drive customer acquisition. Direct-to-consumer service, which bypasses infrastructure-based distributors, content, and broadcast networks with high-quality content and strong channel brands. Linear streaming aggregation, which is online content aggregators' ability to obtain streaming content licenses continues to be the rising trend. Content creators continue to be advantaged across all scenarios, particularly those that own must-have content that drives significant audiences or small, loyal fan bases. Subscription TV channels will face erosion of market share depending on the degree to which they are able to access differentiated and engaging content. TV distributors and aggregators with scale and well-developed video and broadband infrastructure are well positioned to compete; smaller players or those without well-developed video and broadband capabilities will need to quickly expand capabilities, either through partnerships or M&A (Mergers & acquisitions)

activity. Online video distributors and aggregators will face a unique set of issues that determine the size of their value capture, particularly whether to migrate their platforms from nonlinear to live content, whether and how to expand internationally, and how to balance their business models between consumer pay services and ad-supported revenue streams (BCG, 2016).

For revenue generation, the trend that is visible is that professional content is usually monetised through subscription, and amateur content through platform monetisation. Revenue Streams for OTT video platforms involves models like Content monetisation, Subscription, Pay-per-view, Pay for format, Customised content, Syndication, licensing, custom feeds, serve advertising, distribution fees etc. Advertising and branding involves brand creative, pay per view/ click / action, product placement, classifieds, contextual advertising, transaction fees, brand licensing, sponsor fees, branded content; Affiliation, Pay per redirect, pay per download, pay per sale, lead generation, offers, enquiry matching, revenue / profit sharing and other revenue generating models which include conferences, showcases, community membership, sales of community research, merchandising etc. RedSeer (2017) analysis highlight the following major findings of digital media consumption:

1. Traditional media conglomerates have identified the evolving video value chain and have jumped on the tech bandwagon cross-cutting expertise
2. Cost of creation, distribution and consumption has reduced, decentralised, personalised, and hyper-connected leading to new monetisation channels through alternative content based on an extensive technology stack
3. The Indian Video OTT industry reflects the global trends of video consumption enabled by rising income and internet access

- Indians download free (and pirated) Bollywood content through mobile data connections

4. Indian content creators are mostly concentrating on creating original, comedy content and distributing through third party players; however, a number of curated content platforms have also emerged and managed to monetise global and vernacular content through a combination of subscription and ad revenues

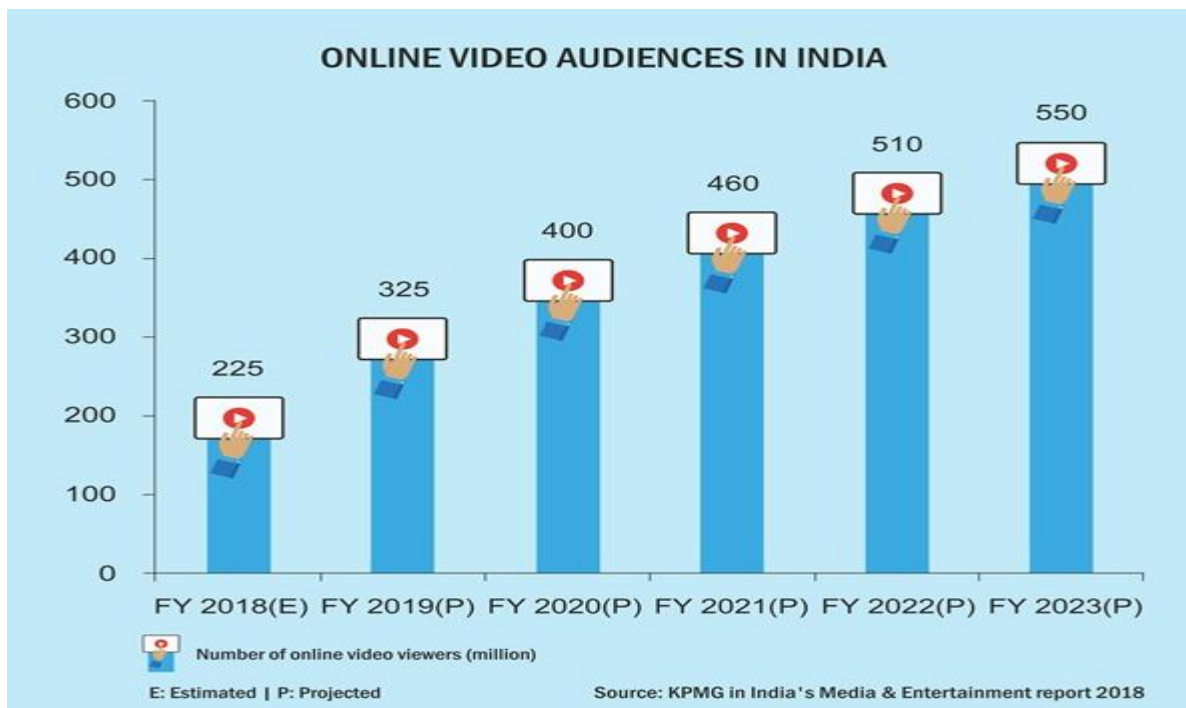


Figure-1: Online Video Audiences in India (Source - KPMG in India's Media & Entertainment report 2018)

Australian Communications and Media Authority (ACMA) in their study reported some of the emerging trends as given below:

1. Communications goes over-the-top (OTT): consumers are increasingly using OTT services. Globally, the volume of OTT mobile messages sent has overtaken SMS traffic.
2. Consumers build their own communications links: consumers are using the communications 'building blocks' at network, service and device levels to construct their own communication access pathways. Consumers can often choose a different option if one service is not working, effectively building additional redundancy and robustness through self-management of their communications network and service access. These decentralised modes of connection mean regulation may need to address public interest outcomes such as end-to-end connectivity and universal service in new ways.
3. Wearable devices and personalised data arrives: there is a rapidly growing number of internet-accessible wearable devices that allow individuals to track their activities. These devices may provide new avenues to deliver important consumer and market outcomes.
4. 'Flexible' TV—online expands viewer options: Flexible TV refers to the expanding range of service options for viewers to access content from free-to-air television, subscription television, catch-up television or online video. OTT video content is now a commonly used.
5. Multi-screening is mainstream: viewers are using second (and even third) screens when they watch television. For some audiences, there is a deeper connection with the television content; for other audiences, attention is split. The emergence of second-screen behaviour has potential implications for the regulatory concept of influence and for content-related industry obligations. For example, as second-screen content becomes mainstream, and audiences view it as a core part of their entertainment experience, they may transfer the expectations they have of broadcast television to the second screen. Conversely, the experience of second- and third-screen viewing may affect expectations about the content experience on the television screen.

As part of the regulation of media diversity, citizens' consumption of a more interactive and dispersed set of news sources is important to the way that regulators measure and assess the influence of news and the diversity of media voices. How the changing environment for the production, supply and consumption of news may be affecting media diversity is highly contestable. The accurate measurement of online news, and content consumption more generally, is undergoing considerable innovation and is the subject of discussion between industry and regulators internationally (ACMA,2014).

NEW MEDIA ECOLOGIES AND IT'S IMPLICATIONS

Media convergence is the interlinking of computing and other information technologies, media content, media companies and communication networks that have arisen as the result of the evolution and popularisation of the Internet as well as the activities, products and services that have emerged in the digital media. Blockchain technology is like the internet in that it has a built-in robustness. By storing blocks of information that are identical across its network, the blockchain cannot be controlled by any single entity and has no single point of failure (Wolfe, 1972). McLuhan has developed a theory that goes like this: "The new technologies of the electronic age, notably television, radio, the telephone, and computers, make up a new environment. A new environment: they are not merely added to some basic human environment . . . They radically alter the entire way people use their five senses, the way they react to things, and therefore, their entire lives and the entire society" (McLuhan, 1962).

BCG (2016) reports the following forces spurring the trends that are reshaping the industry today:

- Online viewership is becoming significant
- Viewing is undergoing a major shift to non- linear consumption
- Online value capture is beginning to follow viewers

- The profile of valuable content is changing.
- The distribution of value across the supply chain is relatively stable, but it is slowly shifting to content creators.

KPMG 2018, reported that online video audience in India is expected to reach around 550 million by 2023, with video OTT revenue expected to grow to Rs 138.1 billion. Meanwhile FICCI, 2018 reports the video OTT market in India now has at least 30 players from diverse domains - broadcasters, studios, DTH operators, telcos and content aggregators. Some of the notable ones include Airtel TV, Reliance Jio, Sony LIV, Zee, ALT Balaji, Netflix, Amazon Prime, Hotstar, Voot, Eros Now, etc. The Hotstar India Report 2018 pegs online video consumption growth at nearly five times in India in 2017, 3.5x for metros and 4.3x for towns with populations less than 10 lakh. With one-third of Hotstar users watching their favourite programmes on the mobile rather than on the TV.

The globalisation of content via the internet presents opportunities in the global market as well. Zee is taking its OTT service ZEE5 to more than 190 countries, the first Indian company to do so. While a majority of the content still continues to be catch-up TV (reruns of TV programmes with some content additions to engage viewers) via the Advertising Video on Demand (AVOD) model, the sheer diversity in platforms and intense competition is propelling players to also adopt the digital first model with original content. In this format, players leverage the Subscription Video on Demand (SVOD) model. Platforms like Netflix and Amazon Prime are tying up aggressively with leading production houses for original and exclusive content to cater to Indian audiences (FICCI, 2018). A number of brands often advertise on niche or speciality television channels to target specific audiences. A specialty channel can be a commercial broadcasting or non-commercial television channel which consists of television programming focused on a single genre, subject or targeted television market at a specific psychographic, rather than the demographics. data analytics has changed the way entertainment industry targets its niche audience, how information about current and prospective audience is gathered, psychographics involved etc. Niche channels provide a more cost-effective medium for advertisers looking to target a select group of audiences.

RISK AND POLITICAL ECONOMY

Winseck (2002) mentions that inventors of new technologies generate new patents (ham heaven). When market become established: patents bought or litigated (crisis of capital for development). Incumbent industries either block development or buy out new technology. If new technology threatens core business of old, then predatory behaviour, or massive buyout takes place. Impacts of Cross Media Ownership can be seen as now vertically and horizontal companies can control all aspects of message. Which allows economies of scale, more money reinvested in content, better assumption of risk, more choice and also the aforementioned “netscapes of power” and rise of gatekeepers and “walled gardens”. Which further leads to trend of bundling services for convenience, styling information services for personal preferences— and not challenging these (narrower and narrower homogenous taste communities). This perhaps leading to media as ‘technologies of discrimination’ akin to owner preference in placing subsidiaries at front of retail shelf and burying competitive service providers. Hence the Subversive/Freewheel, Egalitarian media further gives a different anarchic power to the people leading in further globalisation with corporatised/control. Creating the digital gap of E-haves and E- have nots with authoritarian power to the dollar; Americanising and further conformity (Pavlik, 2000; Winseck, 2002; 2007; 2011).

There have been merger of telecom industries with media and entertainment companies in instances like Reliance taking stakes in a number of like Balaji Telefilms, Saavn and Eros now to strengthen its content offerings for its Jio subscribers. It also set up a Rs 1,000 crore fund with Eros International Media to acquire Indian films and digital originals. This trend is opening up huge opportunities for content providers in terms of digital revenue streams. For instance, digital/OTT revenue reached Rs 8.5 billion for the film segment in 2017, a growth of 40% year-on-year. The entertainment business in the age of smart devices is smart for a reason, OTT players have unprecedented access to real time data on the specific preferences in terms of programmes, engagement levels, audience profiles, etc that can help them plan their content, distribution and monetisation approach going forward. Some notable ways in which AI and machine learning is helping

content producers today include planning the development of trailers and promos to achieve best possible engagement, updating best possible sports highlights/data, automatic meta tagging and subtitling of content, evaluating story options as well as ad targeting and scheduling (FICCI, 2018).

The network architecture is now “smart” with the rise of psychographics over demographics. Bits are monitored, stored in charting flow and effective service; Network architectures can be established which can identify each traffic type-Web, email, voice, video and isolate the type of application even down to specific brands, by the interface used, by the user type and individual user identification or by the site address. Rise of “cookies” (spies on content, personal information and preferences jeopardising privacy), technological potential of building a complete ‘data shadow’ of the consumer, to better market to them is the new dark art of influencing. This new economy of web advertising has spawned a whole new method of audience analysis in the dark art of user metrics – measuring user behaviour and engagements (Winseck, 2011). The affordances of the net enable advertisers to collect information about how long a user hovers over an ad, whether they click, how long they spend on a page, if they ‘click through’ to further brand information. All of this information can be totalised and sold to advertisers on a whole new range of packages that are far more sophisticated than previous forms of TV or Press advertising. The scholarly study of the political economy of communication entails two main dimensions. First, it addresses the nature of the relationship of media and communications systems to the broader structure of society. In other words, it examines how media (and communication) systems and content reinforce, challenge, or influence existing class and social relations. Second, looks specifically at how ownership support mechanisms (e.g. advertising), and government policies influence media behaviour and content. This line of inquiry emphasizes structural factors and the labor process in the production, distribution and consumption of communication (McChesney et al. 2000; 2003)

Political economy now concerns ownership, the economics of production and consumption, competition and the role of the state, law and regulation in determining both how we experience new media and how they in turn shape our world. Production in a capitalist society is primarily, but not exclusively, organised around the production of goods and services (i.e. commodities) for profit. In media production, a capitalist model of production therefore leads to the creation of cultural commodities such as books, television programmes, music CDs, websites, CD-ROMs, DVDs, computer software and so on. With these types of commodity, the ways in which profitable distribution can be achieved can be quite complex. For instance, in commercial television this happens primarily through securing audiences so that advertising space can be sold. Indeed, Dallas Smythe has argued that it is the audience viewing figures or ‘ratings’ that are actually for sale (Smythe ,1981). In fact we can see this very clearly in the way in which Google’s business model actually functions on the basis of the number of clicks that an entry provides (Van Couvering, 2004).

Manovich (2001) in ‘The language of new media’ mentions that the process of ‘social shaping’ leaves a medium with a social form, an identity, which influences the way it is used and its impact on the world; it is never quite shaken off. In this way we can see that new media are as much the product of social, political and economic forces as they are of technological endeavour. Media not only influence the way in which we see and experience our world but are products of the world in which we live. Our contemporary experience of intense change is not only associated with new media but also with other wider kinds of social, economic and political experience. The form of a medium is a product not only of what is technically possible, but also of the material and economic circumstances of its creation. These circumstances may be commercial or intellectual, or a mixture of these and other factors, but they leave the medium with a social form that cannot be ignored. The outcome of these three vital developments is hardly determined any more by the technology that they contain than by the social circumstance of their development. But the ‘social form’ which they take, along with other developments, and investment in communications combine to give us the Internet. New media can carry a sense of being the technological correlative of postmodern thought. Speed, flexibility, digitality, hypertextuality have all been posited as characteristic both of new media and of postmodernity. Political economy can explain these apparently radically innovative technological and social forms. It could be argued that postmodernism, with its emphasis on fluidity, the immediate, and the constant re-referencing of texts, sits uneasily alongside the more materialist approach of political economy. Globalisation, neo-

liberalism and the Internet can be seen in the form of large-scale programmes of deregulation as part of what we might now call the ideology of neo-liberalism; that is to say, the belief that the commodity market is the best way of distributing resources, and to that end as many goods and services must be available for trading, and at as many sites and in as many markets as possible. Hence markets that had been 'regulated', managed or protected by state legislation were thrown open to competition, leading to large-scale transfers of capital from state to private sectors and to increases in profitability (Manovich, 2001). McChesney et al. (1998) argued that much of what has been called globalisation is rather another version of neo-liberalism (i.e. the opening up of markets to international investment).

NETWORKS, USERS AND ECONOMICS

The development of New Media is definitely not limited to only re-adjusting the dissemination methods of existing formats. New media forms can bring out new media practices which can be seen in Niche content marketing. It has also led to the practice of the Long Tail economics. The theory of the Long Tail suggests that new technology, including the rapid growth of online shopping, has reduced barriers to entry for many firms selling products to niche markets. These products are unlikely to command shop space in traditional bricks-and-mortar retailers. Lower production and distribution costs means that many products may have a very low break-even quantity, which does not deter specialist online retailers with 'infinite' storage space, and which has created the so-called long tail of smaller, specialist retailers. 'Our culture and economy are increasingly shifting away from a focus on a relatively small number of hits (mainstream products and markets) at the head of the demand curve, and moving toward a huge number of niches in the tail' (Anderson, 2006). The Long Tail is an important feature of the web media marketplace, with 'narrow niches making up the bulk of the Internet's possible applications. The OTT video market in India has at least 30 major players currently, focussed on servicing a fast growing and increasingly subscription-led market that is moving online for its entertainment needs. This trend is expected to spur major innovations in content and also open up lucrative opportunities for content providers in the global sphere. As per ongoing trends, digital advertising is the largest growth driver of the industry. The over-the-top (OTT) video segment is a prime example of how digitisation is making a transformative change in the overall media and entertainment industry. This transformation is driven largely by rapidly improving mobile phone technology, rising penetration of smart devices like smart TVs, tablets, etc, faster and increasingly economical internet speeds, widespread internet access and consumer demand for diverse and original content. The rise of OTT is ushering in a transformation in the way Indians consume video content. Simultaneously, it is also precipitating a rapid increase in the number of OTT content platforms bringing diverse and rich content from across the world to the Indian consumers (IBEF, 2018).

CONCLUSION

In this process, understanding viral communications patterns has become a major new field of study for social scientists and communications researchers who are developing new ways of measuring and visualising the topology of networks. The probability of purchasing a product/viewing a programme increases with the number of recommendations received, but quickly saturates to a constant and relatively low probability. The dynamics of viral transmission in consumer behaviour are particular and unpredictable. Producers need to use customer behaviour in order to reach all the 'narrow niches' of the Long Tail and find all the possible trading spaces in the online network. In the concept of the 'walled garden', 'Users Add Value' and 'Network Effects by Default', all argue in different ways that user behaviour creates a commodity (market data and audience as community) that has value. Significance of online culture in shaping the contemporary media landscape. Internet has afforded new ways of experiencing the self and new ways of relating to groups. Interactive programmes have been a new trend in the new media Platform. Netflix for instance has interactive programmes for its viewers viz. Puss in Book: Trapped in an Epic Tale, Buddy Thunderstruck: The Maybe Pile, Stretch Armstrong: The Breakout, Minecraft: Story Mode, Black Mirror: Bandersnatch, and Bear Grylls' You vs. Wild. This form and level of interactivity enables the viewers and the programmers engage in different form of communication. The ideas thus explored are that of the idea of anonymity/avatar and the effects that it has on communication; ideas about identity, masquerade, performance and performativity; the idea of the self in relation to others, to a community or network. The strand that runs

through the history of net research has to do with resolving the alleged dichotomy or difference between 'real' and 'virtual' experiences. Being anonymous, belonging, living in the interface, the internet and the public sphere are general issues which need to be discussed in this digital ecosystem.

YouTube and Post Television has led to User-generated content in symbiotic relationship with players as producers in the media culture. There is the growing ecology of online video, where TV hybridises itself, there is growing content with Web drama, Web series etc. Networked media are produced within a system where technology is never stable, what Kline et al. (2003) call a state of 'perpetual innovation'. Human creativity, technological affordance and economic advantage each contribute to shaping our own individual networked media experiences – as both producers and consumers. The outcomes of this triangulation are necessarily dynamic and unpredictable. Post-television culture involves digital ecologies with increased nonlinear mobility and choices, but at the same time raises issues of surveillance and structural hegemonies. Issues of power and control nowadays go even beyond audience and industry practices, involving the capabilities of adaptive agent technologies and the relatively unexplored power of the algorithm (Uricchio, 2004; Beer, 2009; Strangelove, 2015). Taking into account of all of these processes is a necessary part of understanding networked media ecologies and the media messages that circulate within them.

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