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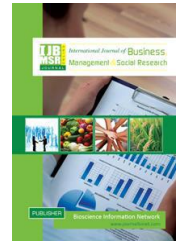
Emergence and future of Over-the-top (OTT) video services in India: an analytical research

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ABSTRACT

Over-the-Top (OTT) video platforms, once considered a luxury is today a commodity. In India, there is an increasingly growing number of consumers adapting to it. While Indian streaming services like Hotstar and Jio Cinema has gained a stronger foothold, global players like Netflix and Amazon Prime have steadily grown their market share in India. This paper explores the emergence, advantage, and future of streaming service in India through an analytical research. We also present the various OTT services, their growth factors, technology background, audience characteristics, content, censorship and future developments expected in the industry.

Key Words: *OTT future, Network, Policy, Competition, Regulation, Market, Telecommunications, Internet.*

I. Introduction

Traditionally, the consumption of movies and other audio and video content has always been in the form of mediums like theatre and television. As the technology developed, it was easily accessible at home and whenever required with the introduction of VHS, DVDs, Blu-rays and disc rental services. Further, cable television brought the content through Co-axial cables and fibre optic cables. Another better service emerged as Direct-to-home (DTH) technology through satellite and dish connectivity that brought high-quality broadcast and on-demand content directly to the consumer. Recently, technological advancements have made the movie or TV watching more convenient through online streaming or Video on Demand (VoD) services. VoD refers to streaming of video content over the Internet, through applications typically referred to as Over-The-Top (OTT). Viewers can access video content through OTT apps in any Internet-connected device like a Smartphone, smart TV, tablet, desktop computer, laptop, etc. Unlike traditional media, streaming services tell varied stories that are not restricted by censors, box office or demographic. It gives a viewing experience with greatly improved sound and visual quality, provided the consumers have a stable Internet.

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OTT bypasses cable, broadcast, satellite television and other platforms that generally act as a controller or distributor and enables disintermediation. The sole gateway to consumers', in the age of traditional media, was through film distributors, theatre runners, television networks or Multiple System Operators (MSOs). With OTT, the content creators can interact with their audience directly through a web page or Smartphone app. This offers the comfort of viewing movie and other entertainment at one's convenient time and place (Ganuza and Viecens, 2014).

Once considered a luxury, an increasingly growing number of Indians are shifting towards cord-cutting or online streaming. While the figures show that the VoD industry is still at its nascent stage, the entry of almost 40 VoD companies in a span of just three years indicates the massive potential of the industry. Out of five Smartphone owners in India, at least four people watch content in at least one OTT app (New18.com, 2019). The OTT apps have become the most downloaded app category ahead of social networking apps like Facebook, messaging apps like WhatsApp, and e-commerce apps like Amazon and Flipkart. The streaming market will collectively account for 46% of the overall growth in the Indian entertainment and media industry from 2017 to 2022 (PwC India, 2018). This paper presents the emergence, growth, major streaming services in India, content typically consumed in OTT, audience characteristics, problems and future of OTT services in India. The next section discusses the factors that prompted the sudden rise of the VoD market in India.

II. Reasons for rise of streaming service

As the American OTT market is moving closer to maturity, many global players are shifting their focus to other international markets like India to drive their next cycle of subscriber growth. Rajib Basu of Entertainment & Media, PwC India reported that "India is the fastest-growing entertainment and media market globally and is expected to keep that momentum" (PwC India, 2019). Significant factors driving the growth of the VoD market in India are rising Internet & broadband penetration and declining data charges, the proliferation of internet-enabled mobile phones, personalization of content and pricing.

Currently, Internet is being actively used by more than half of the world's population. Though India is only second to China in terms Internet users. At the end of 2019, India had 451 million monthly active Internet users, which is projected at 666.4 million by 2023. The majority of them are mobile phone Internet users, who take advantage of the cheap alternative over the expensive landline connection (IAMAI, 2019). However, a large segment of rural India is devoid of Internet access. Therefore, there is still enormous opportunity for growth, which will contribute to an increase in the overall Internet population. In a country where nearly 70% of the population resides in rural regions, no service meant for the masses can afford to overlook this market.

Today, the Internet is not only a technology which may have a specific effect on how business is conducted in certain sectors, but it is also a market place, as demonstrated by the enormous success of OTT providers (Li, 2015). Reliance Jio has been a significant catalyst in the penetration of Internet and OTT platforms. Jio's telecom network supports over 55% of India's overall OTT traffic and over 65% of OTT consumption on a Smartphone (Keshavdev, 2019). Time spent by rural users, which is about 15 to 30 minutes a day, is also likely to increase as a result of increased bandwidth and a 98% drop in data costs. In response to Jio, other telecommunication services like Vodafone and Airtel have also dropped their tariff rates and introduced easily affordable data plans. OTT also poses a threat to Internet service providers (ISPs) and telecom industries, as they bear the burden of high data traffic and the cost of maintenance, which are the basic requirements to maintain customers' Quality of Experience (QoE) (Jirakasem and Mitomo, 2019).

Online video consumption is heavily reliant on the availability of devices that are compatible with online video viewing. The Smartphone is the preferred video streaming device in India. In February 2019, nearly 144 million people spent a total of 362 million hours on an OTT platform. In which, 87% of time spent occurred in a Smartphone environment and 13% in a desktop environment (Gevers, 2019).With China failing as a manufacturing hub because of its environmental and labour laws getting stricter, India advanced to fill that spot. India is one of the most promising Original Equipment Manufacturers (OEMs) market. So, the Smartphone penetration is expected to double to 859 million by 2022. The 'Make in India' strategy introduced by the Government of India simplified taxation, labour regulations and encouraged infrastructure development, which made it easier for foreign companies to invest in India.

Moreover, it made the Smartphone market more competitive and led to the easy availability of more affordable Smartphone.

Many studies have found that pricing is one of the critical factors in people cord-cutting and moving towards online streaming. Players like Netflix and Prime Video are Subscription-based Video on Demand (SVoD) services, where consumers have to make a regular payment, typically monthly, and gain access to their library of video content. Most viewers prefer free services, and only a small amount of people is ready to pay for the subscription. According to a market study conducted by Brightcove in partnership with YouGov, 29% of consumers mentioned that they prefer to watch movies in the free online streaming sites. 23% said that they would rather pay a lower fee and watch one to three ads (Brightcove, 2018).Therefore, the most common type of monetization model used in OTT platforms is advertising, and it is considered a successful one, as evidenced by the overwhelming revenue and subscribers (Jirakasem and Mitomo, 2019). Ad-based Video on Demand (AVoD) services like Hotstar and Viu allow consumers to access their library for free and gains its revenue through advertising. The market remains highly focused on AVOD services. Among the top eight video streaming services, except for Netflix and Amazon Prime Video, all other services offer ad-supported content. Also, some platforms like YouTube and iTunes are Transaction-based Video on Demand (TVOD) services, in which viewers pay according to what they choose to access.

The second-most important factor for Indians opting to the streaming services is the availability of personalized content. Research by IHS Markit reported that 76% of those surveyed gave their opinion that availability localized content, and 74% opted the quality of dubbing and subtitles of international content as the critical decision-making factors (Begum, 2018).

In today's marketing scenario, it requires efforts beyond just advertising in acquiring customers and tailoring the business objectives towards the needs and wants of the consumers. With advancements in data analytics, companies are now able to gather information about their users and implement plans to create a personalized experience for each user or a demographic. Also, in the future, developments in technologies such as machine learning and artificial intelligence will enable OTT players to analyze the data and offer insights to understand user's viewing patterns. Other factors like ease of use and social trends have an impact on the decision to adopt online streaming over cable TV (Lee et al. 2018).

III. Major streaming services in India

Just like the Smartphone segment, the OTT space in the country is also witnessing a tussle between the indigenous and global payers. There are nearly 40 VoD providers in India, and at the rate in which new players are springing up, the number is expected to reach 100 by 2023. While local players like Hotstar and Jio Cinema has gained a stronger footing in the domestic market, global platforms like Netflix and Amazon Prime have also steadily grown their market share. The major streaming services that are available in India are:

Prime Video
Prime Video is a VoD service owned and operated by Amazon. In India, the Prime Video hosts over 2,000 movies and 400 television shows. The subscription costs around Rs. 129 per month or Rs. 999 per year. With over 10 million subscribers, India is the biggest market in the world for Prime Video. In an annual letter to shareholders, Jeff Bezos, Founder and CEO of Amazon, stated that India is the company's most valuable market outside America (Bezos, 2019). In 2018, Amazon announced that they would invest Rs. 2,000 crores in creating original content (Das, 2019).

Hotstar
Hotstar is ideal for watching movies, daily soaps, live sports and news channels. The users can create an account and view the content for free with advertisements between. Whereas, a Hotstar Premium subscription offers ad-free access to exclusive international movies and TV shows for a price of Rs. 199 per month or Rs. 999 per year. Hotstar downloads crossed 400 million in 2019, and one of the main pulling factors has been live streaming of cricket matches. During Indian Premier League (IPL) 2019 the platform recorded 300 million active viewers. India versus Pakistan match at the ICC World Cup 2019 registered an exceptional 100 million viewers, and India versus New Zealand semi-final had 25.3 million concurrent viewers.

Netflix

Netflix entered India in January 2016. Their Unique Selling Proposition is the abundance of original movies and television shows it offers. As they initially lacked many India-oriented or localized content, Netflix has made its highest investment ever in India to produce more original content. Netflix comes with three different subscription plans with various benefits. The Basic subscription starts at Rs. 500 and does not support HD streaming. The Standard subscription costs Rs. 650 per month and supports HD streaming. The Premium subscription costs Rs. 800 per month and supports ultra-HD streaming and allows up to four devices to stream simultaneously. Netflix is a lot costlier than all of its competitors. So additionally, they launched a low-cost, mobile-only version of its service exclusively in India. The plan costs Rs. 199, and it is aiming to bring a unique personalized experience to the Smartphone users in India.

Jio Cinema and Jio TV

Reliance Jio mobile data service comes bundled with various OTT apps like JioTV, JioCinema and JioSaavn catering to different needs of the customers. The content offered by the service is mostly dedicated to the Indian audience. JioTV offers 647 Live TV channels which are nearly double the channel count provided by its competitors. Whereas, the JioCinema hosts over 10,000 movies and TV shows. Jio has signed a long-term content deal with Disney India to host a dedicated Disney branded section on their homepage with content spanning Disney's movies and animation series. Jio has also announced the launch of Jio Fibre's 'First-Day-First-Show' plan which is set to launch in 2020. Premium Jio customers would be able to watch new movies on their release date, on-demand in the comfort of their house.

SonyLiv

SonyLiv is a VoD streaming service operated by Sony Pictures Networks. It has more than 40,000 hours of content from a wide variety of genres. SonyLiv had a higher growth rate in non-metropolitan cities like Lucknow, Indore, Patna and Jaipur, as compared to the metropolitan cities (KPMG, 2019). Similar to Hotstar, it is available as a freemium service with content which viewers can see without signing-up or subscribing. The premium service starts at Rs.199 per month and offers access to English movies and TV shows. The platform recorded 70 million viewers during the FIFA World Cup in 2018, and 50 million viewers during India's cricket tour of Australia and England in 2019 (Mitter, 2019).

Other OTT players

Eros Now launched by Eros International has the most amount of content compared to other OTT services in India. It hosts over 11,000 movies, 100,000 albums, and 100 TV shows. ErosNow was titled the 'Best OTT Platform of the Year 2019' at the British Asian Media Awards. Hooq is a lesser-known competitor in the market even though it was launched in India much before other services. Hooq offers more than 10,000 titles, which include movies and renowned DC superhero television shows. Voot is a streaming service owned by Viacom 18. It hosts programmes that are already aired on their television channels such as Colors, MTV, Nickelodeon, etc. Voot also started producing original series under the brand name Voot Originals. ALTBalaji is a VoD platform operated by Balaji Telefilms Ltd. At Rs. 25 per month or Rs. 300 per year, ALTBalaji is the cheapest of all OTT players in India. The platform has over 250 hours of original content with a new show releasing every month. Their library also includes more than 100 hours of kids' content and many shows in regional languages.

MX Player, a mobile video player app was acquired by Times Internet (TIL) group for 1,000 crores in July 2018. TIL has built a digital-first streaming service atop of MX Player to leverage its 350 million user bases in India. Karan Bedi, CEO of MX Player player, said that their OTT service would revolutionize digital entertainment in India (BW Online Bureau, 2019). Currently, MX Player hosts 14 original shows.

IV. Content typically consumed in OTT

Every VoD platform is striving for higher engagement, and hook the viewer through unique, addictive and binge-worthy contents. Binge-watching has become the new typical weekend plan among young people. Teenagers are mostly agnostic about the medium, but they are very selective about quality programming. They are also very active and articulate on social platforms about their favourite shows and binge-viewing practices. So, binge-watching is not just about convenience and customization, but also about cultural unification, connection and community as it bonds people through their shared experience (Matrix, 2014).

The film industry is finding it challenging to drive audiences to theatres in recent years, as shown by the failure of big production movies in 2019 like Thugs of Hindostan and Kalank. As a result, the high-risk investment culture of traditional media often discourages the producers from taking risks in storytelling. But with OTT platforms willingly providing opportunities to indie and regional filmmakers, there has been a massive growth in the production of original, edgy and alternative content. As the audience is becoming more diverse, storytellers have the opportunity to explore stories that resonate to both native and global audience. More shows like Inside Edge, Sacred Games, Breathe and Mirzapur that are coming out in OTT platforms indicate that they are betting on this emerging trend to capture the attention of the audience. Many actors, writers and technicians who have previously worked on television argued that the overreliance on soap opera limited their ability to express creatively (Mehta, 2019). Amazon has invested about one-fourth of its Rs. 2,000 crore budgets to collaborate with Indian production houses and digital content creators, including influential filmmakers like Farhan Akhtar and Anurag Kashyap.

According to a survey by Vidooly, 85% of the surveyed audience stated that they watch more original content in OTT platforms (Vidooly, 2019). Younger audiences between 24–34 years of age prefer the romance genre, whereas drama, crime thriller and reality shows are consistent among all age groups. As the viewer crosses the age of 34, their interest in the romance genre starts to fall and gravitate towards action and adventure movies. Documentaries capture the attention of the audience between 24 and 45 years. The survey revealed that there is a difference in the content consumed among the old and younger audience. Movies are preferred by the older audience and TV shows are preferred by the younger audience.

V. Audience characteristics

According to Counterpoint Technology Market Research, Hotstar leads the market share in terms of users, despite the entry of global majors like Amazon Prime and Netflix (Table 01).

Table 01. Market share of OTT platforms in India

OTT Platforms	Usage Share (in %)
Hotstar	20
Amazon Prime Video	20
Netflix	15
SonyLIV	5
Zee5	5
ALTBalaji	5
Viu	5
Hungama Play	5
Eros Now	5
Others	15

Source: Counterpoint Technology Market Research.

While Hotstar and Prime Video are leading in terms of the user base, ErosNow is generating the most engagement among the OTT platforms. In table 02, it can be seen that 68% of users indicate that they watch content on ErosNow daily, with 9% of users spending 21 hours a week watching its content. According to Statista Global Consumer Survey from October 2019, young Indians under the age of 34 years-old accounts for 70% of total users. The 35-44 age group contributes 21.7%, and the 45-54 age group adds 1.8% to the OTT platform viewership in India. AltBalaji scored highest among 25-35 age group users, and ErosNow has the largest share in the age group of 25-39. In 2019, a share of 48.4% of users was in the low-income group. 31.5% of the user was from the medium income group; 20.1 % of users were from the high-income group.

Table 02. User engagement among the OTT platforms

OTT	0-3 Hours	3-9 Hours	9-21 Hours	More than 21 Hours
Hotstar	40%	36%	17%	7%
Amazon Prime Video	31%	40%	20%	8%
Sony LIV	38%	37%	19%	7%
Netflix	31%	39%	22%	7%
Voot	37%	37%	18%	7%
Zee5	23%	43%	26%	8%
ALTBalaji	32%	38%	21%	8%
Eros Now	30%	40%	21%	9%

Source: Counterpoint Technology Market Research.

VI. Problems

After its massive impact on market and culture, OTT became the centre of debate in various aspects, such as its impact on traditional services, threat or opportunity to investors in the industry, and regulatory framework. Copyright owners of contents fear that OTT increases chances of piracy (Crandall, 2014). Ever since content could be stored in digital formats, illegal downloading of movies and TV shows has a significant impact on the market. It is projected to cost the TV and film industry US$ 51.6 billion globally by 2022.The market power of digital media platforms has had massive growth because the OTT platforms have been very lightly regulated in terms of public interest responsibilities and anti-monopolistic behaviour, unlike the legacy media and telecommunications firms. Content with extreme violence, nudity and strong language find their home in OTT platforms because the OTT sector in India is less regulated than its offline counterparts like film and television (Zboralska and Davis, 2017).

Telecoms Regulatory Authority of India (TRAI) has stated concerns over disturbances to the country's social fabric caused by content carried by OTT platforms. The Government of India reaffirmed that, as VoD services are available over the Internet, which is a public medium, OTT platform operators do not require any license to operate. Moreover, TRAI, believe that the Information Technology Act, 2000, offer enough safeguards. The Information Technology Act, 2000 allows the government or the court to either block or take-down content that they consider objectionable.

Domestic or local broadcasting industries are considered vital to cultural expression and democratic practice. For that reason, they receive government support and are regulated in the public interest. Even though the OTT platforms portrayed as complementary to traditional media, their consumerist approach is disruptive to the values and principles of legacy broadcasting (Zboralska and Davis, 2017). Also, their venture into content distribution is indistinguishably connected to their capacity to accumulate and sell data about their users. Therefore, there is an immediate need to regulate OTT platforms in the public interest.

The inconsistency in OTT regulation is based on the disparity between one-sided and two-sided content markets (Bilbil, 2018). The telco industry embraces the one-sided business model for offering internet service. In contrast, many other OTT service providers, such as YouTube support the two-sided business model and therefore becoming a separate technological business faction.

VII. Future of OTT

Video consumption through VoD platforms is nowhere close to slowing down. It is a golden era for content creators with entry barriers becoming low. This section discusses different factors and their impact on the future of OTT platforms in India.

Role 5G and telecom service providers
There is a global race to take the lead in 5G cellular network technology. The government of India has established a dedicated committee for creating an efficient pathway for the roll-out of 5G and develop the next generation of broadband infrastructure. As consumers are seen to be increasingly preferring

high-definition and immersive content, the 5G is expected to create an opportunity for new product and services offerings in the media and entertainment industry (Deloitte, 2019). Apart from OTT, the other fast-growing segments that are benefited by 5G are online gaming and Internet advertising.

Along with 5G, the government's Digital India Initiative is helping urban and even the most remote villages to stay connected. The telecom industry in India faced significant convergence in 2018. Vodafone, the second-largest operator in India, and Idea, the third-largest operator has merged to emerge as the biggest telecom operator in India in terms of subscriber base. With Vodafone's urban-focused network and Idea's rural-focused network, this merger is expected to diminish the urban-rural bandwidth disparity in India and promote OTT.

Sports streaming

Streaming live sports, especially cricket, has turned out to be the critical differentiator in India's OTT space, as shown by Hotstar. Even though Hotstar does not reveal category-specific viewership data, industry experts estimate that its rich sports programming give a distinct advantage over the rest. Hotstar showcases the following sporting events: Pro Kabaddi League, Indian Premier League (IPL), English Premier League (EPL), Indian Super League (ISL), Formula One, German Bundesliga, and Grand Slams. Cricket also provided a significant push to SonyLIV in 2018, when they acquired the streaming rights for India's cricket tours to South Africa, England, and Australia. It is estimated that users spend on average 30-35 minutes on watching sports on OTT platforms (Ernst and Young, 2019). Even though many users do not watch the entire event or match, growing viewership indicates the sense of comfort that viewers experience with the digital medium.

There are six defining characteristics to OTT live sports streaming: The privileging of liveliness, a mix of mass and niche services, changing rights territories, multiplying screens and spaces of consumption, datafication of consumption and viewing habits, and improving the technical infrastructure (Hutchins et al. 2019).

A few years ago, the digital rights for streaming on OTT platforms were sold along with traditional broadcasting rights, and often to the same company. However, now, digital rights are sold separately as their value has increased rapidly. The Board of Control for Cricket in India (BCCI), who owns the IPL, expects the value of digital rights to multiply in the coming years, and thus does not want to make any long-term deals. Prime Video, Jio, Twitter and Facebook have reportedly started showing interest in sports. Facebook's failed bid for IPL's digital rights in 2017 stood at Rs 3,900 crore, indicating its intent to enter India's fast-growing OTT market.

More content in regional languages

Over the last few years, the online media industry has understood that India is not a single market but a combination of multiple markets, each with its unique characteristics. The subset of regional language speaking internet users is growing faster than the Hindi and English-speaking user base. Localized content shows uptake in terms of engagement, as viewers always prefer to consume content in their language. So, primary streaming services like Amazon Prime and Netflix are investing more on producing content besides Hindi and English, in eight major Indian languages. Hoichoi, an all Bengali content streaming platform, saw an 85% growth in traffic from 76 thousand total unique visitors in March 2018 to 140K in March 2019.

The focus of VoD platforms has shifted from urban youths to the mass market. So, the inclusion of regional content has paved the way for mass-market adoption as opposed to the initial niche offering. The demand for local language content development will give rise to new platforms and content creators that will work towards creating narratives that cater to each of the markets.

New business models

Today, most OTT platforms promote them aggressively through a strategy where they allow initial free usage to enable the customer to experience platforms and demand an incremental premium fee at a later stage after consumer behaviour is in favour. So, the business model that is prevalently employed by OTT providers around the globe is B2C. However, some of the prominent streaming industry stakeholders believe that pure B2C models will not work in India and consider B2B2C as the right way to move forward (KPMG, 2019).

A syndicated content offering on the applications likes of Jio Apps, Airtel Wynk, has become the norm. To boost revenues, there has been a significant increase in partnerships between telcos and OTT players in India and globally to provide exclusive video content for free to users of particular telco subscriber. For example, Vodafone has been offering package deals which include access to its entertainment platform, Vodafone Play, as well as a free Amazon Prime subscription. Airtel and Netflix formed a strategic partnership where select broadband subscribers received free subscription of Netflix for three months. DTH operator Tata Sky partnered with Amazon to launch the platform 'Tata Sky Binge', which showcases digital content aggregated from multiple apps. So, in the future, the OTT space will observe smaller or newer platforms acquiring customers through the existing large customer base of Telco or other services.

Better Devices for Content Consumption
Apart from Smartphone, tablets are another promising device for online video consumption. However, India has only around 5.3% penetration of these devices as of 2017, and it is expected to increase to only about 10% by 2022 (ET Bureau, 2019). The low penetration is a missed opportunity as tablets offer relatively larger screens which are better for consuming HD content as compared to Smartphone. Pixalate (2018) argued that OTT is defined on the basis of the devices used to access the content. Apple CEO Tim Cook predicted in 2015 that the future of TV is apps (Zakrzewski, 2015). Smart TVs, much like Smartphones and tablets, offer internet connectivity and support for a range of apps, including OTT apps. According to Sunil Nair, COO of ALTBalaji, "People sample content on their smartphones and migrate quickly to larger screens if the content is long-form and compelling" (Chatterjee, 2017). Xiaomi claimed that they have sold more than two million smart TVs in India in 14 months of its launch (Mukherjee, 2019). Set-top box providers like Roku, Amazon Fire TV and Apple TV can be used to transform a dumb or regular TV into a smart TV.

VIII. Conclusion

Video streaming has become one of the most successful avenues in the content consumption space in India. Even the smaller OTT platforms are raising capital from international investors and making a significant impact on the market. Indian OTT service Hotstar leads the market at present. Hotstar has the highest penetration of non-paying OTT users. The Smartphone is the most common device for OTT video content consumption, and Xiaomi is the most famous Smartphone brand among OTT users. Jio is the most popular networking service among OTT users, followed by Airtel and Vodafone-Idea. The most preferred language is Hindi and English.

The emergence of OTT would harm the penetration of cable TV in India. Therefore, traditional TV stations should prepare for a paradigm shift brought on by OTT platforms. More importantly, they should work towards making high-quality content that can compete with the material that is available in OTT (Shin et al. 2016). Marketers are changing their budget in tune with the transformation of viewer preference towards digital media. They have a big opportunity today where they can use digital platforms to reach their consumers both in urban and rural India. Along with streaming, the online gaming market in India is projected to become a billion-dollar industry by 2020. More than video streaming, Indian youths are more into gaming on their Smartphone.

Though the consumption of video on digital platforms is on the rise in the country, television is still the largest sub-segment within the entertainment and media industry and will continue to be that way. The Indian television industry with a business of 13,314 million USD in 2017 is poised to grow to the extent of 22,003 million USD in 2022 at a CAGR of 10.6%; at the same time, the global growth average of television viewership is as low as 1.4%. According to Deloitte India (2019), television and appointment viewing will continue for another ten years. The reason is that televisions are now extremely affordable, and people can get a basic cable connection for Rs. 120 a month. Tamil Nadu, Karnataka, Kerala and Andhra Pradesh have over 90% of television penetration. Going forward, the Indian youths will drive digital media consumption. VoD services will go through many changes and advancements until they get the right business model that will lead to their success over cable satellite and cable television.

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