

Video on Demand Industry: Challenges and Opportunities in the Indian Market

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Abstract:- This paper examines the Video on Demand Industry and focuses specifically on the Indian market. In today's globalized economy, technology plays a pivotal role in anything and everything that we do. Video on Demand is also an industry which thrives due to the advancements in technology during the recent years. Through this paper, the researchers have made an attempt to isolate the major factors influencing the growth of Video on Demand Industry.

Keywords:- Video on Demand, Technology, Business Model, Content marketing, Social Marketing.

I. INTRODUCTION

Social marketing is just one 'branch' of marketing, where the branches reflect the area of application: for example, sports marketing; business to business or industrial marketing, religious marketing and so on. Social marketing relates to the well-being of the community, and social marketing is concerned with helping to achieve and maintain desirable social change (Rob Donovan and Nadline Henley 2010). The advancements in the internet in recent years have made new systems available to business in social media, the online communities being a good example (Lu Hsiao 2010).

The general availability of internet has given individuals the opportunity to use social media, from e-mail to twitter, Facebook and Video on demand, to interact without the need for physical meetings (Gruzd et al .2011). Today's consumers have access to many different sources of information and experiences, which have been facilitated by other customer's information and recommendations (Senecal and nantel 2004). With the rise of social media and online communities, individuals can easily share and access information (Chen et.al.2011a). By using social media, consumer can create content and offer valuable advice to others (Fuller et.al 2009). Video on demand (VOD) are systems which allow users to select and watch/listen to video or audio content such as movies and TV shows at their convenience, rather than having to watch at a specific time. This was the predominant practice during considerable periods of the 20th century

II. DEFINITIONS OF SOCIAL MARKETING

Social marketing is the design, implementation and control of programs calculated to influence the acceptability of social ideas and involving considerations of product planning, pricing, communication, distribution and marketing research (Kotler and Zaltman 1971)

Social marketing is a process that applies marketing principles and techniques to create, communicate and deliver value in order to influence target audience behaviors that benefit society (public health, safety, the environment, and communities) as well as the target audience. (Kotler and lee 2008).

Social marketing is the application of marketing principles to shape markets that are more effective, efficient, sustainable and just in advancing people's well-being and social welfare (Phils et al , 2008) . This definition reinforces the point that social marketing is the application of marketing principles to improve people's well-being and social welfare.

Social marketing is the adaption of commercial marketing technologies to programs designed to influence the voluntary behaviour of target audiences to improve their personal welfare and that of the society of which they are a part. (Alan. Andreasen 1994).

III. IMPORTANCE OF SOCIAL MARKETING

Social marketing has experienced substantial growth over the last 3 decades with its utilization spreading into various areas of social and public life (Alves, 2010) and has been widely considered in more and more publications.

Marketers aim to understand behavior and influence behavior change (Alves, 2010), and therefore it is important to know how individuals in different market segments are motivated and influenced.

Social marketing is the application of commercial marketing technologies to the analysis, planning, execution, and evaluation of programmes designed to improve their personal welfare and that of their society (Andreasen 1995)

A key feature in enacting social marketing successfully is engaging the public, by implementing educational campaigns to increase knowledge or by launching attitudinal campaigns to alter perceptions at an individual level (Wymer, 2011).

Social marketing develops and applies marketing concepts and techniques to create value for individuals and society. An openness to new ideas will also occur as we embrace the transdisciplinary nature of marketing and the wicked problems we often tackle.

IV. HISTORY OF VOD

In 1998, Kingston Communications became the first UK Company to launch a fully commercial VOD service and the

first to integrate broadcast TV and Internet access through a single set-top box using IP delivery over ADSL. By 2001, Kingston Interactive TV had attracted 15,000 subscribers. This paved the way for the birth of the VOD Industry.

Developing VOD required extensive negotiations to identify a financial model that would serve both content creators and cable providers while providing desirable content for viewers and an acceptable price point. Key factors identified for determining the economic viability of the VOD model included VOD movie buy rates and setting Hollywood and cable operator revenue splits. Cable providers offered VOD as part of digital subscription packages by 2005.

V. TYPES OF VOD

Video – on – Demand (VoD) is defined as premium digital video content, distributed over the Internet. This includes three major fee – based business models:

- Rentals as a single transaction or Pay – per - View
- Subscription – based Video Streaming services
- Digital purchases of Video Downloads (electronic – sell – through EST).

Pay – per – View is defined as access which is limited by time to exclusive video content that requires a one – time payment based on usage. Content includes movies, TV shows or series which can be downloaded or streamed to devices of your choice for a pre – determined period of time. The prices for Pay – per – View offers are usually lower than for Downloads. Other common names for pay per view are transactional - VOD or TVod.

Video Streaming services offer unrestricted access to a limitless selection of different genres and titles for a subscription-fee. Movies and TV series can be streamed to various supported devices. As in Music Streaming, the video content is delivered without the requirement for downloading the files; the content is played from an external source. Famous Video Streaming services are Netflix or Amazon Prime Instant Video. Video Streaming is also referred as Subscription-based-VoD and SVoD.

Video Download means premium digital video content that is bought in a one-time transaction and is always accessible as a digital video file through cloud-based or offline storage. Consumers are purchasing an unlimited usage right to a specific video file. Video Downloads are also termed as Electronic-Sell-Through (EST) or Download-to- own.

VI. GLOBAL VOD INDUSTRY

In 2016, the global Video-on -Demand is about US\$16.3 billion. It accounts for 16% of the Digital Media market. The market for Video-on-Demand is significantly bigger than Digital Music and on a similar level as ePublishing. United States, China and Europe constitute 85.6% of the global Video-

on-Demand market having a cumulated market size of US\$14.0 billion.

United States accounts for 58.5% of global Video-on-Demand market with US\$9.5 billion in 2016. With US\$5.5 billion in 2016, Video Streaming is the biggest segment. Video Downloads and Pay-per-View account for a market size of US\$2.0 billion each.

The European market has a volume of US\$3.5 billion. With 61.6%, the share of Video Streaming is even higher than its share in the US. Pay-per-View accounts for US\$0.8 billion while VideoDownloads stand at US\$0.6 billion in 2016.

Due to a lack of willingness to pay for digital media content, the Chinese market is different from the US & European markets. With US\$0.9 billion, the total market is not even a tenth of the size of US market. The main reason for the small market is a very low adoption rate of paid Video-on-Demand services. Although Streaming is the biggest segment in the Chinese market, with US\$0.6 billion in 2016, only 3.1% of Chinese Internet users are paying for Video Streaming.

With US \$0.3 billion, Downloads account for 27.4% of the Chinese Video-on-Demand market. With US\$0.1 billion in 2016, the Pay-per-View market is the smallest segment in China.

The global market for video on demand industry is driven by the increased reliance on mobile technology. Digital technologies powered by the internet are emancipating the consumers and motivating the new era by providing ease of use and speed.

VII. NEED FOR STUDY

The revolution in the video on demand industry in India is somewhat similar to exponential growth of satellite TV during 1990s, thanks to the globalization policy of the government. Today Digital India initiative is set to accelerate the VOD players. Due to exponential growth in smartphones and a rollout of 4G services, the VOD industry is set to flourish in India. The rise of digital media players such as Netflix, Hotstar, etc. are challenging the traditionally maintained supremacy of the television as the main entertainment hub. People are spending more time each day on digital rather than traditional forms of media.

This paper focuses on the VOD Industry & its emergence in the Indian Industry. Since technology is the buzzword nowadays, the VOD Industry which epitomizes the use of technology will be a good area to focus on. Also, the customer perceptions about the industry will give us a better idea about what customers want when they talk about Value for money.

VIII. OBJECTIVES OF THE STUDY

The objectives of the study are –

- To study the video on demand industry in India.
- To analyze the major factors which influence the market penetration of major VOD players in India.

A. Scope of the Study

The study will focus on the video on demand industry with respect to Indian market to understand the customers' perception about the VOD Industry and to narrow down on the important factors influencing the Industry.

B. Research Methodology

The researchers collected data from various reliable secondary sources in order to get a deeper understanding about the Video on Demand Industry.

Also, primary data was collected in the form of a questionnaire which involved questions to gauge the awareness among the respondents about the industry, the challenges faced by the industry & the major factors which influence the growth of the VOD Industry.

T test, Chi Square Test & Factor Analysis were carried out in order to arrive at the major findings.

IX. DATA ANALYSIS

• VOD in India

The on-demand video streaming industry has been well and truly penetrating the Indian market, with a series of developments since the latter half of 2016. Lot of buzz has been created in this field and a huge array of international players are making a detour for the Indian market in order to magnify their services. The Indian market by its sheer volume is big enough and there is huge scope for each player to cater to the niche segments of the society. Only those video on demand players operating with a strong revenue-generating business model, and who are aware of what viewers want will grow while the rest will be thrown out over time.

Video on demand is not a full grown industry in India but falls under the purview of Media & Entertainment Industry. YouTube dominates the on demand video consumption by Indian consumers with over 55 million unique users per month. Also a majority of the YouTube viewers in India are below the age of 35 years. Other popular video platforms are Vimeo and recently emerging Facebook. These 2-3 major players are serving India's on demand video need today.

In India, several companies have tried to offer Video on Demand services but have been unable to deliver an enriching

customer experience: Near VOD services by DTH operators and online VOD service providers are limited in their service offering due to limited choice of content. Lack of availability of high speed broadband connections limits the chance for the growth of Netflix like models of VOD on internet streaming.

According to a Media Partner Asia (MPA) report, India's active OTT video subscribers in 2014 were 12 million and expected to grow to 105 million by 2020. Even though at its nascent phase, the VOD market is highly competitive in India. Media companies like Star, Sony Pictures Networks, Zee, Eros and Reliance Entertainment already present in the OTT market. Similarly, platforms like YuppTV and Hotstar, PressPlay TV, Viu, Netflix, etc. Are also in the race. Joining the list, India's one of the prominent multimedia company Viacom 18 has entered in the OTT play with the launch of its digital platform called as 'Voot'.

According to Internet and Mobile Association in India (IMAI), the Internet user base will cross 500 million by 2018, with rural Internet users alone being almost 210 million. Therefore, the market potential for online content consumption is enormous. Factors such as smartphone penetration, 4G rollout and categorization of content are key to drive the VOD industry. Cisco's Visual Networking Index Report (VNI) forecasts that online video traffic will contribute approximately 65 percent of all IP traffic in India by 2018.

X. REVIEW OF GLOBAL VOD MARKET

Secondary data was collected about penetration of VOD in major markets around the Globe, i.e. US, Europe & China. With US\$9.5 billion in 2016, United States is leading the global Video-on-Demand market accounting for 58.5% of the total market. With US\$5.5 billion in 2016, Video Streaming is the biggest segment. Video Downloads and Pay-per-View account for a market size of US\$2.0 billion each. The European market has a volume of US\$3.5 billion. With 61.6%, the share of Video Streaming is even higher than its share in the US. Pay-per-View accounts for US\$0.8 billion while VideoDownloads stand at US\$0.6 billion in 2016.

Due to a lack of willingness to pay for digital media content, the Chinese market is different from the US & European markets. With US\$0.9 billion, the total market is not even a tenth of the size of US market. The main reason for the small market is a very low adoption rate of paid Video-on-Demand services. Although Streaming is the biggest segment in the Chinese market, with US\$0.6 billion in 2016, only 3.1% of Chinese Internet users are paying for Video Streaming. With US \$0.3 billion, Downloads account for 27.4% of the Chinese Video-on-Demand market. With US\$0.1 billion in 2016, the Pay-per-View market is the smallest segment in China.

REVENUE	Year	Segment	Pay per View	Streaming	Download
	2016	China	76	602	256
		US	1923	5527	2078
		Europe	774	2155	556
	2017	China	120	888	301
		US	1915	5914	2170
		Europe	847	2506	560
	2018	China	175	1198	356
		US	1908	6270	2258
		Europe	906	2831	563
	2019	China	237	1502	419
		US	1901	6584	2340
		Europe	953	3114	565
2020	China	299	1776	481	
	US	1894	6853	2415	
	Europe	992	3343	566	
2021	China	357	2011	536	
	US	1888	7077	2484	
	Europe	1023	3531	566	

Table 1. VOD Industry Revenue in US, Europe & China
Source: Digital Market Outlook 2016

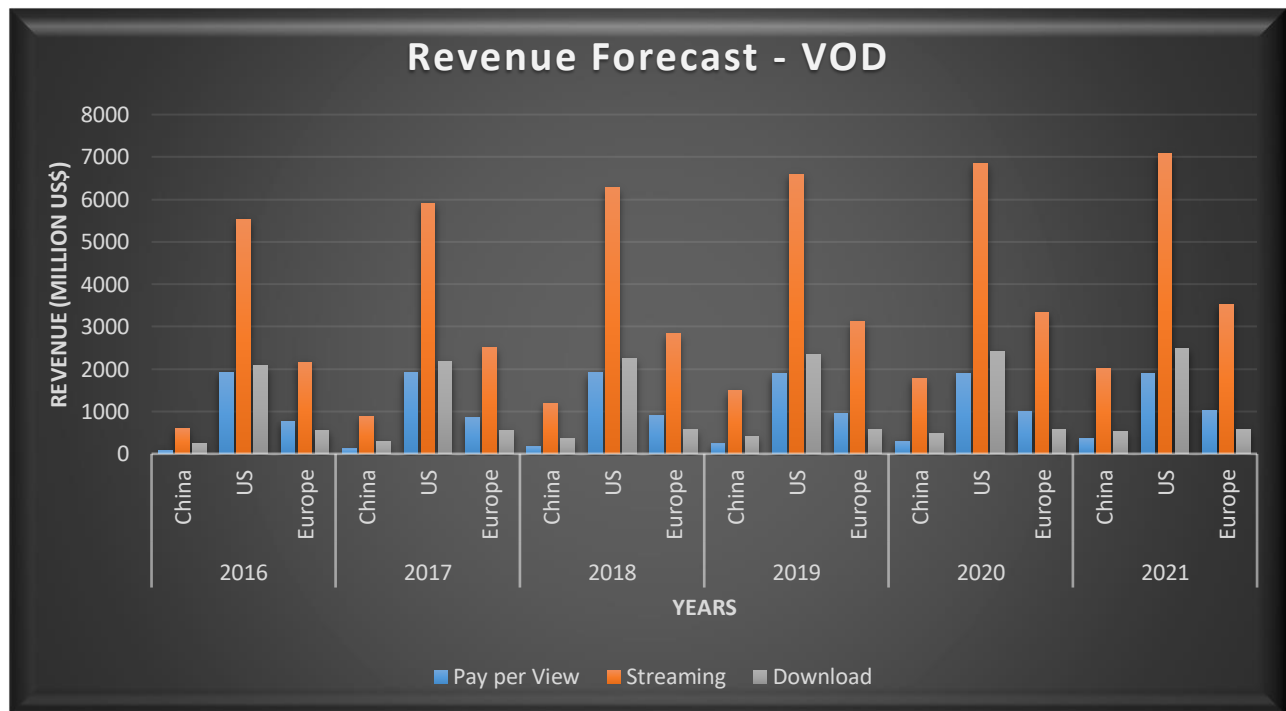


Fig 1:- VOD Industry Revenue in US, Europe & China

USERS	Year	Segment	Pay per View	Streaming	Download
	2016	China	22	27	21
		US	79	67	41
		Europe	38	40	16
	2017	China	30	38	24
		US	78	71	43
		Europe	42	46	16
	2018	China	38	51	28
		US	78	74	45
		Europe	45	52	17
2019	China	45	62	33	
	US	78	77	47	
	Europe	48	57	17	
2020	China	52	73	37	
	US	77	80	49	
	Europe	50	60	17	
2021	China	58	82	41	
	US	77	82	50	
	Europe	52	63	17	

Table 2. VOD Industry Users in US, Europe & China
Source: Digital Market Outlook 2016

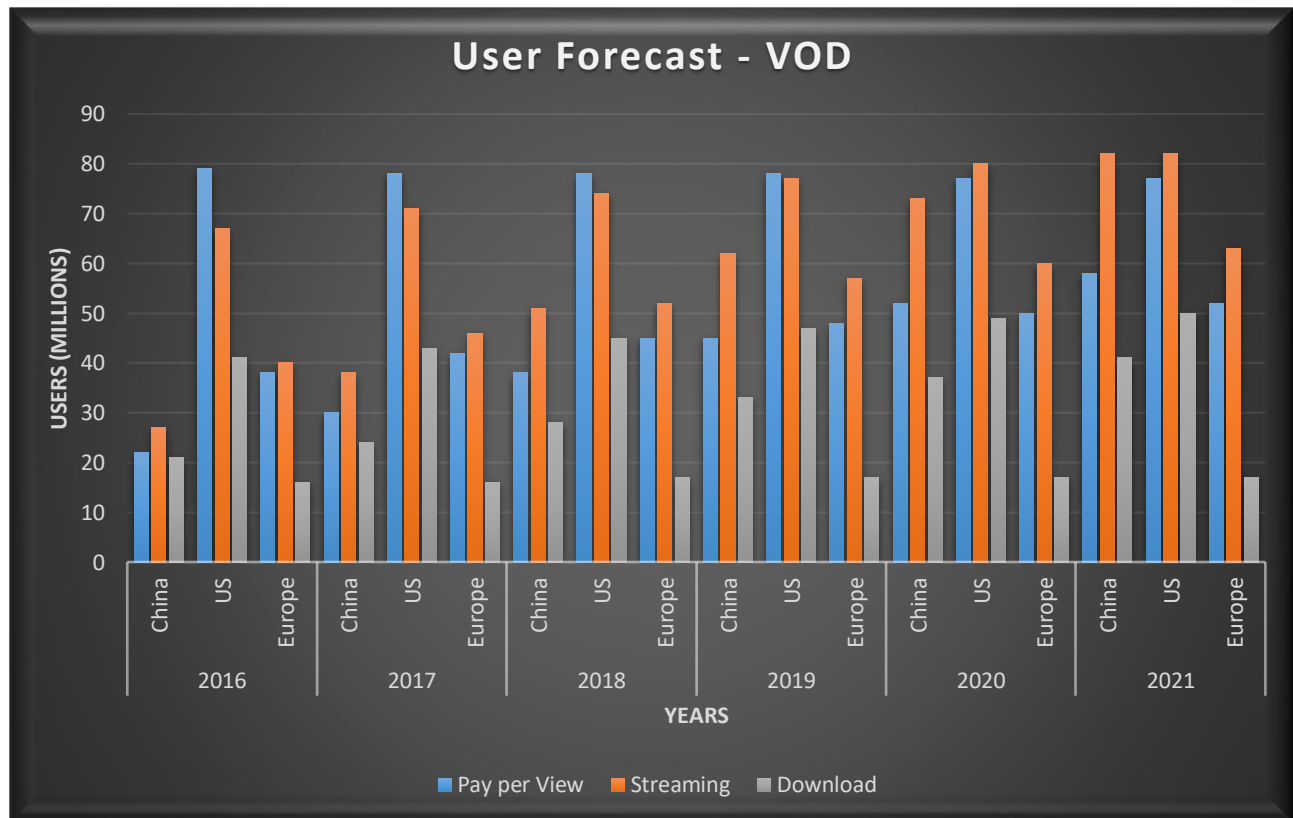


Fig 2:- VOD Industry Users in US, Europe & China

Revenue per User	Year	Segment	Pay per View	Streaming	Download
	2016	China	3.45	22.30	12.19
		US	24.34	82.49	50.68
		Europe	20.37	53.88	34.75
	2017	China	4.00	23.37	12.54
		US	24.55	83.30	50.47
		Europe	20.17	54.48	35.00
	2018	China	4.61	23.49	12.71
		US	24.46	84.73	50.18
		Europe	20.13	54.44	33.12
	2019	China	5.27	24.23	12.70
		US	24.37	85.51	49.79
		Europe	19.85	54.63	33.24
2020	China	5.75	24.33	13.00	
	US	24.60	85.66	49.29	
	Europe	19.84	55.72	33.29	
2021	China	6.16	24.52	13.07	
	US	24.52	86.30	49.68	
	Europe	19.67	56.05	33.29	

Table 3. VOD Industry Revenue per user in US, Europe & China
Source: Digital Market Outlook 2016

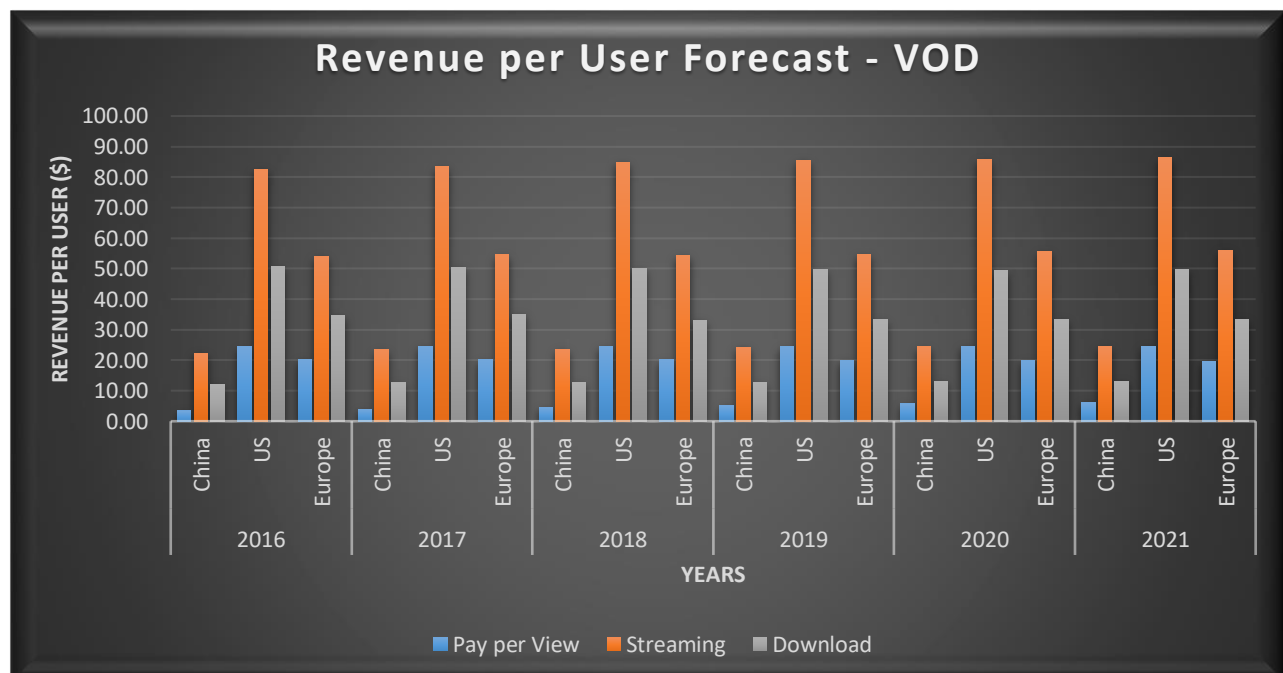
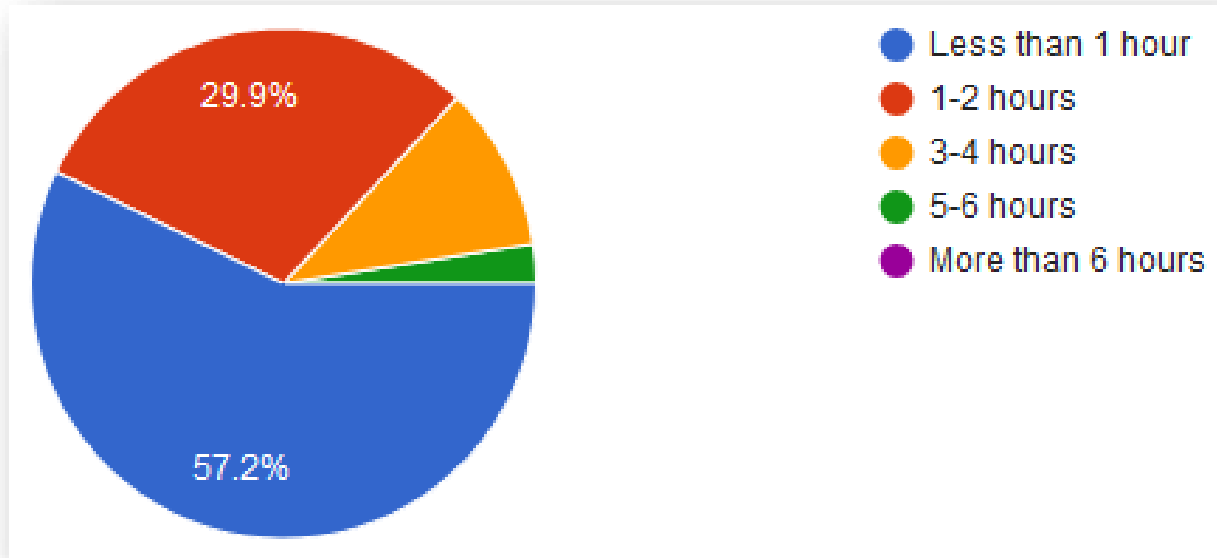


Fig 3:- VOD Industry Revenue per user in US, Europe & China

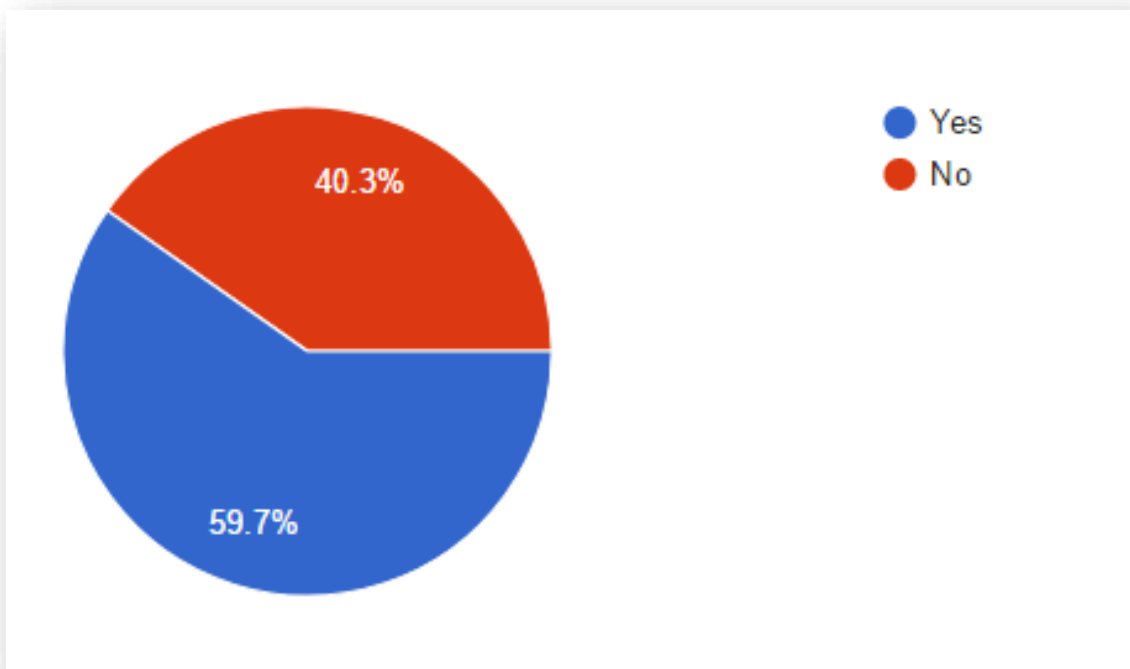
An online questionnaire was circulated by the researchers to get the customer perception about the VOD industry. This pertains to the third Objective. Some of the results which we derived from the questionnaire are given below.

Some of the other important findings from the questionnaire were:

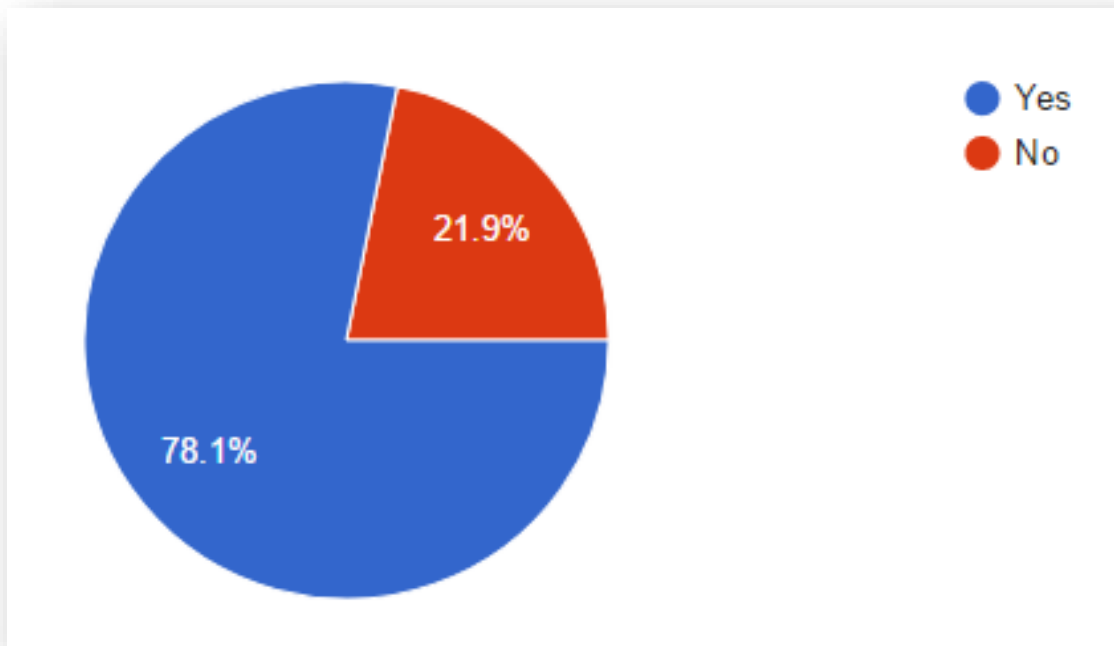
On an average, how much time do you spend daily on Live Video Streaming?



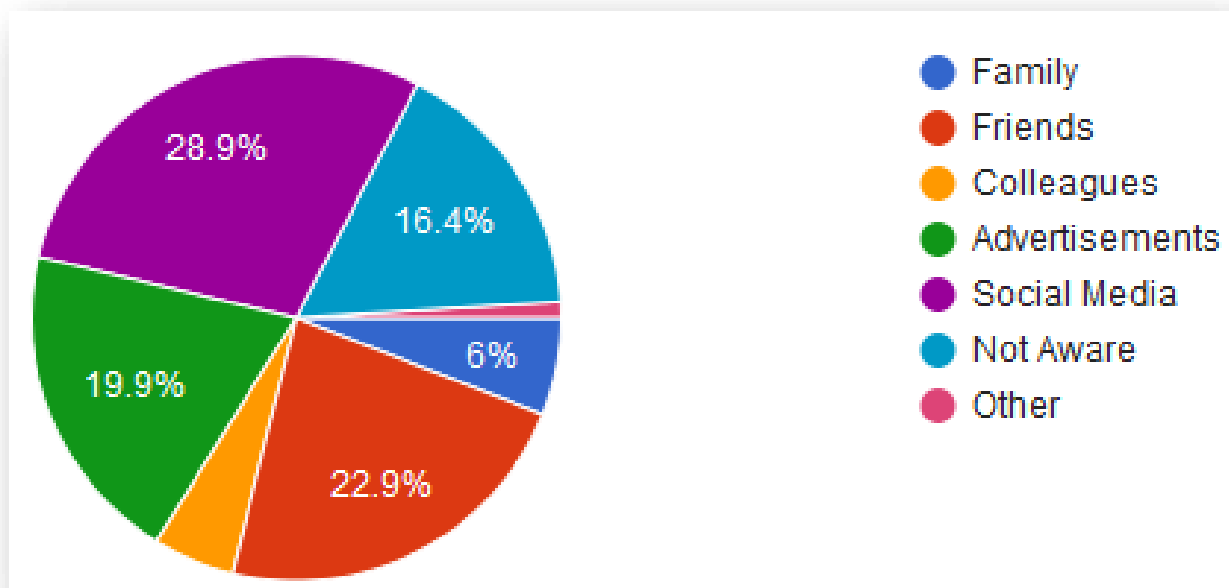
Do you use a 4G connection?



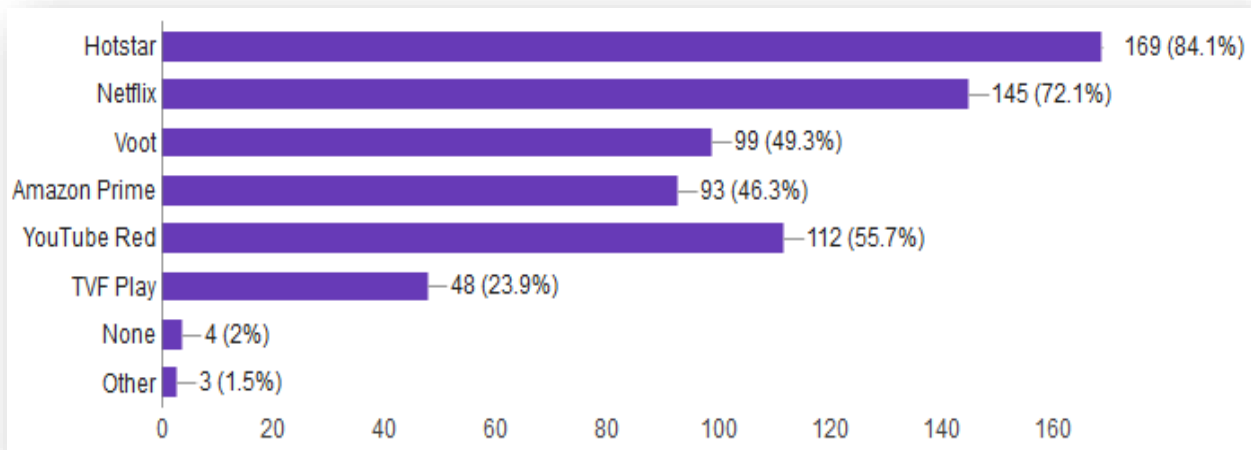
Are you aware of the Video on Demand Industry?



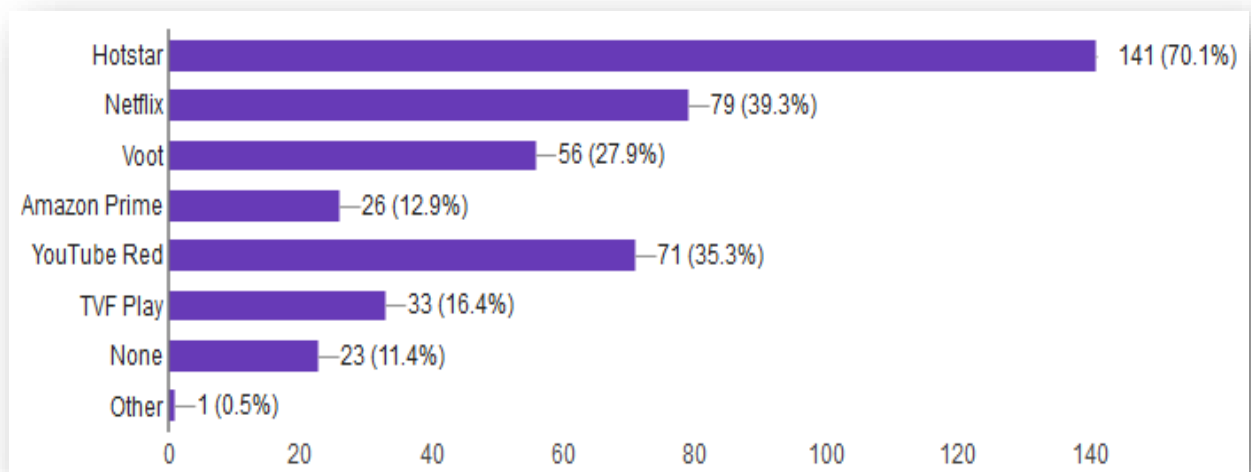
How did you come to know about the VOD Industry?



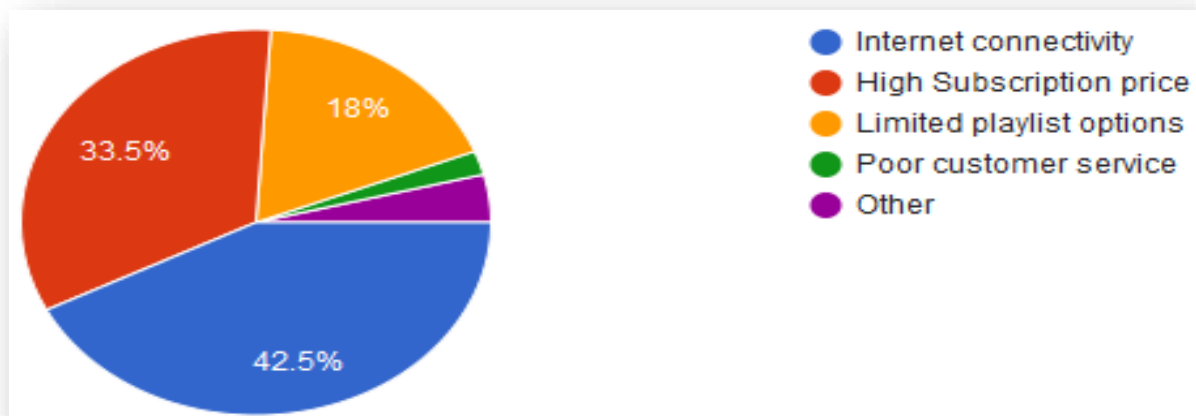
Which of the VOD players have you heard of?



Which of the VOD players have you used?



What were some of the major issues faced while using VOD?



➤ *Rate your experience while using VOD.*

The respondents were asked to rate their experience while using any of the VOD players. We received 201 responses for the same. The scale used was a 5 point scale.

The responses were analyzed using a simple T test. The findings are as follows.

One-Sample Statistics

	N	Mean	Std. Deviation	Std. Error Mean
Userratings	201	3.33	1.017	.072

Table 4. T-test interpretation of user experience

One-Sample Test

	Test Value = 3					
	t	df	Sig. (2-tailed)	Mean Difference	95% Confidence Interval of the Difference	
					Lower	Upper
Userratings	4.649	200	.000	.333	.19	.47

➤ *Awareness about the VOD Industry.*

The researchers also wanted to see if there is a strong relation between the age of the respondents and their awareness about the VOD Industry.

This was done using a Chi-Square test.

H0 – There is no relation between the age of respondents and their awareness about the VOD Industry

H1 – There is a strong relationship between the age of respondents and their awareness about the VOD Industry

Age\Awareness →	Yes	No	Total
18-25	101	27	128
26-34	46	13	59
35-44	6	3	9
45+	4	1	5
Total	157	44	201

Table 5. Table with the Observed Values from the Questionnaire

The calculated value of ChiSquare was 0.747889.

For the same table, the ChiSquare Table value for Degrees of Freedom 3 is 7.81.

So, the researchers accepted the Null Hypothesis - There is no relation between the age of respondents and their awareness about the VOD Industry.

➤ *Rate the issues faced while using VOD services (1 - Lowest, 7 - Highest)*

The researchers identified 10 major issues which might be encountered while using VOD services. The respondents were asked to rate each issue on a scale of 1 to 7 with 1 being lowest & 7 being highest. Then, a factor analysis was done to

get a better idea of the major influencers. As seen from the below table, the 10 factors were falling into 3 major components. They can be grouped as follows:

Basic Customer expectations – Limited playlist options, poor customer service, regional differences in playlist content, lack of constant content upgradation

VOD player differentiators – High subscription price, high frequency of advertisements, irrelevant advertisements

Technology factors – Internet connectivity, video quality, sound quality.

	Component		
	1	2	3
Internet_Connectivity	.209	.334	.400
High_Subscription_Price	.439	.495	.177
Limited_Playlist_options	.765	.353	.028
Poor_Customer_Service	.740	.146	.300
Regional_differences_in_playlist_content	.814	.047	.220
Video_Quality	.204	.146	.917
Sound_Quality	.202	.112	.923
High_Frequency_of_Advertisement	.169	.895	.209
Irrelevant_Advertisement	.175	.916	.074
Lack_of_Constant_upgradation	.542	.399	.247

Table 6. Factor analysis of the issues faced by VOD users
Rotated Component Matrix^a

Component Transformation Matrix

Component	1	2	3
1	.638	.576	.512
2	-.004	-.662	.750
3	-.770	.481	.420

One-Sample Statistics

	N	Mean	Std. Deviation	Std. Error Mean
Internet_Connectivity	154	3.5714	1.89550	.15274
High_Subscription_Price	154	4.1234	1.95815	.15779
Limited_Playlist_options	154	3.5974	1.66674	.13431
Poor_Customer_Service	154	2.9935	1.50162	.12100
Regional_differences_in_playlist_content	154	3.1688	1.68347	.13566
Video_Quality	154	3.3831	1.92064	.15477
Sound_Quality	154	3.3961	1.85211	.14925
High_Frequency_of_Advertisement	154	4.0909	1.99465	.16073
Irrelevant_Advertisement	154	4.1364	1.96728	.15853
Lack_of_Constant_upgradation	154	3.3377	1.74977	.14100

The above table gives us an idea of the major factors which cause distress for the customers, as is clear from the mean values.

➤ Findings

- Video on Demand Industry has seen an astronomical rise in the past few years at a global level. The major markets are United States, China and Europe, as they account for 85.5% of the Video on Demand market globally. The industry can be broken down to three segments, namely pay per View, Video Streaming and Video downloads. Video streaming is the biggest contributor amongst the three in all the major markets.

- Live Video Streaming is a growing industry in India with the youngsters and the working population beginning to spend more and more time streaming videos.
- The increasing effect of Social Media in today’s world is clear by the fact that most people have come to know about the VOD industry through Social Media followed by friends.
- Hotstar is the most heavily used VOD player in India, followed by Netflix and YouTube Red in 2nd & 3rd place respectively. Some other players like Voot, TVF Play & Amazon Prime are also making their presence felt in the VOD market in India with more and more people willing to try out the various options available in the VOD domain.
- Internet connectivity is the major issue faced by consumers of VOD services. But this should go down

with the increased penetration of 4G services in the country. The other major issues faced by the consumers are high Subscription Price & limited playlist options.

This might lead to lesser brand loyalty with the users jumping ship from one VOD player to another based on the pricing and the options provided by them.

XI. CONCLUSION

This paper focused on the Video on Demand Industry with emphasis given to the Indian market. The current global scenario was discussed concentrating on the 3 major markets – US, Europe & China.

Then, the VOD Industry in India was the main focus. VOD in India is still a growing industry with more and more people becoming aware of it. This will only increase with time and the increased reliance & exposure to technology. But there are still many hurdles to cross before India becomes a big player on the VOD Global map. One major factor which is hindering the growth of VOD in India is poor internet connectivity. But all these are small obstacles and the future looks bright for VOD Industry to grow tremendously in the Indian market.

XII. ANNEXURE

The screenshot of the online questionnaire which was used for collecting the responses is given below.

* Required

1. Email address *

2. Age *

Mark only one oval.

- 18-25
 26-34
 35-44
 45+

3. On an average, how much time do you spend daily on Live Video Streaming? *

Mark only one oval.

- Less than 1 hour
 1-2 hours
 3-4 hours
 5-6 hours
 More than 6 hours

4. Do you use a 4G Connection? *

Mark only one oval.

- Yes
 No

5. Are you aware of the Video on Demand Industry? *

Mark only one oval.

- Yes
 No

6. If yes, how did you come to know about it? ***Mark only one oval.**

- Family
- Friends
- Colleagues
- Advertisements
- Social Media
- Not Aware
- Other: _____

7. Which of the following Video on Demand players have you heard of? ***Check all that apply.**

- Hotstar
- Netflix
- Voot
- Amazon Prime
- YouTube Red
- TVF Play
- None
- Other: _____

8. Which of the following Video on Demand players have you used? ***Check all that apply.**

- Hotstar
- Netflix
- Voot
- Amazon Prime
- YouTube Red
- TVF Play
- None
- Other: _____

9. If never used VOD, what has prevented you from using it?**Mark only one oval.**

- Lack of awareness
- High subscription fees
- High data consumption
- Negative reviews
- Other: _____

10. Rate your experience while using VOD *

Mark only one oval.

	1	2	3	4	5	
Lowest	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Highest

11. Rate the issues faced while using VOD services (1 - Lowest, 7 - Highest) *

Mark only one oval per row.

	1	2	3	4	5	6	7
Internet connectivity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
High Subscription price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Limited playlist options	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Poor customer service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regional differences in Playlist content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Video Quality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sound Quality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
High frequency of Advertisements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Irrelevant Advertisements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of constant content upgradation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

The link of the same is given below.

https://docs.google.com/a/sfimar.org/forms/d/1rn6LWv7wraSr9fnjii4KZNdXe_YHmoX0QwqtukP2pLo/edit?ts=58998246

XIII. ACKNOWLEDGEMENT

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