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PERCEPTUAL MAPPING OF ONLINE VIDEO STREAMING PLATFORM IN INDIA

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ABSTRACT

In 2020, online video streaming platforms (OVSP), also known as OTT platforms, have seen massive growth due to pandemic-induced lockdown in India. This research explores the perceived usage and perceived satisfaction of the OVSPs in India. The multidimensional scaling technique is used to analyse the data collected from 265 college students. The findings of the study indicate the relative market position of the OVSPs currently operating in India. This research will provide strategic insights to the streaming platform sin positioning or repositioning their offering in this increasingly competitive scenario. The findings show that the top OVSP Netflix and Amazon Prime Video are maintaining their superiority in the minds of consumers. While Amazon Prime Video is rated as value for money, Netflix is considered to be highly-priced. Disney+Hotstar and Sony Live are distinctive and mainstream; VOOT and Zee5 are popular due to their soap genre.

KEYWORDS: *Online Streaming, OTT, Netflix, Amazon Prime Video, Disney Hot Star, Multidimensional Scaling, Positioning Map, Perceptual Mapping.*

INTRODUCTION

In 2020, due to the COVID19 pandemic worldwide, there has been a significant change in consumer behaviour for digital products (Ballhaus & Chow, 2020). As a result, there is considerable growth in digital entertainment products like online video streaming platforms (OVSP), online music, gaming, and social media platforms(Westcott, Arbanas, Downs, & Arkenberg, 2021). I

India, the online streaming market is growing at a swift pace for a variety of reasons. First, it can be accessed easily from anywhere, with a mobile phone and internet connection (Gupta, 2021). Second, internet connectivity in India is now widely available and more robust (IBEF, 2020). Thirdly, overall increase in consumption of online products due to lockdown. According to a market report by Red seer, the OVSP user base has increased

by 8 million users in the last year (Malik, 2021). As a result, the overall consumption increases from 181 billion minutes to 206 billion minutes (Consultancy .in, 2020).

Due to the country's pandemic-induced lockdown, the video streaming market has seen a rise across all demographics and devices (Consultancy.in, 2020). The increase in digital consumption was initially due to compulsion because outdoor entertainment avenues like movie theatres, parks, restaurants, clubs, and outdoor sports were closed. However, now the consumers started preferring the online video streaming platforms as they control what, when, and where to watch (Ballhaus & Chow, 2020). In addition, these platforms are mindful of growing rural penetration and, therefore, increasing their reach in rural areas. According to a report by The Data Sciences Division of Dentsu Aegis Network (DAN), India, 2020, video streaming is the most popular form of entertainment among the young generation during COVID 19 (WARC, 2020).

Thus, video streaming platforms focus more on young Indians as they are the prime market (Sheth, 2021). The growth in the online streaming market is encouraging existing platforms to increase their reach by increasing content quality and flexible pricing and diversified offerings to meet the expectations of the target markets (IANS@ETBrandEquity, 2021). Currently, online video streaming is dominated by Netflix, Amazon Prime Video, and Disney+Hotstar. SonyLiv, MX Player, JioCinema, Zee5, Alt Balaji, and Eros Now are also an active part of this multi-crore industry in India. New platforms like Starz, Apple TV+, HBO Max, Discovery+, Book my Show Stream, and Big Bang Amusement are planning big for Indian consumers (IANS@ETBrandEquity, 2021). Thus, the positioning strategy would be a big challenge for existing and new platforms.

Perceptual mapping is a technique to display a consumer's perception of a product or service visually. It is a graphical representation of the place that the products acquired in the minds of consumers concerning the other brands (Das, 2018). This technique has been used to identify the brand's relative position in online food delivery, hotel industry, and brand positioning in many other product categories (Bijmolt, Wedel, & DeSarbo, 2020; Das, 2018; Kim & Kim, 2003; Widarmanti & Ramantoko, 2020). In addition, the positioning map helps identify the similarities and differences amongst brands (Han & Lee, 2020). In any market, firms majorly aim at a position that, on the one hand, explains their category membership but also strive for a point of differentiation (Kotler & Keller, 2017).

LITERATURE REVIEW

OVSP Landscape in India

In India, there are around 40 big, small, national, and international OVSPs. Currently, Netflix is the leading subscription-based streaming platform, followed by Amazon Prime Video and Disney+Hotstar (Redseer, 2021). While market leaders Netflix and Amazon Prime have a 20% market each, the challenger position goes to Disney+Hotstar with a 17% market share. Market followers are Zee5 with 9%, JioCinema 7%, Alt Balaji, and SonyLiv with 4% market share each. Others, including MX Player, VOOT, Eros Now, and other regional platforms, account for a 19% market share (Buchhloz, 2020). In India, Netflix and Amazon Prime Video concentrate on developing their own high-quality, high-impact storytelling to maintain their position (PTI@EconomicTimes, 2021). Amazon Prime Video has launched several strategies, including low priced mobile-only subscription plan to deal with the rivals. With a reach in more than 4500 cities across the country, Amazon Prime Video has seen enormous growth in the last year (Staff@Mint, 2021).

While Hotstar, which is now known as Disney+Hotstar, is not growing as fast as its counterparts. Hotstar relies on its advertising revenue growing faster than its subscription revenue (Bhalla, 2021). The slow revenue growth is due to its number of unpaid subscribers (Jha, 2021). Disney+Hotstar was expecting growth in subscription due to the IPL in September 2020 and April-May 2021, but TV is the most preferred mode to watch sports (Farooqui, 2021).

SonyLiv and VOOT compete on the OVSP market through the Indian content, which is popular in non-metro populations. While SonyLiv has a sports genre, VOOT brings reality, kids, fiction shows, and movies (Jha, 2020). In addition, WE, UFC, and live cricket matches have been telecasted on SonyLiv (TechDesk@IndianExpress, 2020). Furthermore, in order to create differentiation, SonyLiv has launched its augmented reality show-based games. These games are based on Sony Pictures Network popular shows like *Kaun Banega Correlate*, *The Kapil Sharma Show*, *CID*, *Crime Patrol*, *Patiala Babes*, *Baal veer*, *Kicko & Super Speedo*, and many others. Recently, SonyLiv has acquired the telecast right of the Friends Reunion in India from HBO Max.

JioCinema has content in many Indian regional languages, including Tamil, Telugu, Malayalam, Kannada, Bengali, Marathi, Punjabi, and Bhojpuri. The platform claims to have around 1 lakh hours of content, including Marvel movies, Disney's *Lion King*, *Cinderella*, and *The Jungle Book* (Laghate, 2018).

Zee5 has movies in Hindi and other regional languages. The most famous shows streamed on Zee5 are *Chotta Bheem* and *Jungle Book* (TechDesk@IndianExpress, 2020). ALT Balaji, owned by Balaji Telefilms, has majorly Hindi content (Bhadani, 2020). MXP Layer has Hollywood movies dubbed in Hindi (TechDesk@IndianExpress, 2020). Run by Times Internet, MX Player has rated as the top Indian streaming app for 2019 by a San Francisco-based research firm that specialises in data on the mobile app industry (ETBureau, 2020).

Yupp TV, an Atlanta-based South Asian content platform, has 14 languages across 200 plus channels and 100 TV shows. They have acquired IPL telecast rights in Continental Europe, Australia, Sri Lanka, Southeast Asia (except Singapore and Malaysia), Central and South America, Central Asia, Nepal, Bhutan, and the Maldives (Tewari, 2021). Big Flix is a Reliance Entertainment venture offering quality content at a low price. Eros Now is from the production house Eros International, and Ditto TV is an aggregator video streaming platform.

A Twitter trend analysis using 1422 tweets was conducted to get people’s view on OVSPs on ATLAS. it software. Figure 1 represents a word cloud of what is trending for OVSP market in India. The highest mentions are there for Prime Video, followed by Netflix and Disney+ Hot star. Zee5 was also trending due to the telecast of Friends Reunion.

FIGURE 1: OVSP Trends on Twitter



Source: Extracted from ATLAS. it Output

PERCEPTUAL MAPPING

Perceptual mapping has been used to identify positioning and repositioning strategies across products and services (Gigauri, 2019). It is also an essential tool for brand positioning. It can simplify complex relations between brands in the form of distances (Gigauri, 2019). The study of positioning maps also helps identify a product/service competitive position (Rasooli, Bksheshi, & Zareian, 2018). In the given competitive environment, perceptual mapping can be a tool for guiding innovation, product development, and improvement (Mina, 2020). Most perceptual maps are created using the multidimensional scaling (MDS) technique (Roy, 2019). MDS aims to create a geometric model that can visually represent the relationship between OVSPs in terms of distances between them (Ding, 2018).

Damavand Bagga (2015) explained the Centrality-Distinctiveness (C-D) matrix for understanding the competitive positioning map. Centrality is explained by the brand’s category point of parity, and distinctiveness describes its point of differentiation. The brands having high centrality and high distinctiveness are called Aspirational. Brands with high centrality and low differentiation are Mainstreams. These are the brands that create the category and thus have little or no differentiation. As the market develops, new entrants try to create differentiation from the existing brands. The successful brands are with low centrality and high differentiation known as Unconventional. Still, some others just try to follow the market leaders with the limited offering called Peripherals with low centrality and low differentiation (Dawar & Bagga, 2015).

RESEARCH DESIGN

This research explores the relative position of the OVSPs using the differences and similarities in their offerings.

First, the literature review was conducted to identify the thirteen leading OVSPs in India. Further, their recent content and pricing strategies published in leading online news pages were discussed. Finally, multidimensional scaling is used to:

1. To create the perceptual mapping of OVSPs on the perceived usage.
2. To identify the relative position of the OVSPs in their minds based on their perceived satisfaction.

To achieve the given objectives, data is collected from 265 college students on a rating scale. The respondents were asked to rate 13 online streaming platforms on a scale of 1-7, on 1) their perceived usage and 2) their perceived satisfaction. The multidimensional scaling technique using Alternate Least Square Method (ALSCAL) is used to create the perceptual maps. The perceptual mapping on the perceived usage rating scale aims to identify the main streams, aspiring, unconventional, and peripheral OVSPs as C-D Matrix. The perceived satisfaction scale is used to identify the cluster of OVSPs based on the distances.

DATA COLLECTION

Amongst the 265 responses received, 163 were male, and 102 were female. The respondents were asked to rate the perceived frequency of usage of 13 OVSPs on a rating scale of 1-7, where 7 - regular user, 6 - usually, in about 90% of the chance I could have, 5 - frequently, about 70% of the chance I could have, 4 - sometimes, about 50% of the chance I could have, 3 - occasionally, about 30% of the chance I could have, 2 - rarely, about 10% of the chance I could have, 1 - never (Vagias & Wade, 2006).

In addition to this, the respondents were also asked to rate their perceived satisfaction with the OVSP on a scale of 1-7, where 1 - completely dissatisfied, 2 - mostly dissatisfied, 3 - somewhat dissatisfied, 4 - neither satisfied nor dissatisfied, 5 - somewhat satisfied, 6 - mostly satisfied, 7 - completely satisfied (Vagias & Wade, 2006). Again, the reversed scale is used to avoid common method biases.

The usage and satisfaction data are summarised in Table 1. Further, it is observed that the maximum numbers of respondents (48.3%) are regular users of Netflix. Also, Amazon Prime Video and Disney+Hotstar are regularly used by 18.1% and 15.1% of users, respectively. On the other hand, around 90% of the respondents have never used Yupp TV, Big Flix, and ditto TV.

TABLE 1: Descriptives

Platform	Usage		Satisfaction	
	Mean	Std. Deviation	Mean	Std. Deviation
Netflix	5.92	1.423	6.25	0.97
Amazon Prime Video	5.39	1.310	5.97	1.11
Disney+HotStar	4.86	1.638	5.61	1.22
ALTBalaji	1.56	1.144	2.68	1.63
JioCinema	1.79	1.360	2.94	1.64
SonyLiv	2.97	1.635	3.86	1.75
VOOT	2.18	1.587	3.12	1.79
MXPlayer	1.62	1.256	2.66	1.60
Zee5	1.95	1.393	2.94	1.71
YuppTV	1.22	0.818	2.28	1.53
Big Flix	1.26	0.926	2.27	1.52
Ditto TV	1.20	0.795	2.27	1.53
Eros Now	1.64	1.170	2.53	1.61

Source: Extracted from SPSS Output

DATA ANALYSIS

The multidimensional scaling technique helps compare the data based on the respondents' judgments (Hair, Black, Babin, & Anderson, 2019). The alternative Least Square ((ALSCAL) approach is used as it uses individual differences model with multiple unfolding (Young, Takane, & Lewyckyj, 1978). It also allows any number of objects and subjects (Juhász-Dóra, 2017). Since the responses were collected using a rating scale, the

option “create data from distances” was selected to create the square dissimilarity matrix (George & Mallery, 2018).

The C-D Matrix

The C-D matrix is formed with the frequency of usage data. The SPSS output S-stress value of 0.13135 was obtained using the Kruskal formula, which shows a proper fit (Roy, 2019). The R-square value of 0.97 indicates an excellent fit (Malhotra & Dash, 2019). The data for dissimilarities is given in Table 2. A value of 2.7777 shows that the data can be represented in a two-dimensional matrix

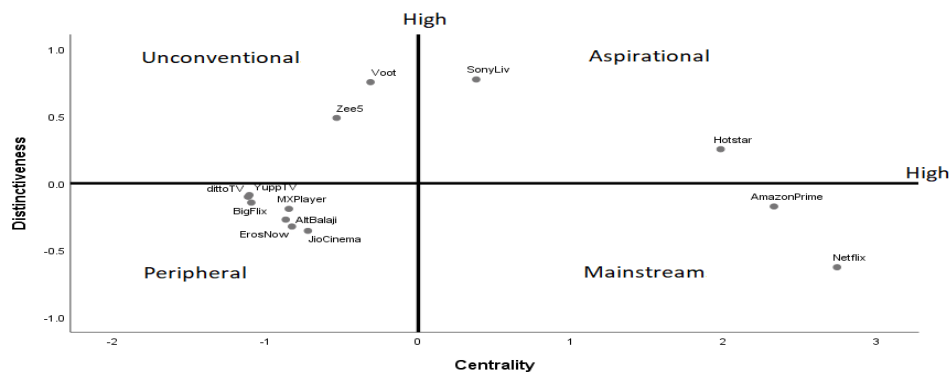
TABLE 2: Dissimilarity Data for Usage

Number	Stimulus	1	2
1	Netflix	2.7777	-0.5885
2	Amazon Prime Video	2.3318	-0.1541
3	Hot star	1.9246	0.2629
4	Alt Balaji	-0.8701	-0.2886
5	JioCinema	-0.7247	-0.3761
6	SonyLiv	0.3903	0.7390
7	Voot	-0.2645	0.7668
8	MX Player	-0.8581	-0.1926
9	Zee5	-0.5342	0.4748
10	Yupp TV	-1.1199	-0.0948
11	Big Flix	-1.1294	-0.1241
12	Ditto TV	-1.1294	-0.1088
13	Eros Now	-0.8191	-0.3158

SOURCE: Extracted from SPSS Output

The two-dimensional matrix represented by the Euclidean distance model shows the centrality-distinctiveness model for OVSP is given in Figure 2. On the lower right corner of the matrix are Netflix and Amazon Prime Video. They are mainstream brands, which are the first to come to mind. The upper right quadrant is for aspiration brands Disney+Hotstar and SonyLiv are more differentiated and have broader appeal. The Upper left corner belongs to unconventional OVSPs, like Voot and Zee5, the most favourite in India for their soaps genre. They have unique characteristics that distinguish them from the other OVSP. Peripheral OVSPs have little to differentiate (Dawar & Bagga, 2015).

FIGURE 2: The C-D Matrix



SOURCE: SPSS Output

The Perceptual Positioning Map

The satisfaction data from the thirteen OVSPs created a perceptual positioning map. The SPSS output indicated an S-stress value of 0.10656. An R-square value of 0.98 indicates an excellent fit (Malhotra & Dash, 2019).

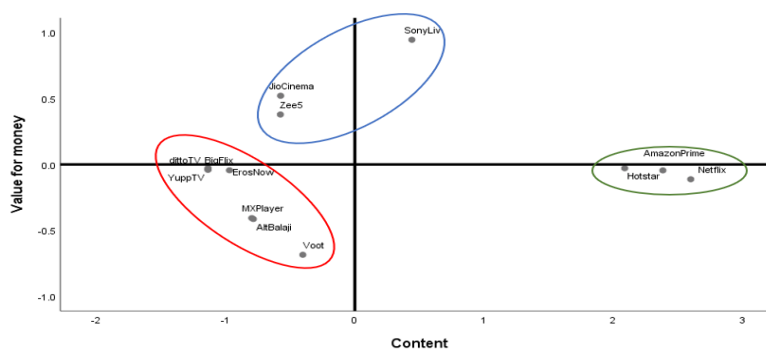
The data for dissimilarities is given in Table3. A dissimilarity value of 2.6089 shows that the data can be represented in a two-dimensional matrix

TABLE 3: Dissimilarities on Satisfaction

Number	Stimulus	1	2
1	Netflix	2.6089	-0.0726
2	Amazon Prime Video	2.387	-0.0398
3	Hot star	2.0535	-0.0364
4	Alt Balaji	-0.7956	-0.4671
5	JioCinema	-0.6092	0.4553
6	SonyLiv	0.4371	0.9056
7	Voot	-0.3413	-0.7126
8	MX Player	-0.7902	-0.447
9	Zee5	-0.5427	0.438
10	Yupp TV	-1.1491	-0.0349
11	Big Flix	-1.1501	-0.0206
12	Ditto TV	-1.1472	-0.0538
13	Eros Now	-0.9611	0.0859

SOURCE: Extracted from SPSS Output

The satisfaction map, based on the Euclidean distances, indicates three clusters, as shown in Figure 3. Cluster 1, on the central right-hand side of the matrix, shows the most popular OVSPs – Netflix, Amazon Prime Video, and Disney+Hotstar. These three OVSPs are currently acquiring 57% of the market share (Buchhloz, 2020). These OVSPs are also considered neutral in terms of value for money, as all are subscription-based models.



SOURCE: SPSS Output

The upper centre cluster of SonyLiv, JioCinema, and Zee5 can create a distinct image in customers’ minds but lacks popularity. This is because they are high on value for money. SonyLiv has a fermium model and provides a wide variety of content, including a gaming platform (SonyLiv, 2021). Jio Cinema and Zee5 have a variety of content but currently lacking popularity. The left cluster is made up of regional and low-cost OVSPs, trying to make their mark in the minds of Indian viewers.

FINDINGS AND CONCLUSION

The crucial findings from the C-D matrix are that Netflix, being the market leader, is providing the required service to its users. The same can be verified by the satisfaction map also. The mainstream position of Netflix

and Amazon Prime Video indicates a focus on the movies and shows, which is the core benefit of OVSPs. Netflix's positioning is premium. That is also reflected in the viewer's opinion that Netflix is not very high on value for money. Amazon Prime Video is better in terms of value for money as it is a part of a package of other services from Amazon. Disney+Hotstar is providing diversified services like sports live streaming. SonyLiv is highly diversified as it is online gaming also, which is not offered by any other OVSP. Therefore, also rating high in terms of value for money. The most ambiguous positioning is Voot and Zee5, which offers soap genres, primarily the repeat telecast of their shows on Colours TV and Zee TV.

Another observation with the C-D matrix in Figure 2, is that the upper half of the matrix has OVSPs that were traditional Television broadcasters. Disney+Hotstar is from Star TV, SonyLiv is from Sony Entertainment Television, Voot is from Colours TVs, and Zee5 is from Zee TV. All others on the lower side of the matrix are new OVSPs.

This study will provide a roadmap to upcoming OVSPs. Online gaming is an upcoming area and can be explored by other OVSPs also. Overall, currently, the users expect more of the content at a low price, as they wanted to subscribe to many OVSPs. The dominance of Netflix may continue as the second wave of COVID19 has hit the country again in March 2021. On May 4, 2021, IPL has been postponed till September, and most of the shows are facing production postponement. OVSPs have no choice but to look for ready-made, high-quality national and international content in this scenario.

LIMITATIONS AND FUTURE RESEARCH DIRECTIONS

This research has majorly focussed on national online video streaming platforms. Regional OVSPs are not considered for the study. Also, YouTube is not considered because most of its content is user-generated. Future researches may take YouTube and regional OVSP, though they will require a larger and diverse sample. Other online products like gaming platforms, music apps, and social media can also be explored to study young college student's perceptions.

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