

Factors Driving Adoption and Usage Behaviour of Over-the-Top Streaming Services – Systematic Literature Review and Development of Conceptual Model

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Over-the-top (OTT) streaming has become a common medium of entertainment in households post Covid-19. This phenomenon was in the nascent stage before Covid-19 pandemic. There was a need to understand consumers in shifting to their new choice of entertainment through internet. The usage of OTT platforms has increased drastically in terms of time and resource spent post Covid-19 pandemic. Total of 54 papers were shortlisted for the systematic literature review. The authors have used PRISMA framework to shortlist and identify papers contributing to understanding the new phenomenon from early 2020. The timelines considered here was based on the services launched by professional companies such as Netflix. Many studies primarily focussed on adoption to new technology like Technology Acceptance Model (TAM), Unified Theory of Acceptance and Use of Technology (UTAUT). The basis to these studies were macro factors like infrastructure and available of technology across different geographies and countries. The study highlights on the insufficient literature available to understand consumer behaviour along with technology adoption in the OTT industry. The systematic literature review contributed in the development of a conceptual model which elaborates the multidimensional approach required to understand consumer adoption of OTT streaming. In future, researchers may use this model to understand consumer behaviour towards OTT services and providers with the latest technology and infrastructure available across geographies.

Keywords: *Over-the-top (OTT), Technology Acceptance Model (TAM), Unified theory of Acceptance and Use of Technology (UTAUT), Uses and Gratification Theory (UGT)*

1.0 Introduction

Over-the-top (OTT) streaming refers to the content, applications and services and provided through internet to the end users (Nomura, 2014). Over-the-top streaming has brought the audiences closer to the entertainment industry. The change in technology and ease of access through gadgets like mobile phones, tablets, computers and smart televisions via internet has made it easier for the consumers to get hooked to their favourite programs. The government and telecom providers have played key role in bringing in latest network band width which has led to increase in consumption of internet-based entertainment services. The traditional mediums like movie theatre, rental cassette's, Digital Video Disc, has been taken over by over-the-top streaming services.

Netflix started revolutionising the streaming services from the year 2007 with movies and televisions series. However, the major disruption happened in the year 2016 when Netflix launched their services in over 130 countries. This created the awareness of OTT services among the global audience. Further adding to this Covid-19 pandemic brought in lot of changes in the lifestyle of people. The changes included strict imposition of lockdowns across the globe restricting the physical movements of people to avoid spread of the Covid-19 virus. This new phenomena of staying at home with ambiguous crisis became the new norm for people across the globe. There was a change in the entertainment industry as movie theatres were shutdown and restrictions on operational capacities of movie theatres. This led to audiences to explore new channels of entertainment like OTT streaming services which included free services like Youtube, Freeve, The Roku Channel to name a few.

The global OTT industry is around \$86 billion exit 2021 and is estimated to grow at CAGR 15% and reach market size of \$263 billion by 2026 (Research and Markets). The Indian market as of exit 2022 is at \$67 billion and is expected to reach \$102 by 2024 (Statista). The data explains the latest industry trends owing to changing consumer demands. There are many studies conducted to understand the phenomenon of OTT industry that is still taking shape across the globe. The service

providers are classified under free and paid subscription model. The free service providers have their limitations in providing quality content and services. Major players in OTT industry are Netflix, Amazon prime, Hulu, Disney-Hotstar and Apple TV. The major categories of entertainment provided through the service providers are motion picture, web series, original content, live TV to name a few. These players are most prominent due to their business model, presence, customer base and investment in creating consumer referred content. Technological change such as 5G network are going to add boost to the internet consumption, especially in India. This study identified the major factors that leads consumer adoption and usage behaviour of OTT customers.

Methodology

The study focussed on the literature available on over-the-top streaming (OTT). The industry had started witnessing change from 2007 when Netflix was launched. OTT industry was in camouflaged as the market was niche. However, the industry underwent a big transition due to Covid-19 pandemic which changed the preference of entertainment service. This was also due the penetration of higher bandwidth internet which was bridging the workspace in the pandemic time. Relevant studies were searched in Google Scholar, EBSCO using the keywords: Over-the-top streaming, OTT, SVOD, Binge watching, Willingness to Pay, TAM, UTAUT2, UGT.

A conceptual model was developed using the theories used in literature reviewed. Gaps in the existing literature and future scope of research were identified in this study.

The screening of research papers was done using PRISMA framework, we identified 54 studies relevant to our topic. Flowchart was created to summarize the search, exclusion and inclusion of research papers. Below mentioned flowchart illustrates the framework followed and Table-1 lists out the journal and their rating as per ABDC.

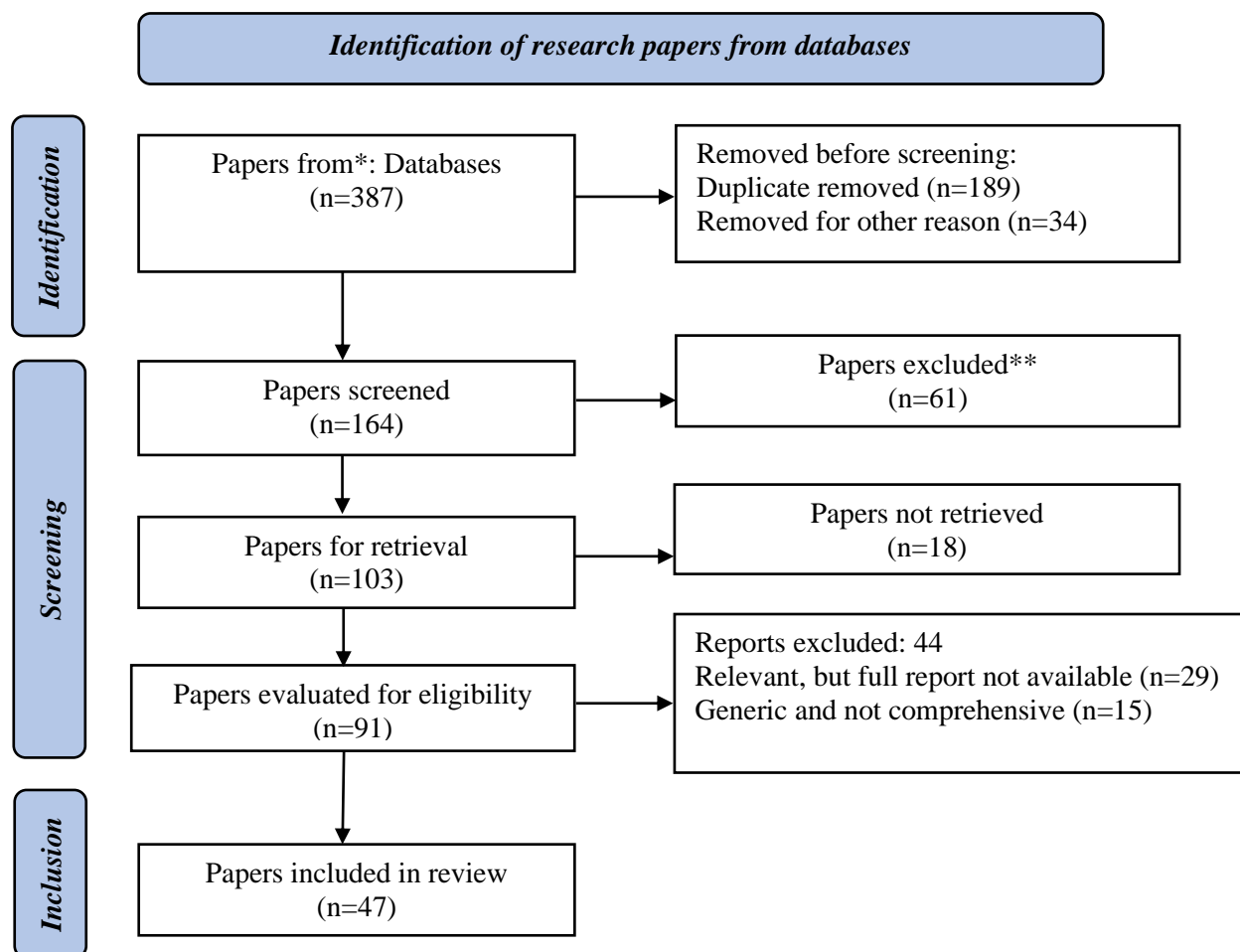


Fig 1 PRISMA framework for selection of research papers considered for this study

Table 1 - Summary of papers reviewed along with journal details and rating as per ABDC listing for the year 2021

<i>Journal Title</i>	<i>ABDC Rating (2021)</i>	<i>No of papers</i>	<i>% of papers</i>
<i>Marketing Science</i>	<i>A*</i>	<i>1</i>	<i>2%</i>
<i>Internet Research</i>	<i>A</i>	<i>1</i>	<i>2%</i>
<i>International Journal of Retail & Distribution Management</i>	<i>A</i>	<i>1</i>	<i>2%</i>
<i>Computers in Human Behavior</i>	<i>A</i>	<i>1</i>	<i>2%</i>
<i>Information Technology & People</i>	<i>A</i>	<i>1</i>	<i>2%</i>
<i>Journal of Global Information Management</i>	<i>A</i>	<i>1</i>	<i>2%</i>
<i>Journal of Cultural Economics</i>	<i>A</i>	<i>1</i>	<i>2%</i>
<i>Technological Forecasting and Social Change</i>	<i>A</i>	<i>1</i>	<i>2%</i>
<i>Journal of Behavioral Decision Making</i>	<i>A</i>	<i>1</i>	<i>2%</i>
<i>Young Consumers</i>	<i>B</i>	<i>1</i>	<i>2%</i>
<i>Communication & Sport</i>	<i>B</i>	<i>1</i>	<i>2%</i>
<i>Journal of Interactive Advertising</i>	<i>B</i>	<i>1</i>	<i>2%</i>
<i>Qualitative Market Research</i>	<i>B</i>	<i>1</i>	<i>2%</i>
<i>Technology in Society</i>	<i>C</i>	<i>2</i>	<i>4%</i>
<i>Telematics and Informatics</i>	<i>C</i>	<i>3</i>	<i>6%</i>
<i>Expert Systems with Applications</i>	<i>C</i>	<i>1</i>	<i>2%</i>
<i>Vision: The Journal of Business Perspective</i>	<i>C</i>	<i>1</i>	<i>2%</i>
<i>Journal of Science and Technology Policy Management</i>	<i>C</i>	<i>1</i>	<i>2%</i>
<i>Total A*,A,B, and C</i>		<i>21</i>	<i>45%</i>
<i>Others</i>	<i>Not listed</i>	<i>26</i>	<i>55%</i>

2.0 Systematic Literature Review Results

The concept of OTT started in early 2000, limited research was done on OTT phenomenon as it was just the start. Availability of technology played a major in awareness and presence across globe. Majority of these studies were conducted in Asian geography, in countries like Korea, Malaysia, Taiwan and India. Also, few studies were published in Europe and US. The initial studies focussed on the infrastructure and technology areas, later followed by adoption of consumers which was done using theoretical concepts and exploratory studies.

<i>Area</i>	<i>% Of papers</i>
OTT Customer adoption	59%
OTT Technology and Infrastructure	31%

OTT Exploratory studies	4%
Other (Distribution, streaming technologies)	6%

The above table describes the broad areas of research addressed in the review of literature in the study. The findings from the systematic literature review are summarized as per the below mentioned themes:

- 1) Over the Top services
- 2) Factors impacting adoption of OTT services
- 3) Uses and Gratification
- 4) Impact of Covid-19 pandemic
- 5) Content
- 6) Social Influence
- 7) Willingness to pay Social Influence
- 8) Binge Watching

2.1 Over the Top Services

OTT (over-the-top media) has become an integral part of entertainment in recent years. This change has been majorly driven by changing lifestyles due to Covid-19 and professional working conditions which has allowed people in managing their time in a more flexible way. OTT refers to the contents, services and applications intended for end users and accessible through open internet (Nomura, 2014). OTT is a form of digital entertainment which can be accessed through internet on various devices like mobiles, tablets, computers, televisions, set up boxes and game consoles. Some of the words frequently associated with OTT are online streaming platforms, SVOD (Streaming video on demand). The traditional entertainment modes are DTH (Direct to Home), movie theatre, user developed you tube content.

2.2 Factors impacting adoption of OTT services

The phenomenon of OTT is considerably new hence there are many exploratory studies trying to identify the primary factors driving OTT consumption. C. C. Lee et al., 2018 has explained that cable TV has been affected by cost and service factors. Further explaining that social trend plays an important role in opting for OTT services. Recommendation setting, lack of self-esteem and self-control has led to increased usage of video streaming services (Hasan et al., 2018). Initial factors such as content availability, pricing and user experience has played important role in customer preference, however offering with competitive prices in delivery of services contributed in continuation of OTT services (S. Lee et al., 2021). Nagaraj et al., 2021 have identified top four demographic factors driving OTT subscription as household structure along with age, occupation, and education.

2.3 Uses and Gratification Theory

The Uses and Gratifications Theory (UGT) is one of the prominent theories for understanding different media. UGT focussed on the premise of user gratification through consumption of media (Katz et al., 1973). Timing of the reward and activity cost is important in understanding problems relating to self-control (O'Donoghue & Rabin, 2000). Some of the Uses & Gratification's identified by Menon, 2022 are Information seeking, companionship, voyeurism, binge watching, social interaction, relaxation, and convenient navigability. The relative advantage of watching television on mobile was significantly associated with affinity for watching television content and using mobile phone (S. I. Shin et al., 2020). The utilitarian motivations like cost savings and convenience were reported as important drivers of OTT (Camilleri & Falzon, 2021).

2.4 Impact of Covid-19 pandemic

Covid-19 pandemic has impacted the globe in all possible ways, business, culture, lifestyle to name a few. There was phased lockdowns imposed across globe to contain Covid-19 virus. This was also the primary driver of majority of people working from home in the year 2020. People were confined to homes for safety reasons, however this was also the time when the larger population was looking out for alternative forms of entertainment resulting in preference and use of OTT streaming platforms. Some of the changes in OTT industry are increased usage time of OTT platforms from 0 to 2 hours to 2-5 hours, average spending of 100 rupees to

300 rupees towards subscription (Madnani et al., 2020). Willingness to

subscribe and continue depended on customer engagement, OTT service experience which was indirectly driving habit and satisfaction of streaming services (Gupta & Singharia, 2021). Customer satisfaction was driven by space to watch along family, available time to use OTT services, and OTT content quality (Madnani et al., 2020).

2.5 Content

Content offered by streaming services plays an important role in subscription and viewing habits. Streaming services have become more proactive in providing quality content. Ranging from web series, movies, live streaming, music streaming to name a few. Gaming has also contributed in relooking at the experiential design of the services (Westcott et al., 2019). OTT streaming services deliver original content produced inhouse. Netflix is a classic example of how a DVD (Digital Video Disc) rental grew into an academy award winning OTT streaming platform (Nafees et al., 2021). Content continues to play a major strategy adopted by OTT streaming services in luring customer the continued usage of services.

2.6 Social Influence (SI)

Social Influence in usage of new technology was adopted as a construct in UTAUT2(Unified Theory of Acceptance and Use of Technology 2). Social Influence was referred to as the level of importance suggested by family and friends in use of new technology (Venkatesh et al., 2012). Social Influence continues to be one of important driver of OTT consumption. Influence by peers and friends helped develop positive status and image building of the users (Bhattacharyya et al., 2022).

2.7 Willingness to Pay (WTP)

Willingness to pay refers to the perceived value of an item by the consumer (Wertenbroch & Skiera, 2002) and WTP is also applied in case of incoming of a new technology (Ratcliffe, 2000). Multiple sources of information put customers in distress in the process of selecting content. Recommendation systems (RS) helps customer identify and choose content based on algorithms. This was also considered one of the important factors impacting customer's willingness to pay for OTT services (M. S. Kim et al., 2017). WTP differs from one geography to another depending on the income levels of the individuals, in comparison of a Chinese and Korean customer, Chinese customer's WTP is higher than that of a Korean customer (M. S. Kim et al., 2017). Consumers are also opt for lower tariff plans with preference of ad-supported option (Kweon & Kweon, 2021). WTP will also reduce over a period time as and when new players enter OTT streaming industry.

2.8 Binge Watching

Post the familiarity of OTT streaming services, it was an important phenomenon to understand the amount of time spent by consumers continuously watching OTT content. Pittman and Sheehan (2015) defined Binge watching as combination of four elements namely amount of time spent, number of episodes, frequency and binge-watching engagement. Also, in this study participants watching two episodes continuously were classified as binge viewers. Binge watching is a new behaviour specially with reference to OTT and has grown since 2013 (Rahman & Arif, 2021), this study also identified that users preferred mobile phones with Netflix subscription during Covid-19 outbreak for binge watching. College students indulge in binge watching as it provides easy access to TV content, escape from reality and social interaction (Panda & Pandey, 2017).

3.0 Discussion

The consumption of OTT streaming services was available early 2000's. How ever advent of new business models providing professional services like Netflix changed the dynamics of OTT streaming industry. Many studies initially focussed on technical adoption and were conducted using established theories such as TAM (Technology Acceptance Model) and UTAUT2(Unified Theory of Acceptance and use of Technology). Later stages it was more about understanding the psychological aspects of consumers like TPB (Theory of Planned Behaviour), UGT (Uses and Gratification Theory).

Later stage studies were conducted to explore novel factors which were not considered in traditional theories like, comparison of traditional media like satellite TV, cable network, binge usage, impact of Covid-19 to name a few. Age factors such as Gen X, Y, Z and attitude towards media entertainment also plays prominent role as per the research papers considered for study. There has been an impact on the habit towards the consumption of OTT services. A more planned approach is followed by the customers on the usage of platforms. Customers have been offered more choices of entertainment there by having a behavioural impact on usage of streaming

platforms. OTT market was valued at \$178 billion in the year 2020 and is estimated to reach around \$298 billion in the year 2026 (Statista).

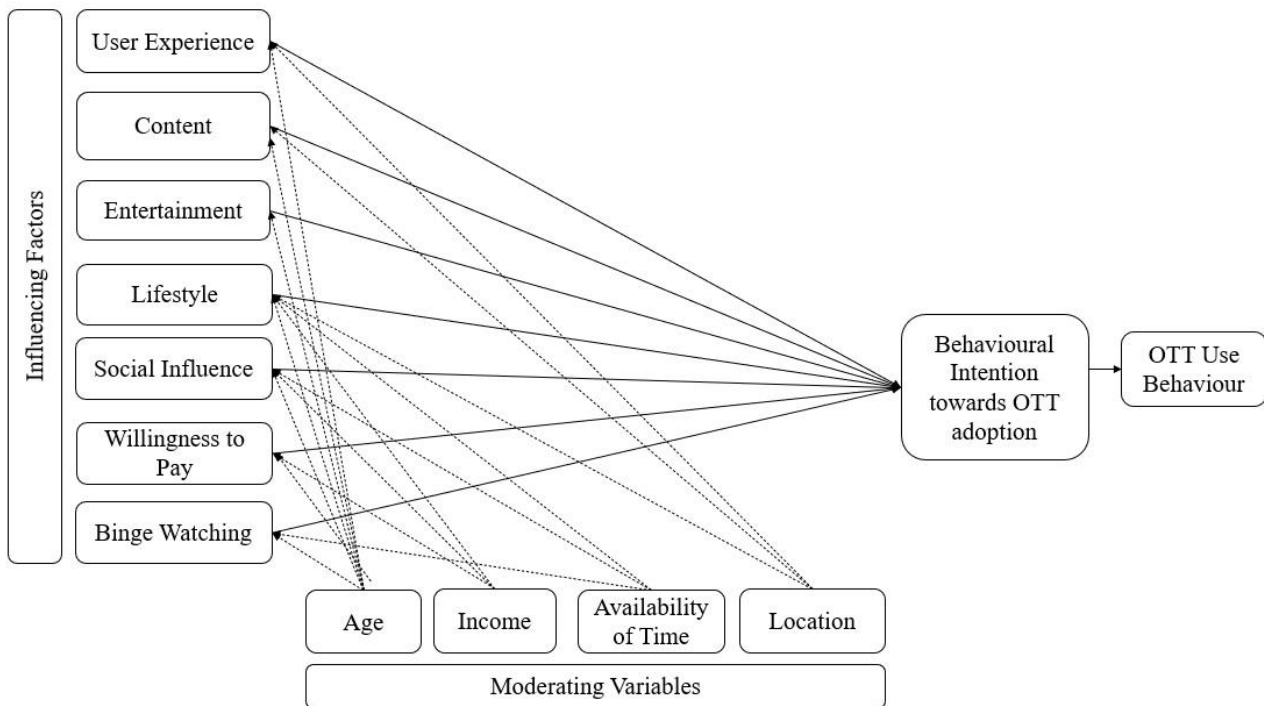
4.0 Conceptual model for adoption and usage of OTT streaming services

Service industries require to understand and adopt to the evolving and ever changing of habits of consumers value and preferences. OTT is an emerging industry and has its own challenges as compared to traditional service industries. Global players have started considering the local preferences of consumers with reference to media. OTT has also grown some of the primary service industries like telecom and entertainment industry. A revised framework is required beyond the boundary of technical adoption suggested in Technology Acceptance Model (TAM) and Unified Theory of Acceptance and Use of Technology and theories explaining the psychological aspects of consumers such Theory of Planned Behaviour (TPB) and Uses and Gratification Theory (UGT).

The conceptual model here considers understanding the various aspects of consumers such as user experience, type of content provided like live streaming, web series, new movie releases to name a few. The model also has incorporated upcoming habitual behaviours such as Binge watching, social influence with respect to viewership, life style. Focus is also on the latest research conducted in last three years as the trend has seen an upswing post Covid-19 pandemic.

Figure 2 – Research conceptual model for adoption and usage behaviour of OTT services

Source: Conceptual design by Author



5. Limitations and Future research

Using the existing literature available, some of the important concepts of over-the-top services, overall ecosystem has been discussed. The phenomenon of OTT gained traction post expansion in early 2020 as major global players expanded their services. The initial studies were conducted using models used for technology adoption. However, there is an opportunity to study the business model adopted by local and international OTT players in the streaming market. Genres available on OTT platforms can be studied in detail to understand the long-term preference of the consumers. Also there exists a research gap in understanding tier-2 towns. There were no literature available understanding the service gaps of existing OTT platforms.

5. Conclusion

There has been a revolution in terms of the popularity of OTT streaming services in the last decade. The scope of understanding this phenomenon is wide and provides an insight into consumer preferences and adoption to newer technologies. The study tries to explore new insights of the OTT industry with special reference to consumer adoption and usage behaviour. These studies can further help the OTT streaming industry in offering the best of services to the consumers.

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