Behavioral shift of generation X towards OTT during Covid’19 in India

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Abstract

Over-the-top (OTT) services such as Netflix, Prime Video, Disney+ Hotstar, Zee5, etc., have changed consumers’ content consumption behavior. Globalization and Digitalization have encouraged consumers to have limitless access to the Internet for information, leisure, entertainment, and social interconnectedness. The increase in the availability of high-speed Internet, the latest smartphones, and breakthroughs in technology have created great opportunities for the OTT sector, with people preferring to consume content on-the-go digitally rather than traditional media services, such as cable television. The Covid’19 pandemic has seen an increase in viewerships and subscriptions towards these streaming platforms, with people of different age groups adapting to changing viewership trends. This study aims to understand Generation X’s behavioral shift (Age 41 to 55) towards OTT during Covid’19 in India. The literature review talks about the Generation X cohort of consumers, their behavioral habits, and attitudes towards technology. It also discusses the changing trends of online content consumption and how Covid’19 has created a spark in viewerships towards India’s online media services. The research study aims to perform explanatory research to establish a relationship between the increase in consumption and subscriptions of OTT services in India by Generation X and the impact of Covid’19 on the same. Data will be collected from consumer’s age amongst 41 to 55 in India via survey questionnaires, and linear regression tests will be performed to test the hypotheses and establish a correlation between the dependent and independent variables.

Keywords

Over the Top (OTT), Generation X, Covid’19, Coronavirus, Impact of Covid, Shift towards OTT, Online content consumption

1 Introduction

Over the Top (OTT) services are content provided to the consumers via the Internet for information, leisure, and entertainment. They can be in the form of video, audio, or text. Over the years, people have been using digital services for social interconnectedness, self-entertainment, information sharing, and increasing self-awareness. Two key players in the rise of Digitalization are Globalization and Innovations in Technology, and the increased availability of high-speed internet connections. Over the years, there has been a significant rise in the number of people who have started consuming OTT services favoring traditional television services. The cutthroat competition is amongst various OTT service providers, each offering unique and original content, which is a plethora of options, in their ways, have left the choice to the consumers. Consumers’ ability to pause, play, and skip parts of movies and TV shows, along with an extremely consumer-centric environment, have created a holistic environment in favor of OTT services.

The world experienced an unprecedented Coronavirus pandemic in the early months of 2020. This pandemic has spread across the globe and has forced people in all countries, irrespective of their demographics, to stay at home and maintain social distancing. As a result, the economies of almost all countries are adversely affected. However, this has been a blessing in disguise for the OTT service industry. People have increased their consumption of OTT services like never before. The average number of hours spent on smartphones, tablets, and computers per day has increased dramatically. People of all ages are looking towards OTT services to help them stay occupied during these difficult times.

This study focuses on the Generation X (41 to 55 years old) demographic and understands their shift towards OTT services in favor of traditional television. This study’s main aim is to determine whether Covid’19 has influenced this observed shift, with content offered by the OTT sector, also to have played a crucial role.
2 Literature review

New trends in technology have shaped content usage in the last few years, mainly due to globalization and the widespread availability of the Internet. People have access to online entertainment, social media, and information services that help them stay interconnected across the globe [1], which has resulted in media consumption across the world has become mostly digital. Freedom to choose the content of their choice has exponentially increased due to the rise in the number of devices and access to the improved internet speed, which has allowed consumption of information, entertainment, or social activity, anytime, anywhere [2]. Uses and gratification provide another explanation for the increased adoption of media content online. According to this perspective, people prefer media that they believe will help them achieve their goals [3]. For example, Digital Media Platforms such as Netflix, Prime Video, and YouTube are a functional alternative to broadcast television for relaxing entertainment. Globally, strong trends have been witnessed in terms of viewership and subscriptions in online video platforms. Fresh, creative, original, and innovative content in digital platforms accelerates this consumer shift, leading to permanently cutting cable TV connections in some countries. By early 2019, the viewership of video streaming services was higher than cable connections [4].

A service or an application which is provided to a user over the Internet, commonly called “Over The Top (OTT) Service,” is one of the “disruptive innovations” that has played a significant role in shaping digital media consumption in the current technologically dominated world. The liberty to surf the Internet without restrictions and the rising demand for non-repetitive, original, and uncensored content has created a spark in the consumption of OTT services [5].

Various variables influence usages and engagements with technology. These variables also impact its usage, age being amongst the most important factors. These individuals are then segmented based on their age groups, which further gets divided into cohorts predicated on generations [6]. According to a recent study conducted by “Kasasa,” Generation X consists of those people born between the years 1965-1979. They are currently 41 to 55 years old. They still read newspapers, magazines, listen to the radio, and watch traditional television. However, over recent years, they have become digitally savvy. The study estimates that the average time on social media is almost equivalent to their younger counterparts. In America, the younger generations have often led the older ones to adopt and use technology, which largely holds today [7].

The world experienced an unprecedented coronavirus crisis in 2020. This pandemic has affected all industries drastically, with people forced to maintain social distancing by staying put at their homes. This crisis, however, has been a blessing in disguise for the Digital Media and Entertainment Industry. The current rate at which content is being consumed worldwide has compelled. People of different age groups shift towards OTT for their entertainment needs as traditional media channels cannot cope with consumer demands.

2.1 Generation X and technology

Generation X is often used to associate youth estranged from the conventional norms practiced by the earlier generations; loosely described as the bridge between two much larger generations, the Baby Boomers ahead and the Millennials behind. The term was first coined in the 1950s by Hungarian photographer Robert Capa, a title-topic for a photo essay about young women and men growing up immediately following World War II. Gen Xers are savvy, skeptical, self-reliant, and they are fiercely independent, for they do as they please [8]. This generation grew in a volatile, uncertain, complex, and ambiguous economic environment that co-existed with their divorced parents or both parents working. [9] All these led them to be free in their thinking and not caring about what others think about them [10].

Generational cohorts are determined by segmenting the population-based on age; this is done by slicing the population data by birth. As a result of this segmentation, we now have a cohort of individuals born during the same period. That is the reason we call them generational cohorts. These cohorts demonstrate major likeliness in values, beliefs, motivations, and behaviors [11]. We will also observe important inconsistencies between generational cohorts which use technology [12]. Thus, these disparate cohorts could impact individual behavior, motivation, and attitude towards adoption and usage of technology [13].

As OTT is increasingly consumed worldwide, it is imperative to understand consumers’ attitudes and behavioral intentions towards its use. This study will focus on the Generation X cohort and how they have become digitally savvy over the years. Their behavioral shift to-
wards digital media can better help companies offering these services to understand and appropriately target this segment. According to a recent study on OTT Consumption Trends, by [14], the older age groups - 35-44 years and 45-54 years, indicate growth in OTT services adoption at 18% and 63% respectively, which clearly shows that there is a broad audience to reach out for the subscription-based services, as this older age group has a higher tendency to pay for content [14] to understand different demographics and learn how various age groups engage with videos, an elaborate study was conducted in the US by [15] to understand the potential shift of U.S Gen Xers from traditional TV to digital video. In 2018, the traditional TV viewers in the US dropped from 60.2 million to 57.8 million.

On the contrary, the number of Digital Video Viewers increased from 51.5 million to 51.8 million. TV viewing habits, which are significant among this generation, are surprisingly declining. Over the past few years, Gen X’s adoption of subscription-based OTT services has taken off. The study also found that Gen X’s viewing habits are not much different from their younger generation. The survey reported that Netflix, YouTube, and Hulu are their top three favorite video content providers. The most influential, with a mind of their own, are the Gen X cohorts. They are the smallest in numbers and generally overlooked in many researches, which could be one of the main reasons for missing evidence while narrating stories about changes amongst demographics, society, and politics. However, it is essential to understand that they are the middle generation who are not entirely resistant to change. Hence, this cohort can be drawn and retained towards technology very quickly when appropriately targeted, similar to their younger counterparts.

2.2 Covid’19 and OTT - an Indian perspective

The world experienced an unprecedented coronavirus crisis in 2020. This pandemic has affected all industries drastically, with people forced to maintain social distancing by staying put in their homes. Nationwide lockdowns have been imposed worldwide to counter the spread of the virus; the pandemic has affected almost all industries, with businesses forced to run on minimal scales due to government restrictions. People are spending time at home, more than they ever did in the past. Most companies, including tech giants such as Google, Facebook, Microsoft, have urged their employees to work from home amidst this pandemic. Irrespective of age group, almost everyone is at the mercy of technology to entertain them at home. This global crisis has been a blessing in disguise for the Digital Media and Entertainment Industry. According to the Nielsen Android Smartphone Panel Survey, smartphone usage increased by 12% as of 10th April 2020 compared to pre COVID’19 (January’20). On average, 15% of the daily smartphone usage time was spent on “Video-on-Demand,” for example, Netflix, Hotstar, Prime Video, YouTube, etc. [16]. Consumers are getting hooked to digital platforms out of curiosity by watching the end of the world/survival movies and being a means of distraction from the pandemic [17].

A survey was conducted on a sample of 1330 respondents in 23 metros and cities in India. It was found that technology is acting as a catalyst for convenient, enhanced consumer experiences. 64% of the respondents have stated that OTT platforms and WIFI connection are integral to getting through the lockdown. 40% of the surveyed consumers planned to increase expenditure on entertainment & amp; tech enablers- Apps, OTT, DTH, WIFI [18] Based on results from Market Estimate, there has been a 50% increase in searches for gaming appliances such as Play stations and Xbox, 25% increase in searches for laptops and a 100% increase in searches for DTH services on e-commerce websites, all of which are supporting OTT platforms for streaming content. A survey conducted on the likely areas to witness a planned reduction and increase in spending indicated that only the Electronics category witnessed a planned increase in expenditure, which showed signs that electronics are now considered an essential commodity, especially during social time distancing. Consumers are spending more on At-home entertainment/media such as paid OTT subscriptions. The increase in sales is mainly driven by distress buying amidst fear of accelerating prices. 31% of the survey feared prices of this sector to slash up.

In comparison, 59% stated they are about to have free time and use entertainment/media services [19]. 52% of respondents in a survey conducted across six countries prefer spending their time at home rather than entertaining themselves outside due to the Covid’19 pandemic. As a result, there has been a 44% increase in Short Video Apps (YouTube) usage and a 42% increase in Video Website Apps (Netflix, Prime Video). The COVID’19 crisis has resulted in a steep increase in content consumption. A report released by Mindshare India and VI dooly over different consump-
tion patterns of digital media content during the 2020 showcase that the time spent by an average user on digital platforms is more than 4 hours per day compared to 1.5 hours per day the end of last year (2019). YouTube alone has garnered over 300 billion views in the first quarter of 2020. Millennials continue to dominate the content consumption on YouTube in India. It was observed that 70% of viewers came from 18-34, and 90% of viewers were through mobile devices. By meeting changing consumer demands online and DTC offerings, consumer experiences are enhanced through the collaboration of technology-based services. Even after the restrictions enforced during the pandemic lessen, many new consumer habits will be ingrained. The ability to recognize new consumer behaviors and adapt to meet the altered needs will be the success mantra.

Out of the four generations, namely Boomers, Generation X, Millennials, and Generation Z, the Xers are the middlemen or the bridge between the boomers and the millennials. They are not hesitant to change and are, to some extent, tech-savvy. With the current unprecedented crisis, social distancing, and nationwide lockdowns in force, the time spent at home by an average consumer of an OTT service is very high. Gen X, or the "sandwich generation," has more experience handling crises than their counterparts. They are responsible for taking care of their children and their parents. Social Media handles in March 2020 trended the #Latch Key Generation for the Xers, stating that they are well prepared to tackle social distancing and lockdowns compared to their younger counterparts. Since this cohort has experience working through tumultuous times, such as 9/11 and the stock market crash in 2008, most of them would be prepared to take responsibilities for running the household, taking care of their children and parents.

It is not entirely unsafe to assume that the number of Generation Xs consuming digital media content would be increasing even more than in the preceding years, as this is one of the most sought out options of entertainment at home. Surveys conducted in 19 countries worldwide say that most Gen Xs believe technology to be a catalyst that helps them cope through these tough times. Media motivations and habits towards the new television are actively shaping the consumer landscape. It is, therefore, crucial to comprehend how this generation chooses to watch content on OTT platforms and why there is a behavioral shift towards the digital landscape, which can be useful, even post-pandemic.

3 Research methodologies

3.1 Research design - explanatory research

The topic is broadly trying to understand the observed phenomenon of increase in OTT services consumption during a pandemic, specifically by Generation X in India, as mentioned in the Literature Review.

1) Does content impact the increase in subscriptions of OTT services during a pandemic?
   Null Hypothesis - Subscription of OTT services during a pandemic is independent of content.
   Alternate Hypothesis - Subscription of OTT services during a pandemic is dependent on content.

2) What percentage of Generation X consumers shifted to OTT during the pandemic in India?
   Null Hypothesis - The number of Gen X consumers that shifted to OTT is independent of the pandemic.
   Alternate Hypothesis - The number of Gen X consumers that shifted to OTT is dependent on the pandemic.

3) Does the content impact its increased consumption of OTT by Generation X in India?
   Null Hypothesis - The shift to OTT by Generation X in India is independent of content.
   Alternate Hypothesis - The shift to OTT by Generation X in India is dependent on content.

3.2 Research approach - quantitative

Since the study deals with the impact of one variable on the other and aims to determine the impact on the increase in OTT adoption, the approach to conduct this study is quantitative. A similar study in Australia used a quantitative approach to tackle their research problem. The segregated age demographics and their preference for different TV viewing habits were quantified and later analyzed.

3.3 Target audience

This study's Target Audience is Males and Females between the ages of 41 to 55 years (Generation X). The ideal participants of the research would be dwelling in metropolitan areas with uninterrupted internet connections.

3.4 Research tool - survey questionnaires

Online Survey Questionnaires would be floated to the target audience via shareable links. Respondents would be questioned in a similar way to the study conducted in Australia to determine the number of con-
sumers who still prefer traditional television instead of the new subscription-based online viewing services. A 5-point Likert Scale would be used to design the questions of the survey. The responses would later be quantified using Excel or SPSS.

3.5 Sampling technique-convenience based sampling
A similar study conducted by [20] uses Purposive (Judgement) Sampling, a type of Non-Probability based sampling. Since the sample frame for this study is unknown, we will use another type of Non-Probability based sampling, namely, Convenience Based Sampling, where the criteria of selecting the sample are age (41 to 55 years) and Geographical Region (Metro Cities)

3.6 Analysis technique-regression
A similar study conducted in the USA about the shift of consumers towards different OTT segments over traditional media tackled their research question by performing a Regression Analysis between a dependent and an independent variable to determine distribution patterns of households and their respective media consumption channel.
Hence, the analysis technique used in this study would be a Regression Analysis. The dependent variable would be the Increase in Adoption of OTT by Gen X, while the independent variable would be Covid’19.

4 Analysis and results
A survey questionnaire created using a Likert Scale was floated via social media and email to consumers in the target group. A total of 218 responses were collected across various metropolitan cities in India. The responses from the survey were quantified on a scale of 1 to 5, with respondents asked to choose one of the options that they associate with the most concerning the question asked:
1: Strongly Disagree
2: Disagree
3: Neutral
4: Agree
5: Strongly agree
Linear regression tests were conducted to test the three hypotheses mentioned in the Research Methodology. For each hypothesis, a dependent variable and an independent variable were chosen from the appropriate question to determine the correlation and impact of variation.

The demographics of the respondents are as follows: Figure 1 shows the 80.3% of respondents were males, while 19.7% were females.

Figure 2 represents the respondents were between the age groups 41 to 55 years old.

Fig. 1. 80.3% of respondents were males, while 19.7% were females

Fig. 2. Respondents were between age groups 41 to 55 years old
Case 1

Null Hypothesis: Subscription of OTT services during a pandemic is independent of content.

Alternate Hypothesis: Subscription of OTT services during a pandemic is dependent on content.

The dependent variable, in this case, is “increased subscriptions of OTT services during Covid’19 than pre-pandemic”. The independent variable is “Covid’19 has had an impact on shaping my content consumption behavior”.

Table 1 indicates the one-way ANOVA table for the first hypothesis. The mean square value on regression is found to be 1.074, the F-Value is 190.662, and the significance value (p) is less than 0.05. Hence, we reject the null hypothesis. Subscription of OTT services during a pandemic is dependent on content.

| Model | Sum of Squares | df | Mean Square | F      | Sig.   |
|-------|----------------|----|-------------|--------|--------|
| 1 Regression | 204.804 | 1  | 204.804 | 190.662 | .000   |
| Residual    | 232.022 | 216 | 1.074   |        |        |
| Total       | 436.826 | 217 |          |        |        |

Table 2 represents the summary of the regression analysis performed for the first hypothesis.

| Model | R  | R Square | Adjusted R Square | Std. Error of the Estimate |
|-------|-----|----------|------------------|---------------------------|
| 1     | .685 | .469    | .466             | 1.036                     |

The R-Value of 0.685 is less than 0.75, indicating a medium correlation between Subscriptions of OTT services during Covid’19 and Content preference.

The R2 value obtained is 0.469 indicates that 46.9% variation in the subscriptions towards OTT during Covid’19 is due to the service providers’ content. The balance of 53.1% is because of unknown factors.

Case 2

Null Hypothesis: The number of Gen X consumers that shifted to OTT is independent of the pandemic.

Alternate Hypothesis: The number of Gen X consumers that shifted to OTT is dependent on the pandemic. The dependent variable, in this case, is “The desire to continue using OTT services post-pandemic.” The independent variable is “Increase in consumption of OTT services due to Covid’19”.

Table 3 represents a one-way ANOVA table for the second hypothesis. The Mean Square value on regression is found to be 0.769, the F-Value is 182.413, and the significance value (p) is less than 0.05. Hence, we reject the null hypothesis. The number of Gen X consumers that shifted to OTT is dependent on Covid’19.

| Model | Sum of Squares | df | Mean Square | F      | Sig.   |
|-------|----------------|----|-------------|--------|--------|
| 1 Regression | 140.255 | 1  | 140.255 | 182.413 | .000   |
| Residual    | 166.080 | 216 | .769   |        |        |
| Total       | 306.335 | 217 |          |        |        |

Table 4 shows the summary of the regression analysis performed for the second hypothesis.

| Model | R | R Square | Adjusted R Square | Std. Error of the Estimate |
|-------|---|----------|------------------|---------------------------|
| 1     | .677 | .458    | .455             | .877                      |

The R-Value of 0.677 is less than 0.75, which indicates a medium correlation between the increase in consumption of OTT services by Generation X consumers and Covid’19 and the social distancing norms.

The R2 value obtained is 0.458 indicates that 45.8% variation in the increase in OTT consumption by Generation X is due to Covid’19 and social distancing factors. The balance of 54.2% is because of unknown factors.

Case 3

Null Hypothesis: The shift to OTT by Generation X in India is independent of content.

Alternate Hypothesis: The shift to OTT by Generation X in India is dependent on content.

The dependent variable, in this case, is “users are hooked on to OTT services because of the realistic, original and uncensored content it has to offer.”

The independent variable is “OTT services offer consumer-centric, diverse and non-repetitive content.”

Table 5 represents the one-way ANOVA table for the third hypothesis. The Mean Square value on regression is found to be 0.763, the F-Value is 218.303, and the significance value (p) is less than 0.05. Hence, we reject the null hypothesis. The shift to OTT by Generation X in India is dependent on content.
Table 5
Third hypothesis of one-way anova table for the third hypothesis

| Model    | Sum of Squares | df | Mean Square | F     | Sig.    |
|----------|----------------|----|-------------|-------|---------|
| Regression | 166.477        | 1  | 166.477     | 218.303 | .000*   |
| Residual  | 164.721        | 216| .763        |       |         |
| Total     | 331.197        | 217|             |       |         |

Table 6 shows the summary of the regression analysis performed for the third hypothesis. The R-Value of 0.709 is less than 0.75, indicating a medium correlation between Consumers hooked to OTT services over traditional television and the diverse, non-repetitive, uncensored, original content offered to them by the OTT service providers.

Table 6
Regression analysis for the third hypothesis

| Model | R     | R Square | Adjusted R Square | Std. Error of the Estimate |
|-------|-------|----------|-------------------|---------------------------|
| 1     | .709* | .503     | .500              | .873                      |

The R2 value obtained is 0.503 indicates that a 50.3% variation in Generation X consumers hooked to OTT platforms is because of the content offered by the respective OTT service provider. The balance of 49.7% is because of unknown factors. The survey also asked some descriptive questions, such as shown in Figure 3.

When asked if OTT has helped people stay put at home during the pandemic, 45.8% responded, favoring the argument. In comparison, 20.6% remained neutral towards the question, which clearly shows that there has been a significant increase in the consumption of digital media services that have helped people stay entertained and occupied at home. Figure 4 represents the consumption behavior in favor of OTT.

The survey also tried to determine whether the Covid’19 pandemic affected shaping content consumption behavior favoring OTT services. 50% of the respondents were in agreement with the question, while 23.4% remained neutral. It can be concluded that there has been an effect on the respondents due to Covid’19, which has made them explore the new domain of OTT services in favor of the traditional cable televisions.

59.6% of respondents have agreed to use OTT services even post-pandemic. In comparison, 21.1% have remained neutral to the arguments; clearly, it shows that OTT has become a habit that has been imbibed in the people during the pandemic. The respondents that voted neutral towards the argument can be consumers who are not extremely devoted towards OTT. However, some external factors might influence their consumption of online services. OTT services, even post-pandemic, are shown in Figure 5.

5 Conclusion and future scope
The study successfully determined the validity of the three hypotheses that were crucial to perform this research. From the consumer data analysis, it can be concluded that Covid’19 does indeed impact the increased adoption of OTT services by Generation X in India. Social distancing norms and very less physical interconnectedness amongst friends and family have forced people to find different ways to keep themselves occupied and entertained at home. Moreover,
the study signifies the importance that content has to play to retain consumers towards OTT platforms. This industry currently faces cutthroat competition with multiple service providers targeting different audiences with an increased number of original, non-repetitive, and diverse content. India has an increased number of local players in the OTT market, such as BIG Flix, Alt Balaji, Voot, Eros Now, Sony LIV, MX Player, Hot star, a plethora of options, all of which have opened up and left the choice to the consumers. The Covid’19 crisis has become a trendsetter in the older generations, inspired by their younger counterparts. A greater willingness to pay for subscription services has increasingly begun consuming online digital media services. Out of the 218 respondents questioned whether they would continue to use OTT services in favor of traditional TV, even post-pandemic, 130 gave positive feedback, 46 were neutral/skeptical, and only 42 unfavorable votes, which can imply that the pandemic has imbied the habit of consuming content online for this cohort of consumers. THUS, the OTT industry is witnessing a change in their viewing audiences, with older generations increasingly consuming digital services with content offered to play a significant role in their retention.

The pandemic has indeed given an increase in the amount of free time in the hands of almost all people; this, in turn, has allowed consumers to explore a variety of content online about different genres. The future of this research could understand the genre preferences of Generation X consumers, which are favored over traditional TV, which can help OTT service companies to target this cohort of audience effectively. Another piece of information that can also be understood is if this generation prefers to watch more TV shows or movies on OTT. The concept of binge-watching shows on OTT platforms is a trendsetter amongst the Millennials and Gen Zs. Understanding the type of shows watched by Gen Xers on OTT and the duration of their stay on a platform in one sitting can give interesting insights into their relationship with binge-watching. It was also understood from the survey that although Covid’19 did impact the increased consumption of OTT services, there was a strong agreement about the original, diverse, and uncensored content offered by OTT platforms, which was otherwise not prevalent in Cable Television. 136 out of the 218 respondents agreed to the statement. Simultaneously, 38 remained neutral, which clearly shows that Gen X consumers’ perception towards OTT is strongly driven by content. Future studies can largely benefit from understanding the content preferences and the average time spent in a single session by a Gen X consumer, which can help make new content more relevant and consumer-centric, which will help the shift towards OTT services grow further.

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