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The impact of increased internet availability on streaming content versus linear TV in South Africa

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A research project submitted to the Faculty of Commerce, Law and Management, University of the Witwatersrand, in partial fulfilment of the requirements for the degree of Master of Management in the field of Digital Business

Johannesburg, 2024

Protocol number: WBS/BA2537058/686

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DECLARATION

I, Nkele Bertha Sekgothe, declare that this research article is my own work except as indicated in

the references and acknowledgments. It is submitted in partial fulfilment of the

requirements for the degree of Master of Business Administration in the Graduate School

of Business Administration, University of the Witwatersrand, Johannesburg. It has not

been submitted before for any degree or examination in this or any other university.

Nkele Bertha Sekgothe

Signed at …Pretoria. On the ……06th…. day of ….June…… 2024…..……...

DEDICATION

This research study is dedicated to my beloved daughters, Reitumetse and Bonolo. Your boundless curiosity and unwavering support have been a constant inspiration throughout this journey. May you always pursue your dreams with passion and determination, and may this work serve as a reminder that with dedication and perseverance, anything is possible. This achievement is as much yours as it is mine.

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LIST OF ACRONYMS

ACRONYMS	
Amazon Prime Video	Amazon Prime Video, or simply Prime Video, is an American subscription video-on-demand over-the-top streaming and rental service of Amazon offered as a standalone service or as part of Amazon's Prime subscription.
Disney+	An American subscription video on-demand over-the-top streaming media service owned and operated by Disney Streaming.
DStv	Digital Satellite Television
eVOD	Exclusive Video on Demand
GDP	Gross domestic product
HULU	Hulu is an American subscription streaming service majority owned by The Walt Disney Company
ICASA	Independent Communications Authority of South Africa
ICT	Information and communication technologies
OTT	Over the top

M-Net	M-Net is a South African pay television channel established by Naspers in 1986.
NETFLIX	An American subscription video-on-demand over-the-top streaming service
PLS	Partial Least Square
SVOD	Subscription video on demand
SABC	South African Broadcasting Corporation is the public broadcaster
VOD	Video on demand
VSAT	Very small aperture terminal
Walt Disney Company	A website operated by Disney Digital Network, a division of The Walt Disney Company, that promotes various Disney properties such as films, television shows, and theme park resorts, and offers entertainment content intended for children and families.

ABSTRACT

The advent of high-speed internet has revolutionized media consumption patterns globally, and South Africa is no exception. This study investigates the impact of increased internet availability on content streaming and its subsequent effect on traditional linear television viewership in South Africa. Using a quantitative research methodology, data was run up and analyzed from a diverse sample of South African media consumers. The study reveals a significant shift in media consumption preferences, with a majority of respondents favouring Over-The-Top (OTT) streaming services over conventional linear TV. This shift is attributed to various factors including the convenience, affordability, and extensive content libraries offered by OTT platforms. The findings suggest that as internet penetration continues to rise, traditional TV broadcasters may need to create and adapt to the changing landscape to remain relevant. This paper provides valuable insights for media companies, policymakers, and researchers interested in the evolving dynamics of media consumption in the digital age.

Keywords: Internet availability, content streaming, linear TV, OTT services, media consumption, South Africa, quantitative research

CHAPTER 1. INTRODUCTION

1.1 Statement of purpose

This empirical case study examines the effects of internet access on the consumption of legal and illegal streaming of television content and its impact on the future of traditional linear television in South Africa. It seeks to gain insight into the motives and preferences of South African viewers regarding internet use for streaming content, the implications for the television industry, and the impact of streaming on linear television viewership.

1.2 Background of the study

Fourie (2013) provides an overview of media transitions, including the shift from traditional TV to digital platforms, and how these changes impact consumer behaviour. Fourie provides a detailed history of media evolution, from print to broadcast and then to digital media. Fourie outlines significant milestones in media history, showing how each transition brought about changes in content production, distribution, and consumption, also how technological innovations, such as the advent of the internet and digital broadcasting, have revolutionized the media landscape. These advancements have enabled the rise of digital platforms, which offer more interactive and on-demand content compared to traditional linear TV. The book further highlights the growth of Over-The-Top (OTT) services like Netflix, Hulu, and local equivalents in South Africa. These services bypass traditional cable or satellite TV providers, delivering content directly over the internet.

The South African television industry is transitioning, with the expanding accessibility of high-speed internet and the emergence of content streaming services like Netflix, which has led to a move on how people are consuming content, with a more significant percentage of people choosing to watch content through streaming services rather than traditional linear TV. With this shift, it is crucial to understand the impact of internet availability on people's viewing habits. The survey focuses on various aspects of the television industry, including the

types of content people consume, the platforms they use to access content, and the quantity of time they spend watching content.

Mabaso (2021) research paper, "Viewing Preferences in the Age of Digital Media: A South African Perspective," provides an in-depth examination of how digital media is transforming viewing preferences among South African audiences. The study investigates the shift from traditional television to digital platforms and the factors driving this change. Improved access to high-speed internet is a primary driver of the shift towards digital media. The paper discusses how the proliferation of affordable internet packages has made streaming services more accessible to a broader audience. Traditional TV viewership is declining as digital media consumption rises. The paper notes a decrease in prime-time viewership and a reduction in the overall time spent watching traditional TV.

Entertainment Strategy Guy (2023) reports that linear TV is the traditional way of watching TV in which viewers watch predetermined programming at predetermined times. It is the opposite of streaming: watching TV on demand and on any device, anytime. While linear TV has been around for decades, its future is still being determined. The increased use of streaming services like Netflix and Hulu has caused a decline in linear TV viewership, and advertising revenues for linear TV have been dropping for years. To add to the problem, the COVID-19 pandemic has accelerated this decline as viewers increasingly turn to streaming services for entertainment.

However, linear TV still has a place in the entertainment landscape. Many viewers still prefer the traditional way of watching TV, and linear TV can be a great way to reach a broader audience. Additionally, linear TV remains the dominant way of reaching specific demographics, such as older viewers and children. At this point, predicting when linear TV will finally die out is difficult. However, the trend is heading in that direction, and streaming service providers should be aware of the implications of this shift. To remain competitive, service providers need to understand the needs of their audiences and develop strategies to meet those needs. They should also consider ways to work with linear TV to reach a broader audience. Entertainment Strategy Guy. (2023).

Leiner and Neuendorf (2022), survey discusses the shift in how people watch television due to the introduction of streaming services such as Netflix, Hulu, and Amazon Prime. The authors note that streaming services are becoming increasingly popular, and that traditional television viewing is declining. They argue that the shift to streaming has changed how people consume television and offer several potential explanations for this phenomenon.

The survey notes that streaming services are more convenient than traditional television. Viewers can watch shows on their own time and access much more comprehensive content than traditional television. They also suggest that streaming services have made television more interactive, as viewers can comment and share content on social media. Additionally, streaming services have allowed viewers to become much more involved in the production of television, as they can access behind-the-scenes content and even participate in the creative process through crowdfunding. Leiner and Neuendorf (2022)

Leiner and Neuendorf (2022), conclude that streaming services have changed how people watch television, and this shift has had both positive and negative implications. On the one hand, streaming services have made television much more accessible and customizable, allowing viewers to have preference of watching content at their own choice at their own time and to interact to whatever is in view (rewind, pause and fast forward).

According to report by, Broadband Africa (2023), South Africa boasts a higher internet penetration rate than Nigeria. Specifically, South Africa has an internet penetration rate of 59.3% while Nigeria only has a rate of 46.3%. This implies that more people in South Africa have internet access than in Nigeria, making it a more promising market for Netflix, which is the biggest TV streaming service provider globally.

In addition, despite Nigeria being rated 7th most populous country world with 206, 0 million people and South Africa being place 25th most populous country 57,7 million people. South African economy is more developed as compared to Nigeria with a GDP of $350 billion, with the economy being more mature than Nigeria at $121 billion GDP. This means South Africa is in a better position to capitalise on

the economic opportunities associated with growth in internet infrastructure than Nigeria. Broadband Africa, (2023),

(Independent Communications Authority of South Africa [ICASA], 2022) provides a comprehensive analysis of the current state of the broadcasting sector in the country. The report examines the challenges, opportunities, and potential future trends in the sector, with a focus on the impact of the spectrum increase on streaming and broadcasting services. The report reveals that there has been a significant increase in the amount of activity within the broadcasting sector in recent years, which is largely attributed to the increased availability of spectrum. This has allowed for the introduction of new services and technologies, resulting in an increase in competition and greater consumer choice, including streaming services.

However, the report also notes that broadcasters face challenges in adapting to the new digital landscape, including difficulties in meeting quality standards, managing content rights, and monetizing their content due to a lack of effective regulation. Moreover, the report identifies potential future trends in the sector, such as the emergence of new technologies like virtual reality and 5G network and the development of new business models that enable streaming TV services. These trends have the potential to reshape the broadcasting sector in the coming years. Overall, the State of the ICT Sector Report of South Africa in March 2022 provides an important insight into the current state and future of the broadcasting sector in the country. (ICASA 2022)

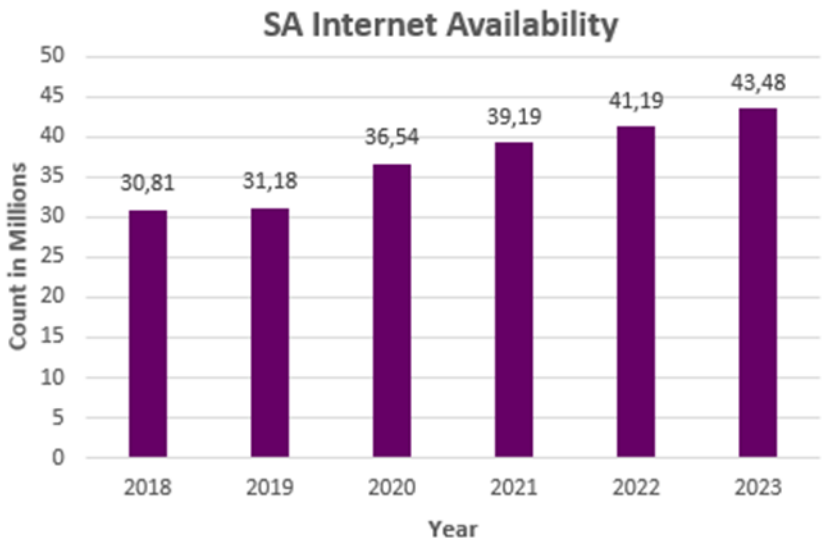


Figure 1: South African Internet availability from 2018 to 2023.

Internet access to citizens has become a necessary tool for global participation. According to Bertot, Jaeger, Jensen, and Harlow (2009), the challenge of telecommunication infrastructure is global, although it is more evident in underdeveloped countries.

(Vercel Inc., n.d.) reports state that the evolution of Very Small Aperture Terminal (VSAT) technology has revolutionized access to the internet. VSAT is a two-way satellite ground station that sends and receives data from a satellite. Although this technology has been around since the 1970s, it has only recently become a viable option for internet access.

VSAT technology has enabled the development of satellite-based broadband internet access. It has also allowed for faster and more reliable internet access in remote areas and enabled new applications and services development. For example, satellite-based broadband internet access has enabled the development of streaming video services, allowing users to watch movies and TV shows.

The technological innovations spearheaded by VSAT, although streaming services require an internet connection, technology innovations now enable many service providers to afford the users with an option of downloading their content for offline viewing. This feature has allowed users to access their favourite

shows, movies, and music without needing to be connected to the internet or suffering from buffering issues. This advancement has not only improved the user experience but has also had a significant impact on the way people consume content, allowing them to enjoy their favourite shows and movies on the go. Additionally, this has made it easier for content providers to reach a wider audience, as people no longer must be connected to the internet to access their content. Finally, this technology has enabled people to save money by enabling them to access content without needing to pay for a subscription.

South Africa has several local video streaming services. The three major ones that are eVOD, SABC+, and Showmax, each owned by the country's leading television broadcasters, Comcast Corporation (a telecommunications conglomerate and the second largest broadcasting and cable television company in the world), South African Broadcasting Services, and MultiChoice, respectively, carry most of the content that enjoys some widespread appeal. MultiChoice's Showmax video streaming service is one of the oldest on-demand streaming services available to South Africans. In addition, there are global role-players in the video streaming platform, such as Netflix, Hulu, Disney+, Apple TV, Britbox, and Dekkoo, to mention a few.

Goldstuck (2022); CEO of World-Wide Worx The South African social media landscape report in 2022; YouTube became a popular alternative to paid platforms like Netflix and Showmax. While it is a free offering, it is still seen as a general streaming option for many South Africans. Its user LSM distribution levels vary within a 10% range, with a near 50/50 distribution split between men and women users. Goldstuck also provides a detailed assessment of the current state of privacy on social media. He examines the various privacy policies of the major social media platforms and identifies their strengths and weaknesses. He then discusses the potential ramifications of privacy issues on businesses and consumers. Which can impact on sharing TV content.

Goldstuck (2022) concludes with a discussion of the future of the social media landscape and its potential impact on businesses and consumers. Goldstuck provides a detailed analysis of the opportunities and challenges that businesses

and consumers will face in the future. He also outlines the potential opportunities for businesses to capitalize on.

Statistics below show how top three streaming providers have increased over the past five years (Figure 2) as per database by the Irdeto Intelligence Sharepoint. As seen in Figure 2, Showmax has seen the biggest growth in the paid streaming sector between 2018 and 2023. The Showmax user number rose from just under 300,000 users in 2018 to almost 800,000 users in 2023. Although at lower numbers, Netflix has also shown a similar growth trend, growing from just under 100,000 in 2018 to about 400,000 in 2023. Apple TV showed to significant growth in between 2018 and 2023 as well.

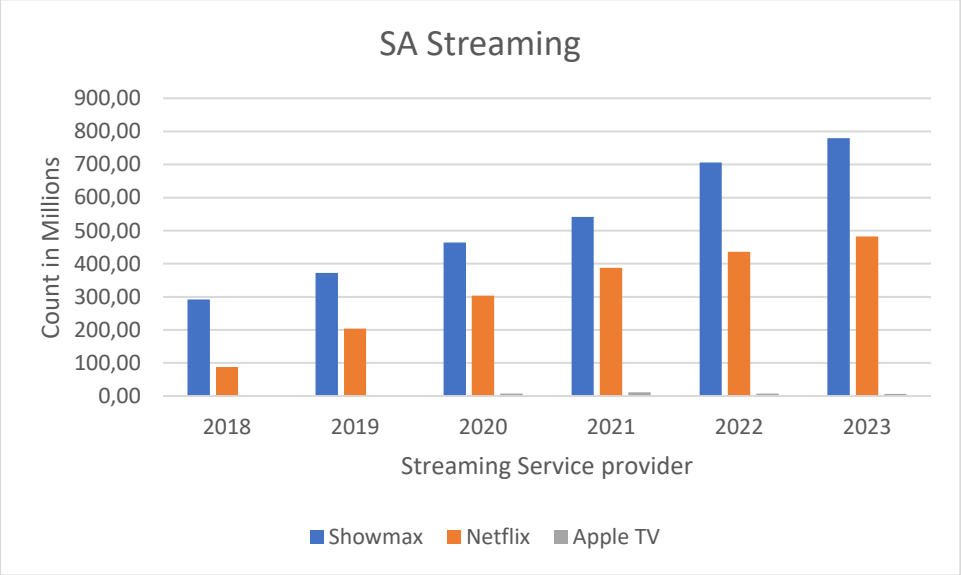


Figure 2: South African Streaming service providers from 2018 to 2023.

Below statistics ratio increase and decrease in linear TV over the past five years (Figure 3) as per the database by the Irdeto Intelligence Sharepoint.

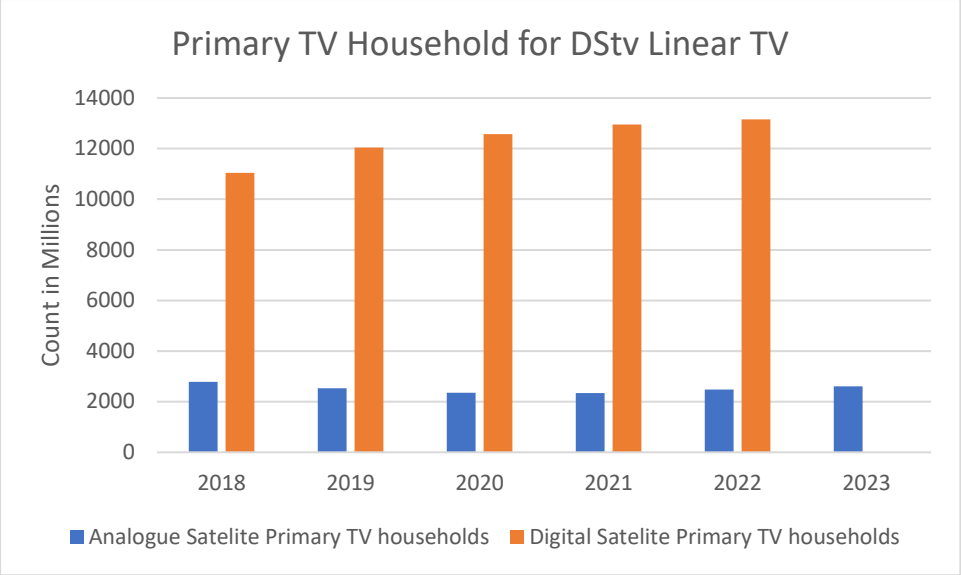


Figure 3: DStv Linear TV subscribers from 2018 to 2023.

It is the research view that increase in internet availability increases the ability for consumers to stream TV content either on legal or illegal platforms.

A section of the population that has access to the internet in South Africa may use illegal streaming services because this type of streaming provides access to content that is not available through legal streaming services. This can include content such as movies, TV shows, and music that is not available on subscription services like Netflix or Hulu. Additionally, illegal streaming services may offer content for free, while legal streaming services typically require a subscription fee. The number of illegal streaming users in South Africa is difficult to determine, as it is regulated by few legal service providers and will be further explored in the study.

The survey also looks at all demographics to understand how these factors influence people's viewing habits. Additionally, the survey explores the impact of internet availability on people's viewing habits, such as how often they are streaming content, the type of content they are streaming, and how much time they spend streaming content. By understanding how people are using content and the impact of internet availability on their viewing habits, the survey will provide valuable insights into the changing television industry in South Africa. The

data collected from this survey can be used to inform decisions by policymakers and content providers.

1.3 Research problem.

Udoakpan (2020) survey aims to investigate how the availability of internet services in South Africa has influenced the subscription rates of pay-TV services. The study examines the extent of internet access and its effects on various socio-economic groups in South Africa. Furthermore, it evaluates the presence of over-the-top (OTT) television services as alternatives to traditional pay-TV subscriptions and their impact on the latter's subscription rates.

The survey focuses on the sources of internet access in South Africa and their impact on the subscription of pay-TV services. It reviews the various sources of internet access, such as mobile networks, fixed-line networks, and satellite connections. It addresses the differences in internet access between urban and rural areas and the implications of this on subscription to pay-TV services. Udoakpan (2020)

Udoakpan (2020) uses data from various sources, including surveys, interviews, and focus groups, to analyze the effect of internet access on the subscription of pay-TV services in South Africa. It also reviews the impact of over-the-top television services on pay-television subscription services in South Africa. Finally, it provides results that suggest that with the introduction of Over the Top (OTT) TV services in South Africa, consumer TV viewing habits have shifted significantly. Most TV consumers are now binge-watching and streaming content online, spending more than five hours a day online on TV content, particularly among male respondents. Furthermore, the sharing of OTT TV login credentials with family and friends is apparent across all demographic groups. This paper provides a valuable contribution to South Africa's television research and enables regulators (i.e., ICASA) to develop practical guidelines and regulations required to mitigate and control the increasing competition between traditional Pay-TV operators and OTT TV services providers and recommendations on improving

the availability of Internet services in South Africa and maximizing the benefits of over-the-top television services.

Fourie (2013) The book provides an extensive analysis of the evolution of media, with a particular focus on the transitions from traditional media platforms such as print and linear TV to digital media formats. It covers historical developments, theoretical frameworks, and the socio-economic impacts of these transitions. Impact of technological advancement, where emphasis is on how technological innovations, particularly the internet, have revolutionized media consumption. The shift from appointment-based viewing on linear TV to on-demand content on streaming platforms is a central theme. The work underscores the significant role of technology in changing media consumption habits. This is particularly relevant for analyzing how internet availability influences the shift from linear TV to streaming services in contemporary settings.

On the other hand, according to Karamshuk, Sastry, Secker, & Chandaria, (2015) South Africans are now viewing more than 60 minutes of streamed entertainment, television, education, live events, live sport, and live streaming of portfolio of video content, namely: absolute numbers, minutes spent viewing per month, monthly active users, and active users per month of subscription, transactional video-on-demand (TVOD), and advertisement-based video-on-demand (AVOD) services in South Africa. Service Providers, such as DStv and MultiChoice hold a large portfolio of video content which they monetize by selling hardware decoders and subscription packages for linear pay-TV, as well as access to streaming on the DSTV app. Netflix, Showmax, Amazon Prime Video also hold large portfolios of video content, subscription packages at various costs, and require some form of Internet access before customers can view any of the content. Distribution of linear video content in a digital form, as streaming services, have caused a major disruption in the television market.

Leading to a research problem as we need to explore further on how the; Increased availability and accessibility of the internet in South Africa has an unintended consequence of a linked increase in streaming platforms and has an associated negative impact on linear TV and legal streaming, thus necessitating cooperation between Government and the private ICT stakeholders to develop

policies that will stifle illegal streaming while supporting the growth of linear TV and legal streaming platform.

1.4 Research objectives.

The research objectives:

(1) Identify how internet availability improved accessibility to consumers in streaming TV content in South Africa.

(2) Investigate the perception of streaming sites in South Africa and how is it facilitated by the internet availability

(3) How is streaming impacting the viewership of linear TV

1.5 Rationale

In South Africa, the SABC, the first linear TV provider, was launched in 1971 by the SABC official website, followed by Multichoice launching the first Electronic Media Network M-Net channel in 1986 Since then, Linear TV has been the leading broadcaster of TV content over the years in Africa and specifically in South Africa

However, over the years, owing to the developments in internet use and the communications and broadcasting space in general, the broadcast landscape grew to offer OTT streaming, and other services. As a result, different demographics use different platforms to consume TV content.

Due to the broad change in the landscape of broadcasting, the rationale for this study is to find out if there is still a consumer/user demand for traditional linear TV. The study also establishes which streaming platforms and the jurisdiction of such platforms are used by users that prefer content streaming.

Policymakers should consider the impact of increased internet availability on traditional linear TV and how it may affect the broadcasting industry. They should also consider regulations that will create a competitive media landscape and

promote the growth of streaming services while protecting the broadcasting industry from a potential decline in viewership. Furthermore, policymakers should consider how to best support the broadcasting industry during this transition and ensure that consumers have access to quality streaming services at an affordable cost. This could include reforms to the current regulatory framework, subsidies for streaming services, and incentives for broadcasters to offer streaming services.

The findings of this survey can provide valuable insights to scholars and policymakers when it comes to understanding the rise in content streaming and its effect on linear TV in South Africa. This research can inform policy decisions that could help create a more competitive media environment by regulating both traditional TV and streaming services. The survey can also inform scholars and policy makers on how to maximize the potential of streaming services by providing users with access to a wide range of content and affordable options. Furthermore, the findings of the survey can be used to inform future research on the effects of internet availability on content streaming in other countries and regions.

Practitioners should also consider these findings when developing and marketing media content. As more people turn to streaming services, practitioners must adjust their strategies accordingly. They should focus on creating content that is tailored to the streaming environment, considering the preferences of streaming users, as well as the platform's capabilities. Additionally, practitioners should look for ways to leverage the advantages of streaming services, such as interactive content and personalization, to create a more engaging experience for viewers. Finally, practitioners should explore ways to make streaming services more accessible and affordable for consumers, such as offering discounted subscription packages or bundling streaming services with other products. The study will provide empirical data that will be used to make recommendations to affected stakeholders. Furthermore, it contributes to the literature, as picked up when trying to get previous literature unavailable in previous studies. This research will be a valuable addition to the broadcasting body of knowledge of broadcasting regulation.

1.6 Delimitations of the study

Not much research has been carried out on this topic. As a result, there is a limited body of previous literature on the topic, which allows us to include relevant industry reports and practitioners as part of our quantitative study. The challenge here is that the target responses can lead to biased responses (self–protection).

To limit the bias of the study, the study will be inclusive of all industry consumers, including different demographics.

The scope of this study is limited to the impact of increased internet availability on content streaming vs linear TV in South Africa. The study looks at the demographics and socio-economic factors of South African audiences and their impact on the usage of streaming services. The study also identifies the differences in usage between legal and illegal streaming. The study will not include other streaming services such as radio and podcasts. Additionally, the study will not include the impact of streaming services on other media such as music and video games.

The study will also cover how the "uses and gratifications (U&G)" approach has a longstanding history in communication research and mass communication, Katz and Lazarsfeld, (1955) core of the theory is the aim to understand how, why, and with what purpose people use media in their everyday lives. The study suggests that people use media to feel entertained, escape, gain knowledge, and feel connected.

In the case of illegal streaming services in South Africa, it is likely that people are using them to gain access to the content they would otherwise not have access to on legal streaming and linear TV. Additionally, users may be using illegal streaming to attain a feeling of being connected to global modern cultures such as pop culture and to escape from everyday lives.

1.7 Assumptions

(1). Availability of content: People may stream TV content if they have access to a wide variety of content that is available to them. This

includes content from different genres, languages, and production companies.

(2). Cost: People may also stream TV content if it is cost-effective. Streaming services often offer discounts, free trials, and/or bundles that make it more affordable than traditional cable or satellite services.

(3). Convenience: People may choose to stream TV content if it is more convenient than traditional cable or satellite services. Streaming services often allow viewers to watch content from anywhere with an internet connection, as well as access content on multiple devices.

(4). Quality: People may also choose to stream TV content if it offers better picture and sound quality than traditional cable or satellite services. Many streaming services offer high-definition and 4K streaming options.

(5). Customization: People may also choose to stream TV content if it allows them to customize their viewing experience. This includes the ability to create custom profiles, set parental controls, and/or create personalized recommendations.

CHAPTER 2. LITERATURE REVIEW AND THEORETICAL FRAMEWORK:

2.1 Introduction

The purpose of a literature review in this project is to provide an overview of how the internet increase and accessibility in South Africa has an impact Over the Top (OTT) (streaming), both legal and illegal, to influence policymaking and regulation. It is also to understand the issues all stakeholders face, identify gaps in the literature, and provide research context.

2.2 Definition of Concepts Discussion

A study by Cape Peninsula Technikon by Udoakpan and Tengeh (2020) focused on individuals aged 18 to 55+ in South Africa who consume television content via OTT and pay-TV services. The research provides an overview of the impact of OTT television services on pay-TV subscriptions in South Africa. It examines the market dynamics of the South African pay-TV industry and how OTT services are affecting traditional pay-TV providers.

The survey finds that OTT services have had a significant impact on the South African pay-TV market. Subscriptions to linear pay television providers have been declining since the introduction of OTT services, and this trend is expected to continue. OTT services have also attracted many viewers, particularly younger viewers, who are unwilling to pay for traditional pay television packages. Udoakpan and Tengeh (2020), also identifies several other factors contributing to the decline in pay-TV subscriptions in South Africa, including the increasing cost of subscription packages, the emergence of alternative video streaming services, and a general shift towards digital content consumption. The report argues that to remain competitive in the face of OTT services, pay-TV providers must focus on developing innovative and attractive content offerings, as well as enhancing the user experience of their services. Online streaming services have been growing exponentially in popularity in South Africa in recent years.

The study by Udoakpan and Tengeh (2020) found that the impact of increased internet availability on streaming OTT services has been largely positive, with low-cost and high-quality media content being more widely accessible due to lower data rates enabled by faster connection speeds. This means that more people have access to a wider range of content and that streaming services become more competitive, driving down prices and allowing subscribers to access high-quality media content without expensive satellite or cable TV. Furthermore, these services are also more flexible due to the ability to watch on multiple devices and locations, as well as the ability to access a greater variety of content, both in terms of genre and niche topics. On the other hand, there is a real issue of sustainability facing streaming services. This is because the costs of providing streaming services are increasing. Our current proposed study fits to elaborate find out how stakeholders can benefit from the expansion and accessibility of the internet and to reconstruct linear TV use for consumers.

According to a study by Media Partners Asia, over 18 million South Africans accessed online streaming services in 2017, an increase of 74 percent from the previous year. Of these, approximately 14 million access linear services such as DStv and Showmax, while 4 million access (OTT) services such as Netflix and Amazon Prime Video. What the study did not discuss was how often and what type of content does users access, and no explanation of how the services are being accessed, i.e., through web, mobile, or smart TVs. Research into the device usage of each service would provide a better understanding of viewing habits, which will lead to designing our research questions.

Mabaso (2021) study delves into the evolving viewing preferences of South African audiences in the context of the digital media landscape. The study explores the shift in consumer behaviour as audiences increasingly turn to digital streaming services over traditional linear television. The study comprehensively examines the factors influencing this transition by analysing detailed data and consumer insights. The study is particularly relevant as it sheds light on the dynamic interplay between internet accessibility and media consumption patterns in South Africa. With the rapid expansion of high-speed internet and the proliferation of affordable digital devices, South Africans have noticed a

noticeable shift in accessing and consuming media content. The study discusses the implications of these changing preferences for traditional television providers. As more viewers opt for streaming services, traditional TV faces challenges in retaining its audience. The study suggests that traditional TV providers need to adapt by integrating digital strategies and offering hybrid models that combine linear and on-demand viewing, also underscores the role of internet accessibility in facilitating the rise of digital media consumption. With increased internet penetration, more South Africans have access to high-speed internet, which supports streaming services. The study is directly linked to the study's exploration of the impact of internet availability on content streaming versus linear TV.

Napoli (2011) work is a comprehensive exploration of how digital technologies reshape how audiences interact with media, moving from traditional platforms such as linear TV to more flexible, on-demand streaming services. Napoli explores the profound impact of new technologies, particularly the internet, on media consumption. He outlines how these technologies enable greater access to a wide array of content, transforming the traditional media landscape. The book highlights the shift from a passive audience, who consume scheduled broadcasts, to an active audience seeking content on digital platforms at their convenience. One of the central themes in Napoli's work is the fragmentation of media audiences. With the advent of digital platforms, audiences are no longer concentrated around a few major broadcasters. Instead, they are dispersed across numerous streaming services and niche content providers. This fragmentation poses challenges for traditional TV providers who rely on large, aggregated audiences for advertising revenue and ratings. Napoli's insights are particularly relevant for understanding how the increasing availability of high-speed internet in South Africa impacts media consumption patterns. His work provides a theoretical framework for examining the shift from linear TV to streaming platforms, highlighting key factors such as audience fragmentation, personalization, and the need for new measurement techniques.

According to a recent survey by AC Nielson, 63% of South Africans watch their favorite programs through any streaming service, and 79% do it at least once a week. The rising appetite for online streaming services among the citizens of SA

has created opportunities for local content providers like MultiChoice to enter the streaming market. This growth in online streaming is likely due to the increasing availability of high-speed internet access in South Africa and the affordability of such services. Furthermore, the availability of a wide variety of content, from TV shows and movies to live sports, has made streaming services more attractive to consumers.

Overall, the survey indicates that linear services are still the most popular form of online streaming in South Africa, with 78% of users accessing them. However, the popularity of OTT services is also on the rise, with 22% of users accessing them in 2017. This indicates that South African consumers are becoming increasingly open to accessing content through online streaming services.

The development of (OTT) video platforms has revolutionized the way viewers watch linear programming. OTT platforms, such as Netflix or Showmax, offer viewers more content at a lower price compared to traditional cable or satellite companies, which have become increasingly popular, especially amongst younger viewers. However, due to the way OTT content is streamed, viewers experience significant time delays compared to other distribution channels, which can be particularly problematic for viewers with fear of missing out (FOMO) who are hoping to take part in the online conversation surrounding live programming. This can be especially vexing for those viewers who are watching the same programming, but via another distribution channel. To prevent spoilers and facilitate discussion, it is important to consider how the harms to viewers from these temporal distortions can be avoided and the delay in OTT content also promotes viewers using illegal streaming platforms to take advantage of real time viewing. This paper will investigate potential solutions, including the possible role of social media platforms in moderating viewers' comments and the potential for increased licensing agreements, joint ventures, or even mergers between social media platforms and other forms the video marketplace to reduce piracy and shape policy and regulation.

The research paper will focus on a South African survey compared to other countries globally that are close to each other regarding socio-economic factors and increased internet availability. The reason for choosing the countries

mentioned above in Africa was due to evidence from the background study that they are close to each other regarding increased internet availability.

A report by NIGCOMSAT (2011) Newsletter reports that out of 1000 communication satellites launched into Space, just a few were from Africa, while the greatest are from Asia and Europe. Egypt has the highest in Africa with just 4; South Africa has only two while Nigeria also launched 2 in 2003 and 2007 respectively as successful in one while the latter failed due to pawer failure on November 11, 2008.

2.3 Review of how increased internet availability improved accessibility to consumers in streaming TV content in South Africa.

Streaming TV, as per the definition from (streaming TV 2020), TV content that is delivered over the Internet, often in real-time or on-demand. Unlike traditional broadcast or cable TV, streaming TV services do not require a dedicated physical connection, such as cable or satellite, to access the content. Instead, streaming TV users can access content through apps and web browsers on devices such as smart phones and TVs, tablets, and computers. Popular streaming TV services include Netflix, Hulu, Amazon Prime Video, Disney+, and Apple TV+.

Napoli (2011) insights into audience evolution and the impact of new technologies on media consumption are highly relevant for understanding the South African context. The increased availability of high-speed internet has significantly improved accessibility to streaming TV content, leading to profound changes in consumer behaviour, economic dynamics, audience fragmentation, and policy considerations. As South Africa continues to navigate this digital transformation, the lessons from Napoli's research provide a valuable framework for addressing the challenges and opportunities presented by the rise of internet-enabled streaming services.

Mula (2022) study found the following factors influencing the adoption of OTT streaming platforms. These factors are content, price, flexibility, convenience, perceived usefulness, perceived enjoyment, desire to be freed from constraints,

entertainment value, socialization, culture inclusion, binge-watching, and self-efficacy. This shift in media consumption is driven by the rise of Internet-enabled OTT streaming platforms that bypass traditional distribution channels, as consumers increasingly expect personalized content anytime and anywhere.

Although the review is limited in its scope and analysis. It is unclear how much research was done on each of the twelve factors, and there is no attempt to synthesize the findings or provide a comprehensive analysis of the literature. Additionally, the review is limited to factors related to the adoption of OTT streaming platforms and does not explore other factors that may influence media consumption. Finally, the study does not consider the broader implications of media consumption on society, such as the impact on the media industry, how it affects illegal media distribution, or the changing nature of media production and distribution. Mula (2022)

A study is required to bridge the gaps identified above by providing a comprehensive analysis of the literature on the factors influencing the adoption of OTT streaming platforms, as identified by Mula (2022) study. A comprehensive analysis could include synthesizing the findings, generalizing the findings across studies, and exploring additional factors that may influence media consumption and its broader implications on society, such as the impact on the media industry, how it affects illegal media distribution, and the changing nature of media production and distribution. To further bridge the gaps, a study could also explore how streaming TV services are used in various demographics and the implications of those differences.

2.3.1 *Legal TV Streaming in South Africa as compared to other countries.*

Garima and Komal (2021) provide an exciting insight into the effect of the COVID-19 pandemic on the usage of OTT media streaming services. The study had a sample of 1493 participants. The study showed that the pandemic had a significant positive effect on the usage of OTT streaming services. Eighty percent of the participants used OTT services during the pandemic. This was a more than a twenty percent increase to the period of a year prior to the pandemic.

Specifically, the study found that the pandemic increased the frequency of OTT streaming services, time spent using them, and overall satisfaction with them. Additionally, the study found that the pandemic positively affected the use of specific OTT streaming services such as Netflix, Disney+, and HBO Max. The discovery of this study also suggests that the COVID-19 pandemic has positively affected the consumption of OTT streaming services, providing insight into consumers' changing media consumption habits during this unprecedented time.

Hardin (2013) comprehensively analyzes the (what market?) market dynamics and the various factors that affect its competition. The author provides an overview of the preconditions of a competitive pay-TV market in South Africa. The paper begins by discussing the structure of the pay-TV market in South Africa and the regulatory framework that governs it. It then analyses the key factors essential for a competitive pay-TV market, including a viable and attractive market for subscribers, effective competition between pay-TV providers, and a regulatory framework that enables competition to thrive. The paper also discusses South Africa's challenges in creating and sustaining a competitive pay-TV market. It highlights the importance of ensuring that the regulatory framework and market conditions are conducive to competition to create a sustainable pay-TV market.

This study revealed that although traditional television still dominated overall viewing, the use of OTT services grew significantly in recent years; herein, 54% of respondents were reported to be using OTT services. 47% of the respondents reported a preference for streaming over traditional television. The survey also showed that while most viewers still accessed content via a television set, mobile devices such as smartphones and tablets were becoming increasingly popular. Overall, the survey reveals an interesting trend in the impact of OTT services on consumer viewing patterns in South Africa. The authors have provided a comprehensive overview of the current state of streaming services, and their conclusions are backed up by the survey results. This article would be a valuable resource for anyone interested in the changing media landscape in South Africa. Hardin (2013).

The two studies above examine different aspects of the modern media market. The first study by Hardin (2013) looks at the preconditions for a competitive pay-TV market in South Africa. This study combines a review of empirical evidence and an analysis of reports issued by the South African Competition and Information Commission. It looks at the factors that must be in place for a competitive pay-TV market in South Africa. This includes factors such as infrastructure, industry structure, and regulatory frameworks. It also looks at the role of media conglomerates in influencing the market's competitiveness.

The second study by Garima and Komal (2021) focuses on consuming over-the-top (OTT) media streaming services during the COVID-19 lockdown. Through partial least squares (PLS) analysis, the authors look at the effect of media convergence, user experience, and content availability on consumer engagement with these services. The findings show that consumers viewed OTT media streaming as a viable option during the lockdown, fulfilling their media needs and providing escapism from the boredom of staying at home 24/7.

Both studies provide important insight into the modern media market. The first look at the preconditions required for a competitive pay-TV market provides essential information for policymakers and industry players. The second looks at consumers' engagement with OTT media streaming, which is becoming increasingly important in a converging media landscape. Both studies demonstrate how traditional linear TV is being replaced by over-the-top media streaming services due to technological advancements and consumer preferences. Therefore, both studies can be seen as contributing to the decrease in the use of linear TV, as they provide valuable insights into the changes in the market.

In terms of further studies, more research needs to be done into the competitive pay-TV market and consumer engagement with media streaming services. More research into the competitiveness of pay-TV markets in other countries is also warranted to give a more comprehensive view of the industry. Furthermore, additional research is needed to better understand consumer behaviour in relation to media streaming services. For example, studies could focus on specific

content genres, such as movies or television shows, to better understand how they are consumed.

This research study by Sharma and Harsora (2020) explores consumer preferences for international OTT platforms and examines sustainability strategies within the Indian market. The study finds that consumers are increasingly opting for international OTT platforms due to their convenience, affordability, and wide range of content. The study also reveals that sustainability strategy is an important factor for consumers in choosing an OTT platform, as they prefer platforms that demonstrate commitment to environmental and social responsibility. Additionally, the study points out that the success of international OTT platforms in the Indian market is dependent on their ability to understand the preferences of Indian consumers and to provide them with relevant content and services. The findings of the study can be useful for companies in the OTT industry as they seek to better understand the preferences of Indian consumers and develop strategies to meet their needs., Sharma and Harsora, (2020).

The Tengeh and Udoakpan, (2020), and Sharma and Harsora, (2020) studies which are conducted in India and South Africa, respectively, studies focus on the preferences of consumers towards international OTT platforms, as well as the sustainability strategies in their respective markets. The first study is specific to the Indian market, while the second study focuses on South Africa. In this regard, Sharma and Harsora, (2020) provides some manner of a comparative benchmark for further studies on the South African market and trends. This is particularly so since both India and South Africa have substantially similar socio-economic backgrounds. The two studies are similar in that they both analyze how consumers view OTT services and how their preferences impact the sustainability of such services in their respective markets. The Indian market is a large and growing market, with a diverse consumer base and many OTT providers. The South African market is more mature and has a smaller consumer base with fewer OTT providers. The two studies may also differ in terms of the methods of data collection and analysis used. For instance, the Indian study may focus on surveys and interviews, whereas the South African study may rely more heavily on market research and data analysis.

Periaiya and Nandukrishnasummary, (2023) analysed the drivers of user stickiness and satisfaction in over-the-top (OTT) video streaming platforms. Mixed-methods research was employed to identify what drives user stickiness and satisfaction by conducting an online survey and in-depth interviews with a sample of users. The findings revealed that user experience (UX), personalization, and content quality and availability were the main drivers of user stickiness and satisfaction. Moreover, other factors such as cost, technology, and service excellence also had an influence. The study concluded that OTT platforms need to have a good UX, personalization, content quality and availability, cost, technology, and service excellence to be successful in the market. Periaiya and Nandukrishnasummary, (2020).

2.3.2 *Illegal Streaming in South Africa as compared to other countries.*

In recent years, online streaming and downloading of TV shows have presented themselves as a novel form of broadcasting piracy. These activities constitute piracy as they use a variety of websites and mobile applications that offer free, illegal access to shows, movies, and other content. The challenge for legal broadcasting is that this piracy is convenient, cost-effective, and allows users to watch shows before they are available on official streaming services Bradley (2020).

Piracy continues to be one of the leading challenges to the growth of OTT streaming services and their revenues; and has caused a decrease in user subscriptions as well as a decline in the income from subscription services Lata, (2023). It is also reported that, due to increased streaming piracy, several OTT services were obligated to make considerable capital investment outlay into anti-piracy security measures. Lata (2021).

Survey by SS Rana & Co (2022) provides an analysis of the causes of piracy in the age of over-the-top (OTT) services, such as streaming platforms. The authors argue that the growth of the OTT market is driving the demand for pirated content, and that this demand is linked to the cost of accessing legal content, the lack of availability of content in some countries, and the slow speed of legal streaming

services. The authors also explore the challenges that the industry is facing in combating piracy, such as the lack of effective enforcement measures and the difficulty of tracking illegal streaming services. Finally, the article suggests several ways to address the issue of piracy, such as improved enforcement measures, better collaboration between stakeholders, and better education of users about the risks of piracy. Overall, this article provides a well-researched and thorough analysis of the issue of piracy in the OTT space. The authors make some insightful points about the causes of piracy and the challenges the industry faces in combatting it. The proposed solutions are sensible and could be effective in reducing the amount of pirated content available. However, the authors do not provide any concrete evidence to support their claims, and this could have strengthened the article further. Additionally, the article does not mention that advertising and subscription-led video streaming services are losing up to 30% of their annual revenue to piracy in India alone.

2.3.3 *Hypothesis*

Increased internet availability in South Africa has led to the growth of both legal and illegal OTT streaming services, making TV content more convenient and cost-effective to access. However, limited content on legal platforms and high subscription costs are pushing consumers towards illegal streaming.

2.4 The Impact of OTT growth on linear TV

A journal article by Dominik, Leiner, Nathalie, and Neuendorf (2022) examines how streaming television services have changed our traditional understanding of television. The authors argue that streaming services have created a new type of television, which is based on non-linear and on-demand engagement by viewers, and which requires a different understanding of television. They provide a detailed review of the literature, discussing the various ways in which streaming services have changed the traditional concept of television, including changes in the way content is consumed, how it is produced, and how it is understood.

Dominik, et. al. (2022) begin by discussing the history of television and how it has evolved from a linear format to a non-linear format. They note that streaming services are allowing viewers to engage with content in new ways, such as by searching for content, creating personalized playlists, and controlling when and where they watch content. They also discuss the impact of streaming services on the production side, noting that streaming services have created a new type of production model, one which relies more heavily on audience engagement and feedback. Dominik et al., (2022) considers the implications of these changes for our understanding of television. They argue that the emergence of streaming services has shifted our understanding of television from one based on linear consumption to the other based on non-linear and on-demand engagement. They also suggest that streaming services have created a new type of television, one which is more interactive and focused on personalization and user experience.

Concluding by noting that streaming services have created a new paradigm for television, one which requires a different understanding of television. They suggest that streaming services have changed the way we watch and understand television and that these changes should be recognised considering the future of television.

In summary, (Dominik et al.,(2022) provides an in-depth look at how streaming services have changed the traditional concept of television. The authors argue that streaming services have shifted our understanding of television from a linear format to a non-linear, on-demand format and that this shift has created a new type of television which is more interactive and focused on personalization and user experience. The authors provide an extensive review of the literature and make a convincing argument for why these changes should be considered when considering the future of TV.

A research paper by Grand View Research, Inc. (2023) examines the current trends and prospects of the global video streaming market. The report highlights the current market size of the industry and projects that the market will be valued at $416.84 billion by 2030. Additionally, the report provides a detailed analysis of the key drivers and restraints of the industry, as well as the key market players.

The video streaming market is driven by the rapid expansion of the internet and the increasing popularity of streaming services. The growing demand for on-demand video content, the rising trend of cord-cutting, and the increasing number of internet-connected devices also contribute to the market's growth. Moreover, the emergence of 5G technology and the increasing adoption of cloud-based video streaming services are expected to further drive the market in the forecast period.

The major players in the market are Amazon, Apple, Google, Microsoft, Netflix, and Hulu. These companies focus on delivering innovative video streaming services with multiple features, such as on-demand content, personalized recommendations, 4K streaming, etc., to expand their customer base. Moreover, companies are investing in developing advanced technologies such as AI and machine learning to enhance their products and services. Overall, this is impacting traditional linear TV content. Grand View Research, Inc. (2023)

Grand View Research, Inc. (2023) highlights the industry's critical challenges, such as the increasing competition from other online streaming services, piracy, and the lack of content diversity. Furthermore, the report provides an in-depth analysis of the regional markets and the competitive landscape.

Semadmin, Editor for SEM Publications Weekly, April (2023) provides an insightful overview of the non-linear television services market and its major players. It examines the current competitive landscape and the strategies the major players employ, such as Netflix, Hulu, Home Box Office, Verizon Communication, and YouTube. Additionally, it looks at the potential for growth in unfolding markets and the increasing demand for personalization of content. The paper concludes by summarizing the findings and suggesting that the major players in the market will continue to dominate. The report provides a valuable resource for those interested in learning about the non-linear television services market.

Mabaso (2021) research provides valuable insights into the impact of OTT growth on linear TV. According to the study, the increasing popularity and accessibility of OTT platforms have led to a noticeable shift in consumer behavior regarding

television consumption. As more viewers opt for OTT services to access their favorite content, traditional linear TV channels experience a decline in viewership. This trend suggests that the growth of OTT platforms directly competes with linear TV, posing challenges to its traditional dominance in the media landscape. Consequently, linear TV providers may need to adapt their strategies to remain competitive in an evolving media environment shaped by the proliferation of OTT services.

According to a report by Myles (2023), The South African Broadcasting Corporation (SABC) is looking for another means of getting people to pay for TV licenses. However, once anything is finalized, South Africans must have a valid license to buy any viewing device that can receive a TV signal. In comparison, projectors and big monitors can be purchased without a TV license. Many of these products are ideal for use with streaming services, such as Netflix, Hulu, and Amazon Prime Video, which are increasingly popular with many people. Many of these streaming services do not require a TV license.

Projectors and big monitors can be used to watch content from streaming services and from USB sticks, external hard drives, or many other types of media. Some monitors can hook up to gaming consoles, such as the Xbox One or PlayStation 4.

If you are looking for a projector or monitor without a TV license, plenty of options are available. These products have HD quality, 3D capability, and wireless connectivity. There are even some projectors that can be used to create a home theatre experience.

No matter your needs, a projector or monitor can fit them without requiring a TV license. This might be the detriment of traditional linear tv, but the convenience and cost savings can be worth it for some.

2.4.1 *Hypothesis*

The growth of Over-The-Top (OTT) streaming services is causing a notable impact on linear TV viewership, leading to a decline in traditional linear TV consumption.

2.5 A guide for improvement on policy regulation in TV broadcasting

Rizvi (2020) conducted a study that examines whether online streaming falls within the scope of broadcasting. The report on the definition of broadcasting under relevant international and domestic laws, as well as the activities and services of online streaming providers. It also considers the implications of online streaming for the traditional broadcasting industry and the potential for regulating this activity. The paper concludes that online streaming does fall within the scope of broadcasting and that potential regulation should consider the unique characteristics of this industry.

Rizvi (2020) discusses the legal implications of online streaming services for broadcasting content. The author notes that the law on broadcasting still needs to be updated to reflect the advent of digital technology. However, many of the same laws apply to online streaming as to traditional broadcasting. Rizvi further examines the implications of this for copyright, broadcasting regulations, and advertising and suggests that digital streaming services should be treated in the same manner as traditional broadcasting services. Rizvi provides a comprehensive review of the current legal landscape, noting the various laws and regulations related to broadcasting and streaming services. She also clearly explains the potential implications of this for content creators, broadcasters, and consumers. She succinctly outlines the potential areas of dispute, as well as the potential solutions. Overall, Rizvi's report is a well-researched and well-written exploration of the legal implications of online streaming services. She provides a clear and concise overview of the current legal landscape and offers thoughtful suggestions on addressing the potential areas of dispute. Her paper is an

essential contribution to the discussion on digital streaming services and provides valuable insight into the potential legal implications for the industry.

The report has the potential to provide a comprehensive overview of online streaming and its implications for broadcasting. It could explore the legal and regulatory frameworks that govern online streaming and how they are similar or different to those that govern broadcasting. Additionally, the paper could look at the potential implications of online streaming for broadcasters and the broadcasting industry, considering topics such as the impact on advertising revenue and changes in how content is produced and consumed. It could also examine the impact of online streaming on the television industry, including topics such as the rise of streaming services, the emergence of new streaming platforms, and the implications for traditional TV networks. Finally, the paper could explore the potential for online streaming to disrupt existing broadcasting models, such as the traditional 'channel' model, and examine the opportunities and challenges for broadcasters.

Dugeri (2022) report on “Entertainment Law in Nigeria: A Foundational Analysis of the Emerging Trends, Sources, Practice, and Precedents” provides a comprehensive overview of the legal framework of entertainment law in Nigeria. The article covers topics such as the evolution of entertainment law in Nigeria, sources of law, the legal implications of entertainment contracts, and the enforcement of entertainment law. The article also discusses the challenges and opportunities for entertainment law in Nigeria and analyzes the emerging trends and precedents in entertainment law. Dugeri’s article is an essential contribution to the field of entertainment law and provides insight into the current legal landscape in Nigeria. Dugeri (2022) begins by outlining the history of entertainment law in Nigeria and its evolution. He notes that the Nigerian legal system is based on the English common law system, and the legal system of Nigeria is based on the English common law system. Dugeri then discusses the sources of entertainment law in Nigeria and the legal implications of entertainment contracts. He notes that the Nigerian Copyright Commission regulates and enforces copyright laws in Nigeria. In addition, he discusses the enforcement of entertainment law in Nigeria and how the law is enforced through

the courts. Dugeri then analyzes the emerging trends and precedents in entertainment law. He notes that the Nigerian Entertainment Council has been established to promote and protect the interests its entertainment industry in Nigeria. In addition, he notes that Nigeria has adopted the International Property Rights Index (IPRI), which measures the strength of intellectual property rights in Nigeria. Finally, Dugeri discusses the challenges and opportunities for entertainment law in Nigeria. He notes that there is a requirement for greater awareness and education on entertainment law among the public and stakeholders in the entertainment industry. In addition, he argues that there is a need for greater enforcement of entertainment law and the establishment of policies and regulations to ensure that the interests of all shareholders are protected. Overall, Dugeri's article provides an informative and comprehensive overview of the legal framework of entertainment law in Nigeria. The article is an essential contribution to the field of entertainment law and provides insight into the current legal landscape in Nigeria. Dugeri's discussion of the sources of entertainment law, the legal implications of entertainment contracts, and the emerging trends and precedents in entertainment law are particularly valuable. (Dugeri, 2022)

Research paper by Hardin (2013) examines the competitive pay-TV market in South Africa. The paper looks at the economic and legal preconditions necessary for establishing a competitive pay-TV market in the country. It also looks at the role of the government in the pay-TV industry and whether the current regulatory framework is sufficient to encourage competition. The paper concludes that the current regulatory framework is inadequate to promote competition and that additional measures should be taken to facilitate a more competitive pay-TV market. The paper starts by providing an overview of the current state of the pay-TV industry in South Africa. It looks at the various players in the market and their respective market shares. The paper then examines the existing regulatory framework, focusing on the competition and broadcasting laws as well as the role of the government in the pay-TV industry. It analyzes the current regulatory environment and its implications for developing a competitive pay-TV market. The paper then discusses the economic and legal preconditions necessary for establishing a competitive pay-TV market in the country. It looks at the role of the

government in the pay-TV industry, including the need for an independent regulatory framework, the establishment of an open-access platform, and the implementation of a fair and transparent pricing structure. The paper then examines the potential effects of competition on the pay-TV industry, including the potential for lower prices, more excellent consumer choices, and improved quality of service. The paper concludes by summarizing its findings and making recommendations for developing a competitive pay-TV market in South Africa. It argues that the current regulatory framework is inadequate to promote competition and that additional measures should be taken to facilitate a more competitive pay-TV market. The paper also suggests that the government should focus on creating an open-access platform, implementing a fair and transparent pricing structure, and promoting competition through independent regulators. Overall, this paper provides an informative and well-researched analysis of the current state of the pay-TV industry in South Africa. It extensively analyzes the existing regulatory framework and makes several recommendations for developing a competitive pay-TV market. The paper is an essential contribution to the literature on the economics of the pay-TV industry in South Africa. It should interest those interested in developing the market in the country.

In conclusion, Hardin (2013) research paper comprehensively analyzes the current pay-TV market in South Africa. It examines the existing regulatory framework and makes several recommendations for developing a competitive pay-TV market in the country. The paper is an essential contribution to the literature on the economics of the pay-TV industry. It provides an insightful look at the potential effects of competition on the market.

The discussion on the increased internet availability for streaming OTT services has focused on many aspects. Firstly, there is a focus on the implications of this increased availability for consumer behaviour and preferences, with a particular focus on whether the OTT services are a substitute or supplement for traditional pay-TV services. There is also a focus on the implications for market competition, with particular attention being paid to the effect this has had on the traditional pay-TV industry. Finally, there has been some discussion on the economic implications for the OTT industry, with a focus on whether increased availability

has had a positive or negative effect on their profits. Overall, the debate has centred on the apprehension of whether increased internet availability has had a net positive or negative effect, with many studies focusing on its impact on the traditional pay-TV industry. However, there is an absence of research focusing on the broader economic implications of increased internet availability for streaming OTT services. Furthermore, there is a lack of research on consumer preferences and behaviour, looking specifically at how consumer demands have shifted in response to greater internet availability. As such, it is important to close the gaps in research by further exploring the impact of this increased availability on consumer behaviour and preferences, as well as the wider economic implications.

2.5.1 *Hypothesis*

The regulatory framework governing TV broadcasting needs to adapt to the emergence of online streaming services, recognizing them as falling within the scope of broadcasting activities.

2.6 ANALYTICAL FRAMEWORK

2.6.1 *Theoretical Review*

According to McQuail (1997) the uses and gratification theory seeks to explain why people use media. It suggests that individuals actively seek media to satisfy their needs and desires. According to the theory, people are not passive recipients of media messages but actively seek out media to fulfil their needs. The theory proposes that media users will select, interpret, and use media content according to their goals and needs. McQuail argues that people use media for four primary purposes: information, personal identity, integration, and entertainment. People use media for information to remain informed and up to date on current events. People also use media to express and maintain a sense of personal identity. This refers to using media to form relationships and learn about different cultures. People also use media to form social networks and to integrate with different social groups. Finally, people use media for entertainment,

such as watching movies, playing video games, and reading books. McQuail's theory is essential for understanding how people interact with media. It suggests that individuals use media for various purposes rather than simply being passive recipients of media messages. This can help explain why specific media content is more popular than others and why certain individuals prefer certain media types.

Hsu and Miao (2021) conducted a study to explore why people are loyal to live stream channels from the perspectives of uses and gratifications and media richness theories. Live stream channels have become increasingly popular for their ability to provide real-time content to viewers. However, there is still an absence of research exploring why people are so loyal to these channels. In this study, we investigated the perspectives of uses and gratifications and media richness theories to explain why people are loyal to livestream channels. An online survey was conducted, and the data from 466 respondents were analyzed. The results showed that the reasons why people are loyal to live stream channels are related to the need for entertainment, social connection, and information seeking. Moreover, the level of media richness, the satisfaction with the live stream channels, and the number of followers were found to be important predictors of loyalty. These findings suggest that live stream channels are a viable media platform for providing entertainment, social connection, and information seeking and that loyalty is likely to be higher when the level of media richness is higher and when the satisfaction with the live stream channels is greater. This study provides to the literature by highlighting the importance of media richness and satisfaction in understanding why people are loyal to live stream channels.

In Ruggiero (2000) article "Uses and Gratifications Theory in the 21st Century," the author provides an updated perspective on the Uses and Gratifications Theory (UGT) and its applicability in the contemporary media landscape. This theory suggests that individuals actively seek out and use media to fulfill specific needs and gratifications rather than being passive recipients of media messages. In the context of the impact of increased internet availability on content streaming versus linear TV in South Africa, Ruggiero's insights can be particularly relevant.

Ruggiero (2000) emphasizes that UGT has evolved to address the changing nature of media consumption, especially with the proliferation of digital technologies like the Internet. He argues that traditional media theories, such as the hypodermic needle model or the two-step flow model, may only partially capture the complexities of modern media consumption patterns. Instead, UGT provides a framework for understanding how individuals actively engage with media content to satisfy various psychological, social, and cultural needs. In the context of South Africa, where internet accessibility has expanded significantly in recent years, UGT offers valuable insights into why individuals might prefer content streaming over linear TV. For example, Ruggiero highlights the importance of interactivity and user control in the digital media. With content streaming platforms offering on-demand access, personalized recommendations, and interactive features, users can tailor their media experiences to their preferences and needs. This aspect of UGT explains why South African consumers gravitate towards streaming services that offer greater flexibility and customization compared to traditional linear TV channels.

This aspect of UGT explains why South African consumers gravitate towards streaming services that offer greater flexibility and customization compared to traditional linear TV channels.

Furthermore, Ruggiero (2000) discusses the role of social interaction and identity reinforcement in media consumption. In content streaming, platforms often facilitate social engagement through features like user reviews, social sharing, and online communities. This social dimension of media consumption aligns with UGT's emphasis on how media can connect with others and construct one's sense of self. In South Africa, where social connectivity is highly valued, the social aspects of content streaming platforms may contribute to their popularity among consumers.

Overall, Ruggiero's exploration of UGT provides a theoretical foundation for understanding the impact of increased internet availability on content streaming versus linear TV in South Africa. By highlighting the active role of users in selecting and using media to gratify their needs, UGT offers valuable insights into the motivations driving media consumption preferences in the digital age.

2.7 Conclusion of Literature Review

In conclusion, the proliferation of internet access in South Africa has drastically changed media consumption by allowing more people to access TV content while also allowing linear and OTT providers to create new opportunities for content creation and consumption. Improved policy regulation could help to protect the rights of viewers as well as content providers while also providing better security measures for the protection of digital content.

CHAPTER 3. RESEARCH METHODOLOGY

The proposed research project focuses on the impact of the internet available on the South African broadcasting landscape and the strategies broadcasters adopt to remain competitive.

The research project is based on a quantitative approach, as this enables a more thorough examination of the variables in the study. The data collection process for the study involves a survey of users in the broadcasting industry in South Africa. The research project benefits from various statistical techniques, including descriptive, inference, correlation, and regression analysis.

3.1 Research Approach

Research methodology involves selecting appropriate methods and techniques for data collection and analysis and considering ethical principles and theoretical frameworks that guide the research process.

In our titled "The Impact of Increased Internet Availability on Content Streaming versus Linear TV in South Africa," a quantitative research methodology is chosen. This approach involves collecting and analysing numerical data to quantify variables and examine their relationships. Here is why a quantitative method is suitable for this study:

Objective Measurement:

Quantitative research allowed for precise measurement of variables related to internet availability, content streaming, and linear TV viewership, facilitating rigorous analysis and interpretation of results.

Statistical Analysis:

The quantitative method enabled statistical techniques (IBM SPSS—Statistics is a statistical software suite developed by IBM) to analyze data, identify patterns, and test hypotheses. Statistical analysis helps assess the significance of relationships between variables and make valid inferences about the population.

Quantification of Trends:

Quantitative research facilitates the quantification of trends and patterns in media consumption, allowing researchers to identify the impact of increased internet availability on content streaming versus linear TV in South Africa. By adopting a quantitative research methodology, this study aims to provide empirical evidence and quantitative insights into the changing media landscape in South Africa and the implications of increased internet availability on content consumption preferences.

3.2 Research Paradigm

Research paradigms are fundamental frameworks that guide research, including the assumptions researchers make about the nature of reality, the nature of knowledge, and the methods for investigating reality. Three research paradigms can be chosen from: (Positivist, Interpretivist, and Pragmatist Paradigms)

Babbie (2016) states that the positivist paradigm is grounded in the belief that reality is objective and can be described objectively and observed without interfering with the studied phenomena. Emphasizing quantifiable observations, hypothesis testing, and statistical analysis, Positivists assume that the world can be understood through empirical observation and reasoned analysis. According to Denzin and Lincoln (2011), the interpretivist paradigm is based on the idea that reality is socially constructed and subjective. It emphasizes understanding the meaning and experiences of participants from their perspectives. Lastly, the pragmatist paradigm by Creswell and Creswell (2018) is characterized by using methods that are most appropriate for the research question, often combining both quantitative and qualitative approaches. Pragmatists focus on practical outcomes and the usefulness of research findings in real-world applications.

The paradigm aligned with our study is a positivist paradigm, which is justified by the need for objective measurement, statistical analysis, generalizability, empirical evidence, and hypothesis testing. By aligning with the positivist paradigm, the study can rigorously analyse the data to provide valuable insights into the evolving media consumption landscape in South Africa, offering

evidence-based recommendations for stakeholders in the broadcasting industry. The study utilised statistical techniques to analyze the data, identify patterns, and test hypotheses about the relationship between internet availability and changes in media consumption. This approach is inherently positivist, relying on empirical data and statistical inference.

A quantitative survey design focused on a positivist approach adopting a descriptive research design using a survey as a data collection method to ensure reliability will be used for the study. Positivist research aims to study patterns and relationships between social factors (variables), which can help researchers make accurate predictions about society and social change. The survey aims to study "the impact of increased internet availability on content streaming versus linear TV in South Africa."

3.3 Population and sample

The target audience for this survey was adults between 18 and 65 in South Africa, as this demographic is most likely to have access to the Internet. The population sample can be selected using non-probability sampling, specifically convenience sampling since it is less expensive and quicker to administer than a random sample. This would provide valuable insights into how the increased availability of the Internet has impacted content streaming and linear TV in South Africa.

Therefore, the study utilized a convenience sampling method due to the ease of accessing participants within the researcher’s network and the constraints of limited financial resources Bryman and Bell (2011)

Additionally, the survey questionnaire link was distributed via email, WhatsApp, and LinkedIn to the target population within the researcher’s network for convenience, leveraging the popularity of these platforms among TV consumers and experts in the TV broadcasting sector. The target sample size was 200, and 102 participants responded positively.

3.4 The research instrument.

Studying the impact of increased internet availability on content streaming versus linear TV in South Africa is a crucial area of research. To do this effectively, we used appropriate research instruments that ensure the collection of reliable and valid data. A questionnaire survey, with several key steps, was deployed to ensure systematic, reliable, and effective data collection.

A survey questionnaire was administered online with subsections, making the theme the most flexible research method.

- Demographic Information: Questions about age, gender, income level, education, and location to understand the demographic profile of respondents.
- Internet Availability: Questions assessing internet access quality, speed, and frequency. Example questions might include:
- Media Consumption Habits: Questions about the amount of time spent on content streaming versus linear TV, preferred platforms, and types of content consumed. Example questions include.
- Which streaming services are used most frequently? (Netflix, Hulu, Amazon Prime Video, Disney+, etc.)
- Perceptions and Preferences: Questions to gauge respondents' preferences for content streaming versus linear TV and their reasons for these preferences.
- What are the main reasons for preferring streaming services? (Convenience, Variety of content, On-demand access, etc.)

3.5 Procedure for data collection

The survey questionnaire was conducted from November 20, 2023, to January 4, 2024. To ensure convenience and a broader reach, the survey link was distributed within the researcher’s network through WhatsApp, Twitter, and LinkedIn, leveraging the popularity of these social media platforms among the target audience, Oji (2017), Additionally, the survey was promoted on Facebook, specifically targeting the study population. The researcher meticulously set

demographic and interest criteria on Facebook to confirm that respondents were residing in South Africa and were part of the targeted group.

3.6 Data analysis strategies and interpretation

Before data can be analyzed and interpreted, it must undergo preparation, which involves data cleaning, editing, coding, and transforming it from its raw state into a format suitable for analysis, Cooper and Schindler, (2013)

The following steps were followed:

1. Remove duplicates.
2. Remove irrelevant data.
3. Standardize capitalization.
4. Convert data type.
5. Clear formatting.
6. Fix errors.
7. Language translation.
8. Handle missing values.

Therefore, the raw data from the survey questionnaire was exported from Google Forms into Microsoft Excel for cleaning, which involved identifying and correcting errors and omissions. The data was then analyzed numerically using the IBM Statistical Package for Social Sciences (IBM SPSS Statistics). Descriptive statistics, such as frequency tables, were employed to understand the study's results. These statistics were used to summarize the participants' responses and interpret the displayed graphical percentages. The researcher presented the results using frequency tables and graphs.

The collected data was analyzed numerically using IBM SPSS Statistics, a software suite developed by IBM for data management and analysis. The

researcher chose IBM SPSS Statistics due to its effectiveness and user-friendly interface. Descriptive statistics were utilized to gain an understanding of the study results, helping to summarize participants' responses and interpret displayed graphical percentages. The results were presented using simple frequency tables generated from the descriptive statistics. The survey results will be used to see the impact of the increased availability of the Internet on the viewing habits of TV consumers in South Africa, and the survey will provide insights into how this has affected the landscape of content streaming and linear TV. The results provide information about preferred streaming services, the motivations behind using them, and how subscribers use them instead of linear TV. The information is also used by TV broadcasters in South Africa to shape their strategies for content delivery to consumers.

3.7 Possible limitations and challenges of the study

The researchers recognized potential limitations that might prevent participants from engaging in the study. Consequently, the survey link was promoted on Facebook and Instagram, targeting the specified audience to ensure that participants were residents of South Africa.

3.8 Quality Assurance

Pilot testing is an essential and effective way of measuring the reliability of a quantitative survey. It involved testing the survey with a small group of people who matched the target audience to verify that it effectively collected the desired data. The data collected from the pilot test was used to identify any areas of improvement or modifications needed before the survey was released for wider distribution. Additionally, the results were used to identify any aspects of the survey that are useful for identifying any potential bias or interference in the data, thereby helping to ensure the validity and reliability of the survey results.

Reliability refers to the consistency of the instrument in producing stable and consistent results over repeated applications, while validity pertains to the accuracy of the instrument in measuring the intended concept Creswell and

Creswell (2018); Babbie, (2016). The reliability and validity of a data collection instrument are important considerations when designing research studies, as the data collected from the instrument can affect the accuracy and generalizability of the results. To ensure validity, researchers used a variety of methods, including ensuring clarity regarding the required data, designing the questionnaire accordingly, and confirming that the questions were understood and answered as intended by the respondent.

To assess reliability, researchers used reliability coefficient tests applied by SPSS (Cronbach's alpha test). This involved:

Having the same group of study participants complete the same data collection instrument multiple times to assess the level of consistency in their responses.

Clarity is essential regarding the required data, and the questionnaire must be designed to reflect this.

The questions should be comprehensible to the respondent as the researcher intended.

It is important that respondents answer the questions, and that the researcher interprets these answers as the respondent intended, emphasizing the researcher's crucial role in accurately understanding and interpreting the data.

Ethical considerations

Given the South African Protection of Personal Information Act 4 of 2013, the responses were designed to protect the respondents' personal information. The survey was distributed via digital channels, such as emails, text messages (SMS), and social media platforms like WhatsApp, Facebook, Twitter, and Instagram. A link to the survey questionnaire was sent to respondents, which they can complete and submit online.

3.9 Summary

This section extensively discussed the methodology and research design employed for the research project. The research employed a quantitative

research approach, utilizing a descriptive research design along with a cross-sectional research design strategy. A non-probability convenience sampling technique was adopted, targeting participants with pay-TV and OTT TV subscriptions who also had internet access.

This chapter addressed the methodology and research design used to conduct the research project in detail. The study adopted a quantitative research approach using a descriptive research design with a cross-sectional research design strategy. Further to this, the study adopted a non- probability convenience sampling technique, and participants with pay-TV and OTT TV subscriptions, including internet access, were the selected target population.

CHAPTER 4: RESULTS AND DISCUSSION

4.1 Introduction

For this section, the research will address the research objectives and the research questions presented earlier in the study. The research attempts to do this by presenting the findings derived from the data collection instrument. Firstly, a descriptive analysis of the findings, and then run the appropriate reliability and validity statistics to determine the dependent and independent variables to be used in our study and discuss the findings.

For the first research objective, the aim was to analyze and identify whether internet availability had a significant impact on the accessibility of streaming TV content within South Africa. Secondly, research objective was addressed, which looked at whether there was a growth in streaming site activity and whether internet availability could be considered as a significant factor regarding overall growth. Thirdly, investigated how streaming has impacted viewership of Linear TV within a South African context.

4.2 The Sample and Response Rate

The research was conducted in a South African environment by distributing an online survey via social media sites and emails to 300 respondents with a voluntary opt-in to respond. A total of 102 responses were received.

4.3 Sample Characteristics

The characteristics of the sample under investigation play a crucial role in moulding the outcomes and conclusions drawn from the study. Sample characteristics encompass a wide range of attributes that define the individuals included in the research sample. Understanding and analysing these

characteristics are critical for securing the validity and reliability of research findings.

4.3.1 Gender Distribution

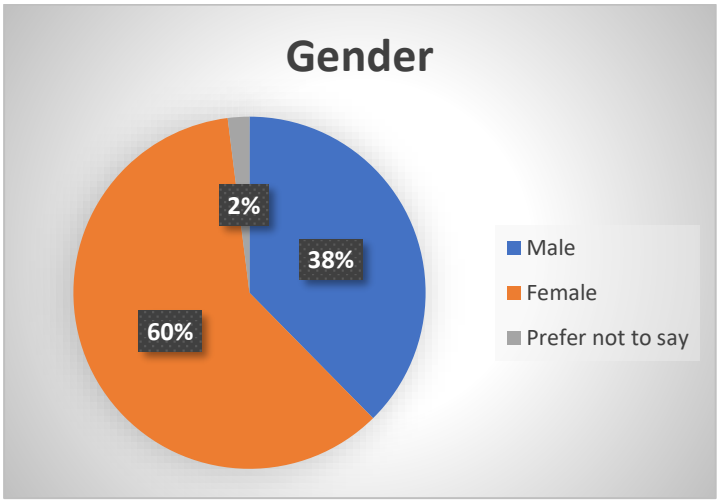


Figure 4: Gender distribution.

Figure 4 The distribution of genders within the sample is as follows: 60% of the respondents who volunteered to participate in the survey were females, while males accounted for 38% of the sample. This indicates a higher representation of females compared to males among the survey participants.

4.3.2 Age Distribution

Figure 5 depicts the sample age distribution. The sample size depicts that more respondents were between the ages of 35 - 45, making up 57% of the respondents. They were followed by 25 - 34 by 30% and 18 - 24 by 24%. Which gives almost an even distribution between the three age groups. The lower ones are 46 - 54 and 55+

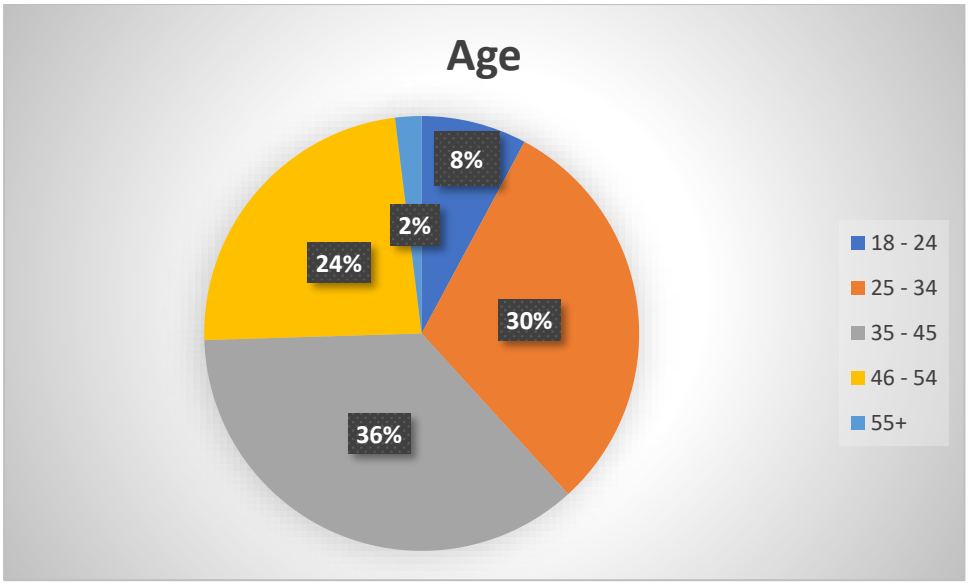


Figure 5:Age distribution.

4.3.3 Employment Status and Household Income

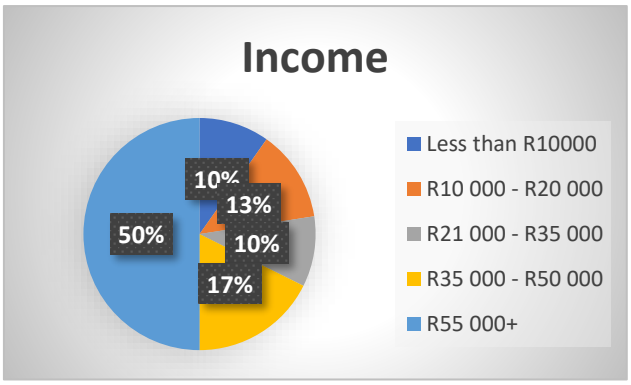


Figure 6: Household income.

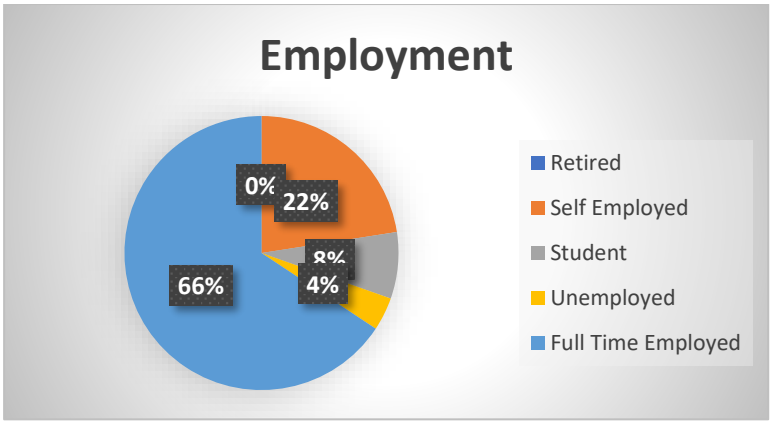


Figure 7: Employment status.

With regards to employment and income, the highest response received is from full-time employed respondents with 66% and 50% of our respondents earning above R50 000. With a substantial portion of respondents earning above R50,000, it may indicate greater purchasing power and propensity to spend on goods and services. This could be valuable information for businesses targeting this demographic segment. While the high response rate from full-time employed individuals and higher-income earners provides insights into certain demographic segments, it may not fully represent the diversity of employment and income statuses within the broader population. This limitation should be considered when interpreting the survey findings and drawing conclusions.

4.3.4 Do you have access to the internet?

This question was asked to identify how many of our respondents have access to the Internet. And 99% of 102 respondents responded positively to the questions. This indicates that most of our respondents have access to the Internet, and the research established below how they access it in further questions.

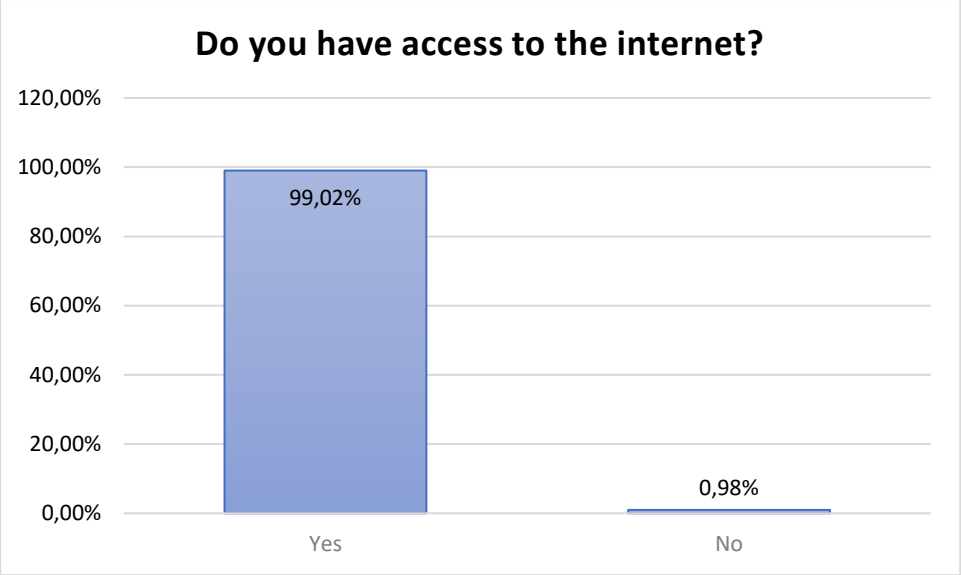


Figure 8: Access to the internet.

4.3.4 How are you accessing the Internet?

Linking the responses to the two above questions*; Do you have access to the internet? And how are you accessing the Internet?*

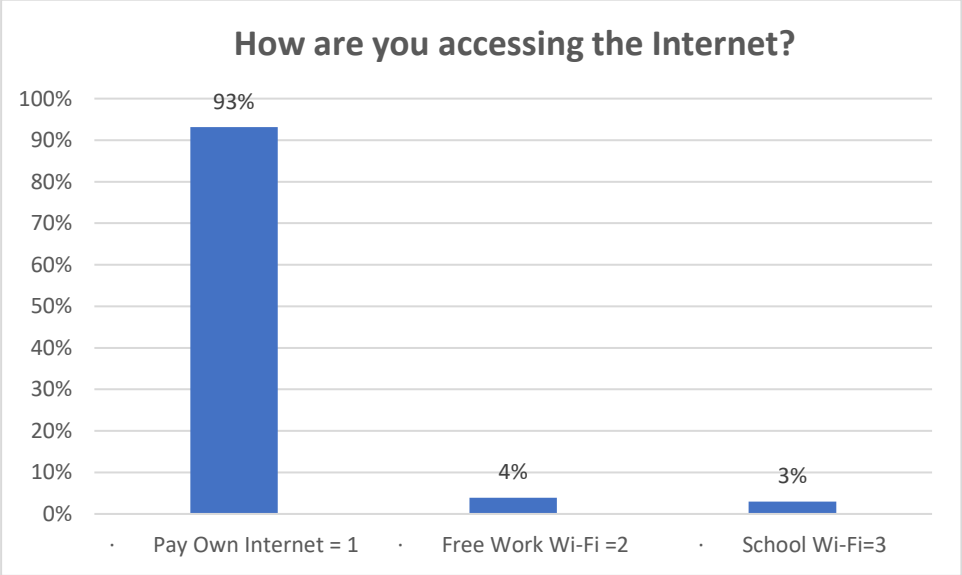


Figure 9: How are you accessing the internet.

Cross-Tabulation: Internet Access and How it's Accessed.

Table 1: Cross-Tabulation: Internet Access and How it's Accessed.

	Pay for Own Internet	**Free Wi-Fi at Work**	**School Wi-Fi**	**Total**
Internet Access				
Yes	95(93%)	4(4%)	3(3%)	102 (100%)
No				0
Total	95(93%)	4(4%)	3(3%)	102(100%)

From the overall respondents, 93% of respondents pay for their internet, 4% use free Wi-Fi at work whereas 3% use school Wi-Fi, and 4% of respondents who use free Wi-Fi at work, none also pays for their internet.; none also use school Wi-Fi. All 93% of respondents who pay for their internet do not use free Wi-Fi at work or school Wi-Fi.

There is no overlap between those who use free Wi-Fi at work and those who use school Wi-Fi.

This table helps you see the relationship between having internet access and how it's accessed among your respondents. It shows that most respondents who have access to the internet pay for their internet, with a few using free Wi-Fi at work or school Wi-Fi. This kind of analysis can help you understand the preferences or circumstances of your respondents regarding their internet access.

4.3.5 Are there any OTT services that you prefer to use?

Table 2: Access to Broadcast Services

Do you have any of the following services?		
• I have OTT (DStv Streaming, Showmax, Netflix, Amazon Prime, Disney+, etc) (An over-the-top media service is a media service offered directly to viewers via the Internet. OTT bypasses cable, broadcast, and satellite television platforms)	57	56%
• Social Media (Facebook, YouTube, Instagram, Twitter, Telegram, etc..)	18	18%
• I have Pay TV (DStv, Gotv, M-Net)	14	14%
• I have both Pay TV & Free to Air	9	9%
• Free to air (SABC, ETV, OVHD)	3	3%
None of the above	1	1%

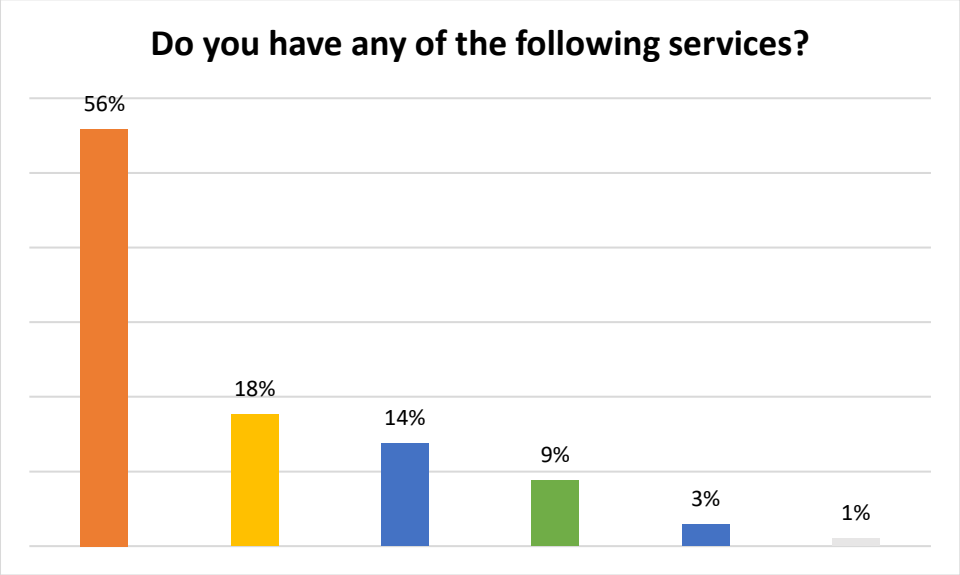


Figure 10: Access to Broadcast services.

Most respondents (56%) have OTT services, indicating a preference for internet-based media consumption. Social media is also widely used, with 18%

of respondents having accounts on platforms like Facebook, YouTube, Instagram, Twitter, and Telegram.

Traditional Pay TV subscriptions are less common (14%), suggesting a shift towards OTT services. A smaller portion (9%) have both Pay TV and Free-to-Air TV services, indicating some overlap in preferences. Only a few respondents (3%) rely solely on Free-to-Air TV services.

The smallest portion (1%) does not have any of the listed services, indicating a very small segment without internet or TV subscriptions.

There are several reasons why people prefer OTT (Over-The-Top) services over traditional linear TV, reflecting broader trends in media consumption. Here are some key reasons, supported by research and industry insights:

Flexibility and Convenience

On-Demand Content: OTT services allow users to watch content whenever they want rather than adhering to the fixed schedules of linear TV. This on-demand access better fits modern, busy lifestyles (Schweidel & Moe, 2016). Cross-Device Access: OTT services can be accessed on multiple devices, including smartphones, tablets, laptops, and smart TVs, providing greater flexibility for users to watch content wherever they are Woldt, (2019).

Personalized Viewing Experience

Personalization: OTT platforms use algorithms to recommend content based on user choices and viewing history, making the viewing experience more personalized and engaging Ruggiero, (2000). Custom Playlists and Subscriptions: Users can create custom playlists and subscribe to specific genres or series, tailoring their content consumption to their interests Pagani, (2004).

Content Variety and Exclusivity

Exclusive Content: OTT services often produce original content that is not available on linear TV, attracting users with unique and high-quality programming Deloitte, (2019).

Global Content Access: These platforms provide access to a diverse range of content from around the world, which is often not available through traditional TV channels Woldt, (2019).

User-Generated Content: Platforms like YouTube allow users to upload and share their own content, generating a more dynamic and interactive media environment Mabaso, (2021).

This summary provides insights into the media consumption preferences of the respondents, showing a trend towards OTT services and social media, with traditional Pay TV and Free-to-Air TV being less common among this group.

Are there any OTT services that you prefer to use?

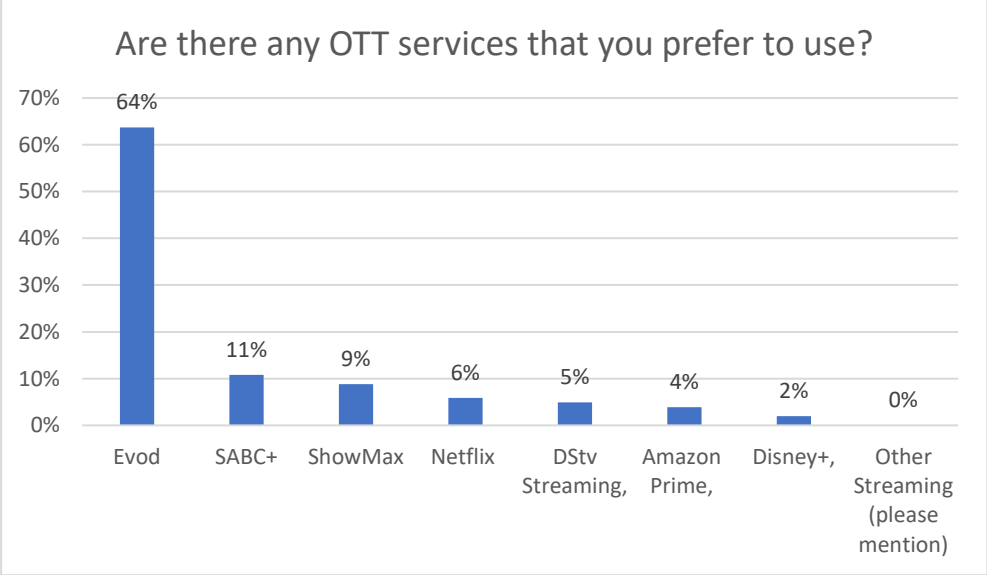


Figure 11: Preferred OTT Service.

The preferences for Evod being 64%, followed by SABC+ at 11% and ShowMax at 9%, can lead to several assumptions about the reasons behind these percentages:

Evod is the most preferred OTT service among the respondents, with 64% out of 102 indicating a preference for this platform. This suggests a strong popularity or satisfaction with Evod's content and offerings. Evod might have a wide variety of content that caters to a broad audience. Content could include popular movies, TV shows, local content, and exclusive content unavailable on other platforms. It also offers competitive pricing compared to other OTT service providers.

4.3.6 What type of device(s) do you use to access OTT services?

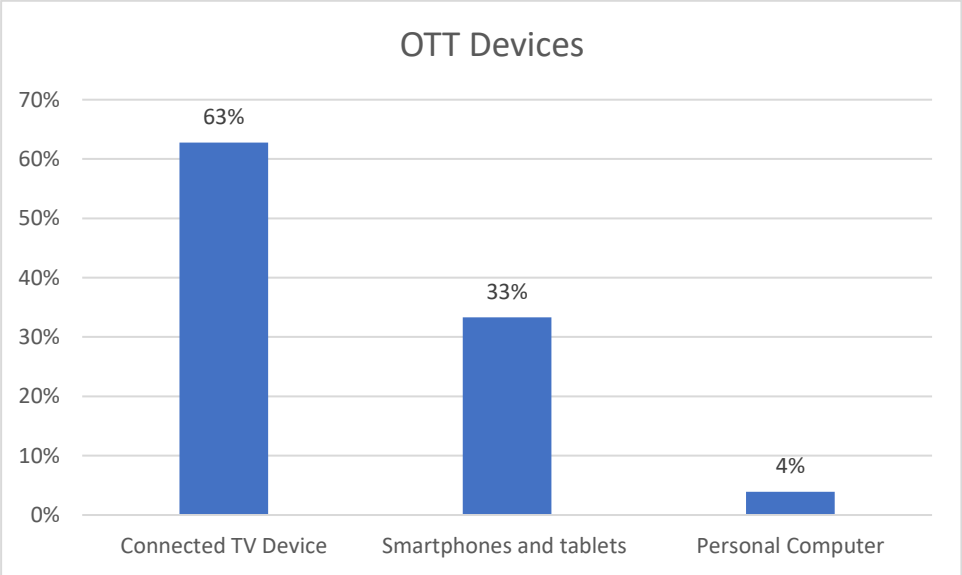


Figure 12: OTT Service Devices.

Users may prefer the larger screens of TVs for a more immersive viewing experience compared to smaller screens like smartphones or tablets as the percentages are 63% compared to 33%. Watching OTT services on TV devices allows users to enjoy content from the comfort of their living rooms or home entertainment areas, potentially with family or friends. The proliferation of smart TVs with built-in OTT apps and streaming capabilities makes it easier for users to access and navigate their favorite OTT services directly from their television sets.

In summary, the assumption drawn from the majority of people connecting TV devices to watch OTT services reflects a preference for enhanced viewing

experiences, convenience, and the shifting landscape of how consumers access and consume entertainment content.

4.3.7 How likely are you to cancel Pay TV subscription and replace with OTT; How often do you use OTT services? And how long have you been using Over-the-Top (OTT) services?

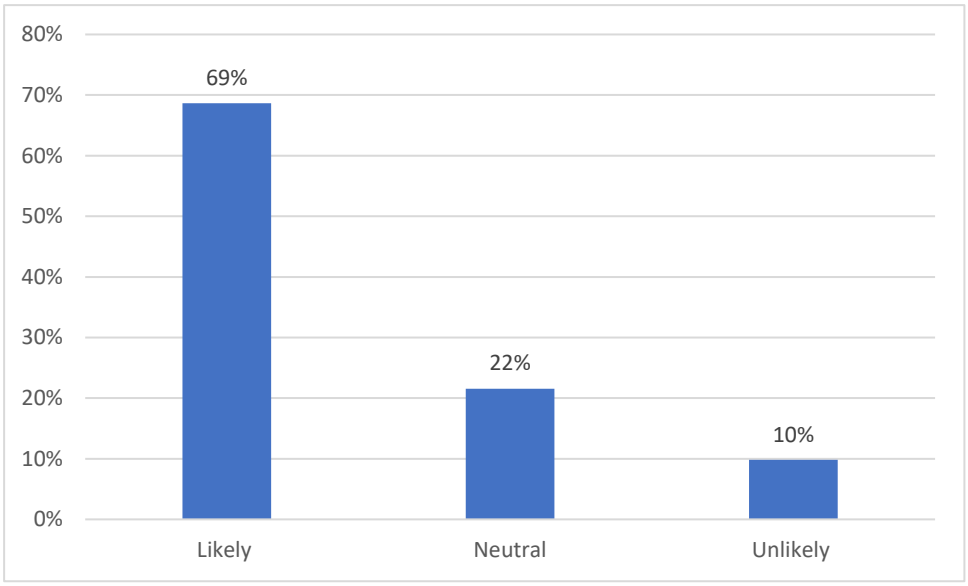


Figure 13: How likely are you to cancel Pay TV subscription and replace with OTT.

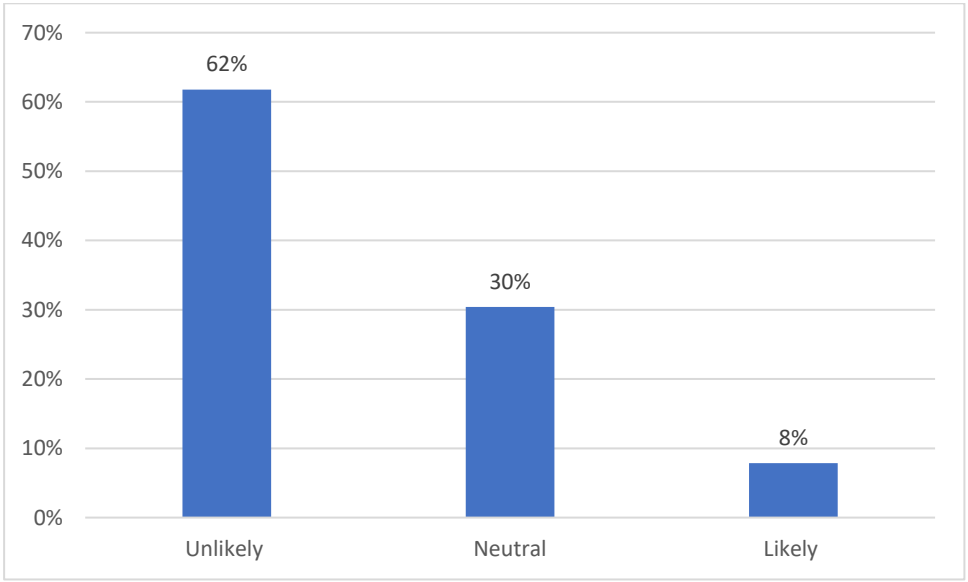


Figure 14: How often do you use OTT services?

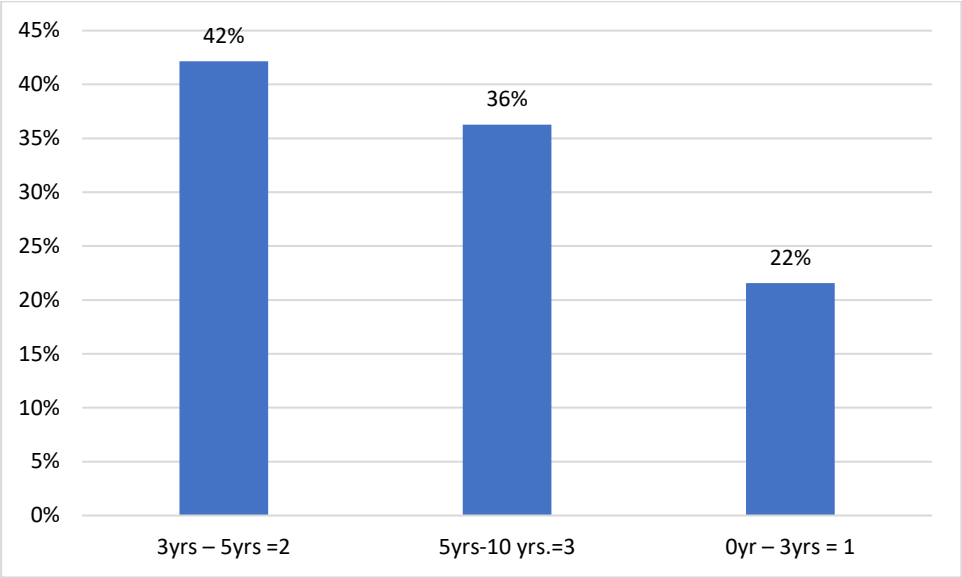


Figure 15: How long have you been using Over-the-Top (OTT) services?

Comparing the provided statistics on consumers' likelihood to cancel Pay TV subscriptions and replace it with OTT, their frequency of OTT usage, and the duration of their OTT service usage reveals interesting insights:

Interestingly, most respondents (63%) report being unlikely to use OTT services frequently. This contrasts with the high likelihood of cancelling Pay TV subscriptions in favour of OTT. It suggests that while consumers express an intention to switch to OTT, they may not currently use these services extensively. Possible reasons could include limited content availability, preferences for traditional TV viewing habits, or dissatisfaction with current OTT offerings.

4.3.8 Do you prefer streaming content over OTT platforms or social media sites; or are you using paid or non-paid alternative streaming services?

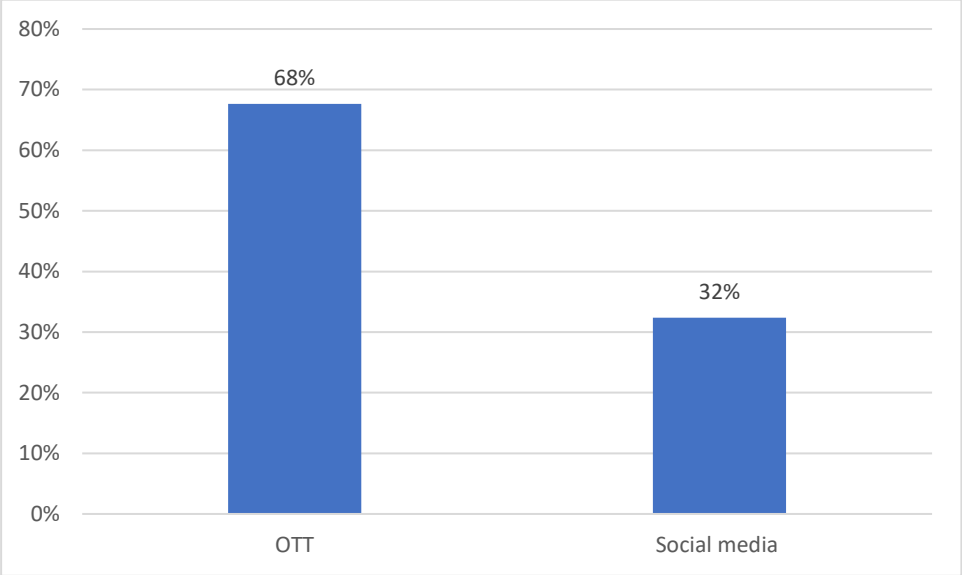


Figure 16: Do you prefer streaming content over OTT platforms or social media sites.

A significant majority of respondents (69%) prefer consuming streaming content over OTT platforms rather than social media sites. This preference suggests that respondents prioritize accessing professionally produced content on OTT platforms, such as movies, TV shows, and original series, over user-generated content on social media platforms.

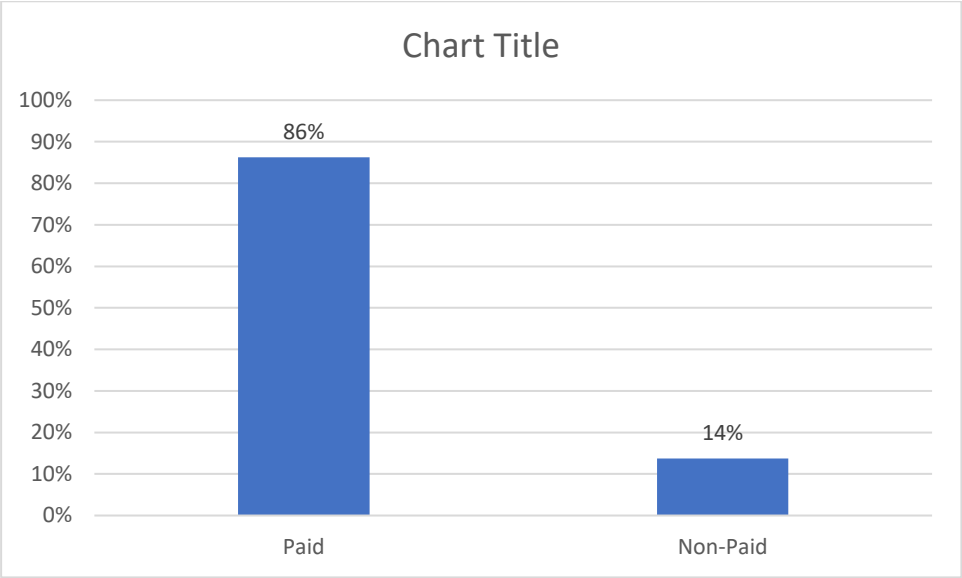


Figure 17: Are you using paid or non-paid alternative streaming services?

The overwhelming majority of respondents (86%) prefer using paid streaming services rather than non-paid alternatives. This preference highlights the perceived value and quality associated with paid streaming services, which often offer ad-free experiences, exclusive content, and a wider selection of titles compared to non-paid alternatives.

4.4 Reliability and Validity Analysis

Determining the internal consistency reliability as well as the construct validity for our OTT usage variable

The study ran a Cronbach's alpha test to determine whether we could obtain a reliable construct concerning the OTT usage variable.

OTT 1 – refers to when we asked people (Q 10 - How likely are you to cancel Pay TV subscription and replace with OTT?)

OTT 2 – refers to when we asked people (Q11 - How often do you use OTT services?)

Internal reliability alludes to the degree to which our data can measure the same constructs consistently Salkind, (2017). Two items were used to compute this construct. The results from our analysis were as follows:

Table 3: Reliability Statistics

Scale	Cronbach's Alpha	N of Items
OTT usage	.590	2

Table 3 shows the reliability statistics for our OTT usage construct derived from our questionnaire. The result shows that the research did not obtain a statistically reliable construct. For a construct to be considered reliable, the research needs to get a Cronbach's alpha value greater than 0.65 Peters and Lee, (2016). Furthermore, the study also tested for construct validity. For constructive validity to be sufficient, the research ran a Pearson's correlation analysis and obtained significant correlations ranging from moderate to vigorous (0.4 to 0.99). The results from our analysis are shown below:

Table 4: Pearsons Correlation Analysis

		OTT1	OTT2
OTT1	Pearsons Correlation	1.000	.419
	Sig. (2-Tailed)		<.01
	N	102	102
OTT2	Pearsons Correlation	.419	<.001
	Sig. (2-Tailed)	<.01	
	N	102	102

The correlations above show that the study obtained a moderate positive correlation ($r(102) = .419$, $p<.01$), which implies that the two items are valid. Due to the results conforming to construct validity, we took the means from both items within our scale and computed a continuous variable, which we named OTT Usage.

4.5 Identifying whether the availability of the Internet had a significant impact on the accessibility of streaming TV content within South Africa

For the first research objective, a logistic regression was run. The independent variable was a binary variable in which participants were required to provide whether they had access to the internet. The dependent variable was also a binary variable in which participants stated whether they mostly engage with linear television or streaming. The null and alternative hypothesis was stated as follows:

Independent Variable - refers to when the study asked people (Q 5 - Do you have access to the internet?)

Dependant Variable – refers to when the study asked people (Q 7 - Do you have any of the following services (Linear/Streaming?)

H0a: Internet Access should have no impact on whether people prefer linear TV or Streaming

H0b: The device choice has no impact on whether people prefer linear or streaming TV.

H1a: Internet Access should have an impact on whether people prefer linear TV or Streaming

H1b: The device choice has no impact on whether people prefer linear or streaming TV

4.5.1 Descriptive Statistics – Logistic Regression Analysis

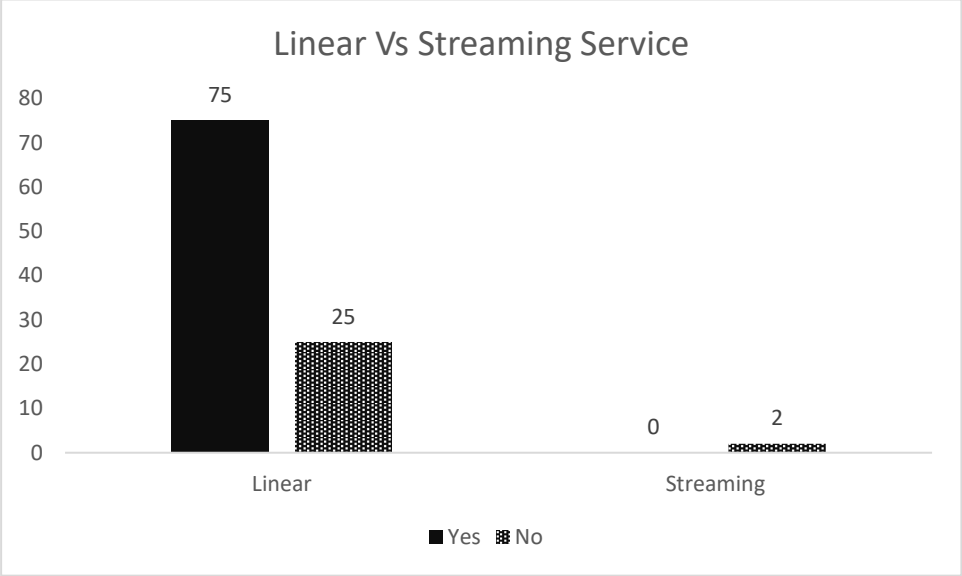


Figure 18: Linear vs Streaming Services.

The results from Figure 1 above shows that most people certainly prefer linear media content. Only 2 people had subscribed to streaming services. Concerning the Linear content, most people who consumed linear content had internet access. Also. based on the figure above it is quite evident that there is no substantial trend to suggest that internet access had any effect based on the type of content consumed.

Statistical Hypothesis Testing – Logistic Regression Analysis with internet access as our independent variable

The study ran a logistic regression analysis due to our dependent variable being a binary variable (Linear or Streaming content). The results from the regression analysis is as follows:

Table 5: Model Summary

Step	-2 Log likelihood	Cox & Snell R Square	Nagelkerke R Square
1	112.467a	.027	.039

As seen in Table 5 above, internet access could only explain 3.9% of the variance in the dependent variable which indicates a low amount of explanatory power.

Based on the nature of the data, the goodness of fit of our model could not be analysed. This therefore indicates that the study should accept our null hypothesis. However, the study will look at the coefficients table to determine whether this assumption is true:

Table 6: Variables in the equation

		B	S.E.	Wald	df	Sig.	Exp(B)
Step 1[a]	Internet Access	-22.302	40192.94	.000	1	1.000	.000
	Constant	7.614	1.523	25.003	1	<.001	2026.229

When evaluating Table 6 above has a significance level for our internet access variable that is 1.000. Therefore, based on this evidence the study can therefore conclude that internet access has no impact on the type of media consumed and we would therefore accept our null hypothesis. However, when we controlled for the device type the following results were returned:

		B	S.E.	Wald	df	Sig.	Exp(B)
Step 1[a]	Internet Access	22.871	40192.94	.000	1	1.000	.000
	Smart Phones	1.237	.496	6.225	1	.013	3.445
	Personal Computers (1)	1.668	1.058	2.486	1	.115	5.300
	Constant	7.614	1.523	25.003	1	<.001	2026.229

When analysing the results of our logistic regression we primarily look at the odds ratios (Exp(B). However, the beta values (B) can be interpreted as which variables would increase the likelihood of a certain outcome occurring. A positive value indicates the likelihood that we would obtain the true result (which is streaming in our case). When people opted for smartphones devices, they were

3,4 times more likely to select streaming as opposed to linear TV. Personal computers had no impact on the decision between linear TV and streaming. Based on this evidence we would still accept the null hypothesis for our internet access variable, but we would reject the null hypothesis with respect to the device choice.

4.6 Assessing whether there was a growth in streaming site activity and whether internet availability could be considered as a significant factor for overall growth.

For this section, we ran a simple linear regression to determine whether internet access had a significant impact on OTT usage (the variable that we computed within section 4.2). The null and alternative hypothesis is as follows:

Independent Variable – refers to when we asked people (Q 5 - Do you have access to the internet?)

Dependant Variable – OTT Usage (New Variable) as per reliability and validity statistics.

HO: Internet Access should have no impact on OTT usage

H1: Internet Access does have an impact on OTT usage.

4.6.1 Descriptive Statistics – Simple Regression Analysis

Table 7: Descriptive Statistics – Simple regression model

	Mean	Standard Deviation	N
OTT Usage	2.913	1	101
Internet Access (Y/N)	0.311	1	101

The descriptive statistics in Table 7 above shows that OTT usage demonstrated the highest mean as well as the highest variance (M = 2.913, SD = 1). Since our Internet access variable is a binary variable, it is not required for us to interpret the descriptive statistics. The descriptive statistics for this variable was highlighted in the previous section.

4.6.2 Statistical Hypothesis Testing – Simple Linear Regression Analysis with OTT usage as our dependent variable

The model summary demonstrates how well the independent variable is able to explain the variance in our dependent variable. The results are shown below.

Table 8: Model Summary[b]

Model	R	R -Square	Adjust R-squared.	Std Error
1	.280[a]	.079	0.069	22.385

a. Predictors: (Constant), Internet Access

b. Dependent Variable: OTT Usage

Table 8 above shows that Internet access was only able to explain 7.9% of the variance in the OTT Usage which indicates a very low amount of explanatory power. The standard in most social science research practices that is deemed acceptable is usually an R-squared value above 20%. We then check the ANOVA statistics to determine whether our model is a good fit:

Table 9: ANOVA Table

Model		Sum of Squares	df	Mean square	F	Sig
1	Regression	4229.99	1	4228.99	8.44	.005
	Residual	49607.65	99	501.09		
	Total	53838.63	100			

Table 9 indicates that the simple linear regression model is a good fit (F (1,99) = 8.44, p=.005, R2 = .079). We will now analyse the magnitude of the effect that internet access has on our dependent variable.

Table 10: Coefficients Table for independent variables

Model		Unstandardized Coefficients		Standardized Coefficients			Collinearity Statistics	
		B	Std. Error	Beta	t	Sig.	Tolerance	VIF
1	(Constant)	139.710	22.828		6.120	<.001		
	Internet Access	65.355	22.497	.208	2.905	.005	1.000	1.000

a. Dependent Variable: OTT Usage

In the table above, a positive coefficient indicates that if the independent variables increase or decrease, the dependent variable will do the same. Therefore, Table 10 demonstrates that for every participant who said that they do have internet access, OTT usage increased on average by 65.4%. Furthermore, it was shown that internet access also proved to be statistically significant within our model (t = 2.905, p = .005). Based on our analysis above, we can therefore reject the null hypothesis and conclude that Internet access did have a significant impact on OTT usage.

Table 11: Coefficients Table for independent variables

Model		Unstandardized Coefficients		Standardized Coefficients			Collinearity Statistics	
		B	Std. Error	Beta	t	Sig.	Tolerance	VIF
1	(Constant)	143.175	22.156		6.183	<.001		
	Smart Phones	-3.980	4.825	-.079	-.806	.422		

Personal Computer	-11.212	11.578	-0.95	-.968	.335		
Internet Access	67.087	22.361	.288	2.964	.004	1.000	1.000

In Table 11 we controlled for device choice and it was found that none of the devices had a significant impact on OTT usage. Overall, the lack of significant impact of device choice on OTT usage despite controlling for it suggests that other factors, such as user preferences, cross-device usage habits, and content availability, may play a more substantial role in influencing OTT consumption behaviour.

4.7 Investigating how streaming has impacted viewership of Linear TV within a South African context.

For our last research objective, we evaluated whether OTT usage had an influence on the satisfaction one derives from watching Linear Pay TV. Like the last objective, we ran a simple linear regression. Our dependent variable did not undergo any reliable or valid testing due to limitations in the data. Similar to our other research objectives, the null and alternative hypothesis is as follows:

Independent Variable – OTT Usage (New Variable) as per reliability and validity statistics

Dependant Variable – (Q 21-What satisfaction is getting from watching Linear Pay TV)

HO: OTT Usage does not have a significant influence on Linear Pay Tv satisfaction.

H1: OTT Usage does have a significant influence on Linear Pay Tv satisfaction.

4.7.1 Descriptive Statistics – Simple Regression Analysis

Table 12: Descriptive statistics for OTT usage and Linear Pay TV satisfaction variables

	Mean	Standard Deviation	N
OTT Usage (LN)	4.2068	0.55	101
Linear Pay TV Satisfaction	44.525	29.28	101

When analysing Table 12 above, Linear Pay TV Satisfaction shows a considerable larger mean and standard deviation as our variables were not measured on the same scale (M = 44.525, SD = 4.2068). It should also be noted that this time the OTT usage variable was transformed into a natural log.

4.7.2 Statistical Hypothesis Testing – Simple Linear Regression Analysis with Linear Pay TV Satisfaction as our dependent variable

Table 13: Model Summary

Model	R	R -Square	Adjust R-squared.	Std Error
1	.211[a]	.045	0.035	28.765

c. Predictors: (Constant), OTT Usage

d. Dependent Variable: Linear Pay TV

Table 13 above shows that our independent variable is only able to explain 4.5% of the variance in Linear Pay TV. Similar to section 4.4, we will now evaluate if our model conforms to the linearity assumption (Goodness of fit test). The ANOVA statistics are noted below:

Table 14: ANOVA Statistics.

Model		Sum of Squares	df	Mean square
1	Regression	3835.57	1	3835.57
	Residual	81913.62	99	827.410
	Total	85749.19	100	

When analysing table 14 above, we see that we have obtained a statistically significant result (F (1,99) = 4.44, p = .034, R2 = .45) This confirms that our model is a good fit, we will now assess the magnitude of the impact within our coefficients table below:

Table 15: Coefficients Table

	Unstandardized Coefficients		Standardized Coefficients			Collinearity Statistics	
Model	B	Std. Error	Beta	t	Sig.	Tolerance	VIF
(Constant)	-2.635	22.090		-0.119	.905		
OTT Usage (LN)	11.210	5.207	.211	2.153	.034	1.000	1.000

a. Dependent Variable: Linear Pay TV Satisfaction

We obtained a positive coefficient regarding our OTT usage variable implying that when OTT usage increases, so would the satisfaction for Linear Pay TV. Since we transformed the independent variable into a natural log, we observe that when OTT usage increases by 1%, Linear Pay TV satisfaction also increases by 11% on average (t = 2.153, p = .034). We transformed the independent variable as we found that the standard variable violated the linearity assumption.

Model		Unstandardized Coefficients	Standardized Coefficients			Collinearity Statistics	
	B	Std. Error	Beta	t	Sig.	Tolerance	VIF
(Constant)	0,399	21, 926		-0,015	.905		
Smart Phones	-4,464	6.103	-0,72	-0,731	0,000		
Personal Computer	-28,992	14.671	-1,94	-1,976	0,051		
OTT Usage (LN)	11,123	5,156	0,210	2,157	0,033	11,123	5,156

a. Dependent Variable: Linear Pay TV Satisfaction

Similar to the previous objective we controlled for the device choice. It was found that personal computers had the most significant impact when compared to all other devices (t = -1, 976, p = 0.051, b= -28. 992)

Based on the above analysis there is sufficient evidence for us to reject the null hypothesis and conclude that OTT usage does somewhat have a significant impact on Linear Pay TV satisfaction.

4.8 Closing of Presentation of the Findings

The aim of this chapter was to address the research objectives and perform the required data analysis from the data derived from our data collection instrument.

We first conducted the required reliability and validity analysis with respect to our OTT usage variable. It was found that we did not obtain a statistically reliable result. However, because the construct was statistically valid, we decided to compute the variable based on the means of the two items.

We then conducted a logistic regression to test whether internet access by itself could predict the type of media being utilised. The results were found to be

inconclusive. The Chi squared test also confirm the outcome of the result. However, when people opted for smartphones devices, they were 3,4 times more likely to select streaming as opposed to linear TV.

We also ran a simple linear regression to determine whether internet access had an impact on OTT usage. It was found that it did have a significant positive impact Overall, while internet access is a crucial factor driving OTT usage, the influence of device choice may be mediated by a variety of other considerations. Understanding these complex interactions can provide valuable insights for OTT service providers seeking to optimize their offerings and enhance the user experience across different devices and platforms.

Lastly, we ran another simple linear regression. Overall, the regression analysis showed that there was a significant positive impact between OTT usage and Linear Pay TV satisfaction. However, further research may be needed to explore the underlying mechanisms and dynamics driving this relationship. Additionally, considering the dynamic nature of the media landscape, ongoing monitoring and analysis of consumer behaviour and preferences are essential for industry stakeholders to adapt and thrive in an increasingly competitive environment.

CHAPTER 5: CONCLUSIONS, LIMITATIONS AND RECOMMENDATIONS

5.1 Introduction

Chapter five serves as the culmination of the research journey, where the delved into the implications of our findings in relation to the study's objectives. Building upon the overarching complete analysis presented in the previous chapter, this final discussion provides a holistic perspective on the impact of internet availability on content streaming versus linear TV consumption in South Africa.

Navigating through the findings, the study draws conclusions that not only address the research objectives but also offer actionable recommendations for stakeholders in the media and telecommunications sectors by synthesizing the results within the context of our study's framework, aiming to provide valuable knowledge that inform strategic decision-making and pave the way for future developments in the industry.

Furthermore, this chapter extends beyond mere interpretation, offering concrete suggestions for future research endeavours. By identifying areas for further investigation, we contribute to the ongoing dialogue surrounding media consumption trends and the evolving digital landscape in South Africa.

5.2 Summary and Conclusion

In this section, we align the findings of our study with the relevant literature reviewed and the overarching research objectives. The primary aim of our research was to investigate the influence of internet availability on content streaming versus linear TV consumption in the South African context. To achieve this overarching objective, we developed sub-research objectives, which were further broken down into three key areas:

5.2.1 Sub-Research Objective 1

Identifying whether the availability of the Internet had a significant impact on the accessibility of streaming TV content within South Africa

The literature review, as indicated by Hardin (2013) and supported by our own research findings, underscores a significant global increase in consumer adoption of Over-The-Top (OTT) services, with South Africa reflecting this trend. Hardin's study highlighted a noteworthy surge in OTT usage among respondents, with 54% reported to be utilizing OTT services. Additionally, 47% of respondents expressed a preference for streaming content over traditional television, indicating a shifting consumer preference towards digital media consumption.

Building upon this literature, our research sought to explore the specific relationship between internet availability and OTT usage in South Africa. Through our quantitative analysis, we observed a substantial increase in OTT usage associated with internet access, with OTT usage rising by an average of 65.4% for each individual with internet connectivity. Importantly, our statistical model confirmed that internet access indeed had a significant impact on OTT usage, further validating the findings of Hardin (2013) and highlighting the pivotal role of internet infrastructure in shaping media consumption behaviours.

In light of these findings, we can confidently conclude that internet access serves as a key determinant of OTT usage in South Africa. As internet penetration continues to expand and access becomes more widespread, we anticipate further growth in OTT adoption and consumption patterns. This has profound implications for various stakeholders in the media and telecommunications sectors, necessitating strategic investments in internet infrastructure, content distribution platforms, and digital marketing strategies to capitalize on the burgeoning demand for OTT services.

Overall, our study provides to the existing literature by adding empirical evidence of the relationship between internet availability and OTT usage in the

South African context. By shedding light on this dynamic interplay, we offer valuable insights for policymakers, industry practitioners, and researchers seeking to understand and navigate the evolving media landscape in an increasingly digital-centric era.

The link between internet access and the increase in Over-The-Top (OTT) usage can be established through the observed correlation in our research. In our study, we found that 99% of respondents had access to the internet, with 98% of them paying for their own internet services. This high rate of internet access and self-payment indicates a widespread and financially supported internet infrastructure among the surveyed population.

Overall, the linkage between internet access, self-payment for internet services, and the increase in OTT usage highlights the pivotal role of internet infrastructure in shaping contemporary media consumption patterns. This interconnectedness underscores the importance of continued investment in internet infrastructure and digital inclusion initiatives to facilitate unbiased access to digital content and services in the evolving media landscape.

However, it's important to recognize that while high rates of internet access and self-payment for internet services may indicate a widespread and financially supported internet infrastructure, they do not necessarily establish a direct causal link between internet access and increased Over-The-Top (OTT) usage. Several factors beyond internet access alone may influence OTT usage patterns, including but not limited to:

Content Availability: The availability and diversity of content on OTT platforms play a significant role in driving consumer adoption and usage. Even with widespread internet access, if the content offered on OTT platforms does not align with consumer preferences or interests, uptake may be limited.

User Preferences: Individual preferences and habits also influence OTT usage. Some consumers may prefer the convenience and flexibility of OTT services, while others may still prefer traditional linear TV or other forms of entertainment.

Technological Literacy: The ability to navigate and utilize OTT platforms effectively may vary among individuals, impacting their likelihood of engaging with such services even if they have internet access.

Economic Factors: Affordability of OTT subscriptions, as well as access to devices capable of streaming content, can also affect usage patterns. Even if internet access is widespread, financial constraints may limit the ability of some individuals to subscribe to OTT services.

5.2.2 Sub-Research Objective 2

Assessing whether there was a growth in streaming site activity and whether internet availability could be considered as a significant factor for overall growth.

This objective seeks to understand how internet availability acts as an enabler for the adoption and utilization of streaming services, shaping consumer perceptions and usage patterns. This objective delves into the subjective aspects of consumer engagement with streaming sites and their underlying motivations for using these platforms.

The previous study highlights the impact of increased internet availability in South Africa on the growth of both legal and illegal Over-The-Top (OTT) streaming services. It acknowledges that improved internet infrastructure has facilitated the accessibility and affordability of streaming TV content, leading to a more enjoyable and accessible viewing experience for consumers. However, it also notes the challenges posed by the lack of available content on legal platforms and the rise of illegal streaming, which has implications for copyright infringement and industry profitability.

In contrast, the current study focuses specifically on the relationship between internet availability and OTT usage. It finds that internet access significantly influences OTT consumption behaviour, with OTT usage increasing on average for every participant with internet access. Furthermore, the study explores the impact of device choice on OTT usage, revealing that device type does not significantly affect consumption patterns.

While it's evident that internet access facilitates access to OTT services, the extent to which it influences consumption behaviour may vary among individuals. Components such as topographical area, socio-economic status, , and social standards can shape how people utilize web network for media utilization. For example, individuals in rural areas with limited internet infrastructure may have access to OTT services but may not utilize them to the same extent as those in urban areas with robust internet connectivity.

Role of Device Choice: While the current study suggests that device choice does not significantly affect OTT consumption patterns, it's essential to delve deeper into the reasons behind this finding. Different devices offer varying levels of convenience, screen size, and user experience, which can influence how individuals engage with OTT content. For instance, mobile devices may be preferred for on-the-go viewing, while smart TVs may be favoured for immersive home entertainment experiences. Therefore, while device choice may not directly impact consumption patterns, it could still play a role in shaping the overall user experience and preferences.

User Preferences and Content Accessibility:

Beyond internet access and device choice, individual preferences and content accessibility also play a critical role in determining OTT consumption behaviour. Consumers may gravitate towards platforms that offer content tailored to their interests, regardless of the device used or the availability of internet access. Additionally, factors such as the availability of high-quality content, ease of navigation, and subscription costs can significantly influence consumer choices and usage patterns.

Evolution of Technology and Consumer Behavior:

As technological innovation continues, and consumer behavior evolves alongside it, the relationship between internet availability, device choice, and OTT usage may change. Emerging technologies such as 5G networks, could reshape how individuals' access and interact with OTT content, potentially altering consumption patterns in unforeseen ways.

5.2.3 Sub-Research Objective 3

Investigating how streaming has impacted viewership of Linear TV within a South African context.

The previous study predicts a negative impact on linear television viewership due to the growth of Over-The-Top (OTT) services. It suggests that traditional linear television providers must adapt their strategies to include more OTT offerings to remain competitive in the future.

Contrary to the notion that there is a high likelihood of cancelling Pay TV subscriptions in favour of Over-The-Top (OTT) services, most respondents reporting being unlikely to use OTT services frequently raises questions about the actual extent of adoption and utilization of OTT platforms. This discrepancy between intention and behaviour underscores the complexity of media consumption preferences and the nuances involved in transitioning from traditional Pay TV to OTT services.

In contrast, our study reveals insights into media consumption preferences, indicating a trend towards OTT services and social media among respondents. While there is a high likelihood of cancelling Pay TV subscriptions in favour of OTT, most respondents report being unlikely to use OTT services frequently. However, there is evidence suggesting that OTT usage does have a significant impact on Linear Pay TV satisfaction.

Impact on Linear Pay TV Satisfaction:

Despite the expressed intention to transition towards OTT services, the study also indicates that the majority of respondents (63%) report being unlikely to use

OTT services frequently. This discrepancy between intention and behaviour suggests that while there is a willingness to embrace OTT services in principle, there may be barriers or limitations preventing regular engagement with these platforms; and the likelihood of cancelling Pay TV subscriptions in favour of OTT, the evidence suggesting that OTT usage has a significant impact on Linear Pay TV satisfaction introduces complexities into the relationship between the two. It implies that while some consumers may supplement or replace Pay TV with OTT services, their overall satisfaction with linear television may still be influenced by their OTT consumption habits. This underscores the interconnectedness of different media platforms and the need to consider their collective impact on consumer satisfaction and preferences.

To summarise the above and conclude:

To effectively link service providers initiatives to the availability of internet and address the impact of increased internet availability on content streaming versus linear TV in South Africa, a comprehensive approach is necessary. Here's a detailed summary that encompasses all contributing factors:

Collaboration for Linear and OTT Integration:

OTT service providers can collaborate with traditional linear TV providers to integrate OTT offerings into their existing service packages. This collaboration can involve joint marketing efforts, content sharing agreements, and bundling OTT subscriptions with traditional TV packages.

By forming partnerships with OTT broadcast service providers, Linear TV providers can leverage their expertise in content creation, distribution, and regulatory compliance to enhance the quality and diversity of its OTT content offerings.

Regulatory Improvement:

Linear TV providers can work with regulatory authorities and industry stakeholders to improve regulations governing the broadcasting and OTT

sectors. This includes advocating for clear and consistent regulatory frameworks that promote fair competition, consumer protection, and content diversity.

By actively participating in regulatory discussions and policy development initiatives, broadcast service providers can contribute to the creation of a conducive environment for innovation, investment, and growth in the broadcasting and digital media industries.

Digital Inclusion and Economic Empowerment:

Broadcast service providers can collaborate with government agencies, NGOs, and other stakeholders to promote digital inclusion initiatives aimed at increasing internet access and affordability, particularly in underserved communities.

Telecommunication stakeholders can support digital inclusion by supporting initiatives that expand broadband infrastructure, offer subsidized data plans, and provide digital literacy training.

Furthermore, media service providers can contribute to poverty reduction and unemployment alleviation efforts, by engaging in job creation and skills development programs. This can include providing training and employment opportunities in content production, distribution, marketing, and customer support roles.

Stakeholder Engagement and Social Responsibility:

Broadcast service providers should actively engage with all stakeholders, including employees, content creators, advertisers, regulatory authorities, and consumers, to ensure that their interests and concerns are addressed.

By fostering transparent communication, fostering collaboration, and promoting ethical business practices, Broadcast service providers can build trust and credibility within the industry and society at large.

In summary, broadcast service provider's efforts to leverage internet availability and navigate the evolving media landscape in South Africa should encompass collaboration, regulatory improvement, digital inclusion, economic empowerment,

stakeholder engagement, and social responsibility. By adopting a holistic approach that addresses the needs and aspirations of all stakeholders can position itself as responsible and impactful players in the broadcasting and digital media sectors.

5.3 Recommendation

Based on the findings, stakeholders in the media and telecommunications sectors can consider the following recommendations: Traditional linear television providers should invest in developing and integrating OTT offerings into their service portfolios to remain competitive. Enhancing content availability, user experience, and affordability to attract and retain subscribers.

Expand legal content offerings on streaming platforms to mitigate the appeal of illegal streaming. Policymakers should consider regulatory frameworks that promote competition and innovation in the media industry while protecting consumer rights and intellectual property to combat piracy.

Overall, continued research into the dynamics of internet availability, content streaming, and linear TV consumption is essential for informing policy decisions, guiding industry strategies, and promoting digital inclusion and access to diverse media content in South Africa.

5.4 Limitations

The study may have relied on convenience sampling methods, such as online survey forms distributed through social media platforms. This approach could result in a sample population that is skewed towards individuals who are more active on social media or have greater access to the internet. As a result, the sample may not accurately reflect the broader demographic diversity of the South African population.

The study was conducted in South Africa which does not have enough OTT service providers to measure the industry's competitiveness. Furthermore, the paucity of literature on the topic posed a challenge, especially in South Africa.

South Africa faces significant disparities in internet access and digital literacy across different socio-economic groups. Individuals from lower-income households, rural areas, or marginalized communities may be underrepresented in the sample due to limited access to digital devices and internet connectivity. This exclusion can lead to an incomplete understanding of the media consumption behaviours and preferences of these population segments. The study may not adequately capture variations in internet infrastructure and media consumption patterns across different regions of South Africa. Urban areas with better internet connectivity and higher digital penetration rates may be overrepresented in the sample compared to rural or remote areas with limited access to digital technologies.

5.5 Suggestions for Future Research

Future research could explore additional factors influencing OTT consumption behaviour, such as demographic trends, regulatory policies, and technological innovations. Longitudinal studies could also track changes in media consumption patterns over time to provide insights into evolving trends and dynamics in the digital media landscape.

Overall, the comparative analysis of the two studies underscores the importance of internet availability in shaping OTT usage and highlights the multifaceted nature of challenges and opportunities in the digital media ecosystem of South Africa. By addressing these issues, stakeholders can work towards creating a diverse, more inclusive and sustainable media environment for consumers and content providers alike.

Supplement quantitative data with qualitative research methods such as interviews and focus groups to gain a deeper understanding of consumer motivations, preferences, and barriers to adopting streaming services. Qualitative insights can provide context and nuance to quantitative findings, helping identify actionable strategies for industry stakeholders.

Hence, further research studies on OTT TV services and pay TV in South Africa would enhance the existing body of knowledge. Companies operating in this

domain stand to gain from investing in research endeavors, as it can inform government policies, enrich the collective understanding, and aid in formulating strategic initiatives for entities in the digital media sector.

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7 APPENDICES

7.1 Survey Questions

Good day all.

I am researching the factors that influence video content use in South Africa. My objective is to understand how increased internet availability improved accessibility to consumers in streaming TV content in South Africa; based on availability and affordability and how streaming impacts the viewership of linear TV and develop recommendations for improving the linear TV viewing experience in South Africa.

I would appreciate your time and valuable feedback in taking this survey. It should not take longer than 10 minutes to complete. Participation is voluntary, anonymous, and private and you are free to withdraw your feedback at any point. Demographic information such as age and gender will be requested but no

personal identification information will be required. The data will be used for academic research purposes only.

please click on the link below to access the survey: https://qualtricsxmmgx7sxvn4.qualtrics.com/jfe/form/SV_39ss3qEB08Sc9E2

Question	Response Type
1. I identify as: • Female • Male • Gender Fluid • Non-Binary • Prefer not to say	Demographic
2.My age is: • 18-24 • 25-34 • 35-45 • 46-54 • 55+	Demographic
3.I am currently: • Retired • Self-Employed • Student • Unemployed • Full Time employed	Demographic

4.Household Income • Less than R10 000 • R10 000 – R20 000 • R21 000 – R35 000 • R35 000 – R50 000 • R55 000+	Demographic
5.Do you have access to the internet?	Yes/No
6.How are you accessing the Internet? • Pay Own Internet • Free Work Wi-Fi • School Wi-Fi	Multiple Choice
7.Do you have any of the following services? • Free to air (SABC, ETV, OVHD) • I have Pay TV (DStv, Gotv, M-Net) • I have both Pay TV & Free to Air • I have OTT (DStv Streaming, Showmax, Netflix, Amazon Prime, Disney+, etc) (An over-the-top media service is a media service offered directly to viewers via the Internet. OTT bypasses cable, broadcast, and satellite television platforms) • Social Media (Facebook, YouTube, Instagram, Twitter, Telegram, etc..) • None of the above	Multiple choice
8.Are there any OTT services that you prefer to use? • Evod	Multiple Choice

• SABC+ • ShowMax • Netflix • DStv Streaming, • Amazon Prime, • Disney+, • Other Streaming (please mention)	
9.What type of device(s) do you use to access OTT services? • Smartphones and tablets • Personal Computers • Connected TV Devices	Multiple Choice
10. How likely are you to cancel Pay TV subscription and replace with OTT (on a scale of 1-10) 1 being less likely and 10 being more likely)	Likert
11. How often do you use OTT services? (On a scale of 1-10) 1 being less likely and 10 being more likely)	Likert
12. How long have you been using Over-the-Top (OTT) services? • 0yr – 3yrs • 3yrs – 5yrs 5yrs-10 yrs.	Multiple Choice
13. How often do you access OTT through a connected TV device? (On a scale of 1-10) 1 being less likely and 10 being more likely)	Likert

14. How often do you access OTT through a Smart TV? (On a scale of 1-10) 1 being less likely and 10 being more likely)	Likert

15. The range of content available on OTT platform is satisfactory. (On a scale of 1-10) 1 being less likely and 10 being more likely)	Likert
16. Do you prefer streaming content over OTT platform or social media sites • OTT • Social media	Multiple-choice
17. If answered 16 with social media, which alternative streaming service do you prefer • YouTube • Facebook • Instagram • Twitter • Telegram • Other? (Specify)	Multiple Choice
18. Are you using paid or non-paid alternative streaming services? • Paid • Non-Paid	Multiple Choice
19. Which internet services provider are you using to access alternative streaming services (Please mention) e.g. (Vodacom. Telkom, Cell C, ..)	Open Ended
20. On a scale of 01 to 10 how satisfied are you with alternative streaming services? 1 being not satisfied and 10 being more satisfied)	Likert
21. What satisfaction are you getting from watching Linear Pay TV? 1 being not satisfied and 10 being more satisfied)	Likert

22. What satisfaction are you getting from watching paid OTT? 1 being not satisfied and 10 being more satisfied)	Likert
23. I am willing to recommend alternative streaming services to my family and friends?	Yes/No
24. How frequently do you access OTT using a Set-top box? (On a scale of 1-10) 1 being less likely and 10 being more likely)	Likert
25.Have you upgraded Pay TV subscription in the last six months?	Yes/No
26. Have you cancelled Pay TV subscription in the last six months?	Yes/No
27.Given a choice between OTT and Pay TV subscription which one will you choose?	OTT/Pay TV
28 - 29. Is combining OTT and Pay TV subscription an option for you?	Yes/No
30.Which OTT TV will you combine with your Pay TV subscription? • Evod • SABC+ • ShowMax • Netflix • DStv Streaming, • Amazon Prime, • Disney+, • Other Streaming (please mention)	Multiple Choice
31.Are you sharing Pay TV subscription and OTT credentials with friends and family?	Yes/No

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