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Is increased consumer control changing media consumption from media business push to media consumer pull?

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Abstract

In the war to win the consumer's attention traditional media is steadily losing ground to new media platforms; which are distributed and consumed digitally, are ubiquitous with the explosive uptake of smart internet connected devices and provide interconnections amongst platforms, devices and even consumers. New media is changing the balance of power in the media landscape from media businesses to media consumers, who now have unlimited choices available to them from which they can decide on what, when, where and how to consume content. So from the traditional outlook of "mass media" there is a transition happening towards "my media" which provide personalised experiences to consumers.

The purpose of this study is to contribute to the discussion on how consumer control is changing the media landscape by applying the dichotomy of push vs. pull in media consumption. The study sought to explore if with increasing consumer empowerment, the consumer instead of passively relying on content push from media businesses is now actively pulling content to fulfil his/her individual needs.

The study was qualitative and exploratory in nature and utilised in depth and semi structured interviews of media consumers and experts to understand in how the role of the consumer is changing in the media landscape, the factors influencing the change, how the empowered consumer is effecting changes in the way he/she consumes content and media business response to the empowered consumer

The study empirically established that consumer control is definitely on the rise in media consumption with consumers preferring to pull content as per their liking. Furthermore it was empirically validated that consumers from lower income levels were as much in control and pulling content as consumers from higher income levels which is a significant departure from the literature. The study also found that even though media businesses acknowledge consumer control in media consumption their response to it is applying certain tactics without any accompanying change in strategies and business models.

The study recommended that for media businesses to stay relevant in the age of consumer control and the accompanying content pull; they need to be more customer centric in their approach where they design their strategies and business models by being consumer focussed and trying to fulfil their needs.

Keywords

Consumer Control, Push, Pull, Consumer Pull, Media Business Push, Media Business, Business Model, Content Consumption, Technology, Rise of New Media, Decline of Traditional Media

“Consumers will take care of moving great content along at the high speed of their network connection. They, in essence, have become the most powerful media channel in any media plan”

- Judy Franks, Integrated Marketing Communications Expert, Faculty at Medill NorthWestern University, Founder of Marketing Democracy and Celebrated Author

Declaration

I declare that this research project is my own work. It is submitted in partial fulfilment of the requirements for the degree of Master of Business Administration at the Gordon Institute of Business Science, University of Pretoria. It has not been submitted before for any degree or examination in any other University. I further declare that I have obtained the necessary authorisation and consent to carry out this research.

.....

Devarpan Chakraborty

14th January 2015

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1. Chapter 1:- Introduction to the Problem

“Newspaper readership is declining like crazy. In fact, there’s a good chance that nobody is reading this column.”

- Dave Barry, Pulitzer Prize winning columnist and New York Times Bestselling Author.

1.1 Background to the Research Problem

1.1.1 The Great War in the Media Landscape

In the media world in a bid to attract the consumer’s attention, traditional media is encountering a stiff challenge from new media platforms. Words like “audience fragmentation”, “cord cutter” and “cord never” have entered the lexicon of media businesses the world over. A Google search of the term “decline of traditional media” returns over 20 million entries. Data from Nielsen and Pew Research have shown the decline in audience and readership numbers in traditional media like radio, television and print industry. The figure below shows audience numbers declining among cable television channels in the United States.

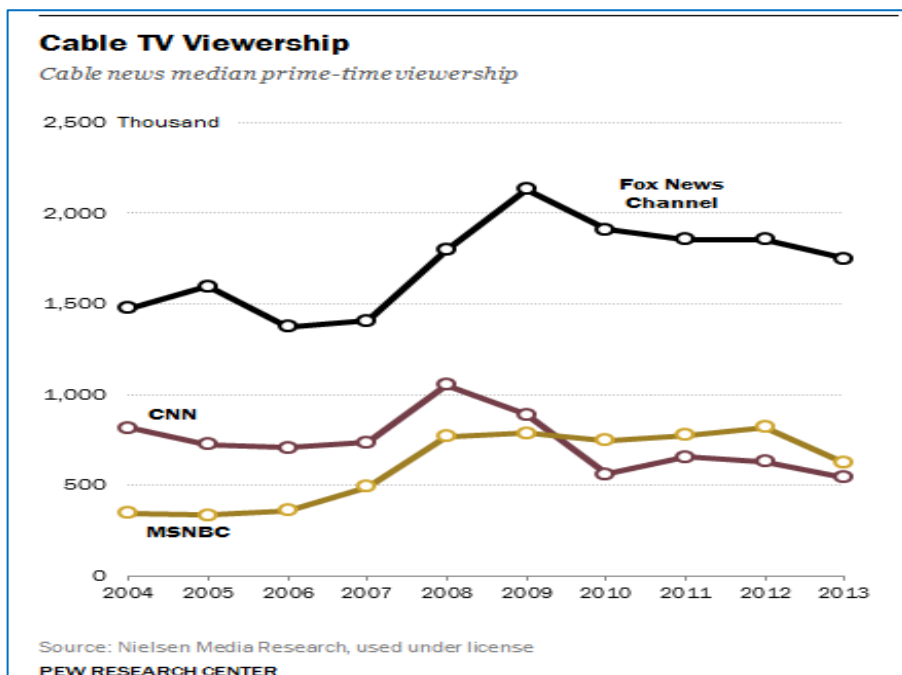


Figure 1: Decline in Television Audiences in the US (Source: Pew Research Centre, State of Media 2014)

There has also been persistent decline in newspaper readership in the United States which is illustrated in the image below.

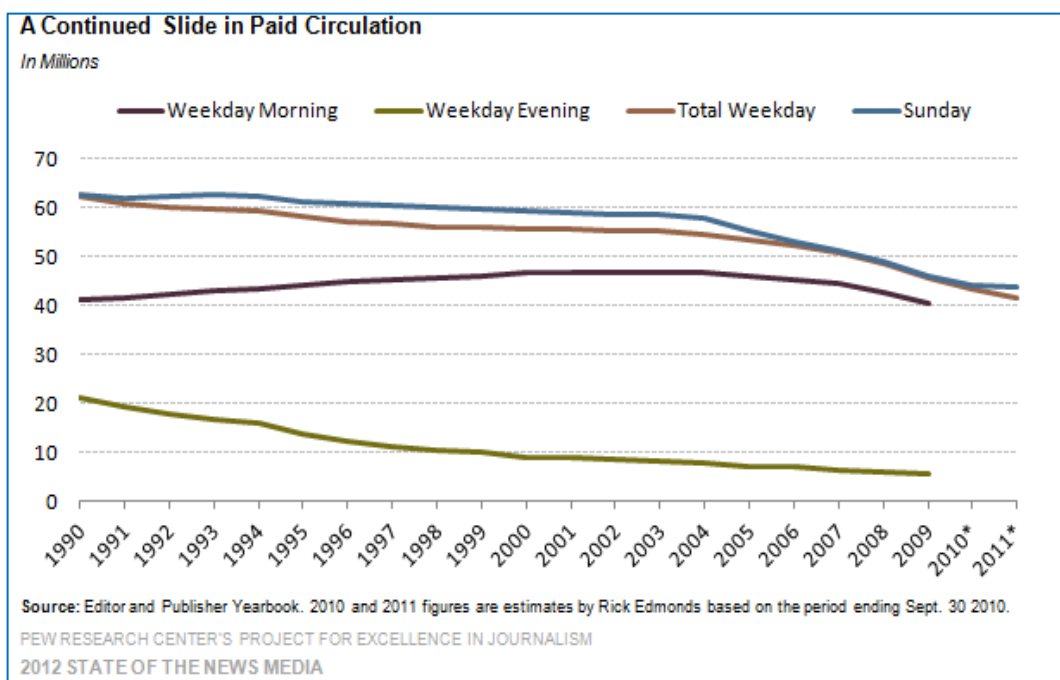


Figure 2: Decline in Newspaper readership in the US (Source: Pew Research Center, State of Media 2012)

This decline in traditional media has been brought about by the en masse adoption of the internet and new media by consumers (Berman, Battino, & Feldman, 2011). There has been an exponential growth of internet users in the past 20 years; where only 16 million people in the world had access to the internet in 1995, more than 3 billion people could access the internet in 2014 (“Internet Growth Statistics - The Global Village Online,” 2014). This growth in internet usage has been associated with increased adoption of smart internet enabled devices globally, where it has been predicted that the number of these smart portable devices would cross the 1.8 billion devices mark worldwide by the end of 2014 (GSM Association, 2014). So it can be seen that consumers are progressively shifting from traditional to new media outlets. This decline in traditional media is not only confined to developed countries, the researcher who is from India and has worked in the digital media industry in multiple African countries like South Africa, Angola, Nigeria, Ghana, Kenya, Tanzania, Uganda and others, has observed in all countries the decline of traditional media accompanied by the rise of new media. In South Africa newspaper circulation numbers are declining across all data points (Moodie, 2014), similarly it is predicted by PricewaterhouseCoopers “Entertainment and Media Outlook Report 2014-2018” (Jager, Stuart, Myburgh, Liebenberg, & Smith, 2014), that the growth in the media

industry in South Africa will be mainly driven by growth in internet spending at CAGR 22.7% with marginal growth in traditional media. This is illustrated in the below image.

South Africa, entertainment and media consumer spend, 2009-2018 (R millions)											
South Africa	Historical data					Forecast data					CAGR %
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	
Books	4 120	3 967	3 901	3 883	3 902	3 917	3 937	3 951	3 964	4 006	0.5%
YOY growth (%)		-3.7%	-1.6%	-0.5%	0.5%	0.4%	0.5%	0.4%	0.3%	1.1%	
Business-to-business	2 691	3 638	3 694	4 030	4 166	4 375	4 631	4 912	5 219	5 558	5.9%
YOY growth (%)		35.3%	1.5%	9.1%	3.4%	5.1%	5.8%	6.1%	6.3%	6.5%	
Filmed entertainment	1 427	1 455	1 604	1 700	1 821	1 936	2 056	2 202	2 375	2 574	7.2%
YOY growth (%)		2.0%	10.2%	6.0%	7.1%	6.3%	6.2%	7.0%	7.9%	8.3%	
Internet	7 955	9 599	12 950	17 816	24 161	31 115	39 416	48 258	57 174	67 218	22.7%
YOY growth (%)		20.7%	34.9%	37.6%	35.6%	28.8%	26.7%	22.4%	18.5%	17.6%	
Magazines	2 966	3 686	4 245	4 826	5 109	5 534	5 963	6 364	6 743	7 114	6.8%
YOY growth (%)		24.3%	15.2%	13.7%	5.9%	8.3%	7.7%	6.7%	6.0%	5.5%	
Music	2 242	2 173	2 057	1 978	1 904	1 816	1 782	1 784	1 808	1 849	-0.6%
YOY growth (%)		-3.1%	-5.4%	-3.9%	-3.7%	-4.6%	-2.0%	0.1%	1.4%	2.3%	
Newspapers	2 677	2 704	2 642	2 691	2 773	2 857	2 943	3 032	3 111	3 176	2.8%
YOY growth (%)		1.0%	-2.3%	1.9%	3.0%	3.0%	3.0%	3.0%	2.6%	2.1%	
Sports	8 641	14 858	8 578	9 230	9 698	10 599	10 957	11 708	12 227	12 866	5.8%
YOY growth (%)		71.9%	-42.3%	7.6%	5.1%	9.3%	3.4%	6.9%	4.4%	5.2%	
Television	12 139	13 846	15 338	16 398	17 527	18 337	19 005	19 742	20 430	21 220	3.9%
YOY growth (%)		13.9%	10.8%	6.9%	6.9%	4.6%	3.6%	3.9%	3.5%	3.9%	
Video games	1 623	1 758	1 958	2 177	2 378	2 560	2 792	3 045	3 334	3 661	9.1%
YOY growth (%)		8.3%	11.4%	11.2%	9.2%	7.7%	9.0%	9.1%	9.4%	9.8%	
Total consumer	46 213	57 372	56 461	64 137	72 760	82 286	92 608	104 025	115 316	128 064	12.0%

Figure 3: Entertainment and Media Spend by South African Consumers (Source: PricewaterhouseCoopers, Entertainment and Media Outlook Report 2014-2018, p. 18)

Whether traditional media will survive this onslaught by new media and internet has been speculated in academic circles (Athey, Calvano, & Gans, 2010; Curran, 2010). In a 2011 Wall Street Journal article, the newspaper industry and dvd rental business were included in the top 10 dying industries along with businesses such as shoe making, apparel manufacturing and appliance repairing (Izzo, 2011). Thus it is seen that in this battle to attract and retain customers traditional media is steadily losing ground to new media platforms.

1.1.2 What are Traditional and New Media?

Before this discussion commences any further, what constitute traditional and new media for this study are elucidated below:

Traditional media in this study refer to mass mediums of entertainment and communication like radio, television and newspapers (Dutta-Bergman, 2004). On the

other hand, new media refer to individualised, digital platforms like video on demand (VOD), internet streaming, internet search engines, social networking sites (SNS), user generated content (UGC) platforms and peer to peer content downloads (Hennig-Thurau, Malthouse, Friege, Gensler, Lobschat, Rangaswamy,& Skiera, 2010). In this study the term new media is interchangeably used with digital media but are meant to signify the same medium with the above discussed characteristics.

1.1.3 Consumer Control in Media

Traditional media has been characterised by homogeneity of the content and bundling of audiences into big groups to which media providers can broadcast content (McPhillips & Merlo, 2008). In this model the media provider is the most important role player and the consumer has very little control over how the content is produced, distributed or presented (Gobé, 2010).

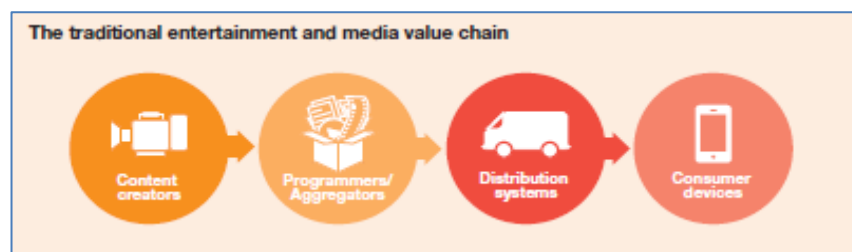


Figure 4: Traditional Media Value Chain (Source: PricewaterhouseCoopers, Entertainment and Media Outlook Report 2014-2018, p. 32)

As seen above, the traditional media value chain is linear and controlled, with a one way flow of information from media businesses to media consumers. This one way model of content dissemination has been successfully used for centuries by people in powerful positions to control the flow of information and content to the masses (Newth, 2010). The media providers have decided on what content their audiences can consume, how the content is produced and distributed (Cha, 2013; Napoli, 2011a; Sundar & Marathe, 2010), and then these media businesses have sold their captured audience information to advertisers who have subjected them to mass advertising of mass produced products (Jaffe, 2005; McPhillips & Merlo, 2008).

But new media has democratised the media landscape, it has given its consumers power and tools to shape their own content pathways (Carrol & Guzman, 2013). New media has given its consumers numerous choices and the ability to choose from these options (Mulhern, 2009). This can be seen with increased fragmentation in media consumption where consumers are partaking content from different platforms on different devices (Kant, 2014; Millington & Wilson, 2010); sometimes

simultaneously to get content to satisfy their individual needs (Berman et al., 2011; Mulhern, 2009). Jenkins (2008) said that in this world of choices and control every consumer is courted on multiple media platforms. This can be seen in the below infographic which shows that all over the world, consumers are increasingly spending more time on new media platforms with shrinking attention on traditional mediums.

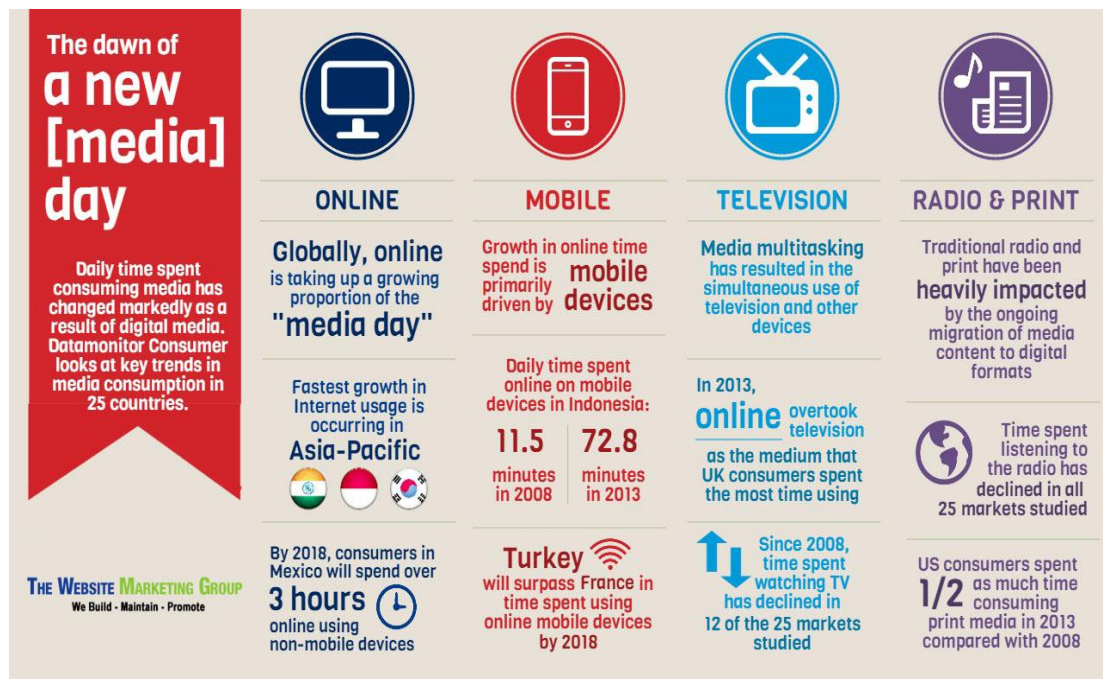


Figure 5: Consumer control and the migration of users towards new media (Source: www.twmg.com.au)

The level of control that consumers now have in media consumption has reached unprecedented levels and consumers are now crafting their own schedules, curating their content, binge watching, creating content, and sharing content amongst themselves (Bright & Daugherty, 2012; Mulhern, 2009; Spurgeon, 2005; Vollmer & Precourt, 2008). So it can be said that with increased consumer control, consumers are to a great extent disintermediating the role of traditional media businesses to get to the content that they want.

It has been posited that increased consumer control can change the pattern of exposure to information from business push to consumer pull (Kitchen & Schultz, 2009; Valos, Ewing, & Powell, 2010) where the consumer can reject pushed messages and instead can pull information from various sources at his/her convenience. As it is seen that consumer control has increased significantly in media consumption so it needs to be empirically ascertained whether this is changing media consumption from push to pull and how media business models are changing have been responding to the change.

1.2 Research Problem

This study was focussed on finding if with increased consumer empowerment in the media landscape; media consumption among consumers is changing from media business push to media consumer pull. Consumer control in media consumption is on the rise and this control could have the power to change the media landscape dramatically.

1.3 Relevance of the Problem

The media industry is presently in a state of flux (Alexander, Owers, Carveth, Hollifield, & Greco, 2004; Hauser, 2014) with the battle between traditional and new media. There is high level of media fragmentation where numerous media options vie for the attention of the media consumer and there is a steady decline of traditional media (Nelson-Field & Riebe, 2011) combined with significant audience fragmentation and migration towards new media which empower their consumers substantially (Valcke, 2011). With this rise in consumer control the position of consumers has changed in the media landscape, from a homogenous view of consumers as audiences who can be aggregated under the control of media businesses (Hollander, 2008; Mulhern, 2009; Nelson-Field & Riebe, 2011) to a move towards a more heterogeneous view of consumers (Brynjolfsson, Hu, & Simester, 2011; Kumar, Sunder, & Ramaseshan, 2011) with increasing control in their choices and as individuals with unique needs and desires (Setia, Venkatesh, & Joglekar, 2013; Vaccaro & Cohn, 2004). So in this world of the empowered consumer who increasingly has the choices and power to get content and information from various sources; it needs to be understood empirically whether the whole pattern of media consumption has now changed from push to pull.

Thus the relevance of this research study is twofold. As the viability of a business is based on its ability to attract and retain consumers (Kotler & Keller, 2012), so it is imperative for businesses to understand their consumers and their associated needs and preferences (Gebauer, Gustafsson, & Witell, 2011). So if consumers are changing the way in which they want to consume content, media businesses need to be aware of the changes and take appropriate steps in response (Heinonen, 2011; M. D. Smith & Telang, 2010; Stanton, Olson, & Bhargava, 2014).

The role of academia is to create and maintain a professional knowledgebase which can be used for answering questions that are pertinent in the society, guiding further research, helping good management decision making, and even commercialise innovation (Mehta, 2004). So this problem is relevant for the academic world to understand how consumer empowerment is changing the way people consume content as consumers are using new media not only for entertainment but also as tools for unmediated communication and effecting social change for example social media played an important role in the events of “Arab Spring” (Khondker, 2011), the “Gaza” conflict (Kwon, Oh, Agrawal, & Rao, 2012) and crisis communication during the Japanese tsunami of 2011 (Bruns & Stieglitz, 2012). The researcher discovered a gap in the literature in fully understanding if this increased consumer control in media consumption is changing media consumption from media business push to media consumer pull. So new thinking in the literature in terms of the role of media consumers (Siano, Vollero, & Palazzo, 2011), media businesses (McPhillips & Merlo, 2008) and their business models (Berman, 2012; Zott, Amit, & Massa, 2011) is required. As Schultz, Block, & Raman (2012) mentioned in the Journal of Marketing Communications that there is very meagre understanding in the literature about how consumers are determining their media consumption and access choices from a media business push and content consumer pull angle.

1.4 Research Objectives

The aim of this study was to gain a more profound understanding of the factors which are influencing increased consumer control in media consumption and if consumer control is changing media consumption from push to pull among consumers. Finally the study wanted to explore the level of business awareness to consumer control and change from push to pull and their responses to them.

- Explore if all consumers now have increased control in deciding on what content they want to peruse and how they want to peruse it.
- Are consumers with increased control now changing media consumption patterns, from being passively pushed content by media businesses to actively pulling content from various sources?
- Determine if media businesses acknowledge consumer control and the paradigm shift in content consumption from push to pull.

- If media businesses are making any changes in their business models and strategies in response to the changed dynamic of consumer pull.

The study was exploratory, descriptive and qualitative in nature since the perceptions of media consumers and media experts were measured in relation to the above research objectives.

1.5 Assumptions and Limitations of the Study

The researcher made the following assumptions during the study and compilation of the report:

- All consumers perceive an increase in control as a benefit to them.
- The strategies and business models of media businesses which were included in the study did not change during the period of investigation.
- No drastic developments took place in the media landscape that made any massive changes either in favour of media business or media consumers.

With regards to limitations, as a result of time, funding and participant access constraints, the sampling method used was non probabilistic that allowed the researcher to use his judgment to select a sample that would best answer the research questions and meet the objectives of the study (Saunders & Lewis, 2012). The researcher is aware of the fact that the respondents selected might not be representative of the entire population. But as Saunders & Lewis (2012) have opined, the aim of a research study is not to produce a theory that is generalisable to the entire population but to try and explain what is happening in one's particular research setting.

1.6 Outline of the Study

The study consists of seven components: a) introduction to the problem b) literature review c) research questions d) research methodology e) research results f) discussion of results and g) research conclusion.

1.6.1 Chapter 2: Literature Review

The literature review evaluates the literature related to consumer control in media consumption and how this control maybe changing media consumption patterns as introduced in Chapter 1. The main objectives of this chapter are to provide context, arguments and perspectives from previous findings and research to give a backdrop on whether consumer control is changing media consumption from push to pull. The following framework was used to provide context, arguments and perspective from previous findings and research:

- Decline of Traditional Media
- Rise of New Media
- Increased Consumer Control in the media landscape
- From Push towards Pull in Content Consumption
- Business Awareness of Consumer Control

1.6.2 Chapter 3: Research Questions

This chapter aimed to systematically investigate, challenge and explore the topic further by posing the research questions for analyses.

1.6.3 Chapter 4: Research Methodology

This chapter discusses in detail the methodology employed in this study and describes the research design, population and unit of analysis, nature of samples and their sizes, interview process and schedule, data collection and analyses, validity and reliability of the data and finally the limitations of the study.

1.6.4 Chapter 5: Research Results

This chapter provides the results of the research conducted in Chapter 4. Evidence is provided within the framework of emergent themes as interpreted by the researcher.

1.6.5 Chapter 6: Discussion of Results

In this chapter the results that were analysed in the preceding chapter are connected to the research question posed in Chapter 3 and integrate them with the literature review. The aim of this chapter is to connect Chapters 1 through 5 cohesively to

promote depth and insights into the findings of the originally stated research objectives.

1.6.6 Chapter 7: Conclusion

This chapter concludes the study, emphasising the key highlights, recommendations and implications of this research study for business and academia and it provides some recommendations on extending this study forward.

1.7 Conclusion

The rise of new media has brought about significant changes in the media landscape, primary among them being the empowerment of media consumers to unprecedented levels (Heinonen, 2011). With a plethora of platforms and technologies that are available now to consumers they are now progressively able to get content and information when, where and how they want (Napoli, 2011a).

In these turbulent times in the media world, an exploration is warranted into media consumption behaviours amongst consumers to investigate whether the entire model of content consumption has changed from consumers being passive recipients of content from media providers to consumers' actively pulling content to suit their individual needs. This exploration can help to better understand the challenges that the empowered consumer is throwing at the "punditocracy of media organisations" (Kwon, Oh, Agrawal, & Rao, 2012, p. 224).



Figure 6: Cartoon on the decline of the newspaper industry (Source: www.chron.com, 2009)

2. Chapter 2:- Literature Review

“The consumer, so it is said, is the king... each is a voter who uses his money as votes to get the things done that he wants done”

- Paul Samuelson, Economist, advisor to John F. Kennedy and Nobel Prize Winner

2.1 Introduction

With the rise of new media there has been a persistent decline in traditional media usage as users have migrated from traditional to new media platforms (Precourt, 2014). The consumer in the age of new media is much more empowered and has far greater control in getting content of his or her liking (Wirtz, Ambtman, Den, Bloemer, Horváth, Ramaseshan, Klundert, Canli, Kandampully, 2013). One of the hallmarks of consumer empowerment has been posited as the ability of consumers to gain control of consumption processes by exercising their own choices to get products or services to fulfil their individual needs (Wathieu, Brenner, Carmon, Chattopadhyay, Wertebroch, Drolet, Gourville, Muthukrishnan, Novemsky, Ratner, Wu, 2002; Wright, Newman, & Dennis, 2006). Traditionally it has been discussed that consumer choice over products and services is driven by either suppliers or the consumers and this is covered in the concept of business push and consumer pull.

The concept of business push and consumer pull and their implications on purchasing behaviour has been discussed extensively in the retail industry (Ewald & Moskowitz, 2007; Martín-Herrán, Sigué, & Zaccour, 2010). It was found that there is little literature available on applying the push pull system in the context of media studies. It has been discussed that new media have empowered consumers to unprecedented levels (Sundar & Marathe, 2010) so it can be assumed that the paradigm of business push and consumer pull in the media industry has changed fundamentally away from push towards pull but this has not been established empirically. Thus it needs to be explored that whether with increased consumer control in the media landscape, consumption patterns have changed from top down content provider push to bottom up content consumer pull.

In this section of the study, the literature review focuses at the academic body of knowledge available presently to explore sequentially the reasons for the decline of traditional media; the rise of new media and how it has empowered the media consumer; a change from push to pull in media consumption and business response to consumer control and content pull.

2.2 The Decline of Traditional Mass Media as we know it

Traditional or mainstream media refers to conventional mediums of communication and include mass media like television, newspapers, radio and direct mail (Hoffman & Novak, 1996). These media forms came to the fore in the first half of the twentieth century, and are characterised by high levels of centralisation with content being produced in certain capitalised locations like newspaper printworks or movie and television studios (Lister, Dovey, Giddings, Grant, & Kelly, 2009). Furthermore consumption patterns were uniform; everyone consumed the same movie, newspaper or radio programme (Lister et al., 2009). So the media systems were standardised in terms of content, distribution and production processes which in turn led to a high extent of control and regulation of these media platforms by their owners to create a clear distinction between producer and user (Lister et al., 2009).

As per Mulhern (2009) traditional mass media has been based on the premise that all audiences can be grouped into monolithic groups based on their tastes or preferences, the content delivery mechanism is “centrally controlled, top-down rigid” (Mulhern, 2009, p. 87). He also argues that traditional media is modular in nature where content providers bundle content together into packages for their audiences and the consumer has no choice on choosing a particular content from this bundle, typical examples being satellite television packages. McPhillips & Merlo (2008) said that traditional media business models have been historically structured on media owners acting as content providers and broadcasting their content to consolidated customers of these media owners. Revenue generation primarily occurs through giving companies and advertisers access to the media owner’s audiences while subscription to content by consumers is the secondary source of revenue (McPhillips & Merlo, 2008). This is depicted in the diagram below, the success of this model depends heavily on the media providers balancing and controlling the needs of both consumers and advertisers (McPhillips & Merlo, 2008).

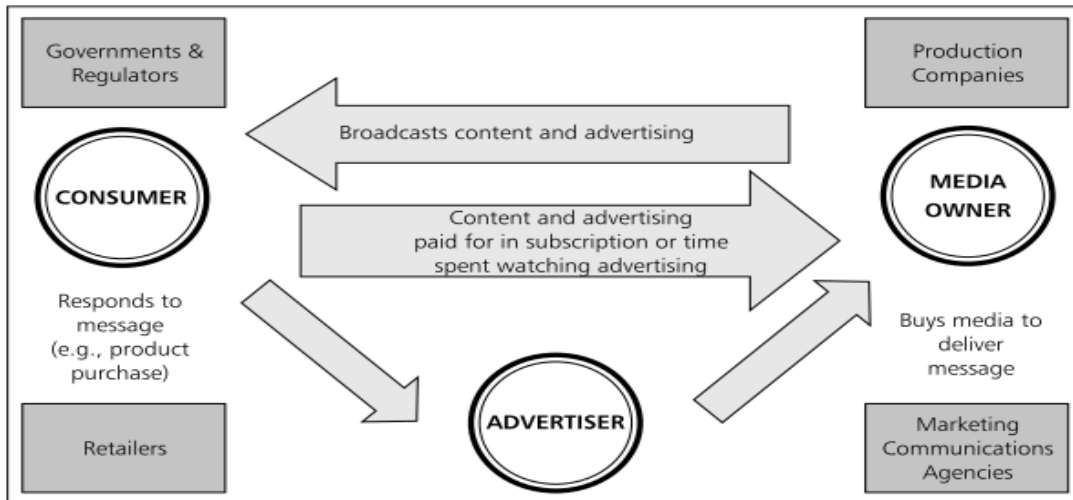


Figure 7: Business Model of Traditional Media Providers (Source: McPhillips & Merlo, 2008, p.238)

Traditional mass media historically has also acted as the gatekeeper of information to the broad audience where the media providers decided on what information would be passed on to a passive audience (Bruns, 2007b; Kwon, Oh, Agrawal, & Rao, 2012, 2012; Meraz, 2009). Gatekeeping was defined by Shoemaker & Reese (2008, p. 9) as “the process of culling and crafting countless bits of information into the limited number of messages that reach people every day”. Kurt Lewin (1943) was the first to propound the concept of gatekeeping where he observed that information moves step by step through channels and information passing through these different channels must pass through gates (Lewin, 1943) and “gatekeepers” (Lewin, 1943, p. 37) who are custodians of these gates, control which information should pass through and which should not. David Manning White (1950) who took this concept further and applied it to communication studies through field research came to the conclusion that a lot of times selection of information by the gatekeeper was “highly subjective” (White, 1950, p. 386). In the below visualisation of White’s model, news sources send information (N_1 , N_2 , N_3 and N_4) to the gatekeepers who send some of the information forward to the audience (M) after changing them (N_2^1 , N_3^1) while rejecting other information (N_1 , N_4).

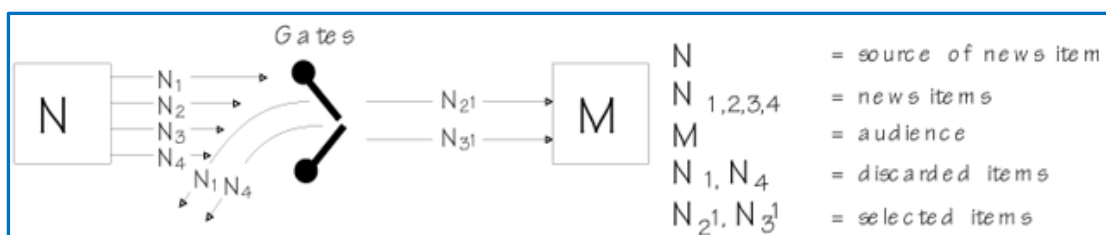


Figure 8: David Manning White's Media Gatekeeping Model (Source: McQuail & Windahl, 1981, p.100-101)

But this traditional model has seen persistent decline in its efficiency, due to the oversupply and commoditisation of content where consumers have now been given numerous options in media outlets (Günzel & Holm, 2013). With the availability of these options the consumer has the ability to choose content from any of these options (Bardhi, Rohm, & Sultan, 2010; Berman et al., 2011) and consumers are now becoming able to act as their own gatekeepers and deciding which content and information to retain or discard (Singer, 2014). So the implications of this change from push to pull for consumer behaviour and its implications on media industry business models need to be empirically validated.

2.2.1 Factors causing this decline

The two main factors that have contributed to the decline of traditional media are mentioned below

2.2.1.1 Increased Uptake of Digital Platforms

The rapid adoption of internet and other digital platforms by consumers (Webster & Ksiazek, 2012) has hastened the decline of traditional media by providing free up-to-date content to consumers whether user-generated or professionally produced which has put a strain on subscription revenues from customers for traditional media (Himelboim, McCreery, & Smith, 2013). But digital media goes further by enabling the unbundling of individual pieces of content which can be freely distributed (Mulhern, 2009). The ramification of unbundling content means that now traditional media providers have less control over content and its distribution and this provides consumers with the capability of choosing what they want without any extraneous content (Mulhern, 2009). This loss in control by traditional media businesses of grabbing audience eyeballs has led to a gradual shift in advertising from mass targeted campaigns on traditional media outlets to sharing and collaborating of information on new media (Kaplan & Haenlein, 2010). The decline of effectiveness of mass advertising which is the main revenue source for traditional media (Godes, Ofek, & Sarvary, 2009) was being recognised as early as 1994 by Rust & Oliver (1994) where they said that with the rise of new media, consumers will have much more choices and advertising will change to a much more targeted approach towards the consumer. This prediction has come true in the age of new media where consumers now have multiple options for content consumption with advertisers employing targeted advertising approaches for these consumers.

Stempel, Hargrove, & Brent (2000) saw this change happen when they studied the growth of internet usage from 1996 to 1999 in the US, and reported a 10 fold growth in the number of internet users accompanied by drop in newspaper and television audiences during this period. Dutta-Bergman (2004) opined that with competition between traditional and new media, consumers would decrease their resource spending on traditional media while increasing resource spending on new media. Ksiazek, Peer, & Lessard, (2014) also opined similarly that the uptake of digital media platforms among consumers has been explosive combined with decline in traditional media usage. So the increased uptake of internet and other digital media by consumers has contributed to the decline of traditional media.

2.2.1.2 Media and Audience Fragmentation

The other major factor that has exacerbated the decline of traditional media is the phenomenon of fragmentation, Philip Napoli (2011) mentioned that the media landscape is increasingly being affected by media and audience fragmentation as illustrated in the below diagram.

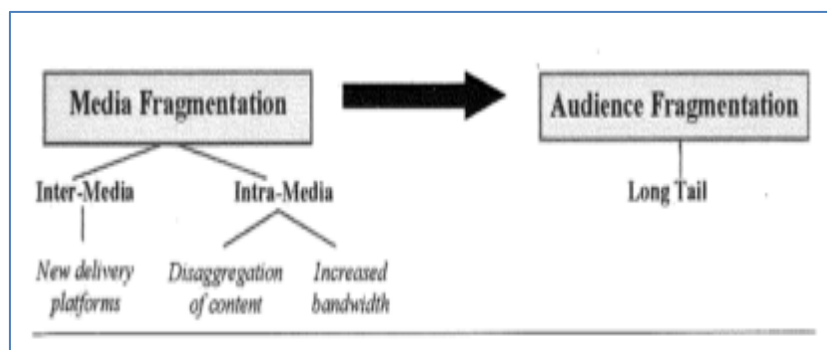


Figure 9: Fragmentation of the Media Environment (Source: Napoli, 2011, p. 57)

Media fragmentation is ascribed to the technological processes that increase available content options to media consumers (Napoli, 2011a). Media fragmentation is further broken into inter-media fragmentation which is the growth of new content delivery platforms and intra-media fragmentation which are processes that divide choices between the same platform (Napoli, 2011a). The distribution of audience attention through audience fragmentation is one of the effects of media fragmentation and is described by Napoli, (2011a) as the notion of media audiences being dispersed across an array of content options and shifting to newer platforms. With increased audience fragmentation media businesses do not have control over their audiences any more as now “the entire balance of power has shifted to the

consumer” (Jaffe, 2005, p.49). Webster & Ksiazek (2012) in their found research that the biggest effect on traditional mass media by the growth of digital media is audience fragmentation which has led to mainstream media outlets see their audience numbers erode or their audience’s attention being diverted with competition from new media outlets. This has led to the notion of “attention economy” (Webster & Ksiazek, 2012, p. 41) where the media marketplace is governed by the need to attract audience’s attention to achieve economic, social or political objectives (Webster & Ksiazek, 2012).

To further understand the phenomenon of audience fragmentation, applying the network analytical approach to audience behaviour, Ksiazek (2011) concluded that there is duplication in media usage across mediums where the audience of one outlet is exposed to content from a multitude of other outlets. He referred to this overlap as “Network centralization” (Ksiazek, 2011, p. 245) where attention tended to spread widely in audience media consumption patterns amongst various media outlets. Thus where earlier, audiences of traditional media were concentrated across a few outlets and could be controlled by these media providers but now consumers are migrating towards products that they prefer and which meet their needs (Webster & Ksiazek, 2012).

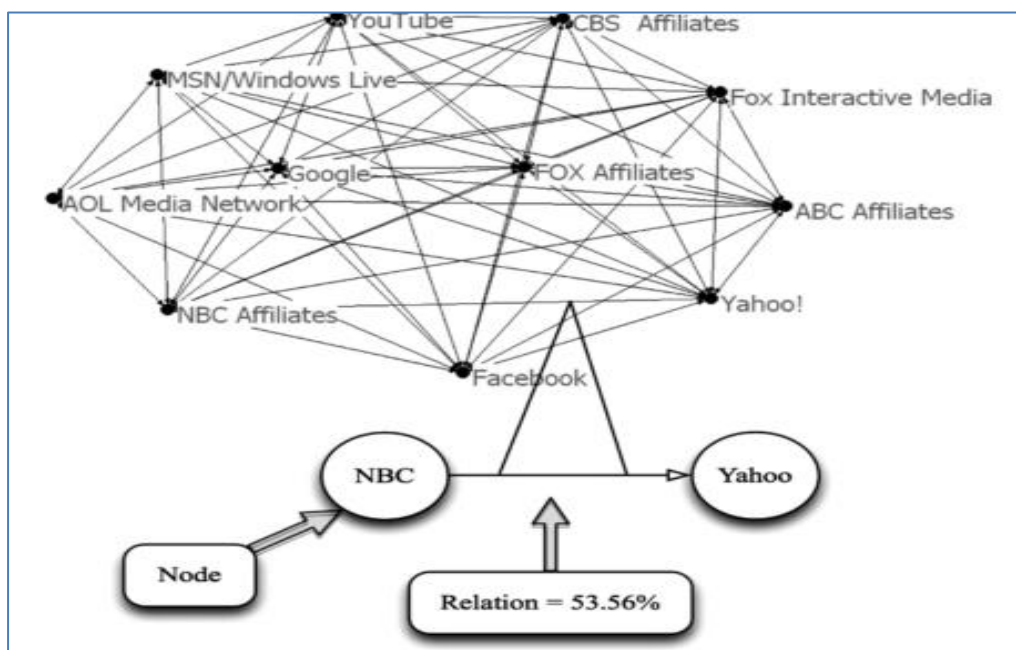


Figure 10: Media network across TV channels and Internet brands (Source: Ksiazek, 2011, p. 238)

Media providers are shown as the nodes of the media network in the above diagram and primary duplication of audiences between the nodes are the links connecting the nodes. Thus we see that 53.56% of NBC viewers also use Yahoo. From the diagram

above, a web of interconnections between the nodes can be seen, this media network has a network centralisation score of 17.08% (Ksiazek, 2011, p. 246), which means that the nodes are widely dispersed in the network and there is a lot of audience fragmentation where media consumers tend to spread their attention across a diverse range of options (Ksiazek, 2011). Ksiazek (2011) also observed that audiences were more highly concentrated in those media outlets which had abundant content options like the internet which suggests that consumers are crowding towards those media platforms from where they can pull content more easily. So it can be seen that there is a fragmentation of audiences from traditional media outlets like print and television and correspondingly audience attention concentrating more in new media outlets (Ksiazek, 2011).

Thus from the above evidence, it can be seen that there is a persistent decline in traditional media as consumers fragment and migrate towards digital media outlets. Academics have found that one of the major reasons that consumers are migrating towards new media is because new media gives consumers a very high level of control in their content consumption choices (Bright & Daugherty, 2012; Spurgeon, 2005) and is much more individualised in terms of fulfilling the consumer's needs (Kant, 2014; Shapiro, 1999) which gives rise to a space for empirical validation of how consumers are manifesting this control.

2.3 The Rise of New Media

New media encompasses interactive media like the internet, online services, video-on-demand, and interactive television (Hoffman & Novak, 1996). The distinguishing feature between traditional and new media is that new media encompasses those technologies that can let users view, move, store, manage and manipulate digital information or content for entertainment, communication, news and other purposes in a converged and instant manner (Steele, 2009). New media can be stored, produced or transmitted digitally; it is networkable and the content is much more interactive and individualised where the user is both a consumer and a producer of content (Flew, 2008; Hennig-Thurau, Malthouse, Friege, Gensler, Lobschat, Rangaswamy, & Skiera, 2010; Lister et al., 2009). Although certain effects of new media on consumer behaviour in the media landscape have been researched, the full implications of how these changes are affecting the entire pattern of media consumption among consumers are yet to be established.

Nelson-Field & Riebe (2011, p. 51) have argued that there is a “continual emergence of new media” due to the spread of internet with technologies like streamed broadcasting, podcasts, user-generated content, video games and others. New media is growing at an extreme pace as compared to traditional media both in audience numbers and in the number of choices available to consumers (Nelson-Field & Riebe, 2011). Digital content can be infinitely copied, reproduced and shared without any loss of quality and at little or no cost (Mulhern, 2009); due to the modularity of digital media, content aggregation happens at the demand side of consumers where consumers can build their own bundles as per their tastes (Mulhern, 2009). This modularity of digital content enables it to be consumed on mobile and smart devices anywhere, which is making these devices companions of people (Hennig-Thurau, Malthouse, Friege, Gensler, Lobschat, Rangaswamy, Skiera, 2010) and in social settings where people are increasingly communicating and collaborating with each other to consume content (Wu, Sun, & Tan, 2013). So we see that in the past few years new media has risen and increasingly drawn new readers, listeners and viewers while splintering or fragmenting traditional media audiences (Schultz, Block, & Raman, 2012). One of the central tenets of new media is the empowerment of consumers where they have the power to get information that is useful for them (Hoffman, Novak, & Schlosser, 2000) which suggests that this consumer power can change media industry business models from media businesses pushing content to content pull by consumers. With new media the consumer is now empowered by having a voice in talking back to media providers and to each other (Hennig-Thurau et al., 2010) and has innumerable choices through a plurality of content and tools to get the content he/she wants (Kant, 2014).

2.3.1 Evolution of Media: From Traditional to New Media

In this changing media landscape where it is seen that there is a clash between traditional and new media forms to grab the consumer’s attention, the impact that new media has had in the evolution of the media landscape needs to be understood in more detail. As suggested by Noll (2007), by studying the successive introduction and evolution of media types we can gain a better understanding of the variables which drive their successes and shortcomings in the media landscape.

To perform this analysis on new media we will use the media theories of Marshall McLuhan the great media visionary and philosopher. In his (1964) seminal book about media “Understanding Media: The Extensions of Man” McLuhan contended

that modern technology changes the way people conduct their lives. He propounded that media is always in state of flux and a new medium is not an addition to old media but rather it oppresses old media and finds new positions and shapes for them. He said that “medium is the message” (McLuhan, 1967, p. 5) where the media shapes people’s behaviours and usage patterns than the content itself.

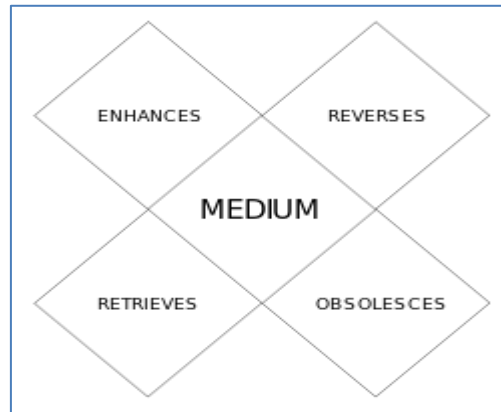


Figure 11: Marshall McLuhan’s Media Tetrad (Source: Wikipedia)

McLuhan summarised his thinking of media with the tetrad of media effects model as shown above, which examines four scenarios on the effects of a medium on society. The four qualities described in the tetrad are summarised below

Table 1: Summary of McLuhan's Media Tetrad

Enhances: The new media form must enhance or amplify some aspect of content communication when it is used
Obsolesces: As a result of using this media form, other media forms may be superseded or their role will diminish in the landscape
Retrieves: This media form will revive some format of communication which was deprecated earlier
Reverses: If this media is taken to the extreme it assumes different characteristics

By applying this model to new media we can better understand how new media has caused an evolution in the media landscape and the factors that has contributed to its wide scale adoption by consumers. We see below that new media “enhances” from earlier forms of media with distinct added value in content consumption by changing the passivity present in consumers of traditional media (Lister et al., 2009; Winer, 1997) where these consumers had the weaker role in the media landscape

(Wagar, Roos, Ravald, & Edvardsson, 2012) and making them more active and in control to get content and information of their choice much more easily from new media (Brunns, 2007b; Spurgeon, 2005; Stewart & Pavlou, 2002).

Table 2: Tetrad Analysis of New Media

Tetrad Action	Effect on the Landscape	Description
Enhances	With enhanced control, consumers can now pull content of their choice	<i>New media platforms enhances consumer control by giving them greater choice in when, where, what and how to consume content. Also new media enhances communication between people and sharing experiences between them using social content consumption platforms (Schultz et al., 2012).</i>
Obsolesces	Leads to the decline of traditional media and rise of new media	<i>New media obsolesces the idea of traditional media gatekeeping where media businesses decide on what consumers can get with consumers now becoming their own gatekeepers (Bright & Daugherty, 2012).</i>
Retrieves	Interactive and social content consumption experience	<i>New media retrieves the idea of community and the global village where people from all over the world can connect with each other and share content and experiences (Rosman & Stuhura, 2013).</i>
Reverses	Consumer polarisation through selective exposure to content.	<i>With too much control in media consumption consumer can take it to an extreme where they only consume content and information that they like and believe in and avoid content which does not match their beliefs. So there is a risk of partisanship and polarisation (Hollander, 2008; Webster & Ksiazek, 2012)</i>

From the above analysis it can be suggested that new media enhances the role of the consumer in the media landscape by giving him/her more control in their choices. It propagates the idea of consumer gatekeeping by obsolescing gatekeeping by traditional media and retrieves the idea of community and a global connected village by facilitating the social aspect of content consumption. These changes represent a significant departure from traditional platforms of content consumption and thus warrant an empirical investigation to be established.

2.4 Increased Consumer Control in the Media Landscape

As discussed in the previous section new media platform have empowered consumers substantially in media consumption. On the notion of consumer empowerment in media consumption Napoli (2011) mentioned the idea of audience autonomy, which is the extent to which new media gives its consumers

unprecedented levels of control over what content they can consume and where, when and how they can consume that content. On a similar note Berman et al. (2011) opined that new media technologies have provided consumers with increased control and flexibility in their media consumption choices. Hoffman & Novak (2009) in trying to understand customer experience in online environments opined that with the advent of Web 2.0 consumers are increasingly controlling their navigational experiences; these empowered consumers are growing insensitive to old-fashioned ideas of content push (Constantinides & Fountain, 2008) and have increased freedom to do whatever they want, whenever and wherever they see fit (Hoffman & Novak, 2009). Thus it has been opined that the media landscape is becoming more interactive and participative in nature with consumers being at a more favourable position of control. With the rise of consumer control, gatekeeping (mentioned earlier) of content by media providers, which has been fundamental to the status, utility and functioning of traditional mass media (Sundar & Marathe, 2010) has been in decline (Bruns, 2007b). Sundar & Marathe (2010) further mention that in the digital age, consumers can now customise and personalise a lot of products and services as per their needs, whether it be deciding on which content categories to consume or streamlining the content they want to consume or organise content as per their wishes (Sundar & Marathe, 2010). So with the increase in consumer control, audiences can now act as their own gatekeepers for their media experience and undermine the role of traditional content providers (Kwon, Oh, Agrawal, & Rao, 2012). As illustrated in the figure below, in the age of new media now the flow of information is changing in the media business to originate from the audience towards the content provider.

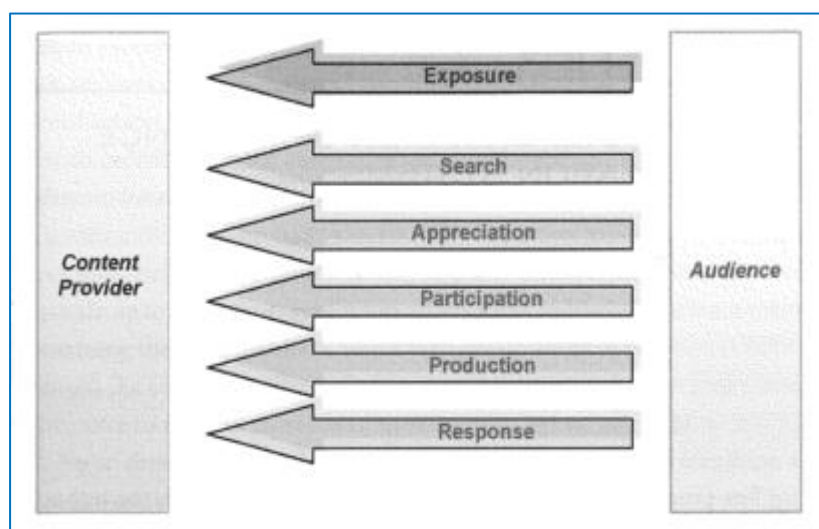


Figure 12: Audience information flow in the age of new media (Source: Napoli, 2011, p. 87)

This control is not only manifested in content consumption; consumers are increasingly engaging with content through user recommendation and other forms of user generated feedback mechanisms to show what they like and not like (Napoli, 2011a). For example- showing appreciation to the content through ratings, recommendations and reviews on online platforms like Netflix, Amazon, IMDB.com; voting on shows like “American Idol” and discussing content on twitter (Hennig-Thurau, Wiertz, & Feldhaus, 2014). It has been posited that this consumer control through word of mouth (WOM) recommendations on social media and other outlets could have the power to make professionally produced experiential media content like movies, music and electronic games, successful or unsuccessful in the market (Hennig-Thurau, Wiertz, & Feldhaus, 2014).

So with the rise of new media the idea of consumer control in media consumption is being increasingly recognised in academia (Bright & Daugherty, 2012; Pelsmacker & Neijens, 2012; Murdough, 2010; Wright, Newman & Dennis, 2006). But all this literature is generated in the developed world with an assumption that consumers live in an abundant media environment (Alexander et al., 2004; Taneja, Webster, Malthouse, & Ksiazek, 2012) with the ability to access and afford the various options and technologies available in the media landscape (Schultz et al., 2012). It has been suggested that consumers from lower economic levels and in developing countries usually do not have access to all the technologies and resources that are available to consumers in developed countries (Hamilton & Catterall, 2005; Moyo, 2012; Porter & Donthu, 2006) so it needs to be empirically tested if income levels of consumers determines the extent to which they exert control in the media landscape.

Wathieu, Brenner, Carmon, Chattopadhyay, Wertenbroch, Drolet, Gourville, Muthukrishnan, Novemsky, Ratner, Wu (2002) mention that increased choices and the consumer’s ability to repeatedly assess and choose from a set of options increases consumer control and empowerment. Thus with the abundance of choices now available to consumers for consuming media, audiences can now actively choose to disperse across a wide variety of content options (Napoli, 2011a). This control in consumption is manifested with the concept of the long tail of audience attention (Napoli, 2011a). Chris Anderson (2004) in a wired magazine article was the first person to apply this to the context of the entertainment industry; he found that with the increased adoption of digital technologies, audiences are not only consuming mainstream so called “hits” but they are spread across and seeking a wide variety of the so called “niche” content (Anderson, 2004, p. 3). These choices were earlier constricted by traditional media outlets that only provided consumers

with what, according to them, was popular amongst users the so called “hits”. He mentions the case of Netflix which offers niche content like documentaries to satisfy this empowered consumer, a content segment that was earlier ignored by traditional dvd rental companies as these media providers did not see profitability in servicing selected niche segments of the market. He also mentioned that the aggregate audience attention which is focussed in the tail could rival or exceed the audiences who are focussed on the selected hits at the head of the curve (Anderson, 2004) as seen in the figure below.

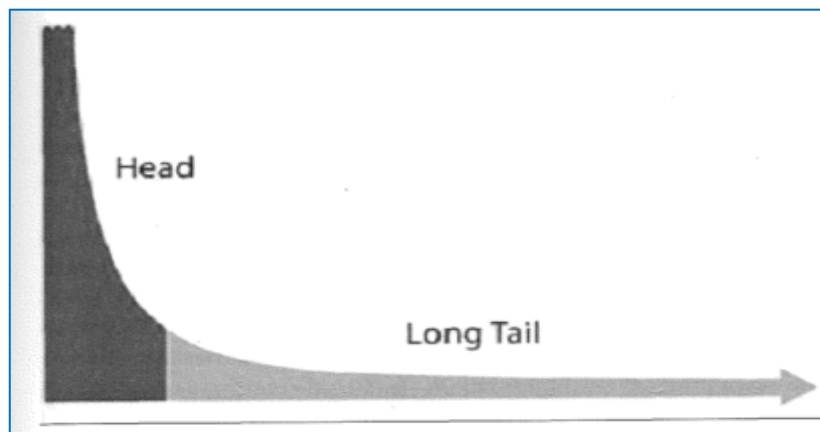


Figure 13: The Long tail distribution of media consumption (Source: Napoli, 2011, p. 59)

Manifestation of consumer control through seeking content by using internet search engines and recommendation websites also stimulate the demand for niche content (Brynjolfsson et al., 2011) this is being recognised and serviced successfully by some new media businesses by changing their business strategies to incorporate consumer control.

With the empowerment of consumers in the media landscape it has been posited that consumers now has access to a multitude of options from which they can decide what when where and how to consume content. Consumers are also influencing other consumers content consumption decisions through recommendations and sharing of content between them.

2.5 From Push towards Pull in Content Consumption

Based on the preceding discussion, the reversal of control from consumer to producer has implications for a posited business model based on push to one based on pull. Before investigating whether increased consumer control is changing media consumption from push to pull, we need to understand the significance of push and

pull and how it can be applied to media studies. Businesses drive a push strategy through its value chain to increase sales of a product or a service whereas pull is a consumer driven initiative to fulfil the consumer's need of a product or a service (Raaij, 1998).

The concept of push vs. pull originated in the field of supply chain and logistics management, Cachon (2004) in his study on the allocation of inventory risk, reviews a considerable amount of literature on the phenomenon of push and pull in supply chains, he opined that with push the supplier stuffs the retailer with all inventory and makes the retailer "captive" (Cachon, 2004, p. 235) whereas with pull the risks of the inventory lie with the supplier (Cachon, 2004). There is a lot of established literature in the retail industry on the phenomenon of push vs. pull; Martín-Herrán, Sigué & Zaccour (2010) say that promotions targeted by businesses towards trade partners are push promotions whereas promotions directed towards the end consumer to attract the consumer to retail locations and induce demand from them are pull promotions (Martín-Herrán, Sigué & Zaccour, 2010). In marketing strategy, push marketing strategy involves a manufacturer directing efforts at personal selling, advertising, and trade oriented promotions to induce its channel partners to increase inventories of its brands as compared to its competitor's brands (Kotler & Keller, 2012). On the other hand, pull demand is driven by consumers where due to the interest generated by manufacturer's successful advertising and promotional efforts, consumers demand products from intermediaries, thus forcing the intermediaries to order them (Kotler & Keller, 2012).

In media studies, Marc Gobé (2010) opined that traditional media outlets like television, radio and cinema target passive audiences by trying to push content to them whereas consumers through their engagement with internet, social media and other new media outlets aim to pull content of their choice. On a related note it has been argued that traditional media businesses try to push content to their passive audiences by determining content and distribution choices for them (Duchêne & Waelbroeck, 2006; Schultz et al., 2012). Whereas with increased number of options now available to consumers it has been posited but yet to be empirically established that consumers are getting content by actively acquiring information and controlling their own choices in the media marketplace (Duchêne & Waelbroeck, 2006; Schultz et al., 2012).

Hoffman & Novak (1996), recognised that traditional mass media models only provide passive one-to-many communication to its consumers. The content and

medium are central in this model with very limited feedback from the consumer (Hoffman & Novak, 1996), this is traditional media push as discussed above and illustrated in the figure below. This push model has been the model of traditional media providers where they own the content, distribute it to consumers and carry the costs for content production, distribution and promotion (Duchêne & Waelbroeck, 2006)

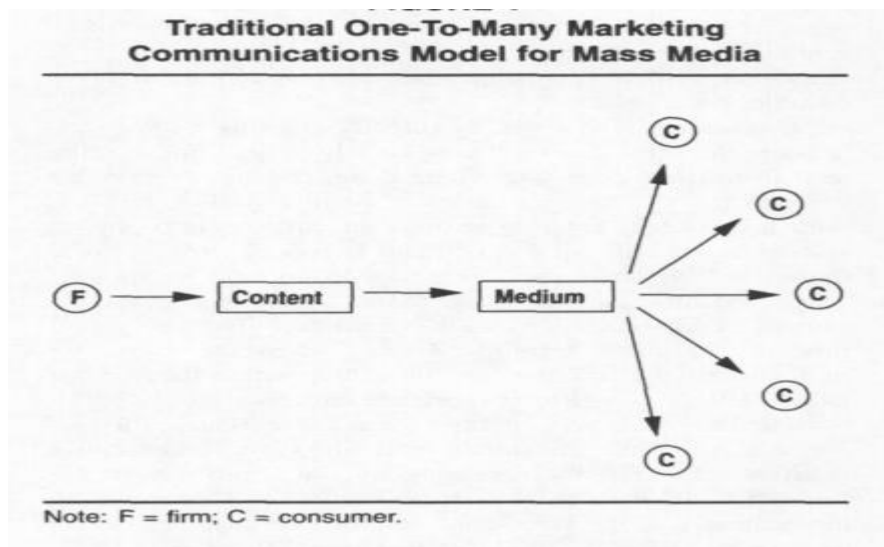


Figure 14: Communications model of Mass Media (Source: Hoffman & Novak, 1996, p. 52)

As seen above the flow of content is linear where content is pushed from firm to consumer with no feedback from consumers. This is in stark contrast to communication in hypermedia computer-mediated environments (CME) where hypermedia CME is defined as a dynamic distributed network which lets consumers and firms to access and create content and communicate through this environment (Hoffman & Novak, 1996).

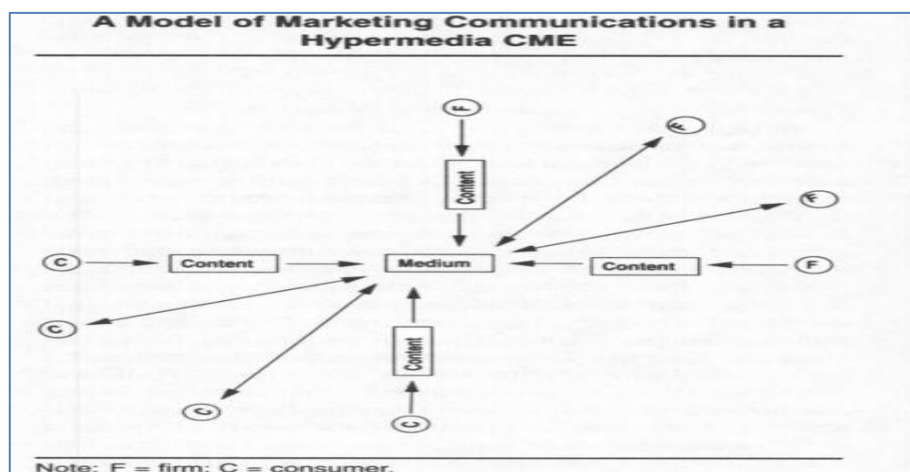


Figure 15: Communications model for Hypermedia CME (Source: Hoffman & Novak, 1996, p. 53)

They further opined that in this CME environment the search and retrieval of content is non-linear and navigation in this network is self-directed by the consumer (Hoffman & Novak, 1996). Such a system affords greater level of control and unlimited freedom of choice to access content for the consumer (Hoffman & Novak, 1996). Thus it can be argued that in today's hypermedia environment consumers are no longer passive recipients of content, now they are increasingly taking an active role to engage with content and the businesses which provide this content (Hanna, Rohm, & Crittenden, 2011)

With the evidence seen above from the literature, in the hypermedia world of new media technologies the consumers have a greater extent of control in satisfying their individual needs by actively seeking and getting content of their choice and are not solely dependent on content push from media businesses. So it needs to be explored further if consumers exercising control by getting the content of their choice from numerous options is changing content consumption pattern from media business push to media consumer pull. As mentioned by Schultz et al. (2012) there is a need in the literature for a qualitative exploration of how consumption patterns are changing among people in a media marketplace which is increasingly becoming consumer controlled.

2.6 Business Response to Consumer Control and Content Pull

With the rise of consumer control in media consumption and the push/pull dynamic in content consumption there has been some recognition of this phenomenon in the literature (Hagel III & Brown, 2011). Consumers using social media are increasingly recommending products and services and influencing purchasing decisions of other consumers (Hanna, Rohm, & Crittenden, 2011), furthermore they are also becoming content producers and sellers to other consumers using the internet. So businesses need understanding of how this customer-oriented behaviour can affect them (Hennig-Thurau et al., 2010) so they can differentiate and innovate in response (Berman, 2012). It has been suggested that consumer control can aid consumers to fulfil their individual needs and deciphering these needs by businesses could help them leverage off this phenomenon (Yadav & Pavlou, 2014). Hennig-Thurau et al. (2010) opine that there is an absence of research to understand how content consumption patterns are changing due to consumer control for both media businesses and advertisers who operate in the media landscape so they can stay relevant in this age. The researcher discovered that there is little research available

on empirically establishing the effects of consumer control on media consumption behaviours among consumers and hence this study was undertaken.

In a bid to keep their consumers under control in the age of consumer empowerment, Berman, Abraham, Battino, Shipnuck & Neus (2007) suggest four primary business models for media companies. These models are spread in terms of content source, distribution and device platforms as shown in the figure below. In their opinion there was no clear winner in terms of which business model media businesses should employ, but they suggested that media businesses should employ any or a combination of these models to leverage off their historical strengths and assets (Berman, Abraham, Battino, Shipnuck, & Neus, 2007).

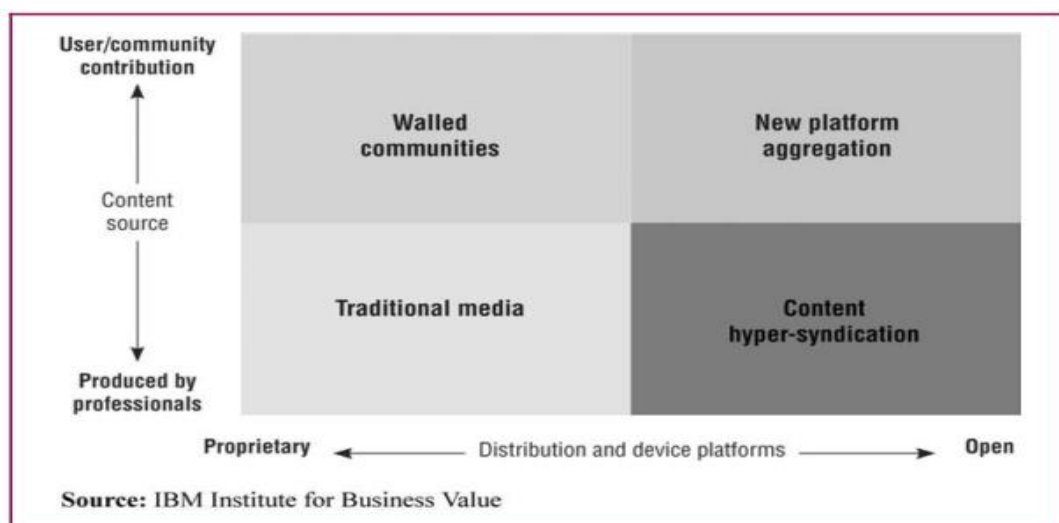


Figure 16: Media Industry Business Models (Source: Berman, Abraham, Battino, Shipnuck & Neus, 2007, p. 24)

The four models that are illustrated in the figure are the following:

- **Traditional Media:** This is the model of traditional media providers where branded content created by professionals is distributed through conditional-access environments (Berman et al., 2007). The newspaper industry, traditional television and the movie industry follow this business model. This business model has the least amount of consumer control in how they are exposed to content (Bezjian-Avery, Calder, & Iacobucci, 1998).
- **Walled Communities:** This model is based on distribution of user and community generated content within a walled or conditional access environments through dedicated devices (Berman et al., 2007). Mobile phone operators like Vodafone and NTT have tried to implement such models to provide multimedia

content to its users while trying to retain them within operator ecosystems (Becker, Mladenow, Kryvinska, & Strauss, 2012). Consumers have more control in these models as compared to traditional media but still they are forced to choose between operator selected content which cannot be influenced by consumers (Becker et al., 2012).

- **Content hyper-syndication:** In this model professionally produced content is made available in open channels without dedicated access providers or devices (Berman et al., 2007). This model is used by BBC through its iPlayer service where professional content programming is made available on an open platform. Netflix and Hulu also use a similar model. Consumers have a great extent of control in this model where they can choose professional content anywhere, anytime and in whatever way they like.
- **New platform-aggregation:** This model works in the realm of user-generated content, here the content is produced by users and distributed on open platforms (Berman et al., 2007). Social media sites like Facebook, MySpace and YouTube use this model. This model gives consumers the greatest control where they are content producers and consumers which Axel Bruns (2008, p. 2) labelled as “produsage”.

So looking at the above figure, literature is proposing media businesses to change their business models in response to consumer control; however as it can be seen that all these models are predicated at businesses having control by aiming to confine the consumer within content sources and distribution platforms by giving them certain leeway in accessing content through “walled” or conditional access environments (Berman et al., 2007, p. 24). So the response to consumer control by businesses is still aimed at trying to control consumers by tweaking certain aspects of their business models (Berman et al., 2007, 2011). So these strategies do not really factor consumer control in business strategies and models of media businesses; instead these models are still aimed at controlling the consumer through some changes in business artifices. Whereas the premise of consumer control is based on businesses ceding control to their consumers who will indicate to businesses what their choices are and they need to come up with solutions to satisfy these choices (Hunter & Garnefeld, 2008).

Thus business response to consumer control is still focussed on changing tactics by media businesses and not a move to change their strategies entirely. Therefore there

is still little understanding in the literature on grasping the full extent of consumer control and crafting business strategies in response.

2.7 Conclusion

Thus as seen from the literature review above; the media landscape is in a state of flux right now. Traditional media businesses which for generations used models for content production, distribution and monetisation designed towards passive audiences (Loosen & Schmidt, 2012) with limited opportunities for feedback to the businesses are now being challenged by new media which are empowering media consumers (Valcke, 2011). So the point of this study is to explore if consumers really have control in pulling content, business awareness of this control and what are they doing in response.

In the following sections this research will investigate whether with the increased control that the consumer has in this changed media landscape, is changing consumption models from media provider push to media consumer pull. Also this research will investigate media businesses' awareness and acknowledgment of consumer control and any tactics that they are deploying in response to this phenomenon.

3. Chapter 3:- Research Questions

“The content provider is no longer at the center of the universe. At the center of the universe is now the content consumer.”

- Arianna Huffington, Author and Editor in Chief of Huffington Media Group

Based on the literature review above, the following questions come to mind and need further exploration:

With the rise of new media the consumer is effectively in control in the media landscape (Napoli, 2011a) now it needs to be investigated if this control is being manifested by consumers pulling content to suit their specific needs (Hagel III & Brown, 2011) than consumers being reliant on content push of media providers

Research Question 1: Is consumer control changing media consumption from push to pull based models?

It has been discussed that consumers who have the capability of choosing between different options are in control (Raaij, 1998; Sundar & Marathe, 2010), it needs to be explored whether consumers who have less resources at their disposal to access different choices are also in control of pulling content.

Research Question 2: Is the income of a consumer a determinant in whether the consumer has control and is able to pull content?

Media businesses who have traditionally been in control of the content are grappling with the idea of the consumer being in control of their content consumption choices (Deuze, Bruns, & Neuberger, 2007; Sharp, Beal, & Collins, 2009). So it needs to be investigated if media businesses are adjusting their strategies in response to consumers pulling content as per their needs.

Research Question 3: Is the media industry accommodating this paradigm shift from push to pull in their Business Strategies?

4. Chapter 4:- Research Methodology

“Research is to see what everybody else has seen, and to think what nobody else has thought.”

- Albert Szent-Gyorgyi, Noble Prize Winner in Medicine and discoverer of Vitamin C

4.1 Introduction

This section explains the research methodology employed in this study. The study was exploratory in nature which is apparent in the research-method, research design, sampling and data-analysis techniques used; and used a qualitative method of data collection using semi-structured in-depth interviews of media consumers and experts from the media industry.

4.2 Research Design

Saunders & Lewis (2012) stated that exploratory studies aim to discover new information about a topic that is not clearly understood by the researcher. During the literature review it was seen that there is a lot of literature that talks on new media's contribution in increasing consumer empowerment in media consumption (Constantinides & Fountain, 2008; Heinonen, 2011; K. T. Smith, 2012; Yadav & Pavlou, 2014) and the control these empowered consumers now exert in this changed media landscape (Block & Schultz, 2009; Bright & Daugherty, 2012; Hoffman et al., 2000a; Shapiro, 1999; Vollmer & Precourt, 2008). As posited by Winer (2009) that the media landscape has changed dramatically by the introduction of new digital media technologies and research is needed to understand changing consumer behaviour in this landscape. Schultz, Block, & Raman (2012) mention that even though there is increasing professional and academic interest in this field, the amount of knowledge available on consumer behaviour through the lens of content push by businesses and content pull by consumers is still “embarrassingly meagre” (Schultz et al., 2012, p. 176). Marshall & Rossman (2006) opined that exploratory research is most appropriately applicable to phenomenon that has been little understood to identify important categories of meanings to find more understanding

for this phenomenon. Hence in trying to better understand this meagre information, an exploratory research is most appropriate for this study.

For data collection a qualitative method was used, as according to Marshall & Rossman (2006) qualitative research is appropriate for three main purposes; to explain, to explore or to describe a phenomenon. Using a qualitative research design is appropriate for increasing understanding of a particular phenomenon of interest (Leedy & Ormrod, 2010). The process of qualitative research is a craft which intends on discovering new knowledge (Daft, 1983). Agee (2009) said that a qualitative study inspires a process of exploration and discovery.

As this study was aimed at discovering the effects of consumer control on the change in media consumption patterns, so it involved a process of exploration and discovery of consumer behaviours in media consumption, so a qualitative study was used. Qualitative studies in addition can enable the researcher to enquire further on how experiences of events and conditions affect the concerned individuals or groups and helps in deeper and richer understanding of these experiences (Agee, 2009). As discussed in the literature review of this study, the paradigm of push versus pull in the media landscape has two perspectives: consumer experiences and the experiences from the side of the business; so detailed narratives on consumption experiences in the media landscape from both perspectives through the use of interviews were considered as an appropriate approach. Furthermore the use of interviews to gather data from both media consumers and experts gave the participants freedom to define their reality and added to the overall richness of the data, this according to (Creswell, 2003) gives an opportunity to increase the validity of the research project.

So the study argues that a qualitative study is best suited for data collection to provide the depth and detail (Cooper & Schindler, 2014) required to answer the research questions and potentially prompt other insights that have not yet been explored in this relatively fresh research context.

4.3 Research Process

The research project was conducted in the form of a two-phase qualitative study through the use of interviews. As push and pull have two sides in the equation:

consumers and businesses operating in the landscape; so the research process had two phases, one to get insights on consumer control and content pull from media consumers and the second to get insights on the topic from media experts. Details of each phase are as follows:

- **Phase 1**

The first phase consisted of individual depth interviews with media consumers to delve into their personal experiences and view-points (Marshall & Rossman, 2006). Long interviews takes the researcher into the lifeworld of the interviewee to see the content and pattern of the individual's daily experience (McCracken, 1988). The aim of this phase of the study was to explore in depth the ways people consume media content and how it has changed with increased popularity of new media technologies amongst consumers. Whether now consumers think that they are in control in their media consumption choices and if with increased control media now, consumption is changing among consumers from a top down media business driven push based model to a consumer driven pull based one; where the consumer exercises control and actively pulls content to meet his or her needs. This phase also tried to find if the level of control that consumers have and exercise in media consumption is dependent on age, economic levels and gender of consumers.

- **Phase 2**

This phase consisted of semi-structured interviews with media industry experts (elites). Hitzler (1994) quoted by Pfadenhauer (2009) defines an expert as a person who has a good overview of the overall knowledge in a specialist knowledge field. The aim of this phase of the study was to explore if media businesses acknowledge consumer control and the resultant content pull exercised by consumers. If media businesses take cognisance of content pull, then how are they responding to this challenge; that is whether media businesses are now making any changes their strategy and business models in response to consumer pull, as this change challenges the core tenet of media business models that have been designed to push content to passive audiences. Semi-structured interviews are extensively used for interviewing elites; elites are defined as individuals or groups who occupy the top echelons of an organisation or society, they have more knowledge or status and assume a higher position than others in the population (Odendahl & Shaw, 2001). Zhang & Wildemuth (2009) describe semi-structured interviews as a flexible way of interviewing

respondents using an interview-guide including both close-ended and open-ended questions. In this technique the interviewer has a certain amount of room to add questions or modify the sequence of questions based on participant responses (Zhang & Wildemuth, 2009). The technique of semi-structured interviews is useful for elite interviewing as this instrument allows the interviewer to be flexible in soliciting information and adapt to the situation or personality rather than sticking to a prepared script (Odendahl & Shaw, 2001).

4.4 Population and Unit of Analysis

The two phases required two populations of relevance in this study, media consumers and media industry experts.

- **Consumers of Media** were used to signify any user of media whether Printed, Aural or Visual. Consumers for this study were identified based on their access and awareness of traditional and new media platforms to explore their views on consumer control and whether they were able to pull content on any of these platforms. Therefore media consumers were defined as people
 - o With access to at least two mediums of consuming media among radio, free to air television, dvd player, satellite television decoder, internet connection whether fixed or mobile, mobile phone or other internet enabled devices, newspapers and printed materials.

- **Industry Experts** for this study needed to be people who have knowledge of the media landscape and are aware of both traditional and new media platforms that are now available to consumers and how content consumption patterns are changing among consumers in this landscape. These people are at senior or executive management level in the organisation so they are not only concerned about operational tasks but also strategic issues affecting their businesses' and have a certain influence on developing and/or implementing their businesses' tactics and strategies to deal with business challenges. So experts were defined as:
 - o People who have an experience of atleast 5 years in the media industry (Traditional Media Outlets/Digital Media/Media Research/Media planning).

- People who are in middle or executive Management positions in their organisations.
 - People who are involved in their company's strategy setting and implementation, marketing, content acquisition and business analytics
- The universe of this study was limited to consumers and industry experts in Gauteng, South Africa.

Unit of Analysis

The unit of analysis was the individual; whether media consumers and experts from the media industry.

4.5 Nature of Samples and Size

Non probability sampling methods without the use of sampling frames are deemed appropriate for exploratory qualitative studies (Cooper & Schindler, 2014; Marshall & Rossman, 2006) Hence no sampling frame was used to select participants for this study and non-probability sampling methods were used to select the respondents from the two populations and included elements of quota sampling method.

1. Media consumers

In quota sampling participants are selected in such a way so as to ensure that the sample contains a sufficient number of units to satisfy certain specified conditions (Saunders & Lewis, 2012) and can be useful to ensure the representation of all crucial categories in the sample that are pertinent to the study without expending a lot of resources in terms of time and money (Denscombe, 2010). Quota sampling was used for selecting media consumer respondents for the first phase of interviews that were selected on three levels. First, on the basis of LSM levels; the LSM or Lifestyle Standards Measure is a marketing research tool used in Southern Africa that is used to segment the population based on economic indicators and purchasing ability ("Living Standards Measure," n.d.). LSM levels were determined using a short set of questions included in the appendix (A), this was done to select participants from different economic groups to see whether consumer control in media consumption is affected by the level of financial resources available to expend on accessing different content platforms. Second, age was also used to explore any variations in consumer control based on age of the consumer and third, gender of the

participant to examine if technology adoption and the level of control that consumer has is dependent on the gender of the consumer.

2. Industry experts

Using researcher connections can be a very useful method to “get through the door” to get access to elites who are high up in an organisation (Goldstein, 2002). So the experts from South African media businesses were selected using researcher connections based on the quota dimensions discussed in sections 4.4 and 4.5.1.2. In the second phase, experts from different media businesses were interviewed to investigate if organisations across different ends of the media industry value chain recognise consumer control in media consumption and whether any of these businesses are changing their tactics and strategies in response.

4.5.1 Sampling Information

The table below indicates the research phases, data collection method, sampling technique and sample size for each phase of the project. For a qualitative research project the appropriate sample size is one that can answer the research questions (Marshall, 1996), also Paterson, Thorne, Canam, & Jillings (2001) say that there is no fixed size for a sample as long as the data generated from the samples can be used to permit comparisons among selected dimensions, the data is distinct and independent of each other, the data is sufficient to answer the research questions and also allows the researcher to do in-depth study of individual cases. The sample size was selected based on the above considerations and spread across the quota dimensions to ensure data sufficiency. Although it has been recommended to use two interviews per respondent for an exploratory qualitative study (Marshall & Rossman, 2006). But due to issues of time, access to respondents and financial considerations only one interview was conducted per respondent group.

4.5.1.1 Media Consumers

For media consumers, as discussed above individuals were selected by using quota sampling on the basis of LSM levels to get a wider variety in the sample to check for variations in media consumption behaviours from different economic strata's. Consumers were also selected on the basis of age groups to explore consumption

behaviour depending on age. Thus the respondents selected ensured variance in the collected data.

LSM Level	Age Group	No. of Respondents	Sex
4	35-40	1	M
7	20-25	1	F
8	45-50	1	F
9	40-45	1	F
10	25-30	1	M

Table 3: Sample Description, Media Consumers

4.5.1.2 Media Experts

Regarding the sample of experts, industry experts in this context are professionals who have spent considerable amount of time in the Media industry and who have insight in the way this industry functions and its future direction. Media Industry experts were picked from the following parts of the Media Industry Value Chain.

- Content Creators: Content creators produce the content that is consumed by audiences; they also own rights to the produced content. They produce content based on consumer trends and behaviours.
- Content Aggregators/Distributors: Content distributors, aggregate the content from content creators and distribute the content across different platforms. They work in two markets: the market of audiences for their media products and the market of advertisers where they sell these audience numbers to get advertising revenue (Bornman, 2009).
- Media Planning/Consulting Agencies: Media planning/consulting agencies work on behalf of advertisers and sponsors and provide specialist advice as well as detailed audience information and analytics to their clients (Bornman, 2009).

The respondents in this phase belonged to content aggregators from the pay television domain: MNet and Multichoice, traditional media providers SABC and Times Media, who are also original content creators; and media planning/consultancy companies Mediashop and Cube on the Square (the experts consented to their names and organisational details to be mentioned for this study as part of the consent form that was given to all respondents). The experts were selected on the

basis of their competence in the field of media business. The same interview guide was administered to each expert. The objective of this phase was to identify if media businesses whether they produce, distribute, manage or advertise content; acknowledge the phenomenon of increased consumer control and the pull that consumers are exerting on media resources and whether the media industry is adapting its business models to cater to increased control.

Industry	Company	No. of Respondents
Content Producers	SABC	1
	Times Media	1
Content Providers	Mnet	1
	Dstv	1
Media Consultancy	Media Shop	1
	Cube on the Square	1

Table 4: Sample Description, Media Experts

The table below describes the research process followed in the two phases. In each phase the sampling technique and the sample size were chosen to fulfil the research aims of that phase. The number of respondents was selected to show variance in the data collected. In the first phase, five media consumers were selected from five different LSM levels and five different age groups. In the second phase of interviewing media experts, as discussed above six respondents were chosen from different parts of the media business value chain to introduce variance and saturation in the data. All experts chosen are competent in their field and also their competences lie at different parts of the business value chain, this helped in ensuring to get different perspectives on the media landscape.

Research Phase	Aim of Research	Data Collection Method	Sampling Technique	Sample Size
Phase 1	<ul style="list-style-type: none"> - To discover ways in which consumers consume content, whether they now are more in control and if they are utilising this increased control in Pulling content through the value chain. - Consumer Expectations from Media Providers 	Long Interviews (McCracken, 1988), In-depth Interview (Legard, Keegan, & Ward, 2003)	Quota Sampling (Saunders & Lewis, 2012)	5

Phase 2	- Expert Interviews to discover if media houses are aware of increases Consumer Control and whether they are changing their business models in response.	Semi-structured (Kvale, 2008) , Elite Interviews (Odendahl & Shaw, 2001)	Quota Sampling (Leedy & Ormrod, 2010)	6
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Table 5: Representation of the Research Phases

4.6 Interview Process and Schedule

Leech (2006) suggests establishing rapport with respondents and putting them at ease about the process as the first step for conducting an interview. To put the interviewees at ease; the agenda of the interview, background of the research and letter of consent was sent out prior to conducting any interviews. Also the interviews were conducted at locations of the interviewee's choice so the interviewee could express his/her views freely in a comfortable setting.

The interviews were all started with some general easy questions like name, age, gender, occupation to confirm the details of the respondents of the sample followed by some ice-breaker questions to ease the interviewees into the interview process, following Greenberg (1996) cited in (Leech, 2006, p. 666) suggestions of asking nonthreatening questions first.

Grand tour questions (Spradley, 1979) were the main tool of the interviews so the respondents could tell their story in their own way in a fairly focussed manner and without the question supplying the terms of the answers it solicits in any way (McCracken, 1988). Media Consumers were asked grand questions to understand their opinions and thoughts on how their media consumption patterns are changing and whether they have more control in getting the kind of content they like and want. Grand questions were used for media experts to get their views on the media landscape and its evolution, the future of traditional media, the idea of consumer control in media consumption and whether increased consumer control is affecting media industry business models.

Example of grand tour questions for media consumers-

- | |
|--|
| <ul style="list-style-type: none"> ▪ <i>Has the way you watch tv, movies; listen to music; get your news changed in anyway during the past 5 years?</i> |
| <ul style="list-style-type: none"> ▪ <i>Do you think you have more control now in accessing and consuming content than 5 years ago?</i> |

Examples of grand tour questions for media experts-

- *How do you think the media landscape has changed in the past few years?*
- *How do you think media consumption will change in the future among consumers?*

After information starts to build from grand tour questions it can be sustained by using prompts (McCracken, 1988). Prompts keep the respondents talking and help to get clear responses when responses do not clearly elaborate a topic (Leech, 2006). Using this idea, planned prompts were used as a formal technique in the interview to solicit information on understanding the factors influencing consumer choices for media consumption from the media consumer's side and to explore the views of experts on whether more widespread internet usage will increase consumer control and the role of financial means of consumers in exercising control .

Planned prompts used during interviews with media consumers-

- *Does money play any role in your media consumption choices?*

Planned prompts used during interviews with media experts-

- *Do you think with the increased availability of cheaper internet bandwidth and other technologies consumers now have increased control in media consumption?*

Floating prompts are an unobtrusive and spontaneous way of eliciting key information during conversations (McCracken, 1988), they were deployed during interviews with media consumers to get their opinions, complaints, suggestions for existing media providers in South Africa. Examples of floating prompts in the interview guide for consumers-

- *Is there anything that you would like Content Providers to change so you get more benefit out of their platforms?*

Similarly floating prompts were used during interviews with media professionals on eliciting information on threats to existing business models of the media industry. Examples of floating prompts in the interview guide for experts-

- *In your opinion are there any threats to existing Media Industry Models?*

Contrasting prompts as mentioned by McCracken (1988) are one of the most important planned prompts and are used to find the difference between categories. Contrasting prompts were used in the interviews to discover how media consumers' perceive the difference in increased control between traditional and newer media platforms. Whether they were different in any way in terms of their media consumption patterns from their families and friends? This helped in getting a sense of whether consumers had more control in consuming media between traditional and newer platforms and also whether trends are shifting in terms of change in media consumption patterns. Examples of contrasting prompts that were used with media consumers-

- *Do you think there is a difference between traditional media outlets and newer media technologies in terms of control in choosing what you want from them?*

For media industry professionals these prompts were used to solicit more information on their views and outlook on push versus pull by consumers for getting content. Example of contrasting prompts used during interviews with media experts.

- *Are you aware of push and pull marketing strategy? Do you think this is applicable to the media industry and if it is do you think now there is a change from business push to consumer pull?*

In the first phase of research in interviewing media consumers, in-depth interviews were used. Semi-structured interviews were used in the second phase to interview media industry experts.

The details of the respondents of the two phases and the interview schedules are included in the appendix (B).

4.7 Data Collection and Data Analysis

As per Marshall & Rossman (2006) a researcher should determine the most practical, efficient, feasible and ethical methods for collecting data for a study. Data was collected in this study using interviews. The process of data analysis was carried out once all the data was collected by the researcher to form emerging concepts, themes and categories from the collected data (Merriam, 2002). The preliminary

research questions and literature review were used as the backdrop to analyse and manage the collected data.

4.7.1 Data Collection

Due to the exploratory nature of the research data collection was accomplished via interviews, in two phases as indicated above in Table-5. In the first phase five participants were engaged in in-depth interviews, in-depth interviews are described as conversations with a purpose (Webb & Webb, 1975) and combine structure with flexibility and help in discovering new knowledge and thoughts (Legard, Keegan & Ward, 2003). This technique was appropriate for the phase to probe into the respondent's understanding and viewpoints on the idea of consumer control and delving into their personal experiences and views. Interview duration of consumers lasted between thirty minutes to one and a half hours.

In the second phase as discussed previously, semi-structured elite interviews were used to gain insights from six media experts on their awareness and acknowledgment of the phenomenon of consumer control and their views on media business response to consumer control. Using semi-structured interviews in this stage enabled the probing of experts to get more clarity on certain points related to the media landscape apart from information solicited explicitly for the research questions. Duration of each interview was between thirty minutes to one hour and was conducted in the respondent's work place.

Pre-testing of both interview guides (included in appendix C) was done using one respondent each selected on the same criteria as the actual sample to check the validity of questions and to allow the researcher to become comfortable with the interviewing technique and data capturing process. The interviews in both phases were recorded using a voice recorder after taking the respondent's permission and handwritten notes were taken by the researcher to record any additional information.

4.7.1.1 Ethical Considerations

Ethical considerations to protect the interests of research participants is an essential part for any research project (Saunders & Lewis, 2012). In this study all participants were first provided with an interview consent form (included in the appendix D) which made them aware at the very outset that their participation was completely voluntary and they could withdraw from the study at any time. In a qualitative interview

precautions need to be taken to ensure the confidentiality of subject's responses (Kvale, 2008), so the voice records, notes and the transcribed interviews were stored on the researcher's password protected computer. Also any references to future products, services and organisational strategies not in the public domain and comments on competitor products and services were removed from the data.

4.7.2 Data Analysis

This phase involved the reduction and synthesis of the data gathered from the interviews into more manageable pieces for interpretation. In the analysis of qualitative data the following steps are involved:-

- Clean and organise the primary data
 - Develop Categories or themes
 - Immersion in the data to become familiar with it
 - Coding the data into configured categories/themes
 - Interpret the data after running analytics
- (Marshall & Rossman, 2006; Saunders & Lewis, 2012)

All the interviews were transcribed to allow analysis of the data. The transcribed data was read in depth to identify common patterns and themes. In accordance to Gilham's (2005) suggestion that a high level approach should be used by the researcher in analysing the collected data as otherwise there is a risk of subjective interpretation of data collected from respondents. The major themes identified were then used as categories to code the data for interpretation and running analytics. The data was analysed using qualitative data analysis software Atlas.Ti[®]. Atlas.Ti[®] is a tool for an explorative approach for theory-building and it can convert linear data like transcribed interviews into maps to identify patterns and concepts (Muhr, 1991).

The content was thematically analysed in an inductive manner to identify patterns. The thematic approach was used as: it is highly flexible; it is an accessible method for researchers with little or no experience in qualitative research; results generated can be understood by a much wider section of the public (Braun & Clarke, 2006). Furthermore as opined by Braun & Clarke (2006) inductive thematic analysis is highly flexible, bottom up, rich and data driven without trying to fit the data in any pre-existing coding frame. This is particularly useful in gaining insights into an area where there is limited research (Braun & Clarke, 2006).

4.8 Data Validity and Reliability

As per Leedy & Ormrod (2010), the validity and reliability of research instruments influence the extent to which the researcher can learn something about the phenomenon under study. Qualitative research is aimed at finding different interpretations of a particular event instead of being focussed on fixed, single and measurable outcome of an event like quantitative research (Merriam, 2002). To reduce researcher bias, rigour needs to be introduced in the process. Reliability of a research study refers to the consistency of the measures used in the study and validity is concerned with the extent to which the study reflects the phenomena being observed (Wahyuni, 2012).

For qualitative research Shenton (2004) and Wahyuni (2012) have suggested that the notion of dependability is more appropriate than validity, dependability can be achieved by a detailed explanation of the processes used in the study so future researchers can follow a similar framework to repeat the study (Shenton, 2004; Wahyuni, 2012). In this study the interview guides, details of the respondent samples, interview transcripts and the analysed data will be made available to any future researcher who might be interested in replicating this project.

To ensure reliability of a research study Creswell (2003) suggest 8 strategies from which the researcher can choose one or more to increase the reliability of the study. Out of the eight strategies the researcher chose researcher reflexivity, thick, rich descriptions and spending time in the field (Creswell, 2003).

Researcher reflexivity refers to the researcher's awareness of his/her personal beliefs, values, and biases and how they affect the processes and results of the research project (Anderson, 2008). To account for researcher reflexivity, the researcher should disclose these beliefs, values and biases so the reader can understand and adjust to these beliefs (Creswell, 2003). The researcher highlights his own biases when it comes to this study in the research limitations section, as the researcher comes from the information technology industry and has been a cord cutter from traditional media he overly emphasises the role of consumer control and that now consumers can and are increasingly dis-intermediating the role of media businesses by pulling content of their choice legally or illegally. Thus the disclosure will enable readers to have a more objective perspective on the findings and

discussions in Chapters 5, 6, and 7. This will help in improving the reliability of the data.

Thick, rich descriptions can help the reader visualise and virtually experience the actual narrative experiences of the participants (Creswell, 2003). During in depth interviews of media consumers and semi-structured media experts the narratives of the respondents provided a lot of narrative experience. The researcher has extensively used the actual narratives of the participants to present the results so that the readers can experience the results in the respondents own words; so they can visualise how these convey the richness and detail of the experiences and emotions; thus improving the validity of the results.

On spending time in the field, the researcher has spent a lot of time in the field of media particularly digital media as a professional working in the industry as well as a consumer since the past ten years. So the researcher has in depth understanding of the phenomenon under study and can thus convey the details pertinent to the landscape and the people under study. This adds validity to the narrative accounts of the study as per Creswell (2003).

4.9 Research Limitations

Exploratory research provides deep insights and fuller understanding of an issue and provides impetus for further research of the phenomenon, but there are certain limitations associated with this approach; as definitive conclusions cannot be drawn on the issue being investigated from this kind of research or the interpretations of the findings can be judgemental (Saunders & Lewis, 2012). The researcher acknowledges these limitations for this research project.

Exploratory research is very subjective and susceptible to the perspectives and biases of the researcher (Saunders & Lewis, 2012). The researcher in this case is a digital media enthusiast, has worked in the digital media industry, is a cord cutter ("Cord Cutter," n.d.); and an ardent advocate of free content sharing. This may influence the researcher to overemphasise the phenomenon of consumer control and the increased ability of consumers to pull content instead of being dependant on content push by media businesses and the need for media businesses to craft new strategies to factor this consumer control and pull. The researcher may have been inclined to find that there is much more consumer control and content pull than might be the case objectively.

Furthermore the researcher is not a formally trained interviewer and is not conversant with all the techniques that can be applied to probe in depth to illicit insights.

Due to time constraints, access to respondents, response rates particularly from media experts and financial considerations, a small sample size of respondents were selected from Gauteng Province, South Africa using non-probability sampling method which is a limitation of this study as the results cannot be generalised for the entire population.

This study was performed cross-sectionally by factoring the opinions of media consumers and experts at one point in time. So this study is limited to the fact that it does not account for any longitudinal changes that may be happening among media consumers and experts.

Also the results of the research are highly dependent on the information provided by the respondents during interviews, which means that they are dependent on the questions in the interview-guide and data collection process.

4.10 Conclusion

This chapter described the research design and methodologies used; to meet the objectives established at the beginning of the research report and provide answers to the research questions. The results of the exploratory study are described in the next chapter.

5. Chapter 5:- Research Results

“You discover yourself through the research of your work”

- Makoto Kobayashi, Physicist and Nobel Prize Winner

5.1 Introduction

The purpose of the study was to see if increased consumer control in media consumption is changing consumption models from content provider push to content consumer pull and business awareness to this change. This chapter presents the results of the study. Media consumers and experts from the media industry were interviewed to explore whether consumers now have more control in content consumption; how content consumption is changing with increased consumer control and business awareness to consumer control and content pull.

5.2 Demographic details of the participants

5.2.1 Media Consumers

Five media consumers were selected for this study, in between LSM levels 4-10 and from the ages of 21 to 50. Three of the respondents were female and two were male. Respondent 1 is from LSM 10; Mr G is 26 years old and manages his family owned logistics business. He holds an MBA degree and is very interested in the happenings in the business world particularly financial information of South African listed companies. Media consumer 2, Mr M is 37 years old and is from LSM 4. He is a part time handyman and gardener and has been moving from one job to another. He is from Zimbabwe but has lived in South Africa for 5 years. Miss N who is media consumer 3 is 21 and belongs to LSM 7. She qualified from the university last year with a degree in psychology and recently started her first job as a junior sales support staff in an IT company. The 4th respondent Mrs C (LSM 8) is a middle aged financial controller in a government department; she is a very religious person and is mostly interested in christian content. Mrs M, the final respondent is 45 years old belongs to LSM 9, has a university qualification and works as a logistics controller in a telecommunications company. She loves to watch tv series, documentaries and movies. The interviews from the consumers provided insights into the following perspectives from the side of the consumer:

- Consumer control at different economic levels
- Content consumption patterns in different age groups
- Content pull by consumers who now have access to various technologies

5.2.2 Media Experts

Six media experts were interviewed for the study. The experts were selected from different spheres of the media business which included public broadcasting, print industry, pay television and media planning/consulting. Experts included 1 respondent from the South African public broadcaster which has a mandate of producing and broadcasting entertainment as well as informational content in South Africa's 11 official languages. One respondent was from the newspaper industry and is a part of the biggest print publication of South Africa which runs 6 daily national newspapers and reaches approximately 4 million readers every day. Another respondent was a marketing and media consultant who regularly advises companies on how to create and monetise opportunities in the media business; her clients include the largest cellular service provider in the African continent. She is also an adjunct faculty in a South African business school and teaches a course on digital content marketing. There were 2 respondents from the pay television business; one is the CEO of the biggest and oldest pay tv channel in Africa, while the other is the product owner of the free video on demand (FVOD) service of the biggest pay tv provider in the African continent which has annual revenues in excess of ZAR 30 billion. This expert is a digital media evangelist and has managed the digital music portfolio of the largest South African cellular service provider and digital products of the biggest South African bank. During the course of the study, the CEO of one of the biggest South African media planning companies was also interviewed. The company advises its clients on how to connect with their customers and spread advertising messages using both traditional and new media. The company has numerous clients including the biggest African retailer and the world's largest carbonated drinks brand. The media experts represent a cumulative experience of more than 100 years in the media industry spanning both traditional and new media channels. Valuable insights were gained from these experts on the following.

- Awareness and acknowledgement of consumer control by traditional media businesses.
- Level of recognition of consumer control by media businesses in other parts of the media ecosystem.

- Expert's viewpoint on whether consumer control is changing content consumption from push to pull.
- Business response to consumer control and pull.
- The future of business models and strategies of the media industry in the age of the empowered consumer.

5.3 Explanation of the Data Collection and Analysis process

The data was collected using interviews from 5 media consumers who were selected based on quota based criteria and 6 media experts from different parts of the media industry value chain. Getting access to media experts was quite difficult and the researcher had initially solicited interview requests from a lot more media experts than the final tally. One media expert rescheduled the interview thrice and ultimately dropped out of the study. The data from the interviews which was voice recorded with the respondent's permission was then transcribed from the voice notes using transcription software. Once the interviews were transcribed it helped the researcher to immerse himself in the data and identify the core themes that were emerging from each interview and how these themes connected with each other. Once all the interviews were transcribed the data was inputted into qualitative data analysis software Atlas.ti. Using Atlas.ti the researcher started to put codes against the emergent themes from the interviews. The researcher in the first iteration of coding the transcripts ended up with 258 codes to symbolise the themes from the conversation which were then pared down to 152 by combining and deleting some codes which were redundant or repetitive (The complete list of the 152 codes are included in appendix E). These codes then helped the researcher to run analytics on the collected data.

5.4 Data Results: According to themes

As discussed above in total 11 interviews were carried out for the study. During the course of the interviews, the themes that emerged from the interviewee responses are represented graphically in the image below. These themes demonstrate the journey of consumer empowerment and content pull in the media landscape and business response to consumer empowerment and will be discussed sequentially in the following sections

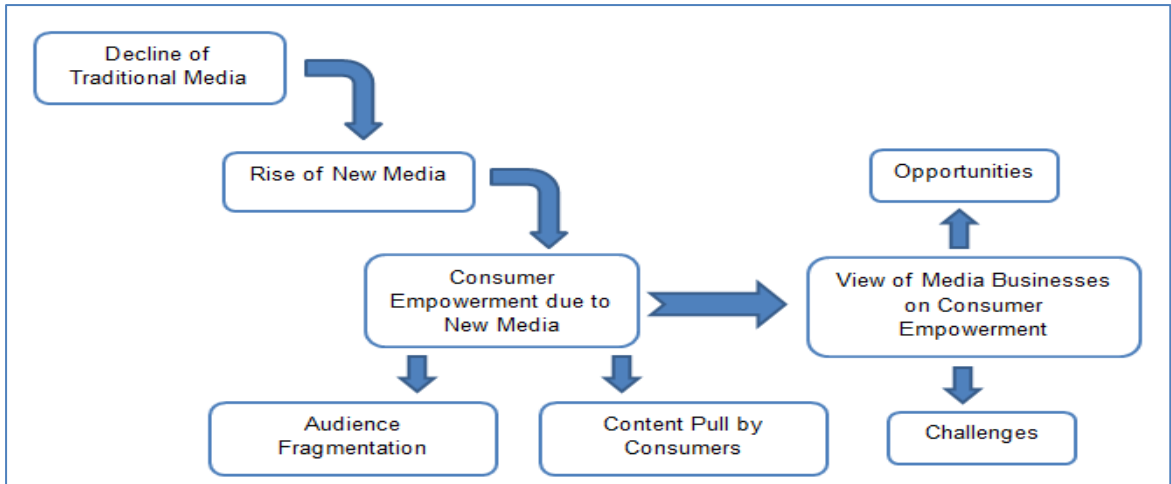


Figure 17: Map of Emergent Themes from the Interviews

From these themes organic connections emerged to the research questions. In the table below, the first set of horizontal row represents the emergent themes and the responses given by the respondents on those themes are shown in the second set of rows. Three vertical columns RQ1, RQ2 and RQ3 represent the three research questions posed in Chapter 3. The arrow connectors show the connection between themes and the boxes represent the connection between the responses on these themes and the research questions.

Emergent Themes	Respondent Responses	RQ 1: Consumer control Changing Consumption From Push to Pull	RQ2: Are all consumers able to Pull Content	RQ3: What are Businesses Doing in Response
Decline of Traditional Media	Lack of Choices			
	Expensive			
	Frustration with Current Choices			
	No Control on content being pushed			
Rise of New Media	More Choices Available			
	More Individualised			
	Non Linear Content Delivery			
Consumer Empowerment	More Control in Media Consumption			
	Ability to Peruse Multiple Platforms			
	Pull Content as per Consumer Needs	→		
	Even at low income levels consumers are empowered		→	
View of Media Businesses On Consumer Empowerment	Challenges to Businesses from Empowerment			
	Try to Give Consumers what they want			
	Understand Consumers better			
	Change Business Tactics to Factor Pull			→

Figure 18: Flow chart of emergent themes and respondent responses to the research questions

Codes were assigned to all the transcribed interviews based on themes that came out of these interviews. The results are analysed using word counts of these assigned key codes and selected quotes from respondents on these themes.

5.4.1 Decline of Traditional Media

This was the first theme that emerged from the interviews. Media consumers frequently mentioned how they had stopped reading newspapers as they can get all their news online or stopped going the movie theatres as they could download the movies they wanted to watch. Consumers also mentioned that current television programming was not interesting and they did not find any content that interests them even on pay tv. Even media experts agreed that traditional media is on the path of decline with competition from digital platforms. Some of the reasons offered by them were migration of users to social media, the problem with linear content delivery systems of traditional media not fulfilling consumer needs.

The co-occurrences of key codes **Decline** and **Traditional Media** were counted to find where they appeared together to find all instances in the conversations where respondents talked about decline in traditional media. As seen below, the conversation about decline in traditional media happened 33 times across all 11 interviews with media experts repeating this theme 17 times while media consumers mentioned this theme 16 times.

Key Codes	Media Consumers	Media Experts	TOTALS:
Decline COOCCUR Traditional Media	16	17	33
TOTALS:	16	17	33
Percentage	48%	52%	100%

Table 6: Code Analysis on Decline of Traditional Media amongst media consumers and media experts

So the conversation on the decline in traditional media was almost evenly split between media experts and consumers with experts giving it a slightly higher emphasis at 52% as compared to 48% of consumers. So it can be inferred that consumers and experts are in agreement over the decline of traditional media.

When the co-occurrence analysis of the same two codes was done between the 5 media consumers, it was seen that the highest share of voice to the decline of traditional media was from Media Consumer 2, **Mr M** who is from the lowest LSM level among all respondents. So it can be deduced that consumers for whom money

is in short supply are giving up on traditional media channels. The second biggest share of the voice was from LSM 10 consumer **Mr G**. Consumers from higher LSM levels can afford various options in content consumption and this is possibly leading to them supplanting traditional media outlets with other mediums.

Key Codes	Media Consumer 1: LSM 10-26yrs	Media Consumer 2: LSM 4-37yrs	Media Consumer 3: LSM 7-21yrs	Media Consumer 4: LSM 8-50yrs	Media Consumer 5: LSM 9-45yrs	TOTALS:
*Decline COOCCUR Traditional Media	4	6	1	2	3	16
TOTALS:	4	6	1	2	3	16
Percentage	25%	38%	6%	13%	19%	100%

Table 7: Media consumers share of voice towards decline in traditional media

When the reasons for the decline of traditional media were analysed individually amongst the 5 media consumers, key reasons given were that traditional media is expensive, there was frustration over available choices on traditional media and traditional media was not fulfilling the consumer's needs. The below table summarises the co-occurrences of the codes that indicate frustration with traditional media. Media Consumer 2, **Mr M**, was the most concerned about traditional media being expensive (4/6 times), as this consumer is from the lowest LSM level among all respondents it follows that since the respondent has limited financial means to spend on entertainment he was concerned about the expense this also validates the analysis above where this consumer was the biggest contributor to the discussion on the decline of traditional media among all media consumers. But the other respondent who mentioned traditional media as expensive as Media Consumer 1 **Mr G** and mentioned it 2 times out of the total of 6, this respondent is from the highest LSM level 10 and so it can be surmised that consumers at high and low income levels are concerned about the cost of accessing traditional media outlets like newspapers and pay tv subscriptions. Media consumers 3 and 5 **Miss N** and **Mrs M** expressed frustration with the content on traditional mediums due to the fact that the content was old, often repeated or had a lot of advertising messages on television.

Key Codes	Media Consumer 1: LSM 10-26yrs	Media Consumer 2: LSM 4-37yrs	Media Consumer 3: LSM 7-21yrs	Media Consumer 4: LSM 8-50yrs	Media Consumer 5: LSM 9-45yrs	TOTALS:
Expensive COOCCUR Traditional Media	2	4	0	0	0	6
Frustration COOCCUR Traditional Media	1	4	2	0	3	10
Not Fulfilling Consumer Needs COOCCUR Traditional Media.	1	0	1	0	1	3
TOTALS:	4	8	3	0	4	19
Percentage	21%	42%	16%	0%	21%	100%

Table 8: Codes on Issues with traditional media discussed by media consumers

Selected quotes from media consumers on declining usage of traditional media and some of their concerns with traditional mediums.

LSM	Gender	Name	Age	Quotations
10	M	Mr G.	26	<i>"I don't buy newspapers or I don't get any newspapers"</i> <i>"I spend money on sometimes on eBooks or downloading music and other things but not on newspapers or magazines"</i>
4	M	Mr M.	37	<i>"previously I used to buy The Daily Sun daily but now that has changed"</i> <i>"like 5 years ago I mostly listened to music on the radio but not now"</i> <i>"I don't read the newspaper any more unless I see an interesting headline story and then I buy the paper just to read that story. But I don't read the whole newspaper anymore."</i> <i>"I don't think I will go get a full dstv as I don't need it."</i> <i>"I don't like the dstv giving so many channels when I only want one thing. "</i> <i>"Like newspapers also a lot of times, the news is not relevant or the news is not complete "</i>
7	F	Miss N.	21	<i>"Newspapers well apart from the Sandton Chronicle I don't really make an effort to go out and buy a newspaper. It is too much work holding such a huge newspaper "</i>
8	F	Mrs C.	50	<i>"I prefer eBooks over real books, as they are so convenient to carry them around as compared to real books and they are always with me."</i> <i>"I am turned me off newspapers."</i>
9	F	Mrs M.	45	<i>"Now I don't even watch TV, I can read about things online and be totally informed about what is happening in the world all the time."</i> <i>"I spend much more time on my PC to either watch my TV series or read the news or play games and much lesser time on TV or newspapers. Sometimes I don't even put the TV on the whole day"</i>

				<i>"Repeats on TV is the biggest problem that I think. The Pay TV providers show the same thing over and over again."</i>
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Table 9: Quotes from Media Consumers on decline of traditional media

Looking at some selected quotations from media experts it was seen that there is recognition amongst media experts as well on the decline of traditional media as shown in the table below.

Industry	Quotation
Media Planner	<p><i>"So I think Linear television as you and I know in the long term is dead."</i></p> <p><i>"The days of an editor saying this is the most important news you should know about are gone."</i></p> <p><i>" print will continue its steady decline"</i></p> <p><i>"Look at newspapers and those people always say that oh you can't emulate the experience of holding a newspaper and reading it but look at how they are declining as people don't want that experience as it does not enrich their content consumption in any way."</i></p>
Print Industry	<p><i>"The main thing for us is the declining number of newspaper readers especially Sunday newspapers"</i></p> <p><i>"People reading newspapers are going down and there is a lot of migration to Social Media especially the younger generation."</i></p> <p><i>"And now newspaper groups are struggling to find a way to generate revenue and keep the infrastructure running."</i></p>
Marketing and Media Consultant	<p><i>"Every traditional media form is being challenged in the digital space. So the traditional TV is being challenged by IP TV providers. Also the consumer takes up the challenge as they do not like the linear model of broadcasting where the consumer has to watch what Mr Broadcaster has decided that I should watch. "</i></p>
Pay TV Provider	<p><i>"TV has lost its position as breaker of the news, social media has taken that spot"</i></p> <p><i>"TV stations have to deal with lower budgets and the need to produce content for less"</i></p> <p><i>"When was the last time you saw a news story on TV, or heard it on the radio, that was actually news to you? Before seeing it on Twitter/Facebook/the internet in general? Social media did not only have a major impact on print media, it also triggered major changes in the broadcast media landscape. "</i></p>

Table 10: Quotes from Media Experts on decline of traditional media

5.4.2 Rise of New Media

The decline in traditional media has occurred as consumers have increasingly started using new media technologies to get information and entertainment content. The widespread availability and increasing affordability of technology like internet and smart portable devices has led to their adoption by consumers at all income levels. This was evidenced when consumers talked about increasing use of technology in their lives and their media diet comprising mainly of new media platforms. Media experts also opined to a great extent that new media adoption is on the rise and it will only increase in the future.

Key Codes	Media Consumers	Media Experts	TOTALS:
New Media	77	67	144
Technology	108	74	182
TOTALS:	185	141	326
Percentages	57%	43%	100%

Table 11: Code Analysis of New Media and Technology among Media Consumers & Experts

Analysing the usage of key codes **New Media** and **Technology** amongst all respondents, it was seen that media consumers spent more time (57%) talking about the two codes as evidenced by the iteration of these codes in all transcribed interviews of media consumers. Contrasting this to media experts, the two codes constitute 43% of the iterations in transcribed interviews of media experts. This can inductively mean that media experts are not in agreement of the notion of rise of new media in 57% of their discussion. As four of the experts were from traditional media businesses like public broadcasting, print and pay tv, it is can be said that these experts are still not completely accepting of the idea of decline in traditional media and the rise of new media. Selected quotes from media experts

Media Expert, Public Broadcaster: *“Traditional media outlets in my opinion are not going anywhere, because of the way they connect people”*

Media Expert, Pay TV Channel: *“TV viewership is still very strong and continues to grow, in this country if you look at DSTV, if you look at free to air broadcasters audience numbers are still increasing year on year.”*

The codes **New Media** and **Technology** were then individually analysed amongst the 5 media consumers to see how the usage of technology and new media is

spread between consumers of varied income levels, age and gender. As seen in the table below, the consumer from the lowest LSM **Mr M**. contributes the biggest portion to the discussion at 27% of the overall discussion. He is also the highest individual contributor, to the conversations on new media (22/77 = 29%) and technology (28/108 = 26%). During the interview it came out that **Mr M** is an avid adopter of affordable technology and is conversant in using internet on mobile devices and personal computers. Since he has less money to spend on getting content he wants the most value out of the money spent and he felt that new media and technology give him the most value for money.

Key Codes	Media Consumer 1: LSM 10-26yrs	Media Consumer 2: LSM 4-37yrs	Media Consumer 3: LSM 7-21yrs	Media Consumer 4: LSM 8-50yrs	Media Consumer 5: LSM 9-45yrs	TOTALS:
New Media	14	22	18	7	16	77
Technology	24	28	21	22	13	108
TOTALS:	38	50	39	29	29	185
Percentage	21%	27%	21%	16%	16%	100%

Table 12: Share of discussion on new media and technology amongst media consumers

The two female consumers **Mrs M** and **Mrs C** of LSMs 9 and 8 respectively, contributed to the discussion equally at 16%. When asked during the interviews about their technology usage, they said that they were both familiar with new media technologies but due to family and work commitments are not able to spend much time on using them. So it is important to note that although technology adoption and familiarity is widespread across all the consumers, the lifestyle of consumers also plays an important role on the usage of technology and media.

Selected quotes from media consumers on the increasing use of technology and new media:

LSM	Gender	Name	Age	Quotations
10	M	Mr G	26	"I use it iTunes to download music on my phone." "Yes it is much more on my mobile devices also because it is so easy to use the internet on these devices compared to let's say 3-4 years back when it was much more expensive and also not very widely available as compared to now where Wi-Fi is also much more widely available."

				<p><i>"Yeah, I got an Apple iPad 2 years ago and that is where I now get most of my content, I download my music there, I read my news there, even read eBooks on it sometimes. Before that it was usually I would mostly watch news on TV. But now I can watch or do anything on my Ipad which is different. Especially like the international TV shows I don't have to wait for the season to come on DVD to South Africa or for DSTV to play it. So it has definitely changed the way I consume news and other content. "</i></p>
4	M	Mr M	37	<p><i>"I can do more things on my PC than on a TV."</i></p> <p><i>"I had a computer, a P III but it is broken now, I am still trying to fix it. But I got a P IV motherboard. So I am trying to upgrade now."</i></p> <p><i>"For music I mostly download music on my phone, I downloaded it through my computer or get through blue-tooth from my friends"</i></p> <p><i>"We used to swap cds earlier but now with a computer I take a usb and take it to my friend and copy all the music that I want from him and copy it to my computer"</i></p> <p><i>"So it seems technology is changing so fast, faster than we can think and now I use these technology more than what I used to 5 years ago."</i></p> <p><i>"Years ago I used to have a Nokia 1200 and the internet wasn't easy to get and was expensive at that time"</i></p> <p><i>"Even though I didn't do computers in school, now I learned how to use the computer by myself and use it."</i></p>
8	F	Mrs C	50	<p><i>"Yes I have lots of apps for example I like to play golf and I have apps that give me golf lessons and to improve my handicap etc."</i></p> <p><i>"Earlier one was limited to get content by either turning on the radio, newspaper or TV but now with smartphone you can do all of it through the phone. Even things like banking, buying electricity I can do on the phone"</i></p> <p><i>"My phone as that keeps me in contact with other people and I can do almost everything that I want to do I can do it on my phone. You can take everything else away but as long as I have my cell phone I will be ok. I can keep in touch with people, listen to music, get information, watch videos, read books and almost"</i></p>

				<p><i>anything else I can do it on my phone"</i></p> <p><i>"Technology was not so widespread before as now and also I didn't have things like internet on my phone"</i></p>
7	F	Miss N	21	<p><i>"The last movie I watched was "Legend of Hercules" on my computer one hour ago</i></p> <p><i>"My main source of music is my phone. I download a lot of music on my phone from music sites."</i></p> <p><i>"Well the phone is mobile and you can't carry your TV around you, but you can take your mobile phone with you"</i></p>
9	F	Mrs M	45	<p><i>"Everything is about technology now. 5 years ago I didn't even know the word Wi-Fi but now everything is done over Wi-Fi."</i></p> <p><i>"I use YouTube to watch video clips, read news, go on social media sites like Facebook and Twitter."</i></p> <p><i>"Sometimes I am at the stand and pick up the newspaper and then see I have already all read the news online."</i></p> <p><i>"With the spread of internet and Wi-Fi all over, the internet is like electricity and I will not know what to do without it."</i></p>

Table 13: Quotes from Media Consumers on New Media usage

Even though as shown above, some experts are still not in complete agreement with the view that new media adoption is increasing in leaps and bounds while traditional media usage is on the decline, the discussion also exhibited that experts recognise that technology adoption is leapfrogging traditional mediums and users whether at high or low income levels are using technology to create and consume content and connect with likeminded people. Furthermore the threat to traditional media from new media platforms was also expressed by some experts.

Industry	Quotation
Media Planner	<p><i>"Currently people associate digital media consumption with laptops, pcs and wired connections but now with all these cheap smartphones entering the market you can buy a smart phone for 500 rands and content consumption will be driven on these devices."</i></p> <p><i>"5 years ago Facebook was a baby in South Africa now they have more than 10 million users, there was no twitter, So from the consumers perspective , the way of consuming media has changed drastically"</i></p>

	<p><i>"for a vast majority of poorer South Africans internet access is through their phones and they have never experienced it through computers, so they don't know what a laptop is and they don't even know how to use one but they know how to use the internet and use Google, Facebook and Whatsapp."</i></p>
Print Industry	<p><i>"Consumers share information over social media and create their own communities of interest and participate in discussions, share experiences, stories etc. related to the content they like."</i></p> <p><i>"I think that now with smart phones and tablets it is now easier to consume news by having these newspaper apps on these devices."</i></p> <p><i>"So there is definitely a move to digital media technology, where earlier we used to have a normal distribution with regards to mass media; now we have a long tail where mass media are on one end and digital on the other."</i></p>
Public Broadcaster	<p><i>"The digital space has arrived and there is no going back."</i></p> <p><i>"For instance in the rural areas most people do not have internet access at their homes but they are still communicating differently than earlier. Old ladies are writing text messages; nurses in rural hospitals/clinics are able to administer health advice via cell phones to TB patients. "</i></p> <p><i>"Even in lower impact markets and you see youngsters huddling around places that have free Wi-Fi to download content on their phones. And they don't consume content like I do on my home computer. They use their mobile phones as they can carry it around with them all the time. And they can take their devices to wherever they can access the internet and can leave when they are done. So it is changing things quite radically everywhere and in developing countries. People are becoming very technology savvy without knowing much about technology."</i></p>
Pay TV Channel	<p><i>"As broadcasters we think our competition is other broadcasters or pay-tv providers but maybe it can be a mobile operator or a maybe a satellite services business can be the broadcaster's biggest competition"</i></p>
Pay TV-Provider	<p><i>"In South Africa, as in other markets worldwide, consumers' access to entertainment, media, content and experiences are being driven by the expansion of access to the Internet and the explosive growth in smart devices."</i></p> <p><i>"In 2014, the technology to tie together the pieces of the multi-screen puzzle is being leveraged on a much wider scale than in the past."</i></p>

Table 14 Quotes from Media Experts on New Media

5.4.3 Consumer Empowerment due to New Media

One of the biggest reasons for the increasing popularity of new media amongst consumers is that new media allows the consumer to be increasingly in control of his

or her choices. As reviewed in the literature earlier, new media technologies have enabled unprecedented consumer empowerment in media consumption where the consumer is the audience as well as content producer; this empowerment is changing the dynamics of the media landscape. With the proliferation of platforms and technologies available to consumers, now consumers are actively seeking out the content of their choice from these options than being passive audiences. This theme of empowerment and control in when, where, what and how to consume content was very prominent during the interviews with media consumers. Media experts also mentioned the idea of the consumer now being in control when it comes to media.

Doing a word count as shown below of the key code **Consumer Control** between the two respondent groups, it was mentioned in almost equal proportion amongst media consumers (49%) and media experts (51%).

Key Code	Media Consumers	Media Experts	TOTALS:
Consumer Control	147	152	299
TOTALS:	147	152	299
Percentage	49%	51%	100%

Table 15: Share of discussion on Consumer Control between Media Consumers and Experts
 During the interviews with media experts it was observed; they mentioned a few times that they were sceptical about the idea of consumers having control in consuming content. This sentiment was most strongly expressed by the expert from the public broadcaster (3 times) as shown below; other experts also mentioned this in passing.

Table 16: Media experts denying consumer control

Codes	Media Expert: Public Broadcaster	Media Expert: Media Planner	Media Expert: Print Industry	Media Expert : Marketing & Media Consultancy	Media Expert: Pay TV Content Provider	Media Expert: Pay TV Provider	TOTALS:
*Denying COOCCUR Consumer Control	3	0	2	1	0	2	8
TOTALS:	3	0	2	1	0	2	8
Percentage	38%	0%	25%	13%	0%	25%	100%

As seen above, 4 out of the 6 experts denied consumer control in media consumption in one or more instances. This when analysed with table 15 where experts agreed on consumers having control in their conversation 51% of the time shows that there is a certain paradoxical thought amongst experts in accepting the idea that the consumer is now in control and not the business. As seen from the table below the experts deny and accept the notion of consumer control at the same time. So we can deduce that there is a certain tussle in the thoughts of media experts on the consumer being in control.

Industry	Denying Consumer Control	Accepting Consumer Control
Public Broadcaster	<i>"I think the consumers still do not have much control. Consumers are trying to exert control but I think they are still to quite a great extent, controlled by media providers."</i>	<i>"Consumers are now choosing what they want; and it will be easier for business to tell what consumers want by seeing what they are pulling from the provider networks. They are showing it with their actions that they want to binge watch a complete season of something in one sitting."</i>
	<i>"So I do not think Consumers are in control as of now"</i>	<i>" Consumers will be able to control what they would like to read, watch or listen much more "</i>
	<i>"a lot of times consumers do not know what they want"</i>	<i>"In new media networks I think that the control is much more evident"</i>
Print Industry	<i>"I will give you an example from our industry; here most of our readers do not know what they want. And we avoid asking them what they want instead we give them a list of content that we have available and ask them to choose amongst them."</i>	<i>"Yes, I definitely think consumers have more control. I mean with the use of digital technology people are choosing what to watch, when to watch."</i>
		<i>"So I think yes Consumer control is definitely evident and increasing "</i>
Pay TV Provider	<i>"I don't think consumers will ever have absolute control"</i>	<i>"Consumers definitely have more control now as compared to earlier. So people want to be different and get what they want and not be dictated."</i>
		<i>"Consumers today have little patience for device, access or geographical restrictions."</i>
Marketing & Media Consultant	<i>"the networks have an almost monopolistic control over the content and the consumers through its platforms"</i>	<i>"Yes definitely, the consumer has more control and this is due to the rapid spread of technology all over the world which empowers consumers."</i>

		<i>"The consumer says "I want to watch what I want when I want". So what is happening that services like Netflix are becoming so powerful as more and more consumers are deciding that On Demand Services are much more preferable."</i>
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Table 17: Experts Denying and Accepting Consumer Control

When the word count for the code Consumer control was done individually amongst all media experts, the discussion was dominated by media planning and consulting experts (22% and 24% respectively) whereas traditional media providers contributed the least to the discussion. This can be connected with the above discussion that traditional media providers are still to a certain degree reluctant to accept that the consumer is now in control whereas businesses not tied to traditional models are more accepting of this notion.

Code	Media Expert Public Broadcaster	Media Expert Media Planner	Media Expert Print Industry	Media Expert Marketing /Media Consultancy	Media Expert Pay TV Content Provider	Media Expert Pay TV Provider	TOTALS:
Consumer Control	28	34	19	37	15	20	153
TOTALS:	28	34	19	37	15	20	153
Percentage	18%	22%	12%	24%	10%	13%	100%

Table 18: Share of discussion on consumer control between different media experts

Selected quotes from media experts on consumers being in control are mentioned below.

Industry	Quotation
	<i>"The consumer is the champion now."</i>
	<i>"So the consumer knows what he wants and he will go and look for it."</i>
	<i>"in South Africa are dealing with consumers who never had a voice before who didn't have any options of connecting with their icons and brands."</i>
	<i>"Consumer have more control in media consumption than ever before"</i>
	<i>"So the whole notion of consumer as their own editor, curators' even creators of content is a big evidence of consumer control and how they are manifesting that on media providers. And this will always get bigger."</i>

Media Planner	<p><i>"The fact that half of the 10-11 million people on Facebook in South Africa are in the LSM 5-8 tells us a story that social media is not exclusively for the upper income any more. It will chip away and grow even more in the LSM 5-7 market and so on."</i></p> <p><i>"people are becoming platform agnostic"</i></p> <p><i>"look at newspapers and those people always say that oh you can't emulate the experience of holding a newspaper and reading it but look at how they are declining as people don't want that experience as it does not enrich their content consumption in any way."</i></p>
Media & Marketing Consultant	<p><i>"I think both ease of access and experience of the content are important and the consumer chooses what he or she wants and when."</i></p> <p><i>"Even in lower LSM levels a consumer is much more empowered now than previously."</i></p> <p><i>"The business models of Google and Facebook are built around the concept of consumer control and creating a platform so that content producers and consumers can together on this platform to meet their needs."</i></p>
Pay TV Content Provider	<p><i>"In this day of increased consumer control, consumers can pull content anytime, anywhere, any place on one hand this is very beneficial to the consumers and they definitely like it"</i></p>

Table 19: Quotes from Media Experts on Consumer Control

When interviewed, consumers believed that they definitely had more control now than earlier and they liked being in control as they believed that now they could get content to satisfy their individual needs. Media Consumer 1, **Mr G** mentioned he thinks he definitely has more control in consuming content, he believes that with traditional media the user is forced to see and believe the content that is being presented to him. But with new media he has control on the content and after seeing or watching something he can go and verify the information from other sources. On a similar vein **Mr M** from LSM 4 said that he likes the idea of choosing what he wants and not someone else telling him what he can get. **Miss N** and **Mrs C** both believed that they have more control now than before and they like being in control to read watch or listen to what they want and not being dictated by media providers. **Mr M** from LSM level 4 believed that this control helps him immensely as he is now able to confirm news and information that he reads or hears from other sources using the internet and can determine the veracity of the news himself. Thus, as discussed in the literature review with consumer control he is becoming his own gatekeeper of information and not solely reliant on traditional gatekeepers for information. **Miss N** from LSM 7 said that she did not want to wait to get the content of her choice and now with new media she is empowered to look for what she wants when she wants it. All consumers also stressed the importance of having choices and being able to

choose content that they want from these choices. So we can infer that media consumers are partaking content from various sources to suit their needs and wants. With a word count for **Consumer Control** amongst media consumers, it was observed that all 5 consumers talk about it, with consumers at lower LSMs contributing more to the discussion on consumer control, with LSM 4 and 7 spending 31% and 23% of the total discussion. This stands out as a very important observation that consumers who have less spending power on media resources exert more control as they are more in need of getting content that they want without wasting precious available resources.

Code	Media Consumer 1: LSM-26yrs	Media Consumer 2: LSM 4-37yrs	Media Consumer 3: LSM 7-21yrs	Media Consumer 4: LSM 8-50yrs	Media Consumer 5: LSM-945yrs	TOTALS:
Consumer Control	24	46	34	25	18	147
TOTALS:	24	46	34	25	18	147
Percentage	16%	31%	23%	17%	12%	100%

Table 20: Discussion on Consumer Control between different media consumers

A contrary thought was expressed by the expert from the public broadcaster that the popularity of a certain programme on television with consumers from low LSMs may not be because audiences like it but because of economic constraints they choose that program to satifisce amongst other options.

Media Expert: Public Broadcaster: *“we created Generations thinking that this what the audiences like but maybe this is the only half hour where the family can afford to get together to watch TV and the family agrees on watching "Generations" as they have something for everyone.”*

Some of the media experts interviewed also opined similarly as above where they said that the idea of consumer control and content pull is more apt in developed countries where consumers are in an abundant media environment. Media Expert (Media/Marketing Consultant) remarked that in developed markets where people have enough disposable income they can pull the content that they like from different sources but in Africa, that level of control and pull is not present as money available for content consumption is limited for most consumers. Media Expert (Public Broadcaster) mentioned that people from lower income levels need to budget on how much they spend on daily necessities and on media consumption, so they need to ration their media consumption based on these considerations and hence do not

really have much control in their choices; so these consumers need a media provider who can create programming and schedules for them.

But as seen from the data above, consumers from lower LSMs actively seek out content they want and maybe they all watch this program as they actually like it and can relate to the content. So it was seen that consumers believed and preferred to be in control as consumers believed that with them being able to control their choices, they can get objective exposure to content. Also with the use of internet enabled mobile devices becoming almost ubiquitous amongst consumers at all economic levels, consumers are consuming content from different sources at different times. **Mr M** (LSM 4) said that it is difficult for him to afford traditional media and also these media platforms do not provide him with the content that he wants. So the money that he can spare he uses it to access the internet on his mobile phone. Additionally he mentioned that he had an old P III computer which he is now trying to upgrade to a P IV as he believes the computer will be beneficial to him help in learning a lot of new things. A few years back if he had to access the internet, he had to go to an internet café which was expensive for him but now he can easily access the internet on his phone. In terms of control in getting what he wants **Mr M** said that he believes he has control in getting the content of his choice, he knows from where to get the content. Some of his friends told him about a few websites from where he can get content and he himself searched and found other websites to source content from. He likes this control in selecting things that he wants from where he chooses to get them and in his opinion this control is missing from traditional media like television or newspapers which offer a consumer like him with very limited options. The thought of having 267 virtual friends on Facebook was important to him as he believed he could connect with other people without even meeting them in person and being located in different geographical locations. The consumer at LSM 7 **Miss N** also had similar ideas about her being in control and getting content of her choice. She believes that now she is more in control to get what she wants, when she wants as she can get content from different sources. Moreover she wants different choices in content consumption as she believes that due to her age she is still exploring different kinds of content to see what she likes. An example cited was discovering various sports, once she started watching them on tv she started enjoying them a lot. So choices are important to her and hence she is migrating towards new media platforms that give her these choices.

These usage patterns are very similar to how **Mr G** (LSM 10) uses media in his life. **Mr G** is not constricted by any financial constraints in consuming media, yet he wants

optimum value for the money he spends in consuming media. Even though he can spend money on traditional and new media, in his opinion traditional media doesn't give him adequate value as there is a lot of content that is provided by these services that are not relevant to him. He actively pulls content of his choice from different sources; an example given was downloading of episodes of one of his favourite tv series from the internet and not waiting for it to be broadcasted on television. Mr G uses his internet connected mobile devices a lot to get the content of his choice whenever and wherever he pleases. He believed there is a lack of free content on financial news services in South Africa so he gets this kind of information from international websites. Even for him content communities play a very important role by providing him with recommendations for movies, books and other content that he can peruse.

Selected quotes from media consumers on them being in control

LSM	Gender	Name	Age	Quotations
10	M	Mr G	26	<p><i>"Yes I definitely think I as a user have much more control when I use new age media as compared to traditional media."</i></p> <p><i>" When you use traditional media outlets you are kind of forced to see what is there and kind of believe that but with new age media outlets if you see a news article on a topic on one website, you can quickly go onto to another website to verify, so you can compare. Whereas with traditional media for example the 7 PM news, you get the news and that's it you can't verify it."</i></p> <p><i>"Well it varies, like in the morning I like watching a bit of news on Sky News on TV and then through the day when I am not in front of the TV I check the news on an app or twitter."</i></p> <p><i>"if media is controlled by certain powers you can be brainwashed into thinking about certain things in a particular kind of way, being able to choose what content you want exposes you to different things and not think in one way only"</i></p>
4	M	Mr M	37	<p><i>"Basically I like the idea of me choosing what I want myself and not someone else tells me what I can choose. That is why I like the internet and my PC. "</i></p> <p><i>"I can get things I want more easily. If I hear someone talk about something on the street I can just google it and read more about it and decide if it is true or not. I don't have to go and ask someone about it anymore. "</i></p> <p><i>"So if I am not working one week I spend half the day reading books and half the day using the internet."</i></p>

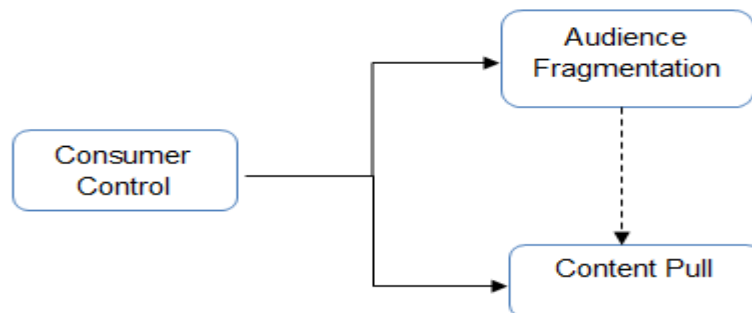
				<p><i>"With my computer and internet I want to improve my education and learn new things and I can do it in my own way."</i></p> <p><i>"I like the idea that I know what I want and I can go and get it, and not someone selecting it for me. Like I said I dont like the dstv giving so many channels when I only want one thing"</i></p>
7	F	Miss N	21	<p><i>"I like to have options in terms of my content. Sometimes I like to watch Entertainment news, then I move to TV series, and then I watch movies or watch the news so I like to have my options."</i></p> <p><i>"I miss the episodes on TV and then I go and download it on my phone to watch it. That's the only reason for downloading a series for me, that I find it very interesting and I miss an episode or two and I have to keep up with the series. "</i></p> <p><i>" I don't want to wait, I want to know it right now "</i></p> <p><i>" I have more control and watch what I like if I don't like what is coming on TV I can switch channels and if I do not like anything on TV, I can get things on my PC or phone. So definitely I think I have much more control in terms of getting what I want"</i></p> <p><i>"If you don't give me those options I am going to go somewhere else and get those options."</i></p>
8	F	Mrs C	50	<p><i>"Yes it has changed for me to listen to music, reading the news or getting weather has changed as there are many more options now."</i></p> <p><i>"Yes I definitely have more control now as compared to earlier. As I have more access and more choices, it was more difficult to get the different things before as technology was not so widespread before as now and also I didn't have things like internet on my phone which has now given me much more control on how I consume things as compared to before. Earlier one was limited to get content by either turning on the radio, newspaper or tv but now with smartphone you can do all of it through the phone.</i></p> <p><i>"I prefer to be in control of what I want to do and what I want to watch, when I can do it. I prefer that, like when I am watching one channel I can switch from one channel to other and If I don't like what is on TV I can browse things on my phone."</i></p> <p><i>"I want value for my money in what I am watching. I want to know that I am receiving quality content in terms of the money I am paying. "</i></p>
9	F		45	<p><i>"I like to buy the series and watch them as I don't miss any episodes and don't have to wait for the episode to come on air in parts."</i></p>

		Mrs M	<p><i>"Yes it does, with my lifestyle usually when I want to watch something by the time I get time to watch it the program is over or the movie is finished. But with the internet I have more control and i can look for things and watch them later or decide if they are worth watching by reading reviews."</i></p> <p><i>"I prefer the options as sometimes you just run out of ideas of what to do and prefer that there are options from which I can choose."</i></p>
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Table 21: Quotes on Media Consumers being in control

Thus from the above quotes of media consumers it is seen that consumer control in media consumption is manifested in two main forms;

- **Audience Fragmentation:** With the plethora of media options now available to the consumer, the consumer now has control in getting content from different mediums leading to audience fragmentation.
- **Content Pull:** With increased consumer control the user now is pulling content of his/her choice from multiple sources, whether they are traditional media outlets like television, new media platforms like search engines, social media, and content downloads or even sharing content amongst peers.



When the interviews were analysed to look for **Audience Fragmentation**; it was seen that it is a serious concern for media businesses as seen below.

Code	Media Consumers	Media Experts	TOTALS:
Audience fragmentation	6	10	16
TOTALS:	6	10	16
Percentage	38%	62%	100%

Table 22: Percentage Analysis of discussion on Audience Fragmentation

This might be because media businesses are worried about not being able to consolidate their audience on one particular platform which becomes a problem for attracting advertising on that platform. Whereas for consumers, fragmentation is a normal trait when the consumer is in control and can choose content from various

options. Analysing the discussions, doing a word count on audience fragmentation, media businesses dominate it with 62% of all occurrences whereas media consumers only mention it at 38%.

5.4.4 Content Pull due to Consumer Control

So it is seen that the consumer is becoming increasingly empowered and in control of his/her media consumption choices. One of the ways that consumers manifest control is by pulling content of their choice from different sources. This pulling of content is an important construct as historically traditional media businesses have based their models on pushing content to their audiences.

It was seen during the interviews that content pull is demonstrated not only consumers pulling content from media platforms as per their needs but also the creation of content communities where people share content recommendations and content amongst themselves. Doing a word count of **Content Pull** amongst the two groups it was seen that both media consumers and experts mention it a lot of times with the total word count of 182 and believe that consumers are pulling content and both groups contribute almost equally to the discussion in attesting to this phenomenon at 49% for media consumers and 51% from media experts as seen in the below table.

Code	Media Consumers	Media Experts	TOTALS:
Content Pull	90	92	182
TOTALS:	90	92	182
Percentage	49%	51%	100%

Table 23: Share of discussion on Content Pull between Media Consumers and Experts

When the same code was analysed individually amongst media consumers, it was seen that **Mr M** from LSM 4 and **Miss N** from LMS 7 are the leading proponents on the discussion with both of them together contributing 50% to the discussion. The third largest contributor to the conversation was **Mr G** from LSM 10. Thus it can be deduced that consumers at all income levels and access to resources are pulling content as per their needs. It is being seen in the study that consumers who have less resources at their disposal are more interested in pulling content which satisfy their needs as they have a more vested interest in not wasting any precious resources on things that do not fulfil their requirements. Consumers at higher income levels are also pulling content as they have much wider access to technologies and

other resources but perhaps they engage in less pull as they can even afford to spend money on things that might not fulfil their needs completely.

Code	Media Consumer 1: LSM 10-26yrs	Media Consumer 2: LSM 4-37yrs	Media Consumer 3: LSM 7-21yrs	Media Consumer 4: LSM-50yrs	Media Consumer 5: LSM 9-45yrs	TOTALS:
Content Pull	14	23	22	17	14	90
TOTALS:	14	23	22	17	14	90
Percentage	16%	26%	24%	19%	16%	100%

Table 24: Share of discussion on Content Pull between media consumers

From the selected quotes of media consumers it is seen that consumers are actively pulling content whether entertainment or information from various sources and also sharing them between peers. This pulling of content is also empowering the consumers by providing them information. As mentioned by **Mr M** he is now able to check the prices of products on the internet before making a purchase and **Miss N** mentions that when she listens to a news on the TV or Radio she reads up more about it on the internet. Another observation is media consumers are using mobile internet enabled devices to pull content whenever and wherever they are. As **Mrs C** said that when she is in a boring meeting she will use her phone to read the news, email or use social media. **Mr G** mentions reading news on twitter this points to the fact that consumers want immediacy in accessing content and they achieve that through pulling content from new media platforms which emphasise ease and speed of access to the content.

Even though all consumers mentioned that they liked to be in control and pull content of their choice yet it was also seen that the level of control and pull that consumers exercise is perhaps based on the individual or even the situation. **Mr G** mentioned that he always liked to be in control of his content choices and to him ease of access and speed of access to the content equated into a good experience. Whereas **Miss N** mentioned that she values the experience of the content more and so she will even wait for quite some time to watch her favourite tv series or movies on pay tv channels as she believed that watching it on television was a good experience for her *“I think I will not Binge Watch my two favourite shows as it will kill the excitement for me and I love to enjoy the experience of watching the series.”* **Mrs M** and **Mrs C** both mentioned that they liked control and to pull content sometimes whereas on other instances they were happy to let media providers present them with content and schedules from which

they could pick something to consume. In the words of **Mrs M** “sometimes you just run out of ideas of what to do and prefer that there are options from which I can choose. When I just want to relax and sit back and enjoy some mindless TV watching I prefer it to just play, like if I am at home alone and doing house work I prefer the TV to be just on and now and again I just look at it to see what is happening and it makes the house feel not so quiet”. So it is possible that the idea of content pull by consumers might not be a single concept instead it might be contextual based on the individual or the situation of the consumer.

Selected quotes from consumers on their wish to pull content.

LSM	Gender	Name	Age	Quotations
10	M	Mr G	26	<p><i>“There is quite a significant delay in the episodes. So I think the new episode comes out every Wednesday night in US and we can download it here on Thursday morning here on iTunes”</i></p> <p><i>“I have the news24 app especially when I am busy or working, I will quickly browse through the app to see the headlines and another app that I use is Flipboard, So I browse through that. I also get a lot of my news through “twitter” just reading the news feeds from some of the news stations and reporters. So if there is some interesting news I will read the headline on twitter. ”</i></p> <p><i>“ in the morning I like watching a bit of news on Sky News on TV and then through the day when I am not in front of the tv I check the news on an app or twitter.”</i></p>
4	4	Mr M	37	<p><i>“but now with a computer I take a usb and take it to my friend and copy all the music that I want from him”</i></p> <p><i>“ If there is some news I listen somewhere I can google it and read more about it”</i></p> <p><i>“5 years ago I mostly listened to music on the radio or buy cds and buy an amplifier but now I can just use my phone, I download the music on my phone and connect it to my amplifier and play my favourite music.”</i></p>

				<p><i>"Earlier you had to go to a shop and see that the item that you want is not there or the price is too high, now we can use google to check these things before going to the shops"</i></p> <p><i>"I am able to get what I want and I know where to go."</i></p> <p><i>"I can read the news and check if it is true on google."</i></p>
7	F	Miss N	21	<p><i>"I borrowed the movie from a friend who in turn had downloaded it from the internet."</i></p> <p><i>"I am watching the series on my phone, there are a couple of websites where you can download the series."</i></p> <p><i>"I get to a chat forum and everyone else in the world is ahead of you as they have watched the episode and you get spoiler alerts which ruin the anticipation and excitement of watching that episode on TV. That's very important for me."</i></p> <p><i>"when I am watching TV if I find something very interesting and I want to find more about, I go on the internet to read about it."</i></p> <p><i>"Because we are one episode behind than the US. and people went ahead and downloaded it. "</i></p>
8	F	Mrs C	50	<p><i>"My son downloads music for me from the internet."</i></p> <p><i>"Well sometimes I am in a boring meeting and I will take my phone out and I will quickly check my emails or check social media on my phone."</i></p> <p><i>"I can do almost everything that I want to do I can do it on my phone. You can take everything else away but as long as I have my cell phone I will be ok. I can keep in touch with people, listen to music, get information, watch videos, read books and almost anything else"</i></p>
9	F	Mrs M	45	<p><i>" I spend much more time on my PC to either watch my TV series or read the news or play games "</i></p> <p><i>"I use the phone to watch video clips on YouTube, read news, go on social media sites like Facebook and Twitter."</i></p>

Table 25: Share of discussion on Content Pull between Media Consumers

Analysing the code **Consumer Control** and doing a word count among the 6 media practioners, it was seen that the expert from the media planning industry mentioned it

the most number of times at 23% followed by the marketing/media consultant at 18%. The expert from the print industry mentioned it the least number of times at 11%. This can be linked to the conversation earlier on consumer control where it was seen that experts from traditional media businesses are somewhat reluctant to accept that the consumer is in control and pulling content as per his/her needs as the model goes completely against the way traditional media businesses are structured.

Code	Media Expert Public Broadcaster	Media Expert Media Planner	Media Expert Print Industry	Media Expert Marketing/Media Consultancy	Media Expert Pay TV Content Provider	Media Expert Pay TV Provider	TOTALS:
Content Pull	15	21	10	17	15	15	93
TOTALS:	15	21	10	17	15	15	93
Percentage	16%	23%	11%	18%	16%	16%	100%

Table 26: Share of discussion on Content Pull between Media Experts

Looking at a few selected quotes from media experts below, some of the experts especially from traditional media did not believe that consumers want or can pull content. This can be related to the discussion earlier on consumer control where these experts were disinclined to accept that the consumer now has control in content consumption.

Some quotes from media experts where they believed that the consumer is not really in control and not able to pull content.

<p>Media Expert: Public Broadcaster: <i>So in a sense for a large swathe of South Africans they do not want to create their own schedules, a schedule must be created for them so that it works perfectly for them.</i></p>
<p><i>We decide on the storylines, we decide on the content to give to consumers, because a lot of times consumers do not know what they want. And we sometimes take a guess at it and decide on what we think will work with consumers. Consumers by using your content exhibit that they have trust in your content.</i></p>
<p><i>So I do not think Consumers are in control as of now, because as of now media providers only look for pockets that they can monetise and some sections are not self-evidently profitable monetarily. And this is what scares me about the digital revolution as there is no controlling mechanism where we can say that for the common good of all the people, do not do this or do this. Here it happens as and when the money flows</i></p>
<p>Media Expert: Pay TV Provider: <i>Push is essential. For example - most people don't know</i></p>

<i>that dstv has a free vod service, and we need to advertise it more so people know about it that is push and with that awareness consumers will then pull whatever content they like.</i>
<i>Push is the acquisition and discovery whereas Pull is the retention so the strategy of acquisition and retention need to go hand in hand. Also as a consumer, taking myself as an example there are lots of instances where I consume content that is pushed to me and I would not have been aware of it if it was not pushed, and a lot of times I am pushed content that are not relevant to me but I will still go and watch them sometimes if they catch my attention on an impulse. So push is exactly that where we try to pander to users' needs and impulses.</i>
Media Expert: Print Industry: <i>In South Africa I don't think we are there yet(Content Pull By Consumers)</i>
<i>We avoid asking them what they want instead we give them a list of content that we have available and ask them to choose amongst them.</i>
<i>I also think that a lot of times people don't know what they want until they see it.</i>

Table 27: Quotes from experts on consumers not able to pull content

On the other hand experts from media businesses which are independent of traditional media platforms; one exception being the expert from the pay tv channel, mentioned that the empowered consumer is able to pull content much more easily. Experts opined that this pull by consumers is on the rise and media businesses have to be cognisant of the phenomenon be successful. Experts pointed out that in the age of pull; consumers are customising content as per their needs and sharing their content experiences in shared communities.

Industry	Quotation
Media Planner	<p><i>"There is an internet radio station iheartradio in the US, so what it does is it collates music from different genres and artists. That is why we see things like Altech node launching and other VOD services. Because you the consumer decide what you want to watch."</i></p> <p><i>" Who says that consumers want to be told on what to consume</i></p> <p><i>"The consumer is pulling content to a much greater and wider extent."</i></p> <p><i>"Consumer will push everybody in the same direction, the consumer will access the content where ever he or she can get hold of it and you as a media provider do not have much say over it."</i></p> <p><i>"Because if they don't then the consumers will go somewhere else and get the content"</i></p>

Marketing/Media Consultant	<p><i>"As more and more people become connected with smart phones and people in fact start to become standalone content sources to a great extent and not be a part of the whole content ecosystem where they do not need access to traditional content providers to get content."</i></p> <p><i>"The consumer says "I want to watch what I want when I want". So what is happening that services like Netflix are becoming so powerful as more and more consumers are deciding that On Demand Services are much more preferable. So the whole Pull methodology is more preferable than Push. "</i></p> <p><i>"So traditionally media outlets used a push strategy where they were the gatekeepers of the content. But now there is increasing pull from consumers to get what they want, where they want and when they want. "</i></p> <p><i>"it is a basic human need to connect with others, to interact and share your thoughts and ideas so you feel you are having an impact on the world around you."</i></p>
Pay TV Channel	<p><i>"People are increasingly looking at paying for only what they are consuming and I think consumers would like to do that if they are given the opportunity to do so."</i></p> <p><i>"there is definitely going to be more pull now and in the future"</i></p>

Table 28: Quotes from experts on consumers being able to pull content

As evidenced in the analysis above, with the rise of new media consumers are adopting it at a rapid pace. New media has given consumers much more control in content consumption in terms of the choices available to them as well and increasingly their power to pull content that they like when and where they desire.

5.4.5 View of Media Business to Consumer Empowerment

The next theme that emerged from the data is how businesses are responding to the empowered consumer, who is now able to pull and consume content from different sources sometimes simultaneously; which is a threat to traditional media business models. All the experts agreed that the empowered consumer is presenting some unique challenges to the media industry and then experts offered some opinions on how to leverage consumer empowerment as an opportunity for businesses.

5.4.5.1 Challenges

The challenges that are being faced by businesses include audience fragmentation, retaining audiences on business platforms, vulnerability of traditional media business

models and evolving consumer trends that are threatening to dis-intermediate content delivery systems of media businesses.

As mentioned previously, audience fragmentation was perceived as a serious threat to media businesses. As businesses aim to consolidate their audiences to target content and sell those eyeballs to advertisers. This fragmentation disrupts their traditional model of generating revenue

Selected quotes from experts on fragmentation of audiences

Media Expert: Public Broadcaster
<i>“In terms of switching and fragmentation the consumer has much more control now.”</i>
Media Expert: Media Planner
<i>“Currently if you see SABC 1 reaches 85% of the population I think in the future we will have more platforms with smaller reach. As there are more and more options available to consumers you will not find individual platforms with massive reach. So it is basically the long tail effect.”</i>
<i>“As a consumer I want to watch the content that I want on whatever platform, so I will go to whoever has that content and gives it to me. I am not loyal to any platform for that matter in any shape or form and I think that is one of the biggest challenges.”</i>
Media Expert: Print Industry
<i>“And another point that I find happening is audience fragmentation. The number of hours people spend on entertainment has remained constant in the past 10 years but now this time is spent among multiple avenues and platforms. So people are reading the newspaper and watching TV or googling on their cell phones at the same time.”</i>
Media Expert: Pay TV provider
<i>“More than 80 per cent of U.S. consumers multitask while watching TV. Most of this multitasking involves another device (e.g., smartphone, laptop, or tablet). The findings suggest viewers’ attention wavers between the television and a second screen.”</i>

Table 29: Quotes from media experts on audience fragmentation

Along with audience fragmentation another challenge facing businesses as mentioned by media experts is retaining consumers on their platforms. As seen in previous chapters there has been a persistent decline through the years in user numbers on traditional media outlets like newspapers. So experts see that consumer empowerment is making it difficult to retain consumers. Words such as “cord cutter” and “cord never” to signify consumers who are moving away from traditional media

outlets completely were mentioned as serious challenges to businesses. A challenge mentioned by the expert from the public broadcaster was their mandate to produce and broadcast certain kind of content to the public, like educational programs or programs on social issues, a lot of the times it does not make any financial sense to produce these programs as they are not popular with audiences, but due to the mandate and decrees from the government and other regulators they need to produce this kind of programming.

Selected quotes from experts on challenges

Media Expert: Media Planner
<i>"So brands have it so difficult to maintain stickiness with their consumers."</i>
<i>"The subscription based revenue models that most media providers have is under threat as people are migrating from one platform or provider to another."</i>
Media Expert: Pay TV Provider
<i>"For media companies married to traditional distribution models, cord-cutting or never cording up in the first place are a genuine threat."</i>
<i>"So we have to open our eyes to the fact that the new generation consumers might be "Cord Nevers" they might not want to cord for a variety of reasons."</i>
Media Expert: Print Industry
<i>"But this worries me as well as now people who are not reading newspapers or using other mass media outlets are only consuming content that they like,"</i>

Table 30: Challenges on retaining consumers on traditional media platforms

With audience fragmentation and difficulties in retaining consumers on media platforms, experts opined that now traditional media businesses are quite vulnerable to these changes. Traditional media has primarily generated revenue through advertising and user subscriptions, but now as audiences are moving away advertisers too are shying away from big above the line mass campaigns on traditional media. Similarly with consumers now able to access a lot of content for free; media businesses which also have been producers of professional content are facing the brunt of not being able to monetise from the content. Selected quotes from media experts on the vulnerability of traditional media

Media Expert: Media Planner
<i>"The revenue models of media businesses are based on advertising and as and when advertising tapers off it is going to impact their business models. So I think any of these business models whose primary revenue source is advertising are in a precarious space."</i>

<p><i>“For dstv try to create stickiness to the premium package they give you all these add ons like box office and walka etc. But then a vidi service comes along and gives access to content whenever, wherever and they also open their platform up and you are not limited to being a premium subscriber only.”</i></p>
<p>Media Expert: Marketing/Media Consultancy</p>
<p><i>“The content owners are saying that this is our asset and we have invested money in it and we want the bigger slice whereas the consumer is saying that I will just go get it for free somewhere else. So it is a very challenging business model to make money out of.”</i></p>
<p><i>“The whole problem is that a lot of these media companies are competing against Free. And you cannot compete against free, that is a no brainer.”</i></p>
<p><i>“We are in a state of flux where brands are realising the importance of digital and customised offerings and somewhat move away from the standard above the line (ATL) advertising.”</i></p>
<p>Media Expert: Print Industry</p>
<p><i>“Another challenge is now days young people are so used to getting content for free that trying and telling them to pay for the content is difficult.”</i></p>
<p><i>“ And we also see that ad spend in newspapers is declining along with TV and Radio, where businesses are now increasing their spending on Below the Line campaigns on the internet as well as promotions, giveaways etc. to attract customers.”</i></p>

Table 31: Difficulties in monetising content

5.4.5.2 Opportunities

As seen above, media experts indicated that consumer empowerment has presented a lot of challenges to the traditional media business models. But some experts said that this empowerment can be also seen as opportunities for business to leverage off. The need to understand consumers and providing them with content that they would be interested to pull was cited as an opportunity that media businesses could explore. Furthermore getting insights on consumer preferences and presenting them to advertisers to generate targeted advertising which are relevant to consumers was cited as a profitable way of generating revenue. Experts mentioned the need to change media industry business models a few times, but what these changes should entail was not mentioned by any of the experts.

Changes in business tactics

Having more insights into customer preferences and trying to create content as per those preferences was mentioned by some experts as a tactic for businesses to stay relevant where the consumer has the power to pull content. Producing and providing

content that the consumers can relate to was also viewed as important hence the significance of producing local content for consumers. Content that creates immersive personalised experiences and creating social opportunities for the content where consumers can enjoy the content experience in social settings through engaging with it on social media, word of mouth recommendations and other channels were also mentioned as another tactic. The pay tv industry expert said that businesses need to move away from a silo mentality towards convergence where the content and its delivery mechanisms and consumer insights across different parts of the media value chain are all integrated together to create omni-channel experiences. Both the experts from pay tv mentioned that they are implementing avenues of branching into multiple platforms both paid and free to provide access anywhere and anytime to their customers. Also giving more control to consumers to curate their content and giving access to more digital content was mentioned as other tactics by media experts as mechanisms to cope with consumer control and content pull. The print industry expert said that in their organisation they are increasingly aiming to provide more digital content to their consumers which is an incentive for consumers to pull content easily.

The thought of innovating media business models in response to consumer control was mentioned by some of the media experts, this was analysed using the co-occurrence of two key codes **Business Model** and **Consumer Control**. It was observed, as seen in the table below that experts did agree on the need to innovate business models in response to consumer control; the highest share of voice in this discussion came from the expert from the pay tv channel followed by the marketing/media consultant. This can perhaps be attributed to the reason that the pay tv channel has recently implemented a number of changes in their business tactics to cater to content pull from its consumers. The least contribution in the discussion came from the print industry expert.

Table 32: Changes in business model due to consumer control

Codes	Media Expert: Public Broadcaster	Media Expert: Media Planner	Media Expert: Print Industry	Media Expert: Marketing/ Media Consulting	Media Expert: Pay TV Channel	Media Expert: Pay TV Provider	TOTALS
Business Model COOCCUR Consumer Control	2	3	1	5	6	2	19
TOTALS	2	3	1	5	6	2	19
PERCENTAGE	11%	16%	5%	26%	32%	11%	100%

Although business model innovation was mentioned as one of the ways to move forward for media businesses, yet none of the experts expressed any thoughts on how exactly should the business models of the media industry change in response to consumer control and content pull. The suggestions offered were all tactics, which tweak certain parts in content delivery mechanisms or provide content on multiple devices.

Selected quotes from experts on businesses tapping into content pull.

Media Expert: Public Broadcaster
<i>“Connecting this with the Pull Phenomenon we should look at what consumers are pulling and create content that they would like to pull”</i>
<i>“The platform is the enabler to the content and people come to your platform looking for the content and not the other way around.”</i>
<i>“We will have to craft television differently, as consumers are already showing us what they want to do. They are showing it with their actions.”</i>
Media Expert: Pay TV Channel
<i>“So you have to welcome the change instead of ignoring it and you can ignore these changes at your own peril. But there is opportunity inherent in this changed reality.”</i>
<i>“We in the media business need to find ways to evolve and come with new business models and</i>

<i>products and services that would appeal to these customers”</i>
<i>“Look at some of the Nollywood movies and how popular they are the quality is not good but because the story is there, because the relevance is there and the resonance is there; a lot of these movies bring higher audience ratings than 100 Million dollar International movies”</i>
<i>“Another thing is that in many ways now International content has lost its relevance or appeal and the importance of Local Content”</i>
Media Expert: Marketing/Media Consultancy
<i>“The whole thing of “Local as Lekker “where people really want local content and the service that gets the mix right will be the one that will be successful”</i>

Table 33: Quotes from media experts on leveraging consumer control

From Mass Advertising to Targeted Advertising

As discussed advertising has been the primary revenue source in traditional media business models but with audience fragmentation and migration this revenue source has been hit substantially. So to leverage off consumer control, experts mentioned the idea of using data to understand consumer preferences and using that data for targeted advertising. It was mentioned by experts that advertisers due to audience fragmentation are becoming shy on investing large amounts of money on mass advertising campaigns on traditional media and are more interested on below the line advertising so it was suggested that some media businesses which have a lot of data on consumer preferences can share this with advertisers to place targeted advertising which are pertinent and useful for consumers. Using so called “big data” to track consumer habits and provide advertising catering to these habits was opined by experts as a new golden opportunity for media businesses. Even this sounds like another tactic by making a small change of media industry business models whose primary revenue source is from advertising, furthermore it warrants the question whether media businesses are actually equipped to generate and analyse consumer data to the levels suggested by the experts.

A few quotes from experts on the importance of data in understanding consumers and selling this data to advertisers.

Media Expert: Public Broadcaster
<i>“Whenever people press a button they start creating a huge amount of data and this big data will be managed and monetised.”</i>

Media Expert: Print Industry
<i>“One of the ways that I think we can generate revenue out of is Big Data. We have our subscribers and then people who participate in our competitions and we can collect information about these people and create a database and approach a company to say that these are the people we need to connect with. So we need to move away from the "one size fits all" model to more individualised offerings whether it be content or advertising.”</i>
Media Expert: Media Planner
<i>“The television and print businesses are learning the value of what is called "big data" so knowing who their consumers are and what their preferences are. So the media owners will become far more data savvy and far more data aware, far more nuanced in terms of selling data and the value of that data.”</i>
<i>“So this is the future of media and advertising it will become much more focussed and individualised.”</i>

Table 34: Expert opinions on using consumer data for targeted advertising

5.5 Data Reliability and Validity for this study

As discussed in the previous chapter, literature has mentioned the notion of dependability as a more appropriate measure for qualitative studies than reliability (Shenton, 2004; Wayhuni, 2012). To ensure the dependability of this research study the entire process of the study including the literature review, research design, sample selection, rationale for sample selection, interview guides, recorded transcripts, the process of data collection and the codes used to analyse the data have been documented in detail and will be made available to any researcher interested in replicating this study at a later stage.

Three approaches to ensure data validity from the 8 posited by Creswell (2003) were used in this study.

A. Researcher Reflexivity- The researcher comes from a digital media profession is an avid advocate of free content sharing and is also a cord cutter who has voluntarily disconnected himself from traditional media platforms. So there can be a certain bias present in the interpretation and discussion of results by trying to show consumer control and content pull to be present among consumers more prominently than the case might be objectively. The reader is advised to be aware of this bias when forming any opinions and conclusions from this study.

B. Thick Detailed Descriptions- The detailed narrative accounts from the respondents of this study helped to form thick rich descriptions of the data. As seen above, the researcher has included the actual narratives from both media consumers and media experts extensively; so the reader can also participate in the experiences and emotions that were conveyed during the conversations with the respondents.

C. Time spent in the field- The researcher has spent a considerable amount of time in the digital media landscape through his professional role. He has observed the evolution of the digital media landscape in India, South Africa, Nigeria, Ghana, Kenya, Tanzania and other countries. Also during the research phase of the study the researcher spent 6 months on analysing the media landscape through perusing literature; discussing with practitioners, consumers and interacting in various forums. Hence with the extent of time spent in the field enables the researcher to bring in a certain level of expertise when interpreting the results.

5.6 Conclusion

This chapter focussed on presenting the results of the discussions that happened during interviews, with media consumers and media experts around changes in the media landscape, consumer control in the age of new media, and the empowered consumer pulling content of his/her choice. From the interviews it was seen that new media has given consumers increased control and this control is manifesting itself in audience fragmentation where consumers are perusing content from multiple sources and content pull as the consumers are getting content of their choice from varied sources. It was also observed that some media experts have started to recognise consumer control and content pull in media consumption; in response of consumer empowerment the experts also offered opinions on how media businesses could leverage from consumer empowerment. Although the changes suggested were small incremental changes to existing business models not accompanied by any significant changes in business strategies.

The next chapter will connect the results which were presented above to the research questions.

6. Chapter 6:- Discussion of Results

“What will make a media company successful is how it copes with competitive markets in which people have the choice and control”

– James Murdoch, CEO 21st Century Fox

6.1 Introduction

The aim of this study was to explore if increased consumer control in media consumption is changing consumption patterns from push to pull, and if there has been a shift in the patterns then whether media businesses recognised this and their responses to this change. The preceding chapter presented the results of the study with prevalent themes which were supported by quotations from both media consumers and experts. This chapter discusses the results of the study which were presented in Chapter 5 by connecting them with the research questions posed in Chapter 3 and the literature reviewed in Chapter 2.

As seen in Chapter 2, the literature agrees on the concept of consumer control to a certain extent and suggests some tactics by which media business can respond to the phenomenon. But as discussed a lot of gaps were seen in the literature regarding grasping the full extent of consumer control and the ability of consumers to pull content as per their choices, fully understanding consumer empowerment amongst low income markets and business strategies in response to consumer control and content pull. This section aims to connect the research findings with the literature and possibly fill some of these gaps.

As discussed in the previous chapter, emergent themes from the interviews conducted with media consumers and experts led to organic connections with the proposed research questions, these questions are discussed by analysing the emergent themes and the reviewed literature, in the sections below.

6.2 Research Questions

Three research questions were posed in Chapter 3 to explore if there is a change from push to pull in media consumption. The research findings from Chapter-5 in relation to these research questions are discussed below.

6.2.1 Research Question 1:

Is consumer control changing media consumption from push to pull based models?

This question was analysed in two parts.

6.2.1.1 Is there increased consumer control in Media Consumption?

Literature has suggested that with the advent and adoption of digital technologies in every facet of the marketplace, there has been a shift in power from producers to consumers and now consumers have acquired more control and influence over what they consume (Shankar, Cherrier, & Canniford, 2006). Consumer empowerment and the ability to control consumption choices has been viewed as a benefit to consumers, as it helps them to fulfil their individual needs (Shankar et al., 2006; Wathieu et al., 2002). The study sought to explore that as more and more digital platforms for content consumption become popular among consumers has this led to increased consumer control in the media landscape and if consumers perceive this control as a benefit to them.

It was seen in the results of the study in Chapter 5, that consumers are actively seeking to gain control in their media consumption and are migrating towards using those mediums which give them more control thus there is a supplanting of traditional media platforms with new media platforms by consumers. With the increased usage of new media technologies among consumers, there has been a substantial increase in consumer control in media consumption and a corresponding decrease in institutional control (Shapiro, 1999). This increased control has enabled consumers to personalise and tailor content as per their wishes (Bright & Daugherty, 2012). Media consumers mentioned during the study, that they want to be at the centre of the media environment where they can get content that can be customised as per their individualised requirements. This shift is changing the entire media landscape where earlier control used to be wielded by content providers and content owners, now consumers are taking control and becoming central in the media environment (Daugherty, Eastin, & Bright, 2008).

Traditionally media providers have controlled information and content flows by acting as the gatekeeper to their audiences (Sundar & Marathe, 2010) where they have decided on what is important for their audiences and given them that content to consume (Meraz, 2009). This control of information has sometimes led to subjective

selection of information and content being passed on to audiences based on personal or organisational vested interests (Shoemaker & Vos, 2009). Even censorship of content by governments and other media regulators has been viewed as a form of gatekeeping of information (Yu, 2011).

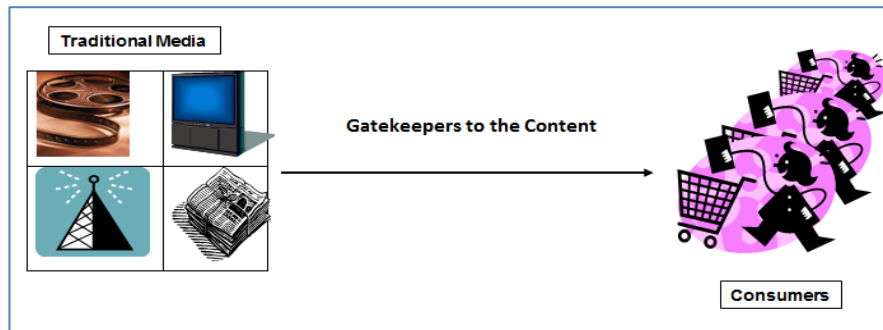


Figure 19: Traditional Media as the gatekeeper of information

But the results of this study provides empirical data that consumers are no longer passive audiences of media businesses, with consumers increasingly becoming their own gatekeepers to the content and electing which content to be exposed to and believe in (Bacile, Ye, & Swilley, 2014). From the results it is established empirically that consumers from both higher and lower economic levels are getting content from various sources and bypassing traditional media providers to get access to the content that they want. Although the phenomenon of consumer control has been discussed in the literature to some extent, where it has been posited that the traditional role of the consumer as a passive recipient of content is changing with the tools and control given to them by new media platforms (Shoemaker et al., 2009; Singer, 2014) but there was scant regard on the ability of consumers from lower income levels to be in control and pull content, this study validates empirically that consumers from lower LSMs are as much in control and able to pull content as consumers from higher LSM levels.

It has been said in the literature that, consumers do not want to be dependent on media businesses to provide them with content in a linear fashion (Valcke, 2011), instead they want to stay up to date with the content they want, non-linearly and on demand (Ksiazek, 2010). In the study this phenomenon was established where media consumer respondents were seen using multiple devices to get the content they want immediately. In this study, media consumers as seen in Chapter 5, mentioned that if content was not available immediately on traditional media then they were accessing it on other platforms to get it instantly. This cross platform availability of content has given rise to increased consumer autonomy in structuring

their consumption patterns (Napoli, 2011a). Immediate access to content was mentioned by consumers as a very important facet of how they manifest control.

From the results it was seen, that all media consumer respondents mentioned their preference to be in control and wanted to have multiple choices from which they can choose what to consume. To them these choices and control are a benefit as they can get access to content that can satisfy their needs in a much more personalised manner. That is why they said that new media platforms increase their welfare as they can get access to content immediately as well as get a diverse range of choices and opinions on issues pertinent to them. This has also been agreed by the literature where it is suggested that source and content diversity constitutes an essential part of welfare for the people (Napoli, 2011b). A similar opinion was expressed by Verhoef, Reinartz, & Krafft (2010) where they said that customers engaging with new media sources help them to derive maximum consumer welfare as they are able to meet their individual needs.

There has been a persistent discussion amongst academics about the presence of a digital divide across gender, where women seemingly have been seen at a disadvantage when compared to men in adopting and using technology (Cooper, 2006; Terlecki & Newcombe, 2005). This research found little evidence to support this contention as it was observed that both men and women are quite comfortable using technology and finding what they want from new media platforms. The three women respondents all mentioned that they are comfortable using the internet on their phones and other connected devices; they seek information on the web, use social media outlets, and download content from various platforms quite easily and without much help from others. As the female respondents are from different LSM and age levels it can be concluded that there is no apparent digital divide present across gender when it comes to using new media and consumers having control in their media consumption

In conclusion, the results of this study found that consumers are indeed increasingly in control of their media consumption choices and they perceive this control as beneficial to them. Although as discussed in Chapter 5 that the level of control that consumers exercise maybe based on the individual and/or situation.

6.2.1.2 Is Consumer Control changing media consumption from push to pull ?

As discussed in the literature in Chapter 2, one of the hallmarks of consumer control has been posited as the ability of consumers to control their consumption choices by actively seeking out goods and services that meet their individual needs (Wright et al., 2006). So this study sought to explore if with increasing consumer empowerment in the media marketplace, consumers are now able to change their media consumption from being dependant on media business push to actively pull content.

During the study as seen, it was found that with increased control, consumer behaviour has changed in media consumption from being passive audiences, all consumers were actively involved in pulling content. With the plethora of choices available to consumers, they are now actively looking for content from various sources thus their attention span is heavily fragmented across devices and platforms. This is consistent with the academic literature where research has found that in an abundant media environment audiences are fragmented over a variety of sources (Taneja, Webster, Malthouse, & Ksiazek, 2012). This can be visualised in the below figure where the consumer is in the centre of the media universe and pulls content from a variety of sources to satisfy his or her demands.

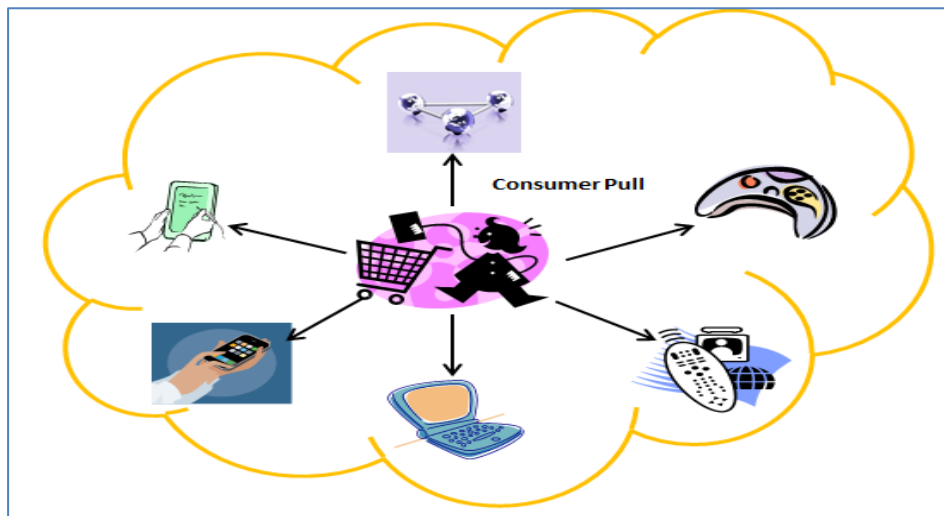


Figure 20: With consumer control, the consumer is in the centre of the media world pulling content

Another way in which interviewed consumers were seen pulling content as seen from the results; was sharing content and content recommendations within content communities with other users (Kaplan & Haenlein, 2010). As seen in the results section, consumers base their content consumption choices on recommendations from other users, it has been suggested that these word of mouth recommendations amongst users have the power to make professionally produced content like movies and music successful or unsuccessful in the media marketplace (Hennig-Thurau et al., 2014; van Noort & Willemsen, 2012). So these content communities are

important for consumers as they foster a feeling of shared consciousness amongst its members and have certain behavioural norms and values that are centred on shared content consumption experiences (Kaplan & Haenlein, 2010; Wirtz, Ambtman, Bloemer, Horváth, Ramaseshan, Klundert, Canli & Kandampully, 2013).

From the results, consumers were seen pulling content to a much greater extent but as seen and discussed in Chapter 5 the level of control and content pull that consumers exercise might be dependent on the person or the situation. For some consumers ease of access and speed of access to the content is of prime importance whereas for other consumers the experience of the content is more important than the speed of access. In the 2 x 2 matrix below which plots speed and ease of access (Y axis) versus experience of accessing content (X axis), some consumers always want to be at the top section of quadrant III where they can get access to content almost instantly; whereas other consumers preferred to be in quadrant II most of the times to delay instant gratification in favour of savouring the experience of the content and for other consumers they wish to move around between quadrants II, III and IV based on the situation. These findings run contrary to the literature which suggests that consumers in control always like speed and ease of access to the content with experience being a secondary consideration (Chiu & Chou, 2011; Smith & Telang, 2010; Sundar & Marathe, 2010)

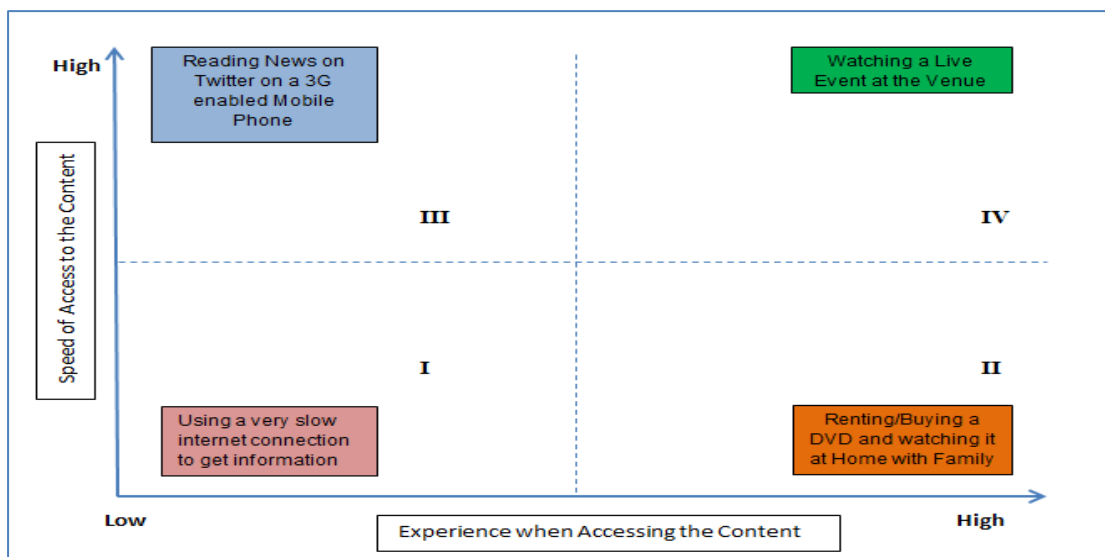


Figure 21: 2x2 matrix plotting speed of access versus experience of access

Similarly some consumers as seen in the results section, opined that they do not always want to pull content but instead rely on media providers to curate and select content for them so they can just consume content without spending any efforts in a directed approach to look for content . These findings present another deviation from

the literature where it has been suggested that with consumer control consumers always engage in a meaningful directed approach of seeking content to satisfy their needs (Hoffman et al., 2000a; Kopetz, Kruglanski, Arens, Etkin, & Johnson, 2012; Liang, Hung-Jen, & Ku, 2006).

Thus in conclusion it was seen from the results that now consumers definitely have more control in the media landscape. Most of the times they are actively engaged in pulling content as per their needs but it was also seen that some consumers were willing to delay gratification of instant access to the content in lieu of a better experience or in some situations consumers did not want to pull content and instead preferred content push from media businesses, this brings in an argument that the level of control and pull that consumers exert in getting content of their choice might be individual or situation dependent.

6.2.2 Research Question 2:

Is the income of a consumer a determinant in whether the consumer has control and is able to pull content?

The premise of consumer empowerment has been typically associated with consumers being able to access and afford resources (Weidner, Rosa, & Viswanathan, 2010) this has also been supported in the literature on media studies where control has been connected with consumers living in a media abundant environment and the ability to get content from various sources (Dutta-Bergman, 2005; Taneja et al., 2012). It has been questioned if consumers from lower income segments who have access to less resources are as empowered and in control of determining their choices as consumers from higher income brackets (Hamilton & Catterall, 2005).

During the study as seen in Chapter 5, media experts opined that models focussing on consumer control and content pull were perhaps more apt in developed markets where consumers had the ability to afford various choices and pull content from these choices. As all the experts were themselves from higher income levels and do not need to make any substitution or optimisation in their content consumption choices so perhaps this led to their belief that financial ability determines the level of control that a media consumer has. But the results of the study threw some interesting outcomes where it was seen that consumers from lower income segments are behaving in surprising ways that has not been factored in literature and business strategies. From the results of the study it was seen that consumers from all

economic levels have control over media consumption and are pulling content as per their needs. In fact as seen in chapter 5, consumers from lower LSM levels contribute significantly more to the discussion on consumer control as compared to respondents from higher LSM levels. It was observed that consumers from lower LSMs carefully balance their financial resources and are more conscious about money spent on media consumption, so the limited money they have they want maximum value out of it by only pulling content that meets their specific needs. These consumers spend most of their resources on new media which gives them more control in getting what they want; they participate more actively in content communities and share content amongst themselves. Also not only do they use new media technology for entertainment but they also use it to try to improve their life by educating themselves, get unbiased information on current happenings and communicate their voice to others on issues pertinent to their lives. This is in stark contrast to a lot of literature on lower income consumers, where it has been posited that consumers in lower income markets might not be able to make rational choices to decide on what to consume with the limited financial resources available to them due to factors such as lack of education, lesser availability of options, poor financial planning, lack of self control (Karnani, 2007) and even going to the extent in saying that just being poor hinders these consumers ability to make good decisions (Karnani, 2009). C. K. Prahalad who has been a champion in advocating businesses to look at bottom of the pyramid markets (Hammond & Prahalad, 2004; Prahalad & Hammond, 2002) had opined that to a great extent consumers in lower income markets lack resources and control in their consumption choices (Prahalad & Hart, 2002). Hoffman, Novak, & Schlosser (2000) also mentioned that there exists a divide amongst consumers from lower income levels when it comes to media consumption as they cannot afford to access different technologies

But as presented in Chapter 5 it was seen that consumers at lower income levels are using new media platforms effectively by adopting simple affordable mobile devices and cheap pre-paid internet on these devices. The consumers were getting content of their choice from the internet or sharing it among their peers, they were verifying prices of products that they wanted to buy using the internet. They were even bypassing traditional gatekeepers of information by reading news and other information on the internet using their mobile phones. So this study supported the findings of other research studies, where it was found that the use of internet on mobile phones by low income consumers to use new media platforms like social networking sites, download content, use search engines for information and to create

user generated content is growing exponentially (Donner & Marsden, 2011; Kreutzer, 2009). So it can be argued that consumers irrespective of income levels are increasingly in control of their media consumption choices.

As opined by Subrahmanyam & Tomas Gomez-Arias (2008) consumers from lower income markets even with limited resources at their disposal are creative with these resources. Such consumers in terms of technology and new media usage are leapfrogging from traditional mediums by directly adopting digital platforms as they give them control and flexibility to fulfill their needs (Subrahmanyam & Tomas Gomez-Arias, 2008). In a Harvard Business Review article, Kay & Lewenstein (2013) questioned the notion of poor consumers as resourceless and mentioned that these consumers are quite resourceful by finding clever and sometimes illegal ways to obtain the things that they need. This sentiment of resourcefulness of consumers from lower income markets has been echoed by Mason, Chakrabarti, & Singh, (2013) where they said that due to limited resources available, consumers at the bottom of the pyramid are very ingenious in optimising the way they use these resources to get maximum value and meet of their needs.

Thus connecting the results of this study with the literature seen above, the results of this study disproves the idea that only consumers with higher disposable incomes who can afford to access different platforms have control in media consumption. The use of internet on mobile phones by low income consumers to use new media platforms like social networking sites, download content, use search engines for information and to create user generated content shows that consumers irrespective of income levels are increasingly in control of their media consumption choices. So a rethink in the literature and business strategies may be required on how they view consumer control as only being exercised by consumers from higher income levels to factor the resourcefulness of consumers from lower income markets when it comes to media consumption; as it is seen that with the increasing adoption of new media technologies these consumers are getting in a position of control and able to pull content from various sources to fulfill their individual needs.

6.2.3 Research Question 3:

Is the media industry accommodating this paradigm shift from push to pull in their Business Strategies?

This research question is answered in two steps

6.2.3.1 Does the media industry recognise consumer control ?

As reviewed in the literature earlier, media businesses have traditionally been the conduits and producers of professional content (McPhillips & Merlo, 2008). They have acted as the gatekeeper of this content and broadcasted this content to consolidated large masses of audiences (Hennig-Thurau et al., 2010; Sundar & Marathe, 2010). Revenue is generated from selling these captured audience eyeballs to advertisers (Lister et al., 2009; Zott et al., 2011) who can then target them with mass advertising (Nelson-Field & Riebe, 2011; Webster & Ksiazek, 2012). Consumers paying for content through subscriptions or once off are the secondary source of revenue (McPhillips & Merlo, 2008). In this model the media business is the dominant player in the landscape as it has control over the content and the audiences to whom the advertisers need access.

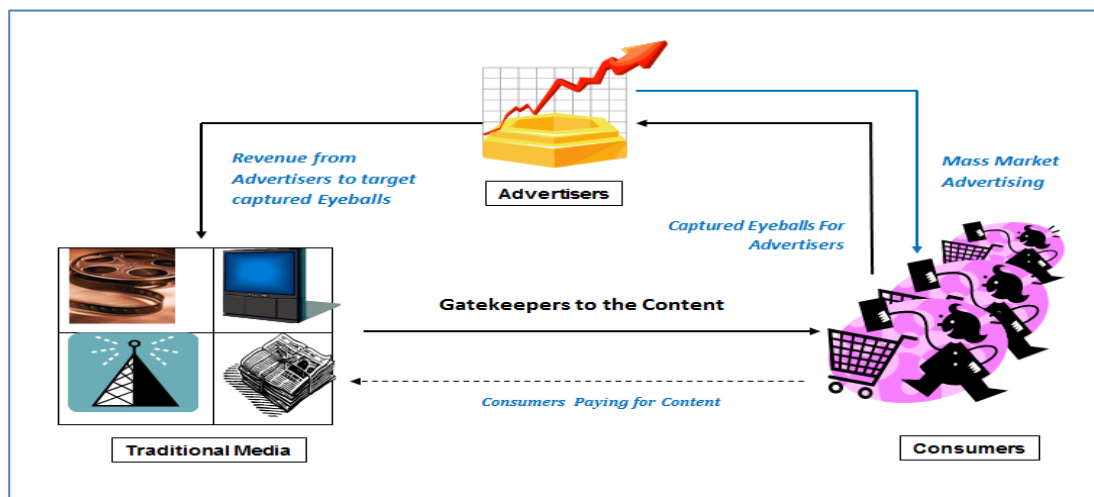


Figure 22: Traditional media business model

But as seen from the results this model is now being challenged by the consumer who is now much more empowered and can increasingly decide on which content to be exposed to (Lombard & Snyder-Duch, 2010; Napoli, 2011b; Stewart & Pavlou, 2002). Thus the argument is that the balance of power in the media landscape is shifting from businesses to consumers (Hagel III & Brown, 2011; Verhoef et al., 2010). Although as seen in Chapter 2 some of the suggested responses to consumer control have been based on trying to tie consumers with content sources and distribution platforms for these content sources (Berman et al., 2007), to expand into other distribution platforms like mobile devices and make some changes in the revenue models (Berman et al., 2011). So there is still an intrinsic belief in a lot of the literature that the response to consumer empowerment and content pull is to control

consumers through certain innovations and changes in business tactics by media businesses

During the study it was seen from the responses of some media experts that there is some degree of trepidation in accepting this change of power structure. Particularly experts from traditional media expressed some apprehensions on whether the consumer really is in control.

So there are two facets in this debate, on the one hand the literature agrees that business models need to change in response to consumer control but a lot of the suggestions put forward still try to retain control of the consumer and hence do not go far enough in terms of complete changes in business strategies. On the other hand the issue is exacerbated by the fact that certain media businesses to a certain extent do not even accept that the consumer is in control and hence do not adopt changes in their tactics or strategies.

As seen from the previous chapter the experts from media planning and media consulting who are independent of the traditional media industry and hence are not married to the traditional media business models were in agreement of consumer control and the consumer's ability to pull content. These experts said that consumers are now increasingly able to curate their own content and act as their own gatekeepers. Furthermore they believed that consumer control will increase even more substantially in the future as access to content becomes more ubiquitous with initiatives such as the Google "loon project" (Levy, 2013) which will make internet access even more cheaper and thus digital platforms will be adopted by consumers at all levels. The experts further believed that consumers are countering linear content delivery on traditional media by migrating to outlets that are nonlinear and are more individualised in serving their needs. Another important point that was raised was about platform or device agnosticism (Prince, 2011; Woodrooffe & Levy, 2012) among consumers, these experts believed that consumers do not want to be tied down to any content delivery platforms, they want to access content from wherever they like and they will push businesses to move in that direction as well.

The experts from traditional media businesses like public broadcasting, print industry and pay television were not completely in agreement of consumer control. These are the so called "established media and entertainment companies" (Berman et al., 2011, p. 44) who are facing the most challenges in this environment of increasing consumer empowerment and content pull by consumers. They have invested a lot on their content delivery systems and business models to push content to their

audiences (McPhillips & Merlo, 2008). So as seen in Chapter 5, these experts did opine that the consumer now has much more control in deciding on what, when and how to use media content yet they were still of the opinion that the consumer is still not in control completely. These experts believed that consumers do not know what they want and there is a need for traditional media businesses to curate content for their consumers and create content schedules for them as consumers are unwilling or unable to do so. But then on the flipside experts mentioned the need for businesses to be aware of consumer control. As seen in Chapter 5 the expert from the public broadcaster mentioned binge watching of television series as a manifestation of consumer control and content pull to satisfy the consumer's needs. She also mentioned that consumers now and in the future will get content from multiple sources and create their own impressions on a subject. This implies that the "walled garden" approach (Berman et al., 2007, p. 24) suggested in the literature on tying consumers into business platforms will not hold. The expert from the pay tv provider said that consumers want to be different and with consumer control they are able to be distinct in their content consumption and are not willing to be dictated and be bunched together in homogenous groups by media businesses

So it may be contended that the level of acceptance of the phenomenon of consumer control and their ability to pull content might be based on which part of the value chain the media businesses belong. Traditional media businesses which are married to traditional media business models are somewhat reluctant to accept consumer control and believe that there is a need for media providers to create schedules and curate content for their consumers. Whereas media businesses which are independent of the traditional business model are more accepting of the notion of consumer control and in their opinion media businesses need to change their tactics and strategies to accommodate this control.

6.2.3.2 If there is increased consumer control, what are Media Businesses doing in response ?

As seen in the discussion above, there is a certain element of resistance in accepting the idea of consumer control across the whole spectrum of the media business.

The literature suggests that with increasing consumer empowerment media businesses need "tactics" (Berman et al., 2011, p.51) to engage the consumers within business platforms. A move towards "many to many" from the established revenue model of "one to many" of traditional media has been posited as one way to go forward (Berman et al., 2011; Kant, 2014). But as mentioned above none of these

solutions go far enough to suggest what should a media business do to change its business strategy in a landscape where the empowered consumer increasingly wants to pull content and shows reluctance to be tied to one specific platform.

As seen in Chapter-5 media experts interviewed during the study offered various suggestions that include incremental changes in their existing business models to respond to consumer control. As seen in the previous chapter “Big Data” (George, Haas, & Pentland, 2014) came up during the interviews with the media experts quite often. Experts mentioned that in the digital era consumers are generating volumes of data during their interactions with multiple platforms which can be used for more a granular understanding of the consumer to understand their preferences, life styles and other parameters so businesses can fulfill their needs better and even monetise from this data by giving this data to advertisers, although how capable these media businesses are to generate and analyse this data is unclear. To cater to content pull by consumers media experts as seen in Chapter-5 suggested several tactics like creating immersive personalised content experiences for their customers, which has been mentioned by academics as a way for businesses to respond to the empowered consumer (Kumar, Aksoy, Donkers, Venkatesan, Wiesel, & Tillmanns, 2010). The experts mentioned that content that is relevant and relatable to the consumers, creating social opportunities to connect with the content; create a much enhanced experience of enjoying the content and this is how businesses can attract new and retain their existing consumers. Experts also mentioned that their businesses are now giving the consumers ability to engage with the content on multiple touch points and providing them with more digital content so they can consume them on mobile connected devices (Berman et al., 2011) and also giving them opportunities to curate their own content so they can customise the content the way they want. Convergence where content flows seamlessly across various platforms has been suggested as the way forward for media business (Jenkins, 2008). Experts agreed similarly on the need for media businesses to provide seamless content experiences to consumers and getting rid of the silo mentality that is prevalent presently. This suggestion of creating convergence is also supported by the literature where it is said that in the era of consumer control, consumers are going anywhere and everywhere in search of content experiences; so there needs to be integration and cooperation amongst multiple platforms, devices and media industries to create convergent media experiences (Bardhi, Rohm, & Sultan, 2010; Berman & Marshall, 2014). As discussed in the previous chapter experts from the pay tv industry said that they were implementing several initiatives to create

convergence amongst platforms to provide seamless content experience to consumers.

But as seen above, all the responses that experts suggested businesses should adopt to consumer control and content pull; are in reality tactics which are still focussed on pushing content by businesses and controlling consumers by accomodating some elements of consumer pull in their tactics, Tactics as mentioned in literature are just small incremental changes in business operations and do not involve changes in the actual business model and strategy (Casadesus-Masanell & Enric Ricart, 2010).

6.2.3.2.1 Does the Media Industry accommodate this shift in their Business Strategies

It has been discussed that the response to consumer empowerment in a turbulent marketplace is for businesses to be more consumer centric so firms focus on fulfilling consumer needs through personalisation instead of just focussing on selling products to them (Gebauer, Gustafsson, & Witell, 2011; Shah, Rust, Parasuraman, Staelin, & Day, 2006; Valos, Ewing, & Powell, 2010). As seen earlier the media industry is in a state of flux with a struggle between traditional and new media platforms to hold the consumer's attention with increasing consumer control and content pull. As consumer control and content pull in the media marketplace are ultimately about the consumer being in the centre, so it can be suggested from the academic evidence above that even media businesses need to apply a consumer centric approach in their business strategies. Yet there was little evidence found in the literature of any suggestions on applying consumer centricity as the central tenet of media business strategies as the way to go forward in response to consumer control. Similarly as seen in the previous chapter there was an absence of discussion on customer-centricity by all media experts.

As seen from the results in the previous chapter and the discussion in the preceeding section; no concerted efforts were seen from businesses to make any changes in their strategies and/or business models to accomdate this shift from media business push to media consumer pull. Instead experts opined that consumer pull of content needs to be combined with media business push to create hybrid models that take cognisance of consumer needs and provide content experiences that feature this pull demand to a certain extent

As this study included mostly experts from the traditional media businesses it perhaps warrants a question if it is possible to change media business strategies and business models from push to pull for every business in the media landscape. So does the extent to which a media business can change its model from push to consumer pull depend on what role it has in the landscape. For a public broadcaster which has a mandate to produce and broadcast socially and nationally relevant content to audiences, its main function in the media landscape is to push content so can it embrace content pull from consumers to the same extent as a media planning company which works on traditional and new media outlets concurrently. Yet the literature treats media business entities as a homogenous group of businesses which can implement the same set of tactics and strategies to respond to consumer control and pull (Berman et al., 2011; Berman, 2012; Hagel III & Brown, 2011). So there needs to be a substantial rethink in the literature on how media businesses can respond to consumer empowerment; as seen above the sole purpose of some businesses in the media marketplace is to push content to audiences whereas other businesses particularly on new media platforms are primarily designed to cater to content pull from consumers, so applying one set of solutions to change business strategies for all media businesses to cater to consumer empowerment as suggested by the literature (Hoffman & Novak, 1997; McPhillips & Merlo, 2008; Oestreicher-Singer & Zalmanson, 2013) might not be feasible for businesses. As seen from this study and anecdotally some businesses which are very tightly integrated with traditional media business models might only be able to improvise to some degree their existing strategies to incorporate a certain element of content pull from consumers whereas other businesses might be able to apply a complete consumer centric approach in their strategy to cater to consumer empowerment and pull. Although with ever increasing consumer empowerment in the media landscape, whether media businesses which are not able to design or reorganise their strategies around the consumer, will be able to survive in the long run is another question.

From the results it is postulated that the whole shift from business push to consumer pull may be achieved more easily and effectively by those parts of the media landscape which have not invested heavily in traditional media business models or which do not have a mandate to produce and broadcast content as per a certain set of rules. This can be seen with the success of some media businesses which operate in the digital realm of the media landscape who have embraced the change from business push to consumer pull and crafted their business models and strategies accordingly. Netflix has been cited as a company which has introduced innovation in

its business model to incorporate content pull by consumers (Ojer & Capapé, 2013). It has successfully monetised the long tail of consumers seeking niche content (Napoli, 2011a) by providing off beat content like cult movies, documentaries and even becoming an original content producer of shows like “Arrested Development” and “House of Cards” (Jenner, 2014). Spotify, an online music streaming service caters to this pull by matching the content to suit consumers’ personal music tastes (Warr & Goode, 2011) and creating a social content consumption experience for all its users (Berman et al., 2011). Their unprecedented success has earned them the term of “a disruptor in the music industry” (Vasagar, 2014). Another example is TED.com run by the Sapling Foundation, whose business model is giving consumers access to all of its content on the internet and mobile platforms for free, this has greatly increased its brand recognition and has it allowed to charge a significant premium from its conferences which in turn is funnelled back into providing the content for free (Masnick, 2011).

However traditional media businesses like public broadcasting and newspapers with a very few notable exceptions (Rosenstiel, Jurkwowitz, & Ji, 2012) have been yet to successfully come up with business models that can help them steer their strategy entirely from push to pull. So it needs to be researched further if all businesses in the media landscape can adapt to content pull to the same extent.

6.3 Conclusion

Thus from the analysis of the results which were presented in Chapter 5 which were then connected to the research questions that were proposed in Chapter 3 using the literature reviewed in Chapter 2, it was empirically established that with the growing adoption of technology and wide popularity of new media platforms consumers are much more empowered in media consumption. Through empirical validation from the results of the study it was seen that consumer empowerment and control is an inclusive process where consumers across income levels, age and gender all now have more control; this control is being manifested by consumers customising their media consumption by pulling content to suit their unique needs. Although as seen from the results, this control and pull also raised questions on whether consumers preferred ease of access to the content or experience of the content and whether the extent to which consumers exercise control and pull content is dependant on the attitudes of the individual and/or the situation.

In terms of business awareness and response to consumer control it was discovered that the acknowledgment of consumer control amongst businesses was mixed with some experts vociferously agreeing that consumers have control whereas others not really accepting the notion of consumer control. It was suggested that perhaps the less businesses are invested in traditional media business models the more accepting they are of consumer control. Certain limitations in the literature on how to respond to consumer control were also noticed, where a lot of the current literature's suggestions on responding to consumer control are by trying to control consumers through some changes in their operations and revenue models. Also from the responses of media experts it was seen that their suggestions to respond to consumer control is mostly change in certain tactics of the business without significant changes in media business strategies and business models. Also the present literature does not go far enough in suggesting clearly on what media businesses can do to respond to this shift in the media landscape. Another absence noticed was the lack of discussion on customer centricity in media business models which has been suggested in other domains of business literature as a response to consumer control. Another query that surfaced was, are all media businesses able to accommodate consumer control and content pull by consumers in their business models to the same extent or whether different parts of the landscape need to come up with different strategies in response to consumer empowerment.

The next and the penultimate chapter of this study will look at the key highlights of this study proffer some suggestions on the usefulness of this study to the business and academic worlds and finally point at possible directions for future research to expand this study.

7. Chapter 7:- Conclusion

“The audience wants the control, they want the freedom ... so give people what they want, when they want it, in the form they want it in, at a reasonable price”

- Kevin Spacey, 2 time Academy Award Winner and CBE.

7.1 Introduction

This study explored if increased consumer control in media consumption is changing media consumption from push to pull. Furthermore this study also explored media business awareness and acknowledgment of consumer control and their response in terms of business strategy and tactics to accommodate content pull due to consumer control. This chapter highlights the main results of this study, furthermore recommendations to businesses (managers) based on the study's findings are discussed, finally this chapter concludes with recommendations for future research directions.

7.2 Principle findings of the study

Even though this study was exploratory in nature using a small sample to base its findings and cannot be broadly extrapolated or relied upon to be representative of the whole population; this research has added to the academic body of knowledge by looking at consumer control in media consumption through the lens of push and pull. This study established empirically that consumer control is increasing in media consumption with increasing use of new media and this is changing the idea of a consumer as a passive recipient of content, instead now consumers are pulling content of their choice from content platforms and amongst themselves (Siano et al., 2011). Thus the top-down model of content delivery by media businesses (Valcke, 2011) is being dis-intermediated by a bottom up content driven mechanism by consumers (Deuze et al., 2007). This study applied the rationale of push versus pull to distinguish between the two. The push pull mooring model has been used in diverse fields such as supply chain management (Cachon, 2004), marketing (Kotler & Keller, 2012; Webster, 2000), retailing (Chiou, Wu, & Chuang, 2010; Martín-Herrán et al., 2010) and advertising (Ewald & Moskowitz, 2007; Kelly, Kerr, & Drennan, 2010; Shankar et al., 2010; Weidner et al., 2010). But the application of push vs. pull dichotomy in media consumption was not found by the researcher. This study

contributes to the body of academic knowledge by applying push versus pull to understand media consumption, traditionally media businesses have focussed on pushing content to their audiences, with increased consumer control now it was seen in the study seen that consumers have started to pull content to satisfy their needs. Thus this study opens a new way of thinking on consumer empowerment in the media world.

Following are the principle findings of the research:

- a) All consumers interviewed in the study believe that they are much more in control of their content choices than before and they like being in control (Wathieu et al., 2002). It was seen that media consumers are shifting towards platforms which give them more control in choosing what they can consume. Hence the exponential growth in adoption of new media platforms as they give consumers more control (Bezjian-Avery et al., 1998; Napoli, 2011a).
- b) The study found that consumers from lower income levels are almost as savvy in technology adoption as consumers from higher income levels. It was seen in the study that consumers with less financial resources at their disposal are talking more about consumer control and using pull in content consumption. It was seen that these consumers were migrating more towards new media which gives them more control and the ability to pull content that is relevant to them. This is a departure from the view in the literature where consumers from lower income levels have been considered resource-less (Karnani, 2009; Weidner et al., 2010). In fact it was seen that these consumers are more resourceful (Kay & Lewenstein, 2013) with the limited assets that they can spare for media consumption by pulling content to fulfil their needs (Subrahmanyam & Tomas Gomez-Arias, 2008).
- c) It was seen in the results phase of the study that the use of internet on smart connected portable devices has become almost ubiquitous among all consumers (Smith, 2012) and the mobile phone is becoming the one stop solution for consuming and creating content (Hennig-Thurau et al., 2010; Mulhern, 2009; Shankar et al., 2010). This can be an advantage for media businesses as they now have a touch point with the consumer which is always carried by him/her.
- d) During the study the social aspect of content consumption among consumers came out quite strongly. It was seen that consumers are creating and

participating in content communities, where they share information and recommendations on content that they like, and also share actual content between themselves. Consumers tend to trust recommendations from peers of these communities in deciding which content to consume, more than recommendations from content providers, advertisers or experts. This supports the observations of Hennig-Thurau, Wiertz, & Feldhaus (2014) where they suggested that word of mouth (WOM) recommendations on content from peers is a content pull mechanism used by media consumers to decide which content to consume.

- e) It was seen in the study that all consumers are now increasingly pulling content from various sources to meet their needs (Hagel III & Brown, 2011). So now consumers have a much more active role in the media landscape. Although it was seen that the idea of pull is not an all-encompassing idea for media consumers. Although the level of pull exerted by consumers may be dependent on the mind-set of the individual or the situation in which the consumer is in.
- f) In the study it was seen that the concept of consumer control in media consumption was not accepted completely by all media businesses. There was a certain reluctance to accept the notion of consumer control among traditional media businesses whereas media businesses which are independent were much more accepting in the idea of the consumer being in control in the media landscape. So it was posited that the level of acceptance of consumer control and their ability to pull content by businesses is based on how integrated these businesses are with traditional media industry models which are based on the premise of content push from media providers.
- g) The study found that businesses are responding to increasing consumer control with only changes in certain business tactics without a complete overall of business models and strategies. Some of the tactics suggested by experts to respond to consumer control were: to use data to understand consumers better (Berman et al., 2011), creating immersive content experiences for their consumers (Kumar et al., 2010), giving consumers access to more digital content which they can consume anytime and anywhere, creating convergence of content, devices and platforms to let consumers enjoy a seamless content experience (Bardhi et al., 2010; Dass & Kumar, 2014) and giving more relevant

content to consumers with which they can relate to much better for example local content.

7.3 Implications for Businesses (Implications for Managers)

Vollmer & Precourt (2008) in their book “Always On” say that the consumer is now in control to such an extent that there is a so called “Mutiny in media” (Vollmer & Precourt, 2008, p. 79), where the consumer has now freed himself from the shackles of traditional media control (Vollmer & Precourt, 2008). Media consumers now have more media outlets at their disposal than ever before and are multi-tasking, fragmenting or moving away from traditional mediums to new digital ones which has changed the way consumers communicate and interact with content in their lives (Gironda & Korgaonkar, 2014; Pynta, Seixas, Nield, & Hier, 2014). Now consumers are rejecting content, communication and marketing that are irrelevant to them and are opting for media that give them more of what they want (Anderson & Wolff, 2010; Truong & Simmons, 2010). So now consumers are selective, sceptical and demanding; and in the relationship between media and consumers, the power has shifted to the consumer (Hanna, Rohm, & Crittenden, 2011; Kwon, Oh, Agrawal, & Rao, 2012).

As seen from the results of the study consumer control is on the rise in the media landscape, and with increasing control, consumers are now pulling content to satisfy their needs which is threatening to obsolesce traditional business models of the media industry. In this state of flux as discussed previously, media businesses should look at becoming more consumer centric in their approach where they need to be keep the consumer at the centre of their business models where these businesses have an intimate knowledge of their consumers and their needs and focus on satisfying these needs while creating wholesome consumer experiences instead of being just focussed on selling them standard products or services (Lamberti, 2013; Shah, Rust, Parasuraman, Staelin, & Day, 2006). Yet it was seen that the literature and expert opinions do not go far enough in suggesting on how to implement this customer centric approach to the media industry. To help businesses implement a more consumer-centric view, a conceptual model is presented below on how the media landscape can change in response to content pull from empowered consumers. Managers of media businesses can use this model as a reference to understand how businesses need to evolve and remain profitable with consumer control.

In this model the media landscape is an ecosystem, the consumer is at the centre of this ecosystem and has the most power or control. This is in departure to traditional media industry models where media businesses wielded the most power in the media landscape. This empowered consumer pulls content from a variety of sources to suit his or her individual needs. This consumer in control not only consumes content but is also a creator of content on various UGC platforms.

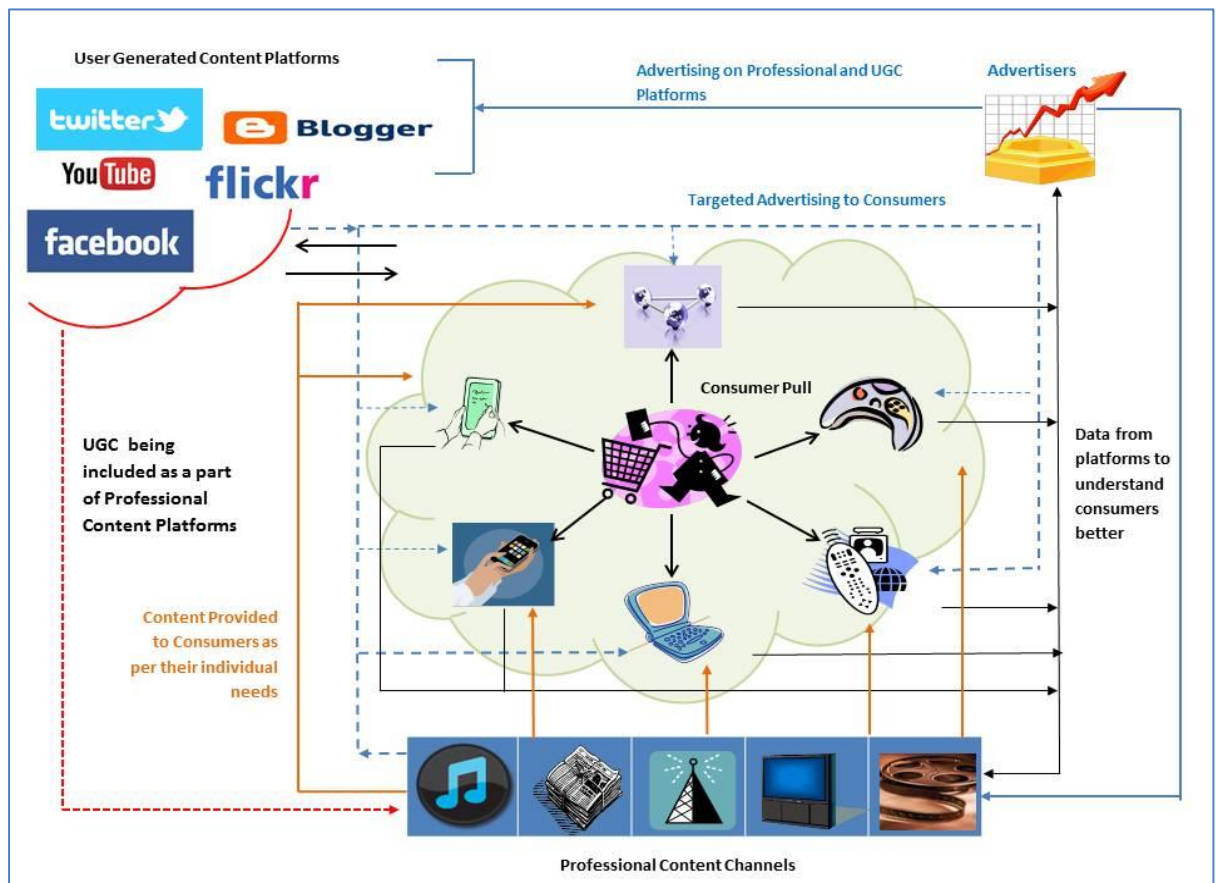


Figure 23: Conceptual model of the media landscape to factor Consumer Pull

This model is characterised by a web of interconnection between platforms, devices, businesses and consumers. In this interconnected space the consumer generates a lot of data through his or her interactions with multiple devices and platforms like mobile phones, internet, video games and others. This generated data can provide insights into customer: preferences, habits, consumption patterns, demographic details and other information, and can be utilised by media businesses to understand their customers better. Also media businesses and advertisers have multiple touch points in this model to interact with the consumer and through these windows they can provide content and information as per the user's needs which the consumer can pull as and when he or she desires. Content platforms not only provide professionally produced content but increasingly include UGC where the consumer is increasingly a

“producer” (Bruns, 2007a; Wofford, 2012). On a similar note, advertising messages are now not an intrusion into customer’s lives (Belch & Belch, 2003; Rust & Oliver, 1994) instead they provide personalised information to help people in their buying decisions. So advertising is targeted not only on professional content platforms but instead they are present wherever the customers are, on professional and user generated content platforms.

Thus this study aims to bring to the attention of media business managers, the idea of consumer control in media consumption and this control changing consumption from media business push to consumer pull. Managers need to be aware of this phenomenon and take cognisance in their business strategies to accommodate consumer control; they need to use their businesses resources to create a unique bundle of benefits for consumers based on their needs. This will become a source of competitive advantage for the business in the media landscape (Lee & Kim, 2012)

7.5 Recommendations for Future Research

Although this study set to find answer to whether consumer control is changing media consumption from push to pull a number of questions arose when trying to answer this question which can form the basis for future research.

a) What is more important for consumers in their content consumption ease and speed of access to the content or enjoying the experience of the content?

As seen during the study for some media consumer respondents ease and speed of access to the content was the most important consideration whereas for others the experience of the content was more important. So there is a scope for further research in investigating on what is more important for consumers’ ease of access or experience of the content.

b) Is the level of content pull that consumers exert to get content dependant on the attitude of the consumer or is content pull dependant on the situation?

As observed in this study some consumers placed greater emphasis on control and pulling content than others and also some consumers mentioned that in some situations they like to pull content whereas in others they prefer content being pushed to them. So it can be researched if content pull by consumers depend on the individual and/or the situation.

- c) With excessive consumer control and content pull in media consumption is there a risk of consumer polarisation where consumers only consume content that they like and have a very limited view and knowledge of the world outside this content.**

Although not covered extensively in the study, it was mentioned in Chapter 2 that that with excessive consumer control and content pull there is a risk that consumers will become polarised by having a very constricted view of the world. This can be expanded further into a research study on whether excessive content pull by consumers can actually result in this.

- d) Is the ability of businesses to adopt consumer control and content pull in their business strategies dependant on what function they perform in the media marketplace?**

As questioned in the previous chapter whether all media businesses can adopt consumer control and content pull in their strategies to the same extent; particularly businesses which have invested a lot of resources on traditional media industry models. So it can be researched whether the level to which businesses can accommodate consumer control in their strategies depend on how integrated they are to traditional models. Furthermore it can also be researched if all businesses cannot accommodate control to the same level; and what can particular players in the media landscape do to adopt consumer control like print publications or pay tv providers or media planners.

- e) How do content providers who have a mandate to provide a certain kind of content adopt consumer control?**

As discussed in the previous chapters that certain media businesses like public broadcasters have a mandate to produce certain kind of content which might not make financial sense as consumers are not interested in pulling that content yet they are regulated to produce and broadcast this kind of content to their audiences. It can be further explored that how do these media businesses adopt content pull strategies and what can they do to make them attractive for consumers to pull content from them.

- f) Can businesses who are unable or unwilling to craft their business strategies around the consumer survive in the long term?**

It was discussed in the preceding chapter that it needs to be investigated whether businesses which are unable or unwilling to change or design their business

strategies around the consumer survive in the long term, this investigation can be taken up in a research study.

7.6 Conclusion

In conclusion the results of this study found that consumer control in media consumption is on the rise and it will only increase in the future academic literature also agrees on this result (Bardhi et al., 2010; Gamble & Gilmore, 2013; Heinonen, 2011; Schultz et al., 2012). This rise in consumer control is enabling users to get content from content platforms based on what, when, where and how they want to consume content. Media businesses have traditionally used models that push content to captive audiences and these models are now being challenged by this consumer control.

This research study tried to explore the effects of consumer control and whether it is changing models from content provider push to content consumer pull. It was found that there was still a certain level of reluctance among businesses on accepting consumer control and there were lack of strategies and business models among media providers to factor consumer control and content pull. Media businesses need to be aware of the empowered role the consumer now has in the media landscape and its implications on the media marketplace, if they are to stay relevant in the consumer's mind. Businesses have to move away from mass offerings to more customised and targeted offerings which reflect the user's needs. So from "mass media" there needs to be a move to "my media" as now in the media landscape the control is now with the consumer.

"This is the end of spoon-fed orthodoxy and infallible institutions...This is the time for the rise of the Consumer"

- Chris Anderson, Entrepreneur, Celebrated Author, Former editor of Wired Magazine

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9. Appendices

Appendix A: LSM Calculator for Media Consumers

LSM Level Calculator (adapted from www.eighty20.co.za)

Metropolitan dweller (250 000+)	DVD Player / Blu Ray Player
Living in a non-urban area	Refrigerator or combined fridge/freezer
House / Cluster House / Town House	Electric Stove
Tap water in house / on plot	Microwave oven
Flush Toilet inside house	Deep Freezer - Free Standing
Hot running water	Have a washing machine
Built in Kitchen Sink	Have a tumble dryer
No Domestic Workers or Gardeners	Dishwashing Machine
Home security service	PayTV (M-net / DSTV / TopTV) Subscription
2 Cellphones in Household	Home Theatre System
3 or more Cellphones in Household	Vacuum Cleaner
Zero or One Radio set in Household	Motor Vehicle in Household
Air conditioner (excl. fans)	Computer - Desktop / Laptop
Have TV set(s)	Land line (excl. Cellphone)
Swimming Pool	

Appendix B: Interview Schedule

Media Consumers

Date	Interviewee	Age	Occupation	LSM Level
06 November	Gerhard	26	Entrepreneur	10
30 September	Nokuthula	21	Sales	7
10 November	Mabuzo	37	Gardener	3
25 September	Monya	45	Logistics	9
20 September	Cheryl	50	Finance	8

Media Experts

Date	Organisation	Interviewee	Department	Designation
23 September	AVUSA	Esmé Deken	Market Intelligence	Group Head
01 October	SABC	Angy Hammond	Market Intelligence	Head
15 November	DSTV	Jacqui Singh	Free VOD	Product Owner
29 October	Media Shop	Chris Botha	-	CEO
31 October	MNet	Yolisa Phale	-	CEO
15 October	Cube on the Square	Luisa Mazinter	-	CEO

Appendix C: Interview Guides

Interview Guide: Media Consumers

Icebreaker Questions

- What was the last movie you watched and where or how did you watch it?
- Did you read the newspaper this week?
- What is the latest song on your phone?
- What is the latest Series you are watching and where are you watching it?
- Do you have any apps on your phone, what kind of apps are they and how often do you use them?
- Do you read eBooks; do you prefer eBooks over real books?

Grand Questions

- Has the way you watch TV, Movies; listen to music; get your news changed in anyway during the past 5 years?
- What kind of content do you like (Ex- Music/News/Sports/Documentaries/Series/Movies/Current Affairs/Society) and is it available to you readily?
- Do you think you have more control now in accessing and consuming content than 5 years ago?
- Do you like the idea of having more control in choosing what you want, when you want and where you want?
- What is more important to you, access to the content or experience of the content?

Floating Prompts

- Is there anything that you would like Content Providers to change so you get more benefit out of their platforms?
- How would you rate your media diet (Heavy/Medium/Light)?
- Do you think in South Africa we have a lack of access to content of our choice?
- Are there any complaints that you have from current media providers?

Planned Prompts

- How much do you spend on media resources and on what?
- Do you think you are getting value for your money in terms of getting access to content from existing media outlets?
- If given a choice of access to only one medium (Radio/Internet/Satellite TV/Books/Newspapers) which medium would you choose and why?
- What is more important to you, to watch/listen/hear only what you want or a platform which has content and you can choose what to see/listen/read from those options?
- Does money play any role in your media consumption choices?

Contrast Prompts

- Do you think there is a difference between traditional media outlets and newer media technologies in terms of control in choosing what you want from them?
- Is there any difference between how you consume media and how your parents/friends consume media?
- What is the biggest constraint in your consuming more media (Watching/Listening/Reading): time or money?

Interview Guide: Media Experts

Grand Questions

- What do you think is the future of traditional media?
- How do you think the Media Landscape has changed in the past few years?
- How do you think Media Consumption will change in the future among consumers?
- Tell me what you think about business models of the media industry- how they conceive the customer to be; how they make money; how they should change?
- What do you think about the concept of Consumer Control in Media consumption? Do you think consumers now have more control in getting what they want, when they want, where they want?
- Do you think Media Industry business models will change from the existing Push Based Models where the provider pushes content to the consumer to Pull Based models where consumers pull content through the value chain?

Floating Prompts

- In your opinion are there any threats to existing Media Industry Models?
- What do you think is the role of content in present media platforms?

- What do you think is the future of content for media platforms?
- Do you think that existing Media Industry Business Models are still relevant in today's digital age?
- How do you feel about User generated content, do you think it has become or will become viable media consumption vertical?
- Do you think there will be increasing produsage and users will now increasingly collaborate with content producers to co-create content as per their preferences?

Planned Prompts

- Do you think with the increased availability of cheaper Internet Bandwidth and other technologies consumers now have increased control in media consumption?
- Do you think Financial Considerations is a major factor in influencing consumer choices and the extent to which they have control in media consumption?

Contrast Prompts

- Are you aware of push and pull marketing strategy? Do you think this is applicable to the media industry and if it is do you think now there is a change from business push to consumer pull?
- Do you see a difference between giving access to content to consumers and giving access to the platform and which in your view is more important?

Appendix D: Interview Consent Form

Consent Form

I am conducting research on “Increased Consumer Control in media consumption changing business models from push to pull”. The focus of this research is within Media Industry and Media Consumers in South Africa.

Our interview is expected to last for about an hour and will tremendously assist in gaining a deeper understanding of the relationship between media providers and media consumers in the age of Digital Media.

Kindly note that **your participation is voluntary and you can withdraw from the interview at any time without any penalty**. The data would be treated and kept with utmost confidentiality. The interview will be conducted for the sole purposes of my research investigation and this consent form provides me with your permission to use the information shared for the purposes of my MBA research and a journal article publication.

If you have any concerns, kindly contact my supervisor or me. Our details are provided below:

Researcher: Devarpan Chakraborty Email: 438825@mygibs.co.za Phone: +27 79 657 8135	Research Supervisor: Kerry Chipp Email: chippk@gibs.co.za Phone: +27 11 771 4175
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Thank you, your assistance is greatly appreciated.

Signature of participant: _____

Organisation: _____

Date: _____

Signature of researcher: _____

Date: _____

Appendix E: List of Content Codes used in the Study

Code-Filter: All

HU: Content Analysis of Data-New-16-Dec
 File: [E:\Content Analysis of Data-New-16-Dec.hpr7]
 Edited by: Super
 Date/Time: 2015-01-08 22:46:28

*Business Model COOCCUR Consumer Control
*Consumer Control COOCCUR Consumer Pull
*Consumer Control COOCCUR Denying
*Decline COOCCUR Traditional Media
*Technology COOCCUR New Media
Adoption
Advertisers
Age
Anticipation
Apps
Audience fragmentation
Big Data
Binge Watching
Bits
Brand
Broadcast
Business Model
Challenge
Changes
Choices
Collaboration
Commodity
Community of Users
Competition
Connect
Constraint
Consumer Control
Consumer Pull
Consumers
Content
Content as per consumers liking
Content Consumption
Content Consumption on "Screens" will always be there
Content Experience
Content is King
Content Mix
Content Owners
Content Push for Content Discovery and Acquisition
Content Rights
Control
Convenience
Convergence
Critical Thinking
Curation

Customised Advertising
Customised Content
Decline
Denying
Developing Markets
Devices
Difficult
Double Sided Business Model
DStv
DTT
Ease of Access
eBooks
Ecosystems
Effectiveness Reduced
Empowerment
Enabler
Expensive
Experience of Content is due to Reference points from the past
Extent
Flow while consuming content
From Mass Media to My Media
Frustration
Future still bright
Gatekeepers
Good Value Propostion
Habit
Impatient
Important
Information
Innovation
Inter-connected
Interactive
International Content
Internet
iTunes
Lack
Landscape
Lean Forward and Lean Backward in consuming content
Life Style
Local Content
Locking
Long Tail Effect
Low LSM
Mass Targeted Campaigns
Measurement Tools
Media Business
Media Download
Media Piracy
Migration
Mobile Device
Mobile Operators
Money
Moving Away
Need
Netflix

New
New Media
New Media more a communication medium than an advertising medium
No Change
No One Size Fits All Model
Not Fulfilling Consumer Needs
Opportunities
Outlier
Pay
Peers
Platform
Platform Agnostic
Preference
Preference for Non Linear mediums
Public Broadcaster
Pull
Push
Push & Pull
Recommendation
Reluctant
Reportoires
Resolve
Response
Revenue
Scares
Second Screen
Self Improvement
Selling Data not Content
Services
Sharing
Silo Mentality
Slow Internet speeds
Social Media
Subscription Based Models
Switching
Targeted Advertising
Technology
Threat
Time
Traditional Media
UGC as a revenue stream
Uncomfortable to change
Understanding
Up To Date
User Generated Content
USP
Value for Money
Verify
VOD
When
Where
Winner
YouTube