

# Impact of Digitization and DVRs on Advertisements in India

*Media Industry Perspective*

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## Abstract

*Whether proliferation of Digital Video Recorders (DVRs) would be the end of the 30 second spot or not has been a debatable topic since its launch. Globally, the number of television households with DVRs is projected to reach 337.6 million by the year 2018 and the impact of DVRs can no longer be ignored. Research has already proven that advertisers who ignore the impact of DVRs risk wasting valuable advertising resources. Advertisers who are aware of this threat are already coming up with innovative ways of getting their messages across to consumers, even in a time-shifted world.*

*In India, DVR penetration is still nascent but is estimated to become significant in the next few years. The available literature review on DVR is mainly related to the US and European countries; hardly any research has been done on impact of DVRs in the context of India. Through in-depth interviews with media experts in India, this study attempts to analyze their perception regarding*

*impact of digitization & DVRs on effectiveness of advertisements; and the implications for media planning and creative execution.*

*It has been concluded from the study that the leading media planners in India are aware of the challenges and opportunities posed by DVR. Although the current scenario related to impact of DVR on advertising in Indian market is not perceived as alarming, but experts believe that awareness regarding the issue and timely strategic planning would help the advertisers effectively combat the challenges posed by DVRs in future.*

## INTRODUCTION

A comprehensive report of Global Industry Analysts, Inc. (2012) indicates that Digital Video Recorder (DVR) market has been witnessing strong growth since its launch more than a decade ago in USA primarily due to the increasing affordability of the devices. Though the DVR ownership rate was significantly less during the early 2000s, it has picked up pace in the past few years driven by declining prices of DVRs. DVR's popularity has also raised concerns among the advertising community, due to the technology's adverse impact on overall ad revenues. A report by Forrester (2002) estimated that viewers would skip 92 per cent of time-shifted ads and by 2007 the shift to on-demand TV will reduce traditional ad-viewing by 19 per cent. This will cut down \$7 billion from traditional TV ad revenue. This has resulted in questions regarding the effectiveness of ads viewed in fast forward mode, with some speculation as to whether fast-forwarded ads

have any impact on viewers at all (Maddox 2006). Such questions have persisted despite research suggesting that the impact of DVRs on television advertising appears to be much less than expected (Consoli 2005, 2007; Wurtzel 2006).

## Penetration and Impact of DVR in International Market

The United States represents the single largest market in terms of number of DVR households. Globally, the number of television households with DVRs is projected to reach 337.6 million by the year 2018, driven by falling prices, and satellite and cable operators' move to offer DVRs in bundled form along with other services. Within Asia-Pacific, Australia, Korea, New Zealand, and Singapore are the nations with highest DVR penetration with average of about 35%. On the other hand, countries such as China, India, Indonesia, Thailand, and Philippines have the lowest penetration rates in the range of 5-7%. The number of DVR households in Asia-Pacific is projected to reach 45.5 million by the year 2015 (Global Industry Analysts, Inc. Report, 2012).

A report on Technology, Media and Telecommunications Predictions (2012) by Deloitte highlights that in several major TV markets, including the US and UK, DVR penetration has already exceeded 50% but some researchers believe that despite that level of penetration, TV advertising will not be affected. The reasoning behind this is that although DVR provides facility to skip ads,

the majority of DVR owners would still prefer watching the vast majority of their television live. Ferguson and Perse (2004) claim DVR owners watch both live and recorded television programs with more enjoyment and greater control. Even if viewers fast forward 15-25 percent of programming, it need not be considered a worthless resource. DUCKFoOT Research and Development conducted a controlled experiment of fast-forward viewing where ads were viewed at 30 times normal speed and concluded that this too induced a positive emotional response. However, this response was only observed for ads that had previously run on prime-time TV. There was no emotional response to a set of ads to which respondents would not have been exposed, suggesting that prior exposure leads the mind to respond positively even to a subsequent fleeting exposure (Who's Afraid of the Big Bad DVR?, 2005). Du Plessis, Erik (2009) also highlighted that by giving attention while fast forwarding, people not only recognize the advertisement, but in the process of recognition they experience similar emotional memories as when they first cognized the advertisement. Thus, in contrast to 'live' or 'by appointment' television viewing, in which ads can be avoided by channel surfing or turning towards other activities, DVR users tend to report that they view the screen while fast-forwarding through ads, hence increasing the likelihood that they are experiencing the ads at some level (Van Meurs 1998; Tse & Lee 2001). Fast forwarders will be concentrating hard to spot the last commercial to ensure they do

not miss the resumption of the program. The advertisers can utilize this opportunity to the best when viewers' concentration on the TV screen is the maximum. Programs that have a higher incidence of pre-recording, advertising at the end of breaks can be sold at a premium as recall for such slots is likely to be highest.

To have a significant impact on viewing behavior, DVR owners would need to pre-record absolutely everything and they would need to keep their eyes closed while fast forwarding which is just not possible. Occasional usage of DVR is rather good for all the stakeholders-the broadcaster, the program maker and the advertiser. Instead of panic, advent of DVR could be very well utilized by the television industry by analysing data like which advertisements are watched, which are always fast-forwarded, and which are rewound and watched again. This data could be combined with repositories of pre-loaded advertisements stored on the DVR that could allow a degree of personalized advertising service to be provided. The rise of the DVR may however pose more of a threat for other parts of the entertainment sector. According to one survey, of DVR owners who were recording more programs than a year back, 40 percent were purchasing fewer DVDs and 38 percent were renting fewer DVDs (Technology, Media and Telecommunications predictions, 2011).

In an article written by Friedman (2010) an interesting research finding was revealed that although watching a television show from a DVR gives viewers a chance to skip

commercials, owning a DVR does not influence the demand for advertised products despite its ad-skipping feature. This gives another sigh of relief to the advertisers as DVR may not have a direct impact on Return on Investment (ROI). As the cost of DVRs continues to fall, they are now becoming a “must have” item in many homes. The owners of DVRs overwhelmingly agreed that their enjoyment of watching TV was significantly enhanced by having a DVR and that it was the second most important household item, after the mobile phone.

### **DVR Penetration and Impact on Indian Market**

A recent review of Digitization progress by the Ministry of Information and Broadcasting has revealed that 68% of Cable TV Digitization has already been achieved in the 4 metro cities of Delhi, Mumbai, Kolkata and Chennai. City wise data shows that digitization in Mumbai is 95%, Kolkata 67%, Delhi 53% and Chennai 49% (Ministry of Information and Broadcasting Report, 17 September 2012). A study by Media Partners Asia, predicted India to be the largest DTH market in the world in terms of subscribers by 2012 and estimated 45 million subscribers by 2014. These are massive numbers for an industry that has not even completed a decade since its inception (HD DTH TV and DVR shootout: Digit rates the top six players in India, 2011). In India, the DVR was first launched in 2008 and the penetration of DVR in India was less than 4% till 2011 (Bapna 2012, August 17) which currently may not be an

alarming situation. However, India is known for its fast adoption of new technologies and with the mandatory digitization process in metropolitan cities; increase of affluent class and working couples, the chances of DVR penetration in coming years are quite high. In this tech-savvy market, we expect that within a short period of time, DVR will be considered as essential as the mobile phone as is happening in other leading markets in the world. Huge social factors that could make DVR big in India are large families and the nature of programming.

In a detailed chat with *Economic Times* (Bapna, 2012 August 19) Atul Phadnis opines that Indian market is fairly ripe for DVRs to be successful due to several factors. One major element is that the viewer of a particular TV series doesn't like to miss even a single episode as it breaks the link in the story progression. Although for serials in mainline languages there are repeat telecasts, but they are generally broadcasted at odd hours, hence the DVR acts as a useful resource. For programs broadcasted in regional languages there are no repeats for main TV serials, hence it makes viewers even more anxious about missing any episode. That increases the possibility of increased DVR penetration in Indian market.

The other element for better DVR penetration in India could be the growing indulgence of the newer generation in sports beyond cricket. These live matches that could be on a US time or a Euro time need to be recorded and hence provide the perfect reason to own a DVR. This is also the reason that sparked the early success of DVR in Europe. Moreover, the TV viewers

in India have been frustrated with too many ads within the programs and wish to opt for interruption free entertainment. However, the price could be one of the major stumbling blocks for DVR penetration in India.

### **Research Gap**

The available literature review on impact of DVRs is mainly related to the USA and European countries, hardly any research has been done in this regard in Indian context. Although DVR penetration in India is currently not alarming, however with increasing digitization process and future predictions made, DVR is expected to be a common household item within a short period of time. This study aims at analyzing the awareness and preparedness level of media planners; and making recommendations for media planning in the Indian context.

## **OBJECTIVES**

The major objectives of the research paper are to study the following aspects in Indian context:

- Awareness about DVR in the advertising industry and if it is perceived to be a threat or an opportunity
- Impact of Digitization & DVRs on Effectiveness of Advertisements
- Implications for media planning and creative execution.

## **METHODOLOGY**

The research was conducted in two phases. First

phase was exploratory in nature. It involved analysis of secondary data and personal interactions with selected industry experts and academicians to define the problem. It resulted in generation of a structured open ended questionnaire. Second phase was conclusive (descriptive) that involved in-depth interviews from media planners and experts from advertising industry.

### **Research Instrument**

Review of literature helped in development of a framework to analyze the impact of DVR on media industry in international market and its implications on media planners. Based on the literature review, the questionnaire for in-depth interviews with medial planners in Indian market was created. The framework included 7 indicative questions covering the following aspects:

- Choice of various modes of advertisements and their efficacy
- Factors that motivate viewers to watch advertisements and if the time spent on watching commercials correlates to their purchasing behavior
- Awareness about DVR and the industry perception regarding challenges and opportunities posed by DVRs
- Implications for media planning to address the increased use and penetration of DVRs

The questionnaire comprised of attributes statements eliciting responses under each of the sub heads of the framework. The

questions were open-ended and were designed to moderately channelize the conversation without restricting its scope. Apart from the responses on the above sections, data was collected with regards to demographics of respondents like industry, profile etc.

### **Sampling**

Descriptive phase involved administration of finalized research instrument to a specified number of experts from media industry. Detailed interviews were conducted with 10 respondents who are experts in advertising industry. The profiles of these respondents are listed in Acknowledgement section.

## **FINDINGS AND ANALYSIS**

The inputs received from interview discussion with the respondents have been summarized below:

### **Advertising Trends in India**

Major modes of advertisement that are primarily used include television, print, radio, internet and OOH (Out-of-Home).<sup>1</sup> The choice of appropriate medium for advertisement depends on the media plan as well as the requirement and varies from product to product. Advertising segment in India is dominated by the television and print sectors with combined contribution

<sup>1</sup> OOH advertising is all about reaching a mobile audience wherever they live, work, play, drive, shop or commute. It is a form of advertising that targets the consumer 'on the go'. It includes Billboards, Banners, Street Advertising, Graffiti, etc.

of over 80% in the total revenue pie. Both these segments are expected to continue to be dominant in the next five years. The reason why television is bound to score over print medium is because the literacy levels are not that impressive in India. Internet/Digital medium is still in its nascent stage and has gained popularity over the past few years for the simple reason that young urban target group(TG) these days is more attuned to receiving information on what is called as the 'New Media'.

When compared with other mediums, television is the most effective because the cost per thousand is the lowest. If we divide the cost of advertisement by the number of people we are reaching, it is found that the amount of money spent per person on TV commercial is the lowest, in contrast to print medium or any other medium. Although TV commercials are more expensive, its efficiency is visible in terms of the leverage it provides by stirring viewers' emotions. For example it's hard to advertise food products in a non-moving medium like radio so, it's just that some categories are more print-driven and some are completely television driven which leads to more sales. *"The effectiveness of the medium also depends on the message. TV is an audio-visual medium that is more engaging and hence appropriate for complex messages, while other media like radio are more effective for simple messages (e.g. information about discount sale) that can be aired more frequently"* as explained by Ms. Arha, Padman Planning Manager, Maxus Bangalore.

As per the market statistics, television and

print go neck to neck in terms of budget allocation. Each takes almost 40% of the entire budget so that makes it 80%. Radio takes around 4%, internet/digital has moved up and occupies now almost 7-8% and OOH consumes the rest. But there's no hard and fast rule as such because it completely depends on the kind of project undertaken, for example the allocation will be entirely different for a launch campaign as compared to a promotional campaign.

Every medium has a different perspective and approach towards the end consumer. Each medium plays its own role like television helps in brand building; radio helps in brand recall; print and digital medium helps in promoting sales; OOH is more on catching the consumer right there and then. Therefore, a launch campaign normally requires a complete 360 degree approach which basically involves the use of all known mediums. Effectiveness of any campaign depends on the entire media plan and not merely on the choice of medium. *"No one medium can suffice, in fact it is the entire plan that has to work. What is required is basically a good plan which is a blend of all the mediums. So it is the entire gamut of mediums that can do the trick for you and not just one medium. As a marketer I need to be present at multiple places at the same time"* as stated by Mr. Rajeev Bhandari, Associate Partner, TMG Advisory Pvt Ltd.

### **Factors that Make Advertisements Appealing**

When respondents were asked about the factors that make advertisements appealing

to viewers, it was mentioned *"People watch advertisements because of the content, length does not really make any difference and lengthy commercials are not usually liked"* according to Mr. Puneet Ahuja, Business Director, Starcom Media Vest Group. Advertisers usually begin with a lengthy commercial (say 45 sec to 60 sec) and they run it for a week to showcase the story and then continue with the edited versions of 10 sec, 20 sec or 30 sec., so length doesn't really add value and instead ruins the investments and user interest goes down very quickly. *"It takes time for a story to establish and once the message has reached the targeted TG, the reach part is over and then the audience is continuously impacted with the smaller edited versions of 10 sec to 20 sec. So it's all about 'Reach & Impact'. And people always come back for the most interesting parts, that is where the edited versions come in handy"* according to Mr. Rajeev Bhandari. So these small versions help in recall since it is not possible to narrate the whole story at all times. *"Celebrity can be an eye catcher and that's the reason a lot of advertisers use it because to cut the clutter you require either some recognizable face or you need to have very creative content"* according to Mr. Sujay Ray, Brand Manager at Bharti Airtel Limited. People stick to their favorite celebrity to see what they are endorsing, but these days people care more about the content, emotional connect and humor. So it's not the matter of length or celebrity, but yes emotional appeal can stop them from fast forwarding. Factors like celebrity can appeal once but not again and again. *"However I would say that it is the combination of truthfulness of product-value communicated and the way in which*

*it is communicated that makes the difference”* according to Mr. Adarsh Atal, Copyrighter, Lowe Lintas Bangalore.

### **Awareness and Perception of DVRs amongst Media Experts**

India has taken its first step in the direction of going digital but it has a long way to go. Moreover, India is a very price sensitive country and most of the people are still confused about transition from cable connections to the DTH service. The huge rural and the urban divide in India can make even the merriest of the things look scary. Mr. Sujay Ray, opines that *“The impact of such technologies in India will mostly be felt in the metros i.e. the tier 1 cities rather than the tier 2 & tier 3 cities. In US it started around 1999 and after almost 13 years the recorders penetration has come to 50%, however in India it’s a recent phenomenon so it can easily take 10-15 years and that too in metros. It is not a threat at least for a decade because it’s a long process that starts with digitization and depends to a great extent on how the market responds to such recording facilities. Urban India is definitely the one where the change is expected to be felt sooner simply for the reasons like disposable income and greater acceptance to internet/digital mediums”*.

The media experts are convinced of the advantages these new devices like DVRs offer -recording, skipping the advertisements, rewinding, forwarding and replaying the content as many times as the viewer wants. Despite all these advantages, they feel ‘cost’ and ‘demand’ are some of the major hindrances in its wide penetration in India.

There could be multiple reasons as to why the need has not been felt yet such as presence of multiple television sets per household provides an option to watch the program on another set rather than recording, increase in the popularity of other mediums like internet/digital YouTube that provide the same content, etc. Though this puts the relevance of the product in question but it does not rule out the fact that at some point later in time it might have an impact on the effectiveness of the advertisements.

### **Impact of DVRs on Advertisements**

*“There’s a threshold of number of times people have to watch an advertisement in order to get motivated and actually make a purchase. In our media balance when we do ‘reach & frequency’ analysis to calculate this threshold”* according to Mr. Gaurav Sinha, Senior Brand Manager, Pizza Hut at Yum! Brands. So clearly when devices like DVRs are used and the advertisements are fast forwarded, this number is not reached. The concept is that it takes time for the perception of the consumer to change. This average is not a standard and in fact depends on a number of factors. It’s easier to calculate this average in case of television because of the quantifiable data which is hard to obtain in case of other mediums. And these numbers will go for a toss with DVRs and other such recording devices because then there is no other way to determine whether the end customer is actually watching the advertisement or not. In this context, how would Television Audience Measurement (TAM) Ratings take place is

a bigger question, according to Mr. Gaurav. However what matters at the end of the day is the conversion rate and this conversion rate is hardly 1% to 2%. So these commercials are important to make the customer aware that there exists a product. This awareness is then followed by generating interest which in turn is followed by desire and then the Desire and the Need together form an action (AIDA theory).

DVRs with HD feature either does not give any advertisement or has advertisements for a very short duration which viewers may not mind watching. Rather, fast forwarding the advertisement in HD channels is more of an inconvenience because due to short duration viewers tend to fast forward beyond the advertisement. So can HD be considered as a sort of midway strategy? Well the answer given to that by experts is NO because less advertisements on HD have an altogether a different reason. As of now, the HD penetration is very low. Every television is not HD compatible and mostly the advertisements are also not shot in HD. Because of less penetration, the advertisers are putting in less commercials for HD channels as compared to other channels, so in future when the HD penetration increases probably the number as well as the length of advertisements will also increase on HD channels. *“For the simple reason of compatibility, for advertisements to be shown on HD channels those ads need to be shot for HD as well and that would unnecessarily increase my costs as an advertiser because the audience/viewers that I can reach is a very small fragment of the total viewership, so it really*

*doesn't serve my purpose at all”* as explained by Mr. Sujay Ray. In HD, the revenues are small but the whole objective is better picture quality. However even HD is now slowly and steadily weaving advertisements to generate more profits. Till now the advertisements shown primarily include promotions of other shows but now product advertisements are also being added of duration that is one-fourth of an advertisement on a regular channel.

As mentioned above, these DVRs are not really a threat but they cannot be ignored as well. *“I don't think it's really a threat to the TV advertising, good ads will still be watched. Also it depends on the penetration of DVRs. If the penetration becomes high, it might result in more focused advertising, with specific focus on specific target segments (TG) and programs that they watch. Media planning would also become a challenge then. Thus it would be a challenge but not a threat”* said Mr. Mainak Bag, Senior Brand Executive, Emami Ltd, Mumbai, who formerly worked for Lintas, Bangalore. It all depends to what extent digitization would happen, penetration of DTH services vis-a-vis Digital Cable Services and the price point. Price point is very critical because how much the consumer can pay for this sort of convenience is a big question. Going forward nothing would be viewed in isolation so it's quite possible to get the same content on the internet at 1/4th the amount one pays for a channel subscription. Also with 4G and better bandwidth technology the viewing experience will improve further over the internet and this could very well prove to be a cost efficient alternative for DVRs, even though currently

the media spends on digital/internet are not more than 2-3% of the entire media budget allocation.

Any new technology slowly percolates from top to the bottom. Even DTH earlier was not known to everybody but with time it is now becoming very much mainline. People do not change their habits overnight, it takes time for the perceptions to change. But people do change habits given a strong proposition, for example, switching to HD is worth because of excellent picture quality, reasonable price and almost negligible ads.

## CONCLUSION

The leading media planners in India are aware of the challenges and opportunities posed by DVR. They believe that impact on the Indian advertising industry depends entirely on how bullish the DVR companies act; how well they are able to penetrate their products in the market and increase their reach because once the volume increases only then can the effects on the media/advertising industry can be analyzed. Till date it is not very clear whether it's just another product variation or a serious alternative that would balance out the viewer's experience. At the end of the day what matters is how well the DVRs are able to impact the end consumer. Moreover, the pricing would play a major role in DVR penetration and its subsequent impact on advertising. Currently, the prices of DVRs are relatively on the higher side, however rigorous competition between the market players would make it more affordable. Although the current scenario related to impact of

DVR on advertising in Indian market is not perceived as alarming, but experts believe that awareness regarding the issue and timely strategic planning would help the advertisers effectively combat the challenges posed by DVRs in future. If these DVRs are a threat anywhere in the near future, then advertisers need to adopt different strategies, try multiple touch-points and catch the consumers on the go.

## IMPLICATIONS FOR MEDIA PLANNING AND CREATIVE EXECUTION

If advertisers are to keep up with the changing force in the media marketplace, they must thoroughly understand how audiences "behave" in the emerging media environment (Lin 1994, p. 30). Thus, advertisers will have to analyze the target audience and their behavior to combat the challenges posed by DVR. In the countries with significant DVR penetration, savvy advertisers are already creatively adjusting their TV advertising strategies to address the widespread use of DVRs and are designing innovative ways to get their messages across to consumers even in a time-shifted world.

Taking clue from the strategies followed by the countries where DVR penetration is much higher than India, the media planners can consider them as precedent and customize to combat the DVR challenges in Indian market. These may include buying ad spots at the start or the end of a commercial break; resorting to other forms of TV advertising like product placements, pop-up ads and sponsorships;

relying on strong iconic and visual imagery that can stand out during fast forwarding; and widening the basket of allocation to include different kinds of programming, from news to sports. Moreover, to overcome the possible downside of DVR fast-forwarding, media planners will have to ensure that the fast-forwarded ads have already been seen by viewers at normal speed. This could be done by preliminary placement of ads in programs that are generally not fast forwarded like sports, news, etc. Hence, media departments' planning will have to emphasize programming, not time slots to understand which programs are most often viewed in real time and which are likely to be time-shifted.

Therefore, it is critical to use the appropriate advertising strategies for right impact. Advertising costs are significant and wrong allocation of funds can result in wasted money and lost opportunities. Devising the right combination of placement and creative strategy holds a significant upside for advertisers. Therefore in the DVR age, it is the job of media planners to ensure that content attracts people even if it is fast-forwarded.

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