An Explorative Study of Malaysian Television Content in the Mobile Environment

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Abstract

This thesis discusses television's online content distribution on mobile platforms in Malaysia. It focuses on broadcast strategy of local television stations for mobile platforms; and comprehensively studies the development of regulatory policies in Malaysia during the past decade. It also explores the challenges faced by the local television industry, such as limited media freedom and fierce competition from global online content providers. The thesis aims to understand the strategies that have developed to meet demand for online content on mobile platforms within the current climate of Malaysian broadcasting.

This thesis examines television content distribution strategies by analysing twenty-four one-to-one, open-ended interviews and two focus groups with key personnel in the industry. These personnel consist of operational teams in the main television stations, the heads of relevant government agencies, and content creators in Malaysia. All data collection sessions were conducted and transcribed in Malay before being translated into English. The analysis reveals the emergence of three major themes: the inconsistent development of Malaysia's television industry, despite global advancements in media technology; a monopoly on sports content due to the ownership structure of Malaysian media; and the disorganised management of regulatory policy for online content in the Malaysian media landscape.

The thesis concludes by offering significant insights on, and suggested improvements to, policies surrounding online content distribution on mobile platforms and best practice for sourcing state of the art television content. It argues that the establishment of an independent media gatekeeper is essential

for the proper regulation of Malaysian media. Finally, it emphasises that there is an urgent need for the Malaysian government to establish competitive industry guidelines for a broad range of online content; policy which will benefit local television stations in the long run.

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Acknowledgement

I do not believe people when they say that "dreams are futile."

This journey begins with a dream to challenge impossibility while tearing down insecurity about becoming a sophisticated and independent grown-up. For the last forty-eight months, I was privileged to embark on a journey that taught me about resilience and perseverance. This remarkable journey required some audacity to clear every hurdle in achieving excellence. It was only made possible with these special individuals.

First and foremost, I would like to take this opportunity to express my limitless gratitude to my supervisors, Prof. Raymond Boyle and Dr Lynn Whitaker for their endless commitment, dedication and hard work. For the last four years, they never stopped believing in me and always provided support, motivating and patiently guiding me in order to bring out the best I could. I have to admit, there was a time when my spirit was severely tested, but they were always there to show me the way and help me to move forward. Throughout this process, they have displayed a very high integrity and transparency in carrying out their task as supervisors. These qualities, as well as enormously helpful supervision sessions, set a good example for me to follow in reaching my ambition to be a credible researcher. Honestly, I am eternally grateful to have been supervised by both of them, and I cannot thank them enough for this opportunity.

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Finally, I believe, "dreams are there to preserve your sanity."

Thank you.

Author's Declaration

This thesis represents the original work of Abdul Hadi Che Hassan and is compliant with the University of Glasgow's ethical guidelines. The research on which it was based was carried out at the University of Glasgow under the supervision of Professor Raymond Boyle and Dr Lynn Whitaker during the period of September 2015 to December 2020.

Definitions/Abbreviations

Abbreviation	Meaning
1MDB	One Malaysia Development Fund Berhad
ASTRO	All-Asian Satellite Television and Radio Operator
AVOD	Advertised financed streaming services
BA	Broadcasting Acts 1988
BBC	British Broadcasting Corporation
CMA	Communications and Multimedia Acts 1998
CMCF	Communications and Multimedia Content Forum
DoJ	United States Department of Justice
DOSM	Department of Statistics Malaysia
DTH	Direct to Home
DVD	Digital Versatile Disc
EPL	English Premier League
FCA	Film Censorship Acts 2002
FCBM	Film Censorship Board of Malaysia
FTA	Free-to-Air
GLC	Government Link Company
HBO	Home Box Office
HSBB	High Speed Broadband
ICT	Information and Communications Technology
IFJ	International Federation of Journalism
IPTV -	Internet Protocol Television
ISA	Internal Security Acts 1960
IUS	Internet Users Survey
MCMC -	Malaysian Communications and Multimedia Commission
MDEC	Malaysia Digital Economy Corporation

MIMOS	Malaysian Institute of Microelectronic Systems
NFL	National Football League
NLA	National Language Acts 1967
NUJM	National Union of Journalists Malaysia
Ofcom	United Kingdom Telecommunications Regulatory Body
OTT	Over–the-Top
PPPA	Printing Presses and Publications Acts 1984
PTVM	Malaysia Television Producers Association
PVOD	Paid Video on Demand
RTM	Radio Televisyen Malaysia
SOA	Security Offenses Acts 2012
STMB/TV3	Sistem Televisyen Malaysia Berhad
TA	Telecommunications Acts 1950
TM	Telekom Malaysia
VOD	Video–on–Demand
Webe	Mobile Broadband offered by Telekom Malaysia

Glossary

Term	Definition
Advertising video on demand	A free subscription service to access video content supported by fixed interval advertisements or promotional videos.
Analogue Television	A television system widely used in the pre-digital era to transmit images and sound by employing analogue electrical signals.
Broadband	Refers to high-speed internet access in transmitting data, sound, voice and video.
Bundling	A marketing strategy of grouping together a few different products or services and offering them as a package. For example, offering phone, television and broadband in a single package.
Cable Television	A distribution system that transmits television content to subscribers by cable.
Digital Content	Any information or data that exists in a digital format and is available for download or distribution on electronic devices.
Digital Content Distribution	A delivery method for digital content in the form of audio, video, and software.
Digital Television	A transmission of television content using digital encoding.
IPTV	A transmission of television content using internet protocol network.

Live Stream	The transmission of a live event or content via the internet as it happens.
Mobile App	A mobile software application program that runs on mobile devices.
Mobile Television	A streaming of television content, video, and recorded or live events to portable or handheld devices such as mobile phones, iPads and tablets.
Multiplatform	Content developed for delivery on multiple platforms: for example, linear television, social media and mobile devices.
Over the Top	A service referring to video or media streaming that is offered directly to viewers via the internet rather than through traditional content distributors such as satellite television platforms or cable. Some examples of prominent OTT providers are Netflix and Amazon Prime Video.
Stream	A transmission of media content to electronic devices such as computers and mobile phones via the internet.
Video on Demand	A distribution service that enables viewers to select and view online videos at their convenience. Viewers are no longer dependent on video playback devices or fixed broadcasting schedules.
Web Television	Television content produced for internet distribution.
Wi-Fi	A wireless networking technology that allows electronic devices such as mobile phones to connect with the internet in a specific coverage area.

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Introduction

The purpose of this thesis is to examine new directions taken by Malaysian television stations to distribute television content on mobile platforms. It does this by focusing on content distribution and regulatory policy undertakings. In the 21st century, broadcasters can increase the quality of their content transmission by using Internet, which introduce new challenges in content distribution as well as new opportunities, particularly to television stations. Each country in the world has adopted a unique set of solutions to cope with global technological changes. This thesis discusses and seeks to explain these trends in Malaysia.

As the thesis progresses, it will also provide a better knowledge of numerous terms used to describe television stations' increased interest in distributing television content such as streaming, video-on-demand (VOD), Internet Protocol Television (IPTV), *et cetera.* Great confusion has been created by these terms being constantly defined without consistency and according to individual practices within the media industry; this has created unnecessary misunderstandings around various issues relating to content distribution in the television industry. Streaming technology has seen considerable growth and exposure in recent years, due to the continuous progress of the mobile device industry (Fortunati and Bakardjieva, 2020). With the introduction of new mobile devices such as smartphones and tablets, and their main characteristic of supporting video streaming services, it is necessary for television broadcasters to adopt this new technology. In the light of the global growth of mobile technology, the Malaysian broadcasting industry, and particularly its television

stations, lags behind in adopting mobile streaming technology. There is little knowledge within the industry concerning best practice in governing and nurturing this new technology for long-term television development. However, despite well-received improvements in other Asian countries, such as South Korea, Taiwan, and China, the current direction of mobile streaming technology's development is relatively uncertain in the Malaysian broadcasting industry, and particularly in the field of content distribution.

This thesis seeks to improve our understanding of the development of television content and streaming services in the Malaysian television market. It contributes to the growing body of academic literature within the key subject areas of mobile technology and television studies. It also seeks to develop and provide crucial distribution strategies that will enable the long-term development of online television broadcasting for mobile platforms in Malaysia. Various hurdles stood in the way of getting to a single consistent definition that could accurately describe the current distribution of television content in Malaysia. Hence, this thesis constructs and frames such a definition by looking at internet-distributed television services based on a limited subset of services described by Amanda Lotz in her book, *Portals: A treatise on internet-distributed television* (2017). Throughout this thesis, television content distribution is associated with 'internet-distributed television'; that is, an online portal distributing series produced in accordance with the 'professionalised, industrial practices of the television industry' (Lotz, Lobato and Thomas, 2018c, p. 36).

As an extension of Lotz's perspective, it is vital to clarify that this thesis argues that 'internet-distributed television is a subcategory of internet-distributed

video' (Lotz, Lobato and Thomas, 2018c, p. 36); this larger category also covering a broad array of internet-distributed films and other audio-visual materials, which are produced beyond the television industry for internet circulation. As an emerging field within the rapidly developing research landscape of media studies and cultural policy, internet-distributed video *as a whole* is fascinating to look at. Nevertheless, the essence of this thesis concerns itself primarily with a focus on the questions and issues that surround the formation and development of internet-distributed video *exclusively* within the Malaysian television industry. To investigate that facet of internet-distributed video, we must begin with an explanation of the phenomenon of media convergence in the following section.

Convergence in Online Television Content Distribution

While the central topic discussed by this thesis is internet distributed television, research in this area must build a bridge to an understanding of television content distribution from a clear understanding of *media convergence*. It is through digitalisation first, and the phenomenon of media convergence that secondarily grew out of it, that we can explain the origins of this new trend: online television content broadcast on mobile platforms (Latzer, 2013). As we are aware, the worldwide convergence of media forms has been considered inevitable for some time (Szczepaniak, 2013; Balbi, 2017). The same developmental process of media convergence found elsewhere in the world can readily be seen in Malaysia, as television stations also begin to embrace the prospect of online content for broadcast on mobile platforms.

Since the Malaysian nation achieved independence on 31st August 1957, its television industry has gone through various phases of content broadcasting (Wong et al., 2016). Back in 1963, television content was broadcast via an analogue radio signal in black and white. A few years later, advancements in the technology of recording, broadcasting and displaying television content enabled coloured content to be broadcast and viewed on colour televisions for the first time. Continual year-on-year development of the television industry has kept pace with the technology itself. The widespread availability of personal desktop computers from the 1980s onwards increasingly allowed and demanded the digitisation of video signals – which had hitherto been created and delivered in analogue data format. The emergence of the internet at the beginning of the 1990s came to vastly increase demand for digital video. This great expansion in internet-distributed video across the board therefore created the *possibility* of internet-distributed television – something which can also be seen as indivisible from the contemporary progressive switch away from analogue radio and television signals to digital audio broadcasting (DAB) radio and digital television.

This progression from analogue to digital video, and the digital transmission of video, can be seen to underpin the *digitalisation* of the media industry. The *Gartner Information Technology Glossary* defines *digitalisation* as "the use of digital technologies to change a business model and provide new revenue and value-producing opportunities; it is the process of moving to a digital business." ("Digitalisation", n.d.). Within the context of this thesis, the relevant digital technologies concerned are the mobile devices, smartphones and tablets which began to appear during the early 2000s. Today, mobile technology means that television has reached a state where the delivery of content is no longer limited

to a physically static receiver – the traditional television set. As mobile technology rapidly developed across various industries (Wong et al., 2014), along with internet distributed content, the mobile platform emerged as a promising field for future distribution of television content (McDonald and Smith-Rowsey, 2016). The development of Video-on-Demand (VOD) was inextricably linked to the vast development and worldwide distribution of mobile devices, smartphones, and tablets; technologies which have allowed users to retrieve internet content virtually anytime and anywhere (Budzinski, Gänßle and Lindstädt, 2020). In this new era, the enormously increased opportunities for the delivery of VOD has meant that content distribution has become an ever more central activity of television stations; an ongoing digital transformation which continues to present the industry with new challenges every day.

Based on its earliest definition (Newman and Levine, 2012), the concept of *media convergence* revolves around the unification of more traditional media (such as the printed word, radio or television) with new, emerging technologies for content distribution (such as the internet). This term was first used in the early 1960s to describe the technical, regulatory, financial, economic, social, cultural, and worldwide growth of the media phenomenon (Szczepaniak, 2013). Interestingly, the concept of convergence can also be understood to describe other revolutionary phases in the media industry – such as when, in the early 20th century, the spoken word was broadcast over radio, or silent movies and sound recordings were brought together as *"talkies"* (Szczepaniak, 2013).

The concept of media convergence continues to be a significant theme in the development of television, and once again became the centre of discussion in the early 2000s when new technologies emerged to facilitate internet-

distributed television content. On top of the digitisation of generated content, and the availability of hardware (mobile devices themselves), these technological transformations also necessitated the production of elements such as software compatible with television's broadcast structure (Cox, 2018) to establish workable streaming platforms. Yet again, a revolution in telecommunications technology paved the way for a new wave of media convergence, a wider definition of its meanings, and a new approach to content distribution among the staff of television stations.

Despite the longstanding focus on media convergence, therefore, these transformations created a fundamentally new form of content distribution on mobile platforms. This new perspective was pioneered by Jenkins (2006), who established the existence of an important connection between media convergence and media content: That they create a two-way interaction between top-down corporate-driven processes on one hand, and bottom-up consumer-driven processes on the other. Through this two-way relationship, media organisations are experimenting with a range of delivery channels to maximise the flow and accessibility of their content; thereby expanding revenue opportunities, broadening media markets, and reinforcing the loyalties and commitments of their consumers. In these ways, media convergence through mobile platforms can be viewed as a key case study in the digitalisation of the television industry.

Over the television industry's recent history, the convergence of electronic media has been seen most clearly in this phenomenon of television stations beginning to move towards the distribution of online content for mobile

platforms (Beutler, 2016). Within the context of this research project, convergence in the media industry will be examined through the decisions of Malaysian television stations to create online content for distribution on mobile platforms. Today, the viewing of television via mobile platforms is a strong trend in Malaysia (Wong et al., 2014). The increase in mobile viewing's popularity has encouraged a change in television viewing habits in Malaysia; meaning that recorded content may be both consumed without the traditional constraints of physical location and broadcast time (Isa et al., 2019); and that live broadcasts can be more easily consumed in real-time through streaming (Dwyer, 2010). In this way, we can see that the new business models of a digitalised television industry, and the phenomenon of media convergence, provide extremely useful concepts for describing and explaining these emerging new directions in broadcasting method undertaken by television stations in Malaysia – themes that I will return to throughout this thesis.

This interaction between corporate-driven and consumer-driven motivations has defined the shifting nature of television content broadcasting as it continues to develop alongside technological changes and transformations in the television industry. Understanding this allows us to better comprehend the influence of digital connectivity on the television industry; how that connectivity has led to the "mainstreaming and channelling of television, and a programmed flow that can be algorithmically customised for each viewer" (Thibault, 2015, p. 118). Therefore, this kind of media convergence increases positive television viewer experience and creates a massive appeal through highly customised channels. While this immersive and highly customised experience of television is generally enabling and positive for consumers, the changes it has brought have not been

entirely beneficial: Due to the emergence of new television viewing trends, scholars acknowledge a tendency for consumers to experience "television dislocation", as content can be retrieved on mobile devices (Oswald and Packer,2013) or via streaming video services (Thibault,2015), regardless of where you may be, or what you may be doing. Equally, the massive proliferation of device types, operating systems, screen proportions and file formats (not to mention legal frameworks around broadcasting) have generated numerous technological and practical hurdles which must be continually overcome, to ensure that the aspects of "device capabilities, media rights, and content are managed using a convergence platform to allow for seamless consumption of content across disparate devices" (Johansson and Billings, 2016, p.1).

To sum up, in recent years, there have been significant developments in the convergence of mobile technology with traditional media such as television, in direct response to the worldwide demand for mobile viewing (Mikos, 2016; Jorgenson and Vu, 2016). This has created a new media form known as online content in television industry, also, substantially transformed the nature of television viewing more generally; a trend which can be seen in Malaysia and many other national cases. The mobile platforms has revolutionised the television's traditional position as a type of mass communication media, creating a situation in which the role between corporate and consumer motivations has become more of a two-way dialogue than was previously the case. As a continuation to the above discussion, in the next section, content distribution is investigated more closely to identify the digital era's new ways of content distribution

Television Content Distribution in the Streaming Era

The technical dimensions of streaming technology involve a combination of internet technology and new media services. Streaming is a new way of accessing digital content obtained from remote servers. It is qualitatively different from downloading, since the content obtained from streaming is not permanently stored on the users' devices. Therefore, users can access digital content at any time, using internet connectivity as the primary medium. While streaming can be done on any electronic device with internet capabilities, streaming is particularly popular with mobile devices such as smart phones and tablets. Streaming has been a major promotional tool in the development of mobile devices for digital content, especially for television viewing. This situation impelled Lotz (2018a) to associate streaming activities involving television content with long-playing television content and to exclude other forms of content such as user-end-amateur generated content. This means that the viewer was only subjected to televised content that had gone through a typical production process, thus fulfilling the production standards set by television stations. The same approach was adopted by Herbert, Lotz and Marshall (2019) but was extended to include the streaming of films and music as well as television programmes.

However, Cunningham and Graig (2019) emphasise that in certain situations, other elements outside the professional television industry need to be considered as well. For example, social media platforms such as *YouTube* also need to be taken into consideration in grasping the fast-paced dynamics of today's streaming activity. Equally, innovations in mobile technology enable

videos to be downloaded from mobile apps and various other popular sources, such as *Vimeo* and *LiveTV* (Hussain and Mkpojiogu, 2016), which similarly allow users to stream the video directly online (i.e. without downloading). This thesis regards Cunningham and Graig's definition as a solid framework supporting the basic argument that we must involve the rapid growth of amateur-generated television content in coming to understand how internet technology is bringing about the evolution of television content distribution. The main advantage in doing so is that it should allow us to see how this development can help the growth of online content distribution in the country, which could lead to further developments in mobile streaming. Streaming has created a new market where telecommunications content is designed expressly for the purposes of online distribution. Since 2002, long-form television content has been professionally designed for mobile viewing. Although initially all content had been live content, the existence of various online television content providers, such as *Netflix*, *Hulu*, and *Amazon Prime Video* sparked new growth in the online content streaming ecosystem.

Many television stations have begun to develop mobile apps which allow access to live programmes, as well as recorded content, using the mobile data network. This can be attributed to the rapid development of the Malaysian telecommunications network, allowing internet facilities to be used at any time. This technological development is significant to this study, given that several of the television stations in Malaysia are currently developing mobile apps to provide television content to their subscribers.

Content in the Malaysian broadcasting industry, and especially in television, has undergone major changes following the emergence of new media technologies (illustrated in Figure 1, and discussed in the foregoing section above). In the last decade, the growth of television content has once again faced a challenge in terms of distribution, as the internet has challenged the traditional Free-to-Air (FTA) service by introducing a new model of subscription-based television. While the initiative to disseminate television content through the internet is generally seen as a commercially positive step in maintaining the true socially beneficial function of television, this can serve as a point of reference to determine the direction of the television industry in the long run. Therefore, this study takes as one of its crucial aims the evaluation and recognition of the steps needed to ensure that this strategy of content distribution on mobile platforms is successful. Considering these points is the subject of the next section.
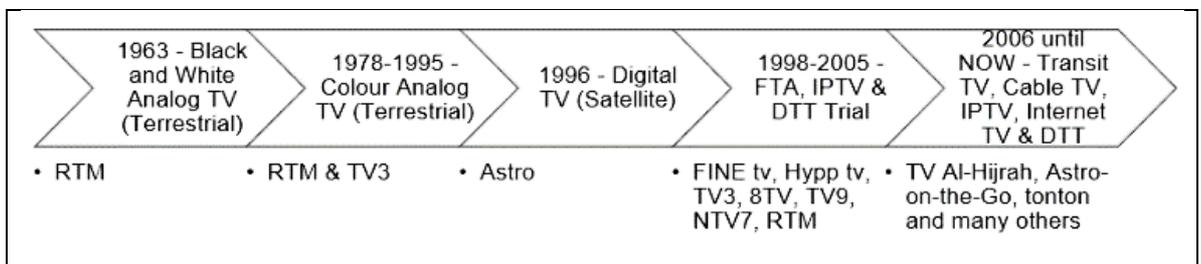
Figure 1: Broadcast television history in Malaysia (Rosmani, Mutalib and Sarif, 2020).

Perception of Online Television Content on Mobile Platforms

This research is principally concerned with how television stations are adjusting to deliver their content over the internet on mobile platforms in Malaysia. The transformation in direction that television stations have taken, from a model of linear FTA or cable content delivery to online content distribution, has been assisted and paralleled by their offering additional content through "websites,

online video streaming services, chat rooms and live events" (Baumann and Hasenpusch, 2016, p. 85). This has resulted in a major change to the public perception of the television industry, from a stand-alone medium to a multi-platforms media service. From the perspective of the industry itself, the value of multiple-platforms viewing has been defined in various technical respects.

In the Malaysian television industry, another term regularly used to explain multiplatform (or 'multiple-platform') viewing is 'mobile television' (Wong et al., 2014). Despite being one of the most highly anticipated advances in mobile technology to date, multiple-platform or mobile television viewing faces inconsistencies in both definition and concept; inconsistencies which hinder the progress of television stations in their development of the new industrial opportunities which it offers (Baumann and Hasenpusch, 2016). To highlight and capitalise upon the cutting-edge innovations in television content that mobile platforms offer, it is vital for television stations to execute effective digitalisation strategies (Bhawan and Marg, 2015). All decisions regarding, and changes to, broadcasting policy made by television stations will determine the direction of development for television content on new platforms such as the mobile platforms.

In Malaysia, the delivery of television content through mobile platforms began to be explored in the early 2000s, with the introduction of a variety of traditionally-broadcast television content available online for re-watching (Ulin, 2013). More recently, however, the development of mobile platforms in Malaysia has taken a massive new direction when television stations in Malaysia actively began developing content specifically for mobile platforms (Wong et al., 2016),

in order to connect with their viewers more diversely. Within the international media industry, the history of mobile platform development reflects the fact that it was inspired by its potential ability to transform the local commercial sector (Soh et al., 2020). Privately owned television stations were the first to introduce mobile streaming on mobile platforms for all users. Sistem Televisyen Malaysia Berhad (TV3), for instance, introduced a mobile application that focused on streaming to mobile devices. Later, government-owned television stations followed suit and introduced a mobile application, *RTM Clicks*, which significantly enhanced their capacity to distribute content. These initiatives undertaken by television stations in recent years have introduced a new mode of content distribution in Malaysia. Undoubtedly, online content on mobile platforms has had a significant impact upon both private and government-owned television stations in Malaysia.

Another major concern in online content on mobile platforms revolves around the existence of different levels of adaptation to the new mobile environment in most Asian countries (Vimalkumar et al., 2020). South Korea, for instance, has a successful history of television content for mobile platforms (Leung and Chen, 2017) in the early 2000s. Studies were carried out in various Asian countries from the mid-2000s onwards which recognised the positive benefit of delivering television content on mobile platforms (Lobato and Sarkar, 2019). However, in 2005, despite the massive positive response from Korean mobile users themselves, demand for mobile content unexpectedly decreased from one of South Korea's mobile television services, *Digital Mobile Broadcasting* (DMB). This has been recognised as an important example of a major failure in mobile television services (Kim, 2017), and it has become clear that the failure was

closely connected to this company's inability to adapt its content for the mobile environment. Furthermore, issues with the range, quality and quantity of provided content played a major part in the venture's failure.

Whilst television companies in countries such as South Korea have suffered major failures, therefore, it is fascinating to see television content on mobile platforms develop and establish itself in other Asian countries. Consider China, for example. Even though it has been labelled by foreign observers as a country with stringent government oversight and limited media freedom, the Chinese government has emerged as a powerful media force with a comprehensive package of its own television channels designed to keep the country free from foreign influences. The next step taken by the Chinese government was to ensure that all media policies were successfully communicated to broadcasters as online content on mobile platforms became available (Keane, 2016). These two conflicting Asian scenarios, those of South Korea and China, provide contrasting cases of the development of mobile platforms experienced by users. While the Korean cases demonstrates the commercial uncertainties that can result from content served up for consumption in a capitalist market, the Chinese case demonstrates what can happen when online content on mobile platforms becomes a tool with which the government seeks to control the public. Although this thesis primarily focuses on online television content, therefore, it is interesting to explore the important role that mobile platforms themselves play in this new era. We should consider how the operational decisions of television stations themselves contribute to both the public's perceived need for mobile platforms in Asia, and to the development of mobile

platforms which service that need. Both political and socioeconomic factors are important in deciding how well a broad mobile ecosystem policy is implemented.

Needless to say, all such discussions in relation to the Malaysian television industry trigger precisely the same set of questions. In order to develop answers to such questions, it becomes necessary to undertake critical research in a range of different areas. At the present time, the following research areas require more analysis:

1. A consideration of how global mobile technology influences the nature of Malaysian television content distribution.

2. An awareness of the process through which television content is transforming in Malaysia, in keeping with the growing global 'hype' around mobile platforms.

3. An evaluation of how the local political, social and economic conditions in Malaysian can either boost or inhibit the evolution of online content for mobile platforms.

Rationale of the Thesis

In the wake of mobile technology, various areas of research have been developed to study the broadcast content of television stations. A good amount of attention was given to the consumption of television content on mobile platforms (Isa et al., 2019). Whilst this research improves our understanding of online television content on mobile platforms, there has been a lack of attention to the process of developing a comprehensive broadcast strategy for mobile platforms by the television stations (Baker and Beng, 2017). The relevant and all-important policies set by the Malaysian government have somehow failed to impact upon the broadcasting of content to mobile devices, resulting in an inefficiency of content distribution. Even today, there is still no clear governmental direction on broadcasting policy for television stations to follow within the field of online content for mobile platforms.

In April 2000, linear television content broadcast by television stations in Malaysia was made available to all Malaysians for free. Prior to that date, every household was required to pay an annual licence fee to watch television content. The decision to abolish television licencing was made by the Malaysian government after it moved to introduce privatisation in various sectors of industry (Ramanadham, 2019). This move was made primarily to lessen the government's funding of the national television station, *Radio Television Malaysia* (RTM). The privatisation of the media industry has paved the way for RTM to operate on a basis of mixed funding streams, with some revenue provided by the government from general taxation and some revenue from advertising. However, the abolition of the television licence does not affect the

four private channels, TV3, 8TV, TV9 and NTV7, owned by Media Prima as they continue to profit from the sale of advertising slots.

Even though television stations were given complete freedom to fund their operations, they are still required to abide by all broadcasting rules provided by the Ministry of Information and Communication. The main role of the Ministry of Information and Multimedia, however, is to ensure that proper guidelines are implemented by each television station, particularly in relation to content creation. In general, all Malaysian television content has to follow the *Rukun Negara* (National Principles), which prohibit prejudice towards or against any of the three different recognised races in Malaysia; Malay, Chinese and Indian (RTM, 2016). Even though these are the core requirements for television content creation, they have not prevented television stations from creating dedicated channels for different races in different languages. For instance, 8TV has been dedicated to Chinese viewers for many years and tends to broadcast more English language content.

The fierce competition among television stations in the privatised market has led some stations to expand their television content to mobile platforms. It is well established that the availability of online television content on mobile platforms has a disruptive affect upon the traditional content broadcast structure which television stations provide (García-Perdomo, 2019). For instance, the scheduling of linear broadcast is now directly affected by the mobile structure, because streamed content is more interactive. According to Lotz (2017, p.2), the new mobile broadcast structure provides "personalised delivery of content independent from a schedule," and this flexibility has

become a crucial feature of next-generation television viewing. Whilst many researchers have recognised that interactive mobile viewing is progressively replacing linear television viewing, the impact which this replacement is having on online content remains uncertain.

There is a strong argument that the availability of internet-based television content should be at the centre of discussions regarding mobile platforms before any broadcast structure is built. As the South Korean case discussed above illustrates, there is a vital need to look into the range, quality and quantity of content being created, in order to determine the potential availability and popularity of content for mobile platform viewing (Carroni and Paolini, 2017). Put most simply, popular television content will increase the demand for online content (Almashor et al., 2014). However, it is crucial for television stations to take a holistic approach, establishing high-quality television content in tandem with executing government policy on mobile platforms (Hajar et al., 2020). As audience engagement becomes a priority area of research in studies of television content on mobile platforms, it is essential to recognise that traditional linear television viewing is still extremely relevant (Medina, Herrero and Portilla, 2019). Nonetheless, there is no doubt that television audiences have developed more interest in mobile platforms in recent years (Abreu et al., 2017).

The increasing demand for online television content on mobile platforms has changed the dynamics of television content distribution (Kua, Armitage and Branch, 2017) by creating new opportunities to enhance the local distribution of online television content. Leading on-stream content providers such as *Netflix* and *Amazon Prime* have an incredible amount of capital to develop their own

platforms and are powerfully reframing the traditional structure of content distribution used by television stations (Weeds, 2016). This development poses major questions about the television content on mobile platforms and will determine the position and future of television as a whole in the digital era.

Research Questions

All research questions for this study have developed out of a curiosity to understand the influence of global technology on Malaysian television stations. This thesis constructively emphasises three research questions from the perspective of television station operators in Malaysia. To investigate the online content environment in the Malaysian television industry, the following questions have been formulated:

RQ1: To what extent does the global television industry influence the nature of content distribution by local television stations in Malaysia?

RQ2: What are the adjustments in content distribution that have been made by Malaysian television stations to embrace streaming services?

RQ3: What roles do the political, social, and economic elements specific to Malaysia play in the development of mobile policies within the country's television industry?

The Significance of the Study

The significance of this thesis lies in the contributions it makes to those fields of media studies concerned with issues in the Malaysian television industry; with the broadcasting industry in the Asian region considered more widely; and with the global context of the emergence of online distribution platforms and the numerous transitions that have occurred as a result of the diverse rates at which they have been implemented in a variety of different contexts. Research into online Malaysian television content delivered on mobile platforms can be considered a subject of study which is playing an ever more critical part in our widening the operational structure of Asian television stations. This thesis does so by offering a new media industry paradigm which is founded upon eastern cultural perspectives, rather than the western perspectives which have dominated the academic literature. By examining and determining eastern television broadcast cultures, this analysis can provide new insights and document fresh contextual broadcasting experiences. At the same time, the thesis also offers valuable insights on the influence that the global mobile phenomenon is having upon local television content, which appears to react through different trends in each country.

By providing insights on the political and socio-economic background of the Malaysian television stations, this thesis shows how these factors have shaped, and continue to shape, the online content industry. It may also serve as an important 'wake-up call' to the Malaysian government to start looking at online television content on mobile platforms as a profitable industry. Therefore, this thesis may provide the Malaysian government with a range of strategic options

that may help to inform regulations for the long-term development of online television content distribution on mobile platforms. Therefore, such a re-thinking may create opportunities for a paradigm shift in how we understand the political and socio-economic dynamics of the local television industry; bringing them into closer accord with the new economic and technological advances that affect the whole country in general.

Another major concern of this research has been the aim to contribute towards the development of the television broadcasting structure in Malaysia. Despite the various commitments made by many relevant agencies in Malaysia, broadcasting structure is one of the areas that still demand further development to fit the context of Malaysian television. In the next chapter, the discussion on television broadcasting structure analyses the various changes that have occurred in policy implementation over the years; starkly illustrating the socio-economic, cultural and political value of the media industry's survival by focusing on the case of Malaysian television stations.

Another significant contribution of this thesis is its implementation of qualitative research methods. Different research methodologies in media studies were historically developed to achieve different objectives, and this thesis introduces a qualitative social research approach to engage more effectively and thoroughly with the personal experience of participants. Various researchers may investigate participant engagement with mobile platforms by adopting methods of quantitative analysis and metrics; however, this thesis takes an alternative approach and makes an empirical investigation of the subject through qualitative social research approaches to engage with participants' online

experiences in a more intensive and personal way. In doing this, it manages to reflect participants' real experiences more accurately; to grasp their perceptions of the levels of policy execution for online content on mobile platforms; and to canvas informed industry opinions on the government's media policies.

This study will also act as a 'check and balance' document which examines the Malaysian government's implementation of its mobile policy. The absence of clear guidelines from Putrajaya[1], to inform television stations in their distribution of online content for mobile platforms, presents a massive obstacle to progress. As a result, the current policy situation has become extremely confusing as more television stations introduce online content for mobile platforms. As online content on mobile platforms is currently being trialled as an experimental service by many of the television stations, it is essential to identify a proper framework of standards for online content at this early stage in its development, in order to ensure that it prospers. Therefore, this thesis will present a comprehensive body of suggestions to address certain gaps in the recent execution of policy within the online content ecosystem in Malaysia. In addition to reviewing the government's implementation of its official mobile policy, this thesis also works to provide a set of practical guidelines for all government agencies engaged with the media content industry

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[1] Malaysia's federal government's administrative centre.

The Organisation of the Thesis

Following this introductory chapter, the thesis is divided into seven chapters.
Chapter One reviews and critiques previous research in the mobile technology
field. It provides a thorough reflection upon the existing literature concerning
global mobile technology and television stations' content distribution practices
from the early 2000s to the present. Next, based on the same range of years,
Chapter One critical analyses the relationship between technological
advancements such as streaming and the distribution of television content. The
essential features of online content are categorised and thoroughly explored
here, as is the role which online content has played in creating a new business
model for television stations. This chapter also identifies other significant
developments such as the phenomenon of *platformisation* in the field of media,
concerning the establishment of online content for mobile platforms.

Chapter Two extends the themes explored in the first chapter by bringing the
reader's attention to the significant impact that global mobile technology has
had on the Malaysian television industry. It continues the analysis of existing
literature into a second, more focused phase with a background overview of the
media more generally, and television stations in particular, with a specific focus
on Malaysia. This narrowing down of the scope to exclusively address the
Malaysian media industry provides the reader with the opportunity to understand
the overall structure of the television industry in Malaysia. This chapter reflects
in detail on the social role of linear television in earlier decades, to
contextualise and understand the recent new directions which the television
stations have taken. Chapter Two also touches on the early development of

television stations as new technologies became available. In this way, the chapter first identifies the challenges faced by local television stations in ensuring the development of a secured mobile ecosystem. Apart from that, it also includes a comprehensive discussion of government policies that directly impact upon the distribution of television content on mobile platforms. Chapter Two develops in this way to ensure that readers have a good understanding of the broader context and recent developments in the Malaysian television industry, before the thesis moves into its phase of fresh research and analysis.

Chapter Three outlines the research methodologies selected for the empirical component of the research programme leading to this thesis. First, I explain the overall methodological rationale underpinning the approach taken here, before going into further detail about the methodologies themselves. I present the case for using a face-to-face, semi-structured interview format for media industry research, which has been used to great effect during this research project; particularly in conducting consultations with policymakers in the television stations themselves, and with the staff of related government agencies in Kuala Lumpur, Malaysia. Secondarily, I discuss the practical processes involved in conducting focus group work, and the merits of this interviewing format; this was used on two occasions during my research, to canvas the opinions of staff members of two premier internet providers. Finally, I outline my methods of data processing and analysis, which consisted of transcribing recordings of these face-to-face encounters, translating the Malay texts into English, and responsive data classification and management. The analytical methods which have been used to generate the thesis's research findings are also explained.

Chapter Four shifts the reader's attention to the findings which have emerged from the process of empirical data collection during the fieldwork research phase outlined in Chapter Three. It uses my original findings to build on the historical and scholarly literature reviews of the earlier chapters, thereby coming to an enriched critical analysis of the impact which global mobile technology has had on the Malaysian television industry. As before, through an intensive research focus on the last twenty years since the year 2000, we can establish a tightly focused analysis of the physical, technological and policy changes that have occurred within local Malaysian television stations over the last two decades. As was the case with the historical and academic analysis of Chapter One, this chapter develops its arguments within a frame of reference motivated by the global mobile technology environment on one hand, and the trends which have been identified within the establishment of online television content on mobile platforms in other Asian countries on the other. In Chapter Four, issues surrounding the relationship between the internet environment in general, and the specific demands of online television content in particular, are closely scrutinised.

Chapter Five serves as the second of the thesis's three findings chapters. It takes a different approach and focus to that of the previous chapter, presenting an analysis of the popularity of various types of television content on mobile platforms in Malaysia. Most fundamentally, this chapter illustrates the power of popular television genres, such as sports content, to boost public demand for online content on mobile platforms. This orientation then leads the chapter into an investigation and critical assessment of the shifting landscape of sports broadcasting rights in Malaysia; an uneven terrain which (given the popularity of

sports broadcasting in Malaysia) has a significant impact on the phenomenon of mobile viewing. Lastly, Chapter Five extends the analysis of findings to explore the secondary issues which are involved with the broadcasting of sports content on mobile platforms.

Chapter Six is the third and final chapter of findings presented within the thesis. It offers a constructive critical analysis of the manner in which the Malaysian government has developed a regulatory framework for the establishment of online content on mobile platforms in the country. Here we will first come to examine the political and socio-economic factors which play a critical role in any government's development of policy for new media; the specific ways in which these factors have played out in the Malaysian case are closely examined here. Second, the discussion moves on to explore the public reaction to the government's management of this emerging media form in the early 21st century, from those of local television station staff within the industry itself, to those of the television viewers who are the crucial end-point consumers of this media product. In bringing these three perspectives into an analytical dialogue, the thesis explores the ways in which the reactions of industry workers and viewers are justified and considers what action this public perception of the government's online content distribution policy recommends for legislators in the future.

Chapter Seven concludes the thesis by synthesising and highlighting the relevant findings of Chapters Four through Six. It seeks to offer interim answers to the guiding research questions laid out above. Thereafter it moves on to further discuss the potential beneficial impact of the study's findings which can be

realised through the revision of industrial practices and the implementation of more finely tuned policy frameworks. Finally, in drawing the conclusion to a close, I reflexively consider the inevitable limitations of the study and offer constructive suggestions for further research directions and approaches crucial to the future investigation of online content on mobile platforms in the Malaysian media industry.

Chapter One:

Global Context of Online Television

Content Distribution on Mobile Platforms

Although the principal purpose of this thesis is to examine the new directions taken by television stations in Malaysia to distribute online content on mobile platforms, it is both proper and essential to consider a wider view of the ways in which mobile technology has developed within the media industry elsewhere. Hence, this chapter will critically review the previous scholarly literature from around the world. This will provide a comprehensive discussion of the key themes within the field, which will therefore enable readers to understand the recent phenomenon of global mobile technology more fully; to grasp the profound transformative impact which it is having upon societies around the world; and to see the prospects of its development in Malaysia. To effectively address the research problems selected for the thesis, this chapter has been carefully developed to achieve an informed critical viewpoint for each of the relevant issues. These include: the innumerable opportunities which mobile technology brings; the range of strategies which television stations around the world have developed to boost their online content distribution; and the various ways in which mobile technology has been developed in the world's television industries.

There are seven sections to this chapter. The first section begins with discussions surrounding the business model for television content distribution and seeks to provide important contextual information about the business models for content distribution used by television stations before the era of

mobile distribution. The second section moves on to generating a deeper understanding of the changes made in the *value chain* of content distribution, recognising the new forms of value chain which the mobile revolution has created within the sphere of television content distribution. Section three then explores the potentially detrimental impact that mobile technology has had upon the existing content distribution systems of the television industry, highlighting its disruptions and potential threats. The focus of section four shifts to discussing the varieties of television content that have become the backbone of the television industry around the world. In the fifth section, I examine the opportunities offered by mobile technology in relation to these different forms of television content, and problematise those opportunities by unveiling necessary changes to the nature of online content which the mobile environment may demand. Sixth, Chapter One highlights constructive strategies which have enabled these disruptions to become valuable elements that actually boost the distribution of content on mobile platforms. Finally, the discussion in section seven focuses on the current position of television stations in the digital era; insights derived from the global industry highlight the urgent need for television stations everywhere to explore and develop mobile platforms as part of a long-term survival plan within the context of public demand. The chapter is then summed up.

The Value Chain in Television Content Distribution

Before this study looks at the impact that mobile technology has had upon the distribution of online television content, it is helpful to examine the basic pre-existing forms of *value chain* which characterise today's television industry. The

concept of the *value chain* "was first developed by Porter (1985). It was initially designed to introduce a template to analyse the value chain in a manufacturer. Later, it was developed to analyse many players along the supply chain in order to obtain a broader picture of the issues and obstacles a manufacturer might face". (Simatupang, Piboonrungroj and Williams, 2017, p. 3). Porter defined the value chain as the succession of strategic activities performed within any business organisation which provide a more valuable product in the form of goods or services. Porter's clear-cut definition, in combination with his focus on customer experience as central, and his emphasis that *added value* at every stage in the chain is what creates customer satisfaction and competitive advantage, has enabled the value chain model to remain applicable and influential today. Porter's model is easily applicable to the nature of the broadcasting industry, where the *added value* of a television station's products in content is so much greater than the raw materials used to produce them.

As Salvador, Simon and Benghozi (2019) discuss, a focus on the creation of added value at each link in the value chain is essential to enhance the performance of individual businesses, and therefore the overall industry, which is crucial for industrial expansion on a society-wide scale. The concept of *industrial expansion* closely interconnects with the core elements of the value chain and value chain analysis, as they both focus on maximising the input of raw materials, optimising the organisation's transformation processes, and maximising the output and distribution of the organisation's products (Porter, 1985). Each of these elements is a crucial stage of primary activity within any business's value chain, and the development, introduction and popularisation of new goods or services

within any industry is a key strategy for both competitive performance and industrial expansion.

Industrial expansion can be clearly seen in the broadcasting industry when we look at the evolution of its two earliest, traditional forms of value chain. In the beginning, Free-to-Air (FTA) and Subscription-Based (including licence-based) television were the two principal forms of content distribution value chain that were used to distribute television series. Throughout this thesis, the progressive growth and transformation of these two value chain models will be linked to the development of contemporary global online television content distribution. FTA and subscription-based value chains have several core similarities, because both are dependent upon on the same basic organisational structures of content production and the same technological means of delivery: Content formulation, production, aggregation, programming and radio transmission. Since the earliest development of telecommunications transmission technology, the development of subscription-based economic models has not significantly disturbed the advertising-based FTA economic model – nor *vice versa*. In some respects, it has even worked to enhance the content and format of the FTA model, because more viewing options become available, and in turn, the overall revenue values of the television industry increase (Choi, 2018). As a result, it can be argued that the FTA and subscription-based television services have grown and expanded side-by-side as media ecosystems which ultimately benefit from each other's existence.

The rapid development and popularisation of online video content distribution, however, has fundamentally changed the landscape of television viewing around

the world. The online delivery of desktop and mobile video content challenges the television industry in a new way, as content is increasingly consumed by viewers in a more active and selective manner via electronic devices. The emerging trends of *Video-on-Demand* (VOD)[2] and *Over-the-Top* (OTT)[3] services "are now growing at sufficient rates to compete with traditional telecommunications and broadcasting services" (Lee et al., 2021, p. 2). Conventional broadcasters around the world can no longer fulfil their aspirations to control the distribution of television content, and nor can they possibly produce enough television content in-house to meet the needs of all the proliferating channels, online and mobile platforms that now exist. In this way, online and mobile platform has powerfully energised independent content distribution. Such transformations in the online distribution phases of the television value chain have a knock-on effect and generate threats in the existing distribution phase of the value chain. By influencing distribution, they thus impact upon revenue, which in turn further transforms production.

On top of the VOD and OTT distribution of content that would otherwise be conventionally broadcast through FTA and subscription-based linear television, in recent years we have seen increasingly huge levels of consumption in long-form digital content - movies and long-form documentary films delivered by Netflix, Amazon and other platforms – which are now being produced specifically for distribution to mobile devices both inside and outside the home. By creating this new form of content distribution, online and mobile digital technology has

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[2] Video-On-Demand (VOD) is a form of viewing digital-format video as well as digital television content, according to the time and place desired by the audience.

[3] Over-The-Top (OTT) is a term referring to devices that enable viewers to select and retrieve television content through a traditional cable box.

fragmented traditional television audiences. This audience fragmentation caused by the development of a third major revenue model has imposed profound challenges and limitations for advertisers in this sector of the media and reshaped the international television industry. As an increasing amount of digital content was created for mobile devices, the economic impact of this could clearly and rapidly be seen in online delivery's increasing market share of advertising revenues when compared with that of FTA broadcast; and in the increasing allocation of content-production funds (derived from subscription or licence fee revenues) to the online content distribution value chain by subscription-based broadcasters.

These economic and structural changes in the global television industry have promoted the emergence of new industry players, most notably independent content creators. Independent content creation is increasingly replacing centralised content development within the television stations themselves – an out-sourcing of products which television stations undertake to boost future value by enriching their programming, or to manage content costs because the independents can produce the content cheaper, or both. These economic factors have enhanced the direct bargaining power of independent content creators within the industry and are thereby gaining them an increasing percentage of the funds available for content creation within the industry.

Therefore, the central role that content creation plays within the value chain of television distribution can be clearly seen in a variety of different aspects. To describe one if its simplest examples, the holders of broadcasting rights sell the right to broadcast the content they own to FTA and subscription television

channels, and increasingly to online content distributors and pure-play digital services. This phenomenon is most typically associated with premium sports content, where the broadcasting rights for a game, a season or an entire sport are sold to broadcasters at premium prices (Setterstrom, Pearson and Guggenheim, 2018). Revenue derived from advertising carriage fees, sports content subscriptions, and one-off consumer payments for this kind of television product can often exceed the direct revenue of an FTA or subscription-based television station (Smith, Evens and Iosifidis, 2016). We will examine this subject more closely in Chapter Five, but it is worth noting here that competition to acquire broadcasting rights for this type of high-profit premium content is particularly intense within the global industry, and major industry players often maintain specific in-house production units for their delivery.

The Threat of Online Television Content Distribution
to the Existing Distribution Value Chain

In this section, those threats to the existing television content distribution value chain outlined above, which online television content distribution has brought about, are analysed in greater depth to build a comprehensive picture of recent economic changes in the industry. Today, the changing nature of television content delivery challenges television stations to strategically change their business models and methods in order to remain successful. According to media analysts, evidence of this can be seen in the fact that the increasing popularity of viewing digital content through Video-On-Demand platforms has been held accountable for "declining prime-time ratings in countries like Australia and the United States" (Wayne, 2020, p. 31).

Technically, the modern television industry can be understood as comprising three key segments. These are: (1) the content owners and broadcasting rights holders; (2) television stations that are available for free and those that require a subscription; and (3) distributors and aggregators on the internet (The Boston Consulting Group, 2016). The proliferation of internet technology in the last two decades has allowed online content delivery to create an entirely new structure of value chain within the first of these three segments, which redefines the societal role of television overall. Equally, this redefinition of the relationship between television content and television viewers has altered both the social value of television content and its impact on the public. Undoubtedly, the centre of these major changes in the television industry lies in the field of content production – specifically, with reference to content ownership, the negotiation of broadcasting rights, and the industry's increasing commercialisation. Overall, we can deduce that there are significant similarities between the traditional distribution value chain forms (FTA and subscription-based) and the new form of online content streaming: Content remains a key control point in the distribution mechanisms of the television industry. However, this fact means that the changing nature of distribution also has a controlling effect upon the structure of content. Both are important and inextricably interconnected.

As online content distribution seems to gain an increasingly dominant influence over the television industry, a few threats have been identified that could lead it to harm the existing Free-To-Air and subscription-based economic models. Firstly, it can easily be identified when one considers the development and widening availability of high-technology hardware and infrastructure; highly

sophisticated video-ready technological devices, streaming platforms, and software applications. Inevitably, such technological advances are creating less dependency on traditional mediums such as the conventional television.

Secondly, it can be seen that online content distribution has increased the overall quantity of high-quality, professionally produced content for the entertainment of television viewers. Netflix is one classic example of a prominent original content creator that dominates the global market in online content distribution. With 167 million paying subscribers around the world, Netflix has radically altered how television content is viewed in this digital era. Back in 2013, Netflix decided to invest in producing original content of its own, despite the risks and the expense of such a new venture. Despite the uncertainties, Netflix has successfully produced a few critically acclaimed television series such as *The Crown* and *House of Cards*. These two series have both been watched by millions of subscribers around the world, and both have been renewed for several seasons.

A third aspect that threatens conventional television content distribution is the existence of cheap-or-free-to-participate models of online content distribution, of which *YouTube* perhaps provides the best-known example. The free-for-all nature of YouTube has allowed the emergence of an entirely new breed of television content developers, those known as social media *influencers*. In contrast to the industry-derived concept of online content distribution that the general public are already very familiar with, influencers on social media platforms "are third-party actors who have established a significant number of relevant relationships with a specific quality to exert an influence on

organisational stakeholders through content production, content distribution, interaction, and personal appearance on the social web" (Enke and Borchers, 2019, p. 261). Through social media platforms like YouTube, influencers can interact directly with their viewers anytime and anywhere, as the content they generate is mostly viewed on handheld devices such as smart phones. While much of the video content prepared for YouTube may archive conventional television broadcasts, or may be of a neutral and instructional nature, social media influencers normally post a multitude of rapidly and recently produced content, often using new and avant-garde filming techniques. This leads to more appealing content being created and enhances the mobile viewing experience, giving its content an entirely different character to conventional television content. This has provided an opportunity for content to be viewed by millions of viewers around the world and changed the way television content is consumed.

In contrast, television content is (of course) traditionally watched on television (Weibel et al. 2019). Moreover, when professional independent content distributors are producing content for television stations, they are constrained by strict national broadcasting standards, and have to follow specific rules set forth by the station management – and every television station has different core elements it requires for each product it broadcasts (Kwak, 2018). In a nutshell, the advent of online content distribution has resulted in significant changes to broadcasting's pre-existing structure, most notably the establishment of a diverse new value chain in the television business, which ultimately benefits the online content on mobile platforms domains.

Speaking generally, and at the present time, these trends towards online content viewing certainly appear to be culturally and economically positive overall. Nevertheless, there is the clear possibility that the emergence of online content distribution will become disruptive to the television industry over time. As is well known, precisely this disruption has already happened to the music, newspaper, and magazine industries, where less consumption via the physical medium now occurs year-on-year. Nevertheless, this thesis seeks to challenge the assumptions of traditional wisdom – that the disruption caused by internet television distribution will *inevitably* damage the profitability of the pre-existing distribution value chains – by advocating for ever greater engagement with the online media ecosystem by television stations and policymakers in the industry.

With the recent emergence of the online content distribution system, the television industry has witnessed what is perhaps the most prominent and critical transformation in the forms of its productive value chain that has ever occurred. This remarkably rapid popularisation of the consumption of television content on mobile platforms has led to an unprecedented degree of disruption in television content broadcasting industry, as discussed in the next section.

The Disruptiveness of Online Content Distribution

Television content distribution has gone through several changes in the last few decades. As discussed in the introductory chapter, television technology itself has transformed profoundly. We have transitioned from the longstanding capture of content through analogue forms (first as film, and then magnetic videotapes) to digital image capture and recording. Equally, television broadcasting technology has transformed from live radio broadcast and then pre-recorded broadcast (both from terrestrial sources with a limited range), to the installation of television distributed via underground cable services, to satellite-broadcast transmissions available almost anywhere in a country, and most recently to delivery through online platforms. With each of these advancements in the technology of recording and broadcasting video, consumers have seen a rise in the transmission quality, availability, and number of providers, of television content.

As discussed in the previous section, with the rise of online content demand on mobile platform, we can see that television content consumption has also experienced similar great modifications; previously, viewers could only retrieve their television content quite passively from television sets. Now, viewers can watch any desired television content on their computers, tablets, and mobile phones. Despite all these changes in the global television industry, however, it must be emphasised that content distribution aspect remains at the core of value creation within the industry, and it is ultimately the distribution of online content that has stimulated (and will continue to stimulate) this process of ongoing technological adaptation (Taşdelen and Kesim, 2020).

The rise of innovative new technologies in business was one of the principal phenomena that encouraged Clayton Christensen (1997) to introduce the theory of *Disruptive Innovation.* Christensen perceived disruptive innovation as new businesses introducing an alternative business model (often created by the development of new technological solutions) into an industry which is dominated by *incumbent* mainstream organisations. Either by causing *low-end disruption* (which undercuts mainstream incumbents to offer adequate services at a lower price) or *new-market disruption* (which generates a customer base by engaging with underserved customers the mainstream incumbents have overlooked), such business models slowly develop to gain an increasing market share over time. This business phenomenon can be seen in a multitude of industries, from supermarkets to clothing stores. In the media industry, however, it has been disruptive innovation in technology which has allowed online content distribution to take over an increasing market share of viewers formerly satisfied by the dominant incumbent linear television providers (Nagy, Schuessler and Dubinsky, 2016). Consequently, we can recognise how technological innovations in television content delivery "are fundamentally transforming the production, distribution and consumption of media content" (Evens, 2010, p. 41).

As suggested above, online content distribution is in a dynamic phase of new approach, and emerging creative directions, which have appeared hand-in-hand with the emergence of new technology. If we apply Christensen's concept of *disruptive innovation* here, we can recognise that the launch of YouTube back in 2005 is a prime example *new-market disruption*, in that YouTube developed a new business model to deliver online video of a fundamentally new kind (Hondros, 2018). Similarly, although Netflix began in the USA by trying to

compete against Blockbuster by undercutting them in the mail-order DVD rental market, the company's decision to switch to streaming services in 2007 utilised this new technology to permanently disrupt the global landscape of movie consumption at home - a change which the management of Blockbuster failed to adapt to quickly enough, causing the business to entirely fail (Au-Yong-Oliveira, Marinheiro and Costa Tavares, 2020). For the television industry, therefore, Netflix and YouTube are two major platforms that have innovatively disrupted traditional content distribution.

To put it simply, the traditional television stations are no longer in an exclusive position as content distributor. This presents television stations with a fundamental and urgent dilemma: Will the television industry lose even more of its audience share, and is the entire future of linear viewing under threat (Gjoni, 2017). There can be no doubt that television stations delivering only conventional linear broadcasting have reasons to worry: Streaming services are synonymous with television delivered through mobile platforms and the content they offer is more varied, available anytime, and personalised by algorithms to the preferences of the individual users (Wayne, 2020). There is no question that workers in television need to strive to do the right thing as technology generates such rapid changes to the industry. Hence, for television stations in this emerging mobile ecosystem, is it vital to determine:

1) How these disruptive innovations can be turned into opportunities that will encourage future development?

2) What are the most beneficial strategic plans that television stations should be considering, to boost their content distribution in this digital age of content-proliferation?

3) How can they play a more active role in providing constructive input to develop robust industry regulations that will prepare for a more successful future in producing online television content?

The Variety of Television Content

Television content is the centre of both television ecosystems. According to Research and Market (2021), OTT revenues would contribute roughly USD 23 billion to global sales in 2021 (up from USD 106 billion in 2020) and will reach USD 210 billion by 2026. In the United Kingdom alone, the OTT market is expected to garner GBP 9.4 billion (USD 6.89 billion) in revenue by the end of 2021 (O'Halloran, 2021). Thus, it can be said that online content distribution on mobile platforms has been a major contributor to the television industry's revenue. While I have given examples above of the diverse ways in which content distribution plays a major role in the television industry's technological revolution, it must be made clear that different types of television content impact upon the industry in different ways. To examine these differences, let us here consider three major genres of television content, each of which can be clearly defined by their role, relationship, and economic contribution: Sports, news, and entertainment.

Sporting events are considered must-see content by many viewers in both the FTA and subscription models of conventional television consumption. Sports are also becoming more important in the internet content distribution value chain as the popularity of online viewing grows. It comes as no surprise that, in recent years, the holders of broadcasting rights for major sporting events have managed

to profit greatly by demanding premium prices from television stations for sports content. To date, even though sports content accounts for only 15% of television viewing, sports content providers receive 65% of the available funding for content distribution – a massive discrepancy (Keating, 2018). Broadcasting networks and online content distributors are willing to pay these inflated prices because sport is considered "killer" content: Broadcasters often consider it a loss leader, because it has a unique ability to garner live viewership due to the extreme loyalty of sports fans (Schmidt, 2020). A channel's availability of sports programming directly affects the acquisition and retention rates of subscribers for subscription-based television services, as well as guaranteed viewing figures for in-game and wrap-around programming slots (Evens and Lefever, 2011). Unlike news and entertainment content, therefore, lively and engaging sports content is particularly attractive to advertisers since it assures that they can reach a broader viewership. A crucial factor in this equation is the fact that must-see sports events are often family viewing and are therefore also viewed by non-sports fans for leisure purposes or as conversation topics (Chiu, Bae and Won, 2017).

Major factors like these have driven the content purchasing strategies of broadcasting networks and distributors working within both the FTA and subscription-based television value chains, because sports viewing figures provide a key mechanism in the development of brand loyalty and the acquisition of market share. Sports programming can deliver multifaceted benefits for broadcasters because fan loyalty ensures that viewers are willing to pay for it at premium pricing levels (Gossmann, 2019). Due to this simple fact, subscription-based sports packages have been used strategically to build entire

revenue franchises. For example, it was the FOX network's gaining of broadcasting rights for the NFL's out of market games that helped to drive consumer subscriptions and establish FOX in the US market.

In stark contrast to this picture, news content is a much more economical product as it is nowhere near as expensive to generate as sports or entertainment content, although obviously a great many people watch news. As a result, it only accounts for 2% of direct payment to content creators worldwide. Regardless of the small costs involved, therefore, investigative journalism is still able to help television channels establish a full range of premium content and may garner large viewing figures for primetime advertising slots. Despite its massive potential, however, news content is generally not perceived as bringing *added value* to the public perception of a television station. Consequently, it rarely makes a long-term sustainable investment plan for television stations to garner profits (Nielsen, R.K., 2016).

Lastly, entertainment content is vitally important to any broadcasting network. From a global perspective, let us take the UK as an example; 74% of broadcast hours consists of entertainment content (The Boston Consulting Group, 2016). Entertainment content plays a significant role in the subscription-based television ecosystem as it accounts for the bulk of carriage fees that television networks – and online television providers - pay to content creators for the right to broadcast their channels and programmes. For the content creators, this sounds so promising, but it comes with one massive drawback: Entertainment content generally lacks longevity. Only 41% of entertainment content products survive beyond the appropriate length of production and are given the chance to continue into a second season (Yao, 2019). If we take the example of one

entertainment series that enjoyed global success, *13 Reasons Why* is an American teen drama series that was produced by Selena Gomez for Netflix. Making its mark in 2016 shortly after its first season premiere, the teen drama revolves around the culture of gossip, bullying, drugs, and sex among teenagers. However, the network decided to end this drama after the fourth season aired in June 2020.

The termination of the drama has prompted the network to start a new cycle by considering new themes with more interesting casts (Durante, Pinotti and Tesei, 2019). This is a normal cycle for entertainment content; products that trend and gain some longevity and viewer-loyalty beyond their first season are nevertheless short-lived, and entertainment content constantly demands new ideas for presentation to the viewers. As such, it can be concluded that the lifespan of entertainment content products is limited because entertainment must, by definition, be and remain entertaining. Like sports content, successfully trending entertainment content of this kind brings great benefits to the networks that carry it. Consequently, entertainment content production and purchasing are massively reflected in the high carriage fee of that content. Thus, the global success of entertainment content plays a role in determining its economic value.

In 2013, Netflix began to invest in original content production by producing content of their own. Globally successful series, such as The Crown and House of Cards, for example, became global viewing sensations, resulting in the birth of a new behaviour known as *binge-watching* or *marathoning* which "can be defined as watching multiple episodes of a television show in one sitting (Starosta and

Izydorczyk, 2020, p. 7). The term *marathoning* was an attempt by practitioners and academics to replace *binge-watching* due in order to avoid the negative connotations of an association with "for example, binge eating and binge drinking" (Bury, 2017, p. 86). Despite some concerns that this new term could lead to modification in its meaning, Perks (2014) maintained *marathoning* as it appropriately relates to watching television series without stopping until all available seasons were completed. However, *binge-watching* is still widely used by the public to explain this phenomenon. According to Jenner (2017), much entertainment television content, and particularly drama series, are particularly appropriate to longer-term viewing sessions of successive episodes, and therefore binge-watching quickly became a major alternative to single-episode television viewing, and a mainstream activity (Jenner, 2016).

At present, binge-watching is synonymous with Netflix's services. Binge-watching began as a historical viewing practice back in the 1980s when VHS video tape rental stores used to offer their customers a discount for renting three or five movies at a time. Jenner claims that Netflix initially adopted the term "binge-watching" as a branding strategy during its pre-streaming era, when it was used to describe an advertising push for their DVDs[4] rental box sets. Jenner (2018, p. 111) argues that Netflix, "came to the conclusion that audiences preferred watching a full disc in one sitting, rather than viewing DVDs as only an ancillary product for fans" to purchase. This marketing ploy became enormously successful, and such efforts have cultivated an international binge-watching trend which creates a major experiential difference to FTA or subscription-based television content. Because viewers are not obliged to stick to the conventional

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[4] DVD also known as Digital Versatile Disc.

broadcasters' one-instalment-a-week-at-the-same-time format, more subscribers now prefer to watch television content on Netflix, or other VOD and OTT platforms, as it offers an infinitely more convenient viewing concept inside or outside the house to experience the same content.

The above discussion provides valid evidence that the presence of Netflix around the globe and "binge watching model affords a clear competitive advantage over traditional television" (Merikivi et al., 2016, p. 2). It is obvious that the rise of Netflix's subscription-based plan has seriously impacted upon the pre-existing patterns of linear television viewing behaviour; a transformation which has become integrated into an entirely new consumer-driven viewing pattern within the household, combined with the consumption of catch-up services provided by other broadcasters through OTT platforms (Turner, 2019).

Shrewd reinvestment of profits into original content, alongside the wide variety of Netflix's carried content catalogue, has also made Netflix the world's leading online content provider (Brennan, 2018). Financially, Netflix's current expenses to assets ratio recorded, 80% from 2016 to 2019, indicating that the large number of the assets were financed through debt. Nevertheless, the cash ratio of the company has increased, showing that it is becoming more capable of servicing its interest payments. Hence, investors are unconcerned about the company's debt levels rising as profits continue to rise (Krivonog, and Androshchuk, 2020). For instance, "in 2016, Netflix released an estimated 126 original series or films more than any other network or cable channel in United State. In October 2017, Netflix iterated a goal of having half of its library consist of original content by 2019, announcing a plan to invent USD 8 billion on original

content in 2018[5]" (Scott, 2019, para. 3). While we must recognise that producing original content is always a high-risk form of investment, as it demands an enormous production budget regardless of the uncertain profits that may (or may not) come, this has not prevented companies such as Netflix from producing interesting content. Netflix is widely perceived as the biggest threat to leading television networks, including the British Broadcasting Corporation (BBC). In 2017, for example, Tony Hall, the 16th Director-General of the BBC commented on the Netflix content production trend by saying "the British content we value and rely upon is under serious threat." (Hall, para. 6, as cited in Ruddick, 2017). This comment should be taken as a serious warning not only to British content production but also content production worldwide. The effect on British content production can clearly be seen in the complete failure of both the BBC's and ITV's usually successful high-investment, high-end drama series to compete with Netflix's own products (Ruddick, 2017). In general, Netflix's strategy for content building and distribution has emerged as an extremely successful framework for online content distribution. The following section develops the arguments outlined above by applying them to an understanding of the relationship between online content and its delivery to mobile devices.

Opportunities to Distribute Television Content on Mobile Platforms

As we have already touched upon several times in this thesis, any discussion regarding online content distribution development must understand its association with the advancement of telecommunication devices. In only two

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[5] Netflix has announced that it will invest USD17 billion in original content creation in 2021. (Same amount as in 2020). (Source: https://deadline.com/2021/04/netflix-to-spend-17b-on-content-in-2021-1234740528/

decades or a little more, it is self-evident that mobile phones have already become a basic necessity of life in many parts of the world. They are convenient, wireless and multi-purpose (Clerck, 2016). For instance, nowadays, mobile phones are linked to digital content creation tools (Szita, 2020), and they are frequently utilised to reduce production costs (Işıkman, 2018). It is also thought to have altered the filmmaking industry and has been dubbed a game changer in the promotion of a new era of cinema (Fletcher, 2019). This handheld digital device was capable of capturing high-resolution cinematic images for use on a large screen (Thorpe, 2021). Films shot using mobile devices such as the iPhone have recently been recognised at prestigious award ceremonies such as the British Academy of Film and Television Arts (BAFTA) 2019[6].

Nevertheless, mobile phone usage is most obviously associated with reliable and regular voice communication, which leads to stronger bonds among family members and close friends (Omar, Fadzil and Bolong, 2019). As it is physically mobile, mobile telecommunication has been growing extensively, due to massive and ever-increasing demands for interaction and information exchange in the postmodern global society (Li, 2019). Nevertheless, due to changes in mobile technology which began almost as soon as mobiles became widely available, the mobile phone has become an (if not *the*) archetypal hybrid technology device. Today, audio and visual multimedia components have been expanded on compact devices like these to aid successful communication through texting and video downloads, not to mention, in recent years, a crucial essential

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[6] Missed Call, a short film directed by Victoria Mapplebeck and shot on an iPhone X, won Best Short Form Film at BAFTA 2019, Best Documentary Short at the 2019 Broadcast Digital Awards, and a few more significant awards outside and inside the UK. This short video cost GBP 10,000 to make and took ten days to complete (Source: https://victoriamapplebeck.com/films/missed-call/ and https://firstpersonfilms.co.uk/films/missed-call/).

developmental trend has been its display size, which is becoming increasingly appealing to users (Reyna et al., 2018).

An increasingly clear usage pattern of activities with mobile phones has been emerging for some years now; downloading and using an ever-widening range of applications (apps), accessing social networking sites and sending short messages to friends, browsing the internet, taking photos, using the phone as an alarm clock, calendar and diary, and innumerable other activities – all while on the move (Wang, Xiang and Fesenmaier, 2016). It is undeniable that the mobile phone must now be considered both a communicative and non-communicative device, which owes as much of its ancestry to the desktop personal computer as it does to the landline telephone. Therefore, it is crucial to examine mobile phone usage not just as a separate topic, but as an integrated subject (Mishra, 2020) which is fundamental to the entire discussion of this thesis. One critical aspect of considering television content on mobile devices that needs to be discussed is why we should make a clear distinction based upon identifying the media platform of delivery as a determinant factor.

Mobile devices and mobile technology are central to this research project on television as one of the key aspects of mobile technology's development has been its progressive integration of interactive multimedia functions, such as audio, video, graphics, text, and animation. Back in the 2000s, the smartphone industry started to develop user-friendly features with the ultimate aim of enabling users to enjoy all of the multimedia content or programmes they were consuming through their home internet or television with minimum interruption or distortion of experience. To develop this delivery of content on mobile

platforms, however, the necessity for data *streaming* became a core technological challenge. The success of the telecommunication device industry in achieving this revolution in data transfer has come to popularise the term 'mobile' as a new phase in human-to-human interaction (Osseiran, Monserrat and Marsch, 2016); in this new mobile era, streaming technology has continued to facilitate a succession of fundamental revolutions in online content production, consumption and distribution. Today, users may now stream television content directly to their mobile devices, putting breaking news and other forms of content such as sports and entertainment content at their fingertips (Leung, 2020).

The constant public demand for television content that keeps up-to-date with the latest news and current affairs, or the most accurate weather forecast, can now be done with smartphones (Phan et al., 2018). Smartphones and other mobile devices receive constant updates or breaking news faster, leading to what Molyneux (2018, p. 634) has described as a "shorter, dispersed consumption pattern" known as *news snacking* or *grazing*. Snacking and grazing increase the viewers' interest and participation levels as they are able to pick shorter news content that contains video reportage (Nelson and Lei, 2018). Hence, the clear public demand for mobile, video-rich news content has heightened the need for a better understanding of online content streaming activity.

Although some social conservatives have raised critical voices concerning the ubiquitous nature of online content - which is constantly available for users twenty-four hours a day, seven days a week, and accessible to very large

audiences - it is crucial for all to recognise that this phenomenon is not going away, and therefore for us to examine the central and beneficial social role that mobile devices play in delivering, creating, and boosting the distribution of, online content for users. According to Jensen (2013, p. 26), "the main agenda for mobile media and communications revolves around the relationship between communication, reflection, and action". The most important element of this relationship can be seen through its role in stimulating communication virtually. As Jensen (2013, p. 28) observes:

> Mobile media may speed up both communication and action. They formulate more action at a distance, but also more reflection before the act. The balance between reflection and action is a matter for both empirical research and sustained theory development regarding the kinds of social relations that mobile media communications may maintain in the future.

Jensen's research focuses on the influence that the enhanced communicative connections of mobile media can have upon users, motivating them to act in specific ways. It shows how mobile news consumption enhances the users' experience and addresses how these elements drive users to adopt new forms of engagement with interactive technology every day. In another study, Barry and Doherty (2017, p. 1056) have similarly shown that the interactive dimension of mobile media consumption may be highly regarded as playing an important role in enabling action, allowing access, offering possibilities opportunities, and creating choices within communication.

In the context of contemporary interactive television viewing, online content has become a significant element. In contrast to traditional broadcasting, where content is disseminated linearly and consumed quite passively, interactive television content broadcasting enables the viewer to send and receive content

via their network connections; all content can therefore be personally tailored to the viewer and made accessible to them anywhere and anytime (Lotz, 2014, p. 32). Nevertheless, as Taşdelen and Kesim (2020) have recently discussed, the study of interactive television viewing habits suggests an alternative view; that the time and location of viewing are still dimensions which play a significant impact in viewers' desire for and retrieval of various types of content. Another distinctive characteristic of interactivity in television viewing is the phenomenon of 'second screens' – the introduction of a variety of different packages that offer ancillary interactive screens which supplement the primary home television (Lee and Andrejevic, 2014). Svensson and Hassoun (2016) extend this concept of second screens to also associate the concept with the 'synchronisation of multiple screens'; in this sense, viewers share an enriched experience which the integration of all related screens allows to compliment the television screen content. Baumann and Hasenpusch (2016) argue, therefore, that second screens should be considered as 'supplementary' or 'companion' devices which can play an important role when developing strategies for television content marketing campaigns. This line of thought about second screens seems to be a promising strategy in disseminating television content effectively, but it is complicated somewhat by the fact that second screens are often used to combine television viewing with social media browsing which may, in fact, draw attention away from the broadcast content.

The emergence of blended television and social media content on internet-enabled devices such as smart phones was closely connected to the release of the advanced mobile platform *Web 2.0,* which was introduced in 2004. Web 2.0 is the next generation of *Web 1.0* and had the important effect of radically

changing the user's role from being a mere consumer of content, to becoming a creator and distributor of content able to share with others (Jacksi and Abass, 2019). This perspective seems utterly different from the role played by television stations in disseminating content. Digital content can now be distributed through mobile platforms via the establishment of various new technology courtesy of the mobile *Web 2.0*'s social networking applications, such as Facebook and Twitter.

The integration of social media platforms and live television viewing was carefully observed by Sørensen (2016) on Twitter and Facebook. Sørensen (2016) suggests that Facebook and Twitter are not particularly crucial in television viewing itself, but they do play a vital role in promoting television content by extending viewer's discussion about content with close friends. Sørensen's argument that social media platform such as Twitter have recently extended viewers' ability to communicate about television content, is entirely in keeping with the spirit of *Web 2.0*. As Cormode and Krishnamurthy (2008, p. 1) describe, the impact of mobile *Web 2.0*'s appearance has been "exemplified by the creation of a large number of niche groups (collections of friends) who can exchange content of any kind (text, audio, video) and tag, comment, and link to both intra-group and extra-group pages." This promotion of television content by the public itself has become an all-important feature of social media, encouraging social media users to watch live broadcast content. This then motivates television stations to actively advertise their broadcasting by integrating their content into Twitter and Facebook through hashtags and web addresses during live telecasts.

As a wide variety of researchers have expressed the positive implications of social media platforms distributing online television content, let us now move on to consider another related online viewing phenomenon that needs further discussion here: Streaming. In the next section, the proliferation of streaming activity and the development of streaming platforms takes centre stage, with the aim of revealing its potential for boosting the adaptation of mobile platforms to television viewing activities more generally.

Strategies to Boost Television Content Distribution in the Digital Era

Before moving on to discuss streaming and mobile platforms, let me begin this section with a few simple observations concerning mobile device ownership and content distribution. Ward and Zheng (2016, p. 91) state that mobile device ownership "has a positive and significant impact on economic growth". Similarly, Pankomera and Van Greunen (2019) recognise that the *mobile penetration rate*[7] within a nation can be shown to determine the rate of local economic growth in any industry. Leslie Haddon's (2003) *domestication* theory helps to explain this relationship between mobile phone adoption and economic growth in further detail: According to Haddon's domestication theory, the rate and economic impact of device usage are mediated by important social and cultural elements.

Amongst viewers of online television content, this can mean two different things. Firstly, it means that cultural factors determining how existing viewers discover, demand, purchase, and integrate the viewing of online content into

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[7] The *mobile penetration rate* is a measure of the percentage of a population who are active owners and users of mobile phones.

their daily routine can have a profound impact on consumption rates. Secondly, compelling online television content has the potential to have a big impact on mobile phone penetration, as more people seek to own devices in order to access the content. The constant demand for online television content certainly creates an opportunity for television stations to generate profit in the long run, provided they understand what the customers want and how they want to consume it. Therefore, investment in a specific platform is essential as an outlet for viewers to retrieve content.

In general, it makes sense to discuss *streaming* services and *mobile platforms* in the same place – as I do here – because streaming has become the major service by which mobile platforms deliver content to users. Despite the fact that there has been great curiosity in the industry and academia to examine the power of mobile platforms to boost the online distribution of television content, little specific attention has been given to the phenomenon of streaming itself. Since the streaming phenomenon has appeared, it has proven to be a fast-growing element in the mobile media industry ecosystem and requires close specific attention in this discussion of the online content environment (Fagerjord and Kueng, 2019, pp. 166). At its most basic level, streaming can be treated as yet another technological advancement in the retrieving of digital online content through any mobile platform. From a historical perspective:

> Streaming appeared in the 1990s to describe a technical process for delivering media over the internet in real-time, without the file being downloaded or stored on a local drive. Alternatively, the phrase sometimes refers to forms of on-demand services regardless of the technical means of transmission, such as cable video on-demand, and it is possible that viewers might conceive of catch-up services (US MVPD video-on-demand) as streaming as well. More and more, however, streaming refers to a particular kind of media service that is

increasingly mainstream in music, movies and television (Herbert, Lotz and Marshall (2019), p. 349).

However, what makes streaming most interesting to look at has been its demonstrated ability to generate enormously successful new business frameworks. *Netflix*, *Spotify*, *Amazon Prime Video*, and *YouTube* are key examples of video and audio streaming businesses. These are companies that implement and represent streaming services as their main operational activity. As discussed above, the rise of streaming services has also played a key role in abruptly moving television content distribution away from television stations' long-held dominance – a remarkably rapid and interesting development, as it was only in 2007 that Netflix converted their business framework from online DVD rentals to streaming. It is undeniable, therefore, that the rise of mobile streaming platforms as an economic model in the media field has caused the television industry to experience a shockwave which has broken down the monopoly of traditional content distribution (Demary, 2015).

As Westlund (2012, p. 108) has observed, the digitisation of television content has created a 'digital habitat [...which...] has stimulated an expanded, ubiquitous, participatory, and competitive media landscape.' As a result, streaming has emerged to support the television content distribution modes of a new era. For instance, streaming services have made it possible for television viewers to watch television material outside of the home, where it is usually restricted (Gros et al., 2017). Whilst much attention has been given to the variety of television content offered by streaming services, deep concern has been triggered among media professionals as recent viewing trends suggest that streaming services extend the landscape of television viewing without being

dependent on linear television viewing (Hutchins and Rowe, 2013). Research in this field indicates that content has become the single most important issue causing audience numbers to decline year after year in Malaysia (Nielsen, 2016). Hence, the availability of varied and interesting content has boosted streaming services and played a large role in the shift from traditional linear viewing. Streaming services have been critical in assuring the global development of the mobile environment. Therefore, this is a significant indicator that television stations need to adapt to the newer, more recent viewing trend, i.e. streaming broadcasting. The content demands for streaming services in Malaysia will be discussed further in the next section.

To avoid any confusion about the relevant terms used in discussing the online content on mobile platform, here I will examine the term *platform*, before moving on to discuss the process of *platformisation*. According to Gawer and Cusumano (2014, p. 418), a *platform* can be defined as a 'building block, which can be a product, a technology, or a service, that acts as the foundation upon which other firms can develop complementary products, technologies or services.' This definition is the first step in the effort to understand platforms as a new trend in media infrastructure. Lotz (2014) extends this definition of the *platform* by emphasising and highlighting its ability to integrate the infrastructure of media content distribution over the internet. While it should be clear, therefore, that the television industry could (and, to succeed, must) greatly benefit from the technological advances of *mobile platforms*, it is equally clear that the television industry has not been the first industry to capitalise on these new technological solutions.

Netflix, Amazon and Hulu have used their platforms to invade the television industry with *Over-The-Top* (OTT) video services, and since then, have gained even greater territory by becoming major players in actively financing, producing and distributing their own content (Wayne, 2018). Gillespie (2010) has discussed how the recent rise of platforms has altered how culture, power, and economic interests function in the broadcasting industries around the world. In a more recent work, Gillespie's (2018) writing on platforms has shifted to focus on their technological aspects, by referring to platforms as 'neutral conduits' and 'the computational, software, and network infrastructures that enable OTT streaming" (Gillespie, 2018, p. 14). As Gillespie emphasises, however, while platforms themselves may be 'neutral conduits' for streamed content, the impact of platforms is not neutral at all; they have the ability to economically revamp the distribution of television content aspects.

The need for distribution platforms that deliver internet-based television content led to another critical phenomenon in the digital media industry. The process through which television industry organisations develop internet platforms for their content, and tailor the production of content for them, has come to be known as *platformisation* (Ballon and Evens, 2014). *Platformisation* (or, as it is sometimes called, *platforming*) 'has close connections to live streaming services, which became a core advantage for mobile streaming services on mobile platforms' (Evens and Donders, 2018, p. 4). As Tom Evens and Karen Donders (2018) successfully illustrate, the process of *platformisation* has become synonymous with rapid market share growth in this digital era; platformised delivery has become an increasingly important and dominant 'infrastructure and/or economic model' (p. 4), within which the internet serves

as a 'worldwide distribution infrastructure' (p. 9) for multimedia content. The concept of platformisation reminds us that, however different it may superficially appear to be, the mobile streaming of video content is, technologically, still an extension of traditional television broadcasting technology through wireless internet technology (Lotz, 2018b). Understanding the pre-existing broadcasting technology and infrastructure is still necessary for contributing to constructive discussions around the ongoing development of video streaming – as is equally (or even more) true of understanding the users' experience and personal relationships with the television content they experience in this contemporary era. These facts can be seen most clearly through the widespread demand for popular linearly-broadcast television content to also be delivered through streaming services. Despite these facts, it remains true that what links content development and streaming demand most strongly in Malaysia are (and will be) the strategies of local broadcasters to create a sustainable market in high-quality digital content.

The growth of mobile platforms and the platformisation of television content distribution are heavily influenced by advancements in telecommunications technology. Let us turn here, therefore, to explore platformisation's contributions to economic models for creating online content that will meet the surging demand for internet content on mobile platforms. The emerging economic model for digital television content distribution which can successfully service the need for streaming has come to be associated with two closely related terms: *360-degree commissioning* and *multi-platform content distribution*. Both terms are widely used in connection with this new technology. *360-degree commissioning* signifies the development of television content

suitable for delivery across multiple platforms and distribution modes (including traditional linear broadcast, DVD sales and so on). *Multi-platform content distribution* signifies the delivery of content as such (Holt and Sanson, 2014). Discussions around multi-platform content in the media industry surged when it became clear that, in principle, 360-degree commissioning and multi-platform distribution provide the most commercially successful value-chain model for the dissemination of television content through the maximised range of outlets (Bennet and Strange, 2008). As a result, television stations have rushed to embrace the multi-platform model for content distribution (Doyle, 2010).

Doyle (2016) argues that the emergence of the internet has fundamentally altered the packaging of television content by switching the format of distribution from the linear channel to online services. Through a standard multi-platform approach, existing television content is reused for digital platforms; for instance, linear television content is made available after its principal broadcasting for viewing online via OTT services, desktop PCs and mobile devices. Alternatively, while a rebroadcast is basically the same as the original linear television content, other options become available through multi-platform delivery: One common approach involves re-editing the original television content with an additional layer of content that provides unique elements of *added value* for the multi-platform distribution strategy (Telkmann, 2020).

Johnson (2019) built upon the concept of multi-platform content distribution by emphasising its connections to the development of internet technology – specifically the advancements delivered by the mobile platform *Web 2.0* as achieving the true extension of linear television to online delivery. Furthermore,

Johnson stresses that the multiplication of television content by its production or reproduction for specific web platforms and mobile apps has powerfully enhanced distribution strategies by increasing the viewer-payoff for following the trend in mobile viewing. On top of that, viewing pleasure has been significantly increased because the content is now formatted to render most successfully in keeping with the unique features of devices on which it is viewed (Taneja and Viswanathan, 2014). This section's discussion has aimed to enhance the reader's understanding of the key features of television content distribution on mobile platforms. In order to develop it further, the following section turns to an exploration of various form of online content on mobile platforms.

Critical Dimensions of Television Content Distribution
in the Digital Era

The main aim of this thesis is to examine the changes occurring in the Malaysian television industry that have been (and are being) brought about by the online content on mobile platforms. In conducting this examination, the different dimensions of television content need to be scrutinised first. In relation to that, Binns (2018, p. 62) agrees with Amanda Lotz (2014) that television content can generally be classified into three major categories:

1. **"Prized" Content**, which is actively sought out and watched as an event; the bleeding of commentary around this content into social circles and online discussion platforms also bolster the content as a valued piece of culture – even if the spike in hype may not last long.
2. **Live Sports and Contests**, which is a particularly important aspect of mobile streaming. Great efforts within the industry have been taken to define sports broadcasting as premium content that should be paid for.

3. **Linear Content**, where the viewer's intentionality and focus may be slightly reduced compared with prized or contest-based programmes.

Besides prized and live content, it can generally be stated that younger viewers prefer to retrieve video and audio entertainment content via online streaming services rather than linear broadcast. I discussed above that, due to the vast proliferation of mobile devices in recent years, and the massive spread of mobile internet, shorter video content delivered through social media platforms such as YouTube has become increasingly popular; equally, streaming platforms for longer-form content closely resembling traditional television content broadcasting, such as Netflix, have now taken the place of linear broadcasting consumption in the hearts of today's mobile media users. These two streaming platforms for Video-on-Demand (VOD) cover an enormous range of content formats, from the short self-made videos characteristic of YouTube, to multi-platformed entertainment series and serials, to conventionally-released movies, and original content which is exclusive to the streaming environment (Andrejevic, 2009).

Netflix has produced highly successful series such as *The Crown*, a fictional drama that chronicles the private life of Queen Elizabeth II (IMDb, 2016). By producing high-quality original content, Netflix has gained a competitive advantage over its competitors and positioned itself as a prominent VOD service provider. Besides Netflix, platforms such as *Disney+* and *Apple TV+* are new players in the VOD sector that are now seeking to attract audience share for original, produced content in the online content arena. With the emergence of a more competitive market, it is therefore hardly surprising that Netflix decided in 2019 to invest even more into content planning for video streaming over the

next three-year cycle of production (Meza, 2019). This commitment to in-house content quality-control can be viewed as related directly to Netflix's business model, which gains profit from paid streaming services (SVOD) by subscribers; without content to attract subscriptions, a PVOD service will fail. On the other hand, YouTube adopts a different kind of business model based on advertising-financed streaming services (AVOD), and only introduced some paid content services in the middle of 2018.

Authors such as Boyle (2015) have argued that mobile devices caused a surge in the production of media sports content, due to a major growth in audience range, investment by advertisers and sponsors, and the increased sale of sports broadcasting rights. A new social media context for sports viewing has been developed by wireless communication. Today's sports fans now consider online content on mobile platforms as a viable alternative to watching their favourite sporting events on the television. As a reflection of this, the streaming of sports content is something The Walt Disney Company has been seriously looking into as part of its investment in platformisation. As Evens and Donders (2018, p.1) observe, however, the economic considerations involved in such a decision are complex:

> The Walt Disney Company's statement that it would launch a streaming subscription service exclusively for its sports network ESPN got [little] attention. [However]…the launch of an ESPN- branded platform is likely to be…revolutionary. ESPN has been commanding the highest retransmission fee—a payment it gets from pay-television operators in return for carrying its channel—of all television and cable networks in the United States. Although a standalone[8] streaming

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[8] A *standalone* is a media device that is able to operate independently from other devices. For example, a cable box television set with the ability to record television programmes, in contrast to DVR players that need to be connected to a television to function. The DVR player is not considered a standalone device.

service would certainly be attractive for cord-cutters[9] missing out on sports events, ESPN would put its substantial income from carriage fees at risk if it were to launch a full-service Over-the-Top (OTT) platform, thereby entering into direct competition with pay-television operators. The latter would suffer seriously if their subscribers were to cancel premium services and switch to cheaper OTT platforms. The war of the platforms has begun.

Within this complex and uncertain emerging economic landscape, the massive viewer demand for sports content on mobile platforms has created an additional level of complication revolving around copyright issues. This was prompted by television stations labelling sport content as 'key content' to attract subscribers and advertisers, fuelling the rapid rise in the cost of football broadcasting rights (Boyle, 2017). According to Boyle (2017), we are consequently at an important turning point in digital television journalism, as the broadcasting of sports content transitions from an FTA linear model to paid online television platforms, resulting in more limited viewer access, but higher revenue, when supported by exclusive live football content.

The emergence of online television sports content has also triggered a phenomenon which media researchers have termed *cord-cutting*. Cord-cutting began in 2014 when *Home Box Office* (HBO), at that time a major provider of cable television content, started to introduce their first streaming application, *HBO Go*. While the appearance of *HBO Go* did manage to increase the company's subscriptions, it also had the unsought-for consequence of causing large numbers of television viewers to decide to disconnect their traditional cable television and rely exclusively on streaming services to retrieve their television content (Reed, 2014). From a global perspective, cord-cutting is a significant

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[9] A behaviour of eliminating services provided by traditional television services or satellite subscriptions to rely entirely on web-based streamed television content.

phenomenon. It goes some way towards explaining the downward trend in traditional television content viewing and cable access figures. The proliferation of broadband internet means that television viewers can now preferentially subscribe to web-based television streaming services such as Netflix, Amazon Prime, Apple TV. In Malaysia, Netflix announced a low-cost subscription rate with only-mobile plan as a reaction to local broadband development and to encourage more mobile plan-based subscribers (White, 2019, as cited in Moura, 2020). Furthermore, Malaysians' widespread smartphone use has demonstrated a bright future in recent years, with 54 percent in 2018 and 90 percent forecast by 2023, implying that more consumers will switch to a mobile-only plan. (Moura, 2020). It suggests that the cord-cutting phenomena is gaining traction in Malaysia, allowing SVOD providers to flourish. Within this context of wider changes in the retrieval of television content, viewers have consequently chosen cord-cutting to also service their chosen sports content needs.

Access to premium sports content has become a major issue when it comes to subscription television content in many countries around the world. Premium subscription television content is primarily made up of sports content which requires the television station to secure additional broadcasting rights that are sold to the highest bidder by the sports league. Significantly, both conventional subscription television broadcasting rights *and* premium sports content broadcasting rights can be owned by a single paid television operator. In this case, the question of monopoly can arise.

For example, in the UK, the television landscape underwent a major change in 1989 when *Sky TV*[10], owned by Rupert Murdoch's *News International Group*, was launched. Following its inception, Sky TV has strengthened its position as the leading satellite broadcasting industry player when it merged with *British Satellite Broadcasting* to become *British Sky Broadcasting*[11] (*BskyB*[12]) in the early 1990s. BskyB's strong position as the dominant streaming content platform in the UK broadcasting industry has had a profound effect on the UK's sports television broadcasting overall, and particularly in the case of football. When the *English Premier League* (EPL) was launched in 1992, BskyB secured the rights to serve as its main broadcaster. To date, the value of the EPL's broadcasting rights has risen sharply following the introduction and rising popularity of content broadcasting across various internet streaming platforms (Boyle, 2014). As such, it is undeniable that subscription-based satellite television such as BSkyB has greatly benefited from the development of local sports, and equally that BskyB became a major financial contributor to the growth of the English and Scottish football industries in the United Kingdom.

However, due to Sky TV's tight control over sports broadcasting, the company's wholesale provision of premium sports and movie channels to other subscription-based television distributors has been the subject of numerous inquiries. In 2010, after a three-year investigation, The UK's *Office of Communication* (*Ofcom*)[13]

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[10] Sky TV is a telecommunications conglomerate fully own by Comcast and based in London. To date it has operations in major city across United Kingdom and Europe and emerged as the largest pay-TV broadcaster with more than 23 million subscribers in 2019. Source: Sky at a Glance. Sky. Accessed on 18 February 2020.

[11] BskyB was formed in 1989 through the merger of Sky TV and British Satellite Broadcasting and become the major holder of EPL broadcast rights in the UK.

[12] BskyB became just Sky TV in 2014.

[13] Ofcom is the United Kingdom's responsible regulatory body which assists the government in administrating the broadcasting, telecommunications and postal industries within the UK.

ruled that BSkyB should provide the premium sports content of its *Sky Sports* channel to other distributors, and at a regulated price (Rab and Sprague, 2014). This move by Ofcom acted to promote competition between content suppliers within the television industry and led to a lower subscription price offered to viewers. This is a mechanism which has successfully been used by regulators in the UK to control the dominance of single broadcasters over exclusive content such as premium sports. By ensuring that subscription-based television broadcasters like BskyB provide at least some of the exclusive content at a regulated price for sale on rival delivery platforms such as BT, regulators have been able to limit the use of exclusive premium sports rights to restrain competition in the subscription-based television market.

This section has clearly shown the development of the sports broadcasting sector and its relevance to the development of online content on various platforms. In addition, this section has shown some of the issues that can emerge in relation to the exclusive control of television content, by looking at relevant cases in the UK. As a country with efficient governance over the control of exclusive content such as the EPL, the steps introduced by UK regulators provide a working example and a benchmark for the successful management of issues related to the sale of content broadcasting rights without detrimentally affecting viewers. Therefore, it is important for this thesis to assess the benefits of a tasking similar approach to the television broadcasting industry in other countries, such as in Malaysia.

Conclusion

This chapter has reviewed a range of significant terms, concepts, business models and events pertinent to content distribution on mobile platforms. In doing so, it has aimed to map out the fundamental conceptual landscape of the thesis and set the tone for the following chapters by exposing new territory and the specific landmarks in this area of research. Academic literature relevant to online content on mobile platforms was carefully considered from a critical position to ensure that a multitude of factors relating to mobile platforms were fairly discussed. Chapter One has attempted to shed light on the future directions of online television content distribution through mobile platforms; in doing so, it has highlighted the plethora of opportunities and threats brought about by the emergence of mobile technology, streaming services, mobile platforms, and the platformisation of television delivery around the globe. With the recent appearance of global mobile platforms such as The Walt Disney Company's latest network, it has become crucial for all television stations around the world to consider how they will adapt to the new technological landscape which is appearing all around them, and to begin placing their content on mobile platforms with competitive strategies.

Relevant gaps in the present corpus of research, that will become central concerns for deeper investigation in the chapters to come, have also been highlighted in the discussion above: There are fairly straightforward issues regarding the implementation of new technologies, which both determine the efficiency and reach of online content distribution, and which equally can be positively impacted upon by the production of competitive content. As we have

seen in the example of sports broadcasting, these simple facts quickly take on complex economic implications that demand careful critical evaluation. Throughout, I have argued that the hesitant attitudes of media practitioners in adopting new technologies for content distribution should be eliminated to ensure a healthy and robust development of the television industry in this digital era. Above all, this chapter has shown that the television industry is still enormously relevant today, but (to preserve that relevance) it must keep up with the challenges of the digital era. As Turner (2019, p.2) stresses, "there is certainly plenty of evidence of technological changes to the processes through which television consumption occurs—in terms of the devices used, the platforms employed, and the catalogues of content available". Clearly, the global television industry must take maximum advantage of mobile platforms to remain relevant in the years to come by fully embracing platformisation.

There has certainly been a stark attitude shift among television viewers as they become mobile users and demand more online content. However, the response to this attitudinal change from television stations has been too slow and is still inadequate; resulting in more attention, viewing hours and advertising revenue being given to online platforms such as YouTube, and internet-based streaming networks such as Netflix. In the next chapter, we will focus in on providing an overview and assessment of the mobile technology revolution in the Malaysian media; exploring the relevant scholarly literature in order to determine those elements that have hindered the rise of a real mobile platform experience in the country.

Chapter Two:

The Malaysian Context for the Mobile Environment

This thesis examines the new directions taken by Malaysian television stations to distribute online television content through mobile platforms, with a specific focus on regulatory policy undertakings. To provide a comprehensive overview of the media landscape in Malaysia, Chapter Two will draw the reader's attention to important and relevant elements of the local television industry, and highlight those issues surrounding television content distribution which have led to the research questions of the present study. In this way, Chapter Two has been developed as an explanatory bridge between the background of the Malaysian television industry and a tight focus on the issues sparking academic debates around online television content distribution in the country. This chapter will also contextualise its understanding of online television content distribution for mobile platforms in Malaysia by examining other Asian cases to address the issue of a specifically Asian model of industry development.

The chapter is organised into six principal sections. The first section begins by providing an overview of the Malaysian media landscape and television industry, highlighting the directions that have been shaped by Malaysian government legislation; by changes within the television industry; and by the distinctive relationship between Malaysia's central government and its states. This section plays a crucial part as it outlines the structure of the Malaysian government and its stance on building a national broadcasting standard for the internet environment. Secondly, the chapter moves on to explore the structure of the

Malaysian television industry, describing the country's public and private television stations. Section two also investigates those pre-existing industry features that have helped to establish online television content distribution on mobile platforms, as well as addressing the status and role of *Information and Communications Technology* (*ICT*) in the country. Thus, the second section attempts to describe how television stations operate in Malaysia, before going on to explore the efforts and investments made by television stations to establish their own mobile platforms.

Growing out of section two's discussion of the widespread engagement with ICT in the country, Chapter Two then moves on to explore the development of online television content distribution in section three, with a specific focus on the context of internet mobile broadband in Malaysia. Fourthly, Chapter Two's final discussion draws a comparison between the development of internet content for mobile platforms in Malaysia and in other Asian countries, focusing on the complexity of television content distribution and the uncertainty that still ripples through the Malaysian broadcast structure. In doing this, it aims to examine the struggles and issues concerning online television content distribution that continue to dog the Malaysian television industry. Finally, it sheds a light on the dilemma faced by television stations in Malaysia today.

The Malaysian Media and Television Industry

As a country that achieved its independence on 31st August 1957, Malaysia was labelled a middle-income country during much of the later 20th century, and a differentiated multi-sector economy has only recently begun to emerge in the

early 21st century. Nevertheless, the country's move towards becoming a new economic power was driven by the nation's rapid increase in population following independence. Malaysia has grown in recent years, in line with the advancement of global technology, and now has a population of 29.1 million people, according to the Department of Statistics Malaysia (DOSM). The population of Malaysia is known for its uniquely multi-racial composition, comprising Malays and Bumiputera groups as the largest ethnic groups, followed by Chinese, then Indians (DOSM, 2018). The ethnic diversity in Malaysia signals its status as a country with diverse cultures, religions, and languages. In terms of geographical location, Malaysia is in Southeast Asia and shares land borders with Thailand, Singapore, Indonesia and Brunei. Peninsular Malaysia and East Malaysia are the two major areas of Malaysia. Malaysian Borneo is made up of the two states of East Malaysia, Sabah and Sarawak. Kuala Lumpur (1.8 million inhabitants) is Malaysia's capital and is located on the west coast of Peninsular Malaysia on the Asian continental mainland

Malaysia is a secular state, although Islam is recognised as its official religion, and several other religions are practiced openly. The National Language Act (1967) recognised Bahasa Malaysia (the Malay language) as the country's official language and mandated that all official government events be held in the language. Although Bahasa Malaysia is the official language of Malaysia, English and other ethnic languages such as Mandarin, Cantonese, Tamil, and other native languages are also widely spoken. The foregoing aspects must be taken into account in this study since they have a significant impact on the nature of the Malaysian media sector.

With the eruption of economic, technological and cultural globalisation, Malaysia has undergone the same challenging phase of adaptation to new technologies that has been seen elsewhere in the world. This has been widely perceived as beneficial for the country's overall development. Some crucial sectors of industry, such as the nation's media, have been massively transformed by the advancement of mobile technology in particular, triggering a plethora of new challenges (Hajar et al., 2020). Wahab and Abdullah (2017) suggest that one possible explanation for this phenomenon of particular challenges has been the fact that mobile technology infrastructure itself has undergone a process of progressive reconstruction during this same short time span, caused in part by an increased demand for online content. Wahab and Abdullah (2017) also found that the increase in demand and infrastructure for the delivery of mobile online content meant that Malaysian users were increasingly able to access, acquire, and store video streams in real time using their mobile networks.

These changes to internet consumption and infrastructure have resulted in the exploration of mobile technology's potential to enhance the operational systems of local television stations' content delivery (see Cha, 2016). Back in 2001, Jenkins was the first scholar to highlight the benefits of mobile technology as a platform for enhanced content flow. Jenkins' perspective on enhanced content flow has become a fundamental tenet of advocates for platform creation these days. From one perspective, which I discussed in the previous chapter, mobile platforms offer a clear opportunity for revenue generation where a television station is the main content provider. However, whilst there is much hype around the delivery of online content on mobile internet platforms, television stations must (of course) abide by the execution rules set by the government. This is not

always easy as some countries enforce strict policies regulating the distribution of online television content. In the next section, therefore, we will turn to discuss the relationship between government and state in Malaysia, in order to make sense of policies developed by the government to support online television content distribution in the local television industry.

The Relationship Between Government and State

The Malaysian government has a history of rigorous media control. Various acts have been introduced to prevent official information from being disseminated, or to suppress negative press in various forms of media, in order to safeguard the interests of the Malaysian government (Makaruddin, 2018). Looking back, in 2012, Malaysia was hit by a massive mob of political supporters of Anuar Ibrahim, the former Deputy Prime Minister at that time. The whole country was brought to a halt due to massive demonstrations organised by his supporters. As public order in Kuala Lumpur threatened to collapse, journalists from various international media agencies rushed to get some insights on the issue.

Unfortunately, not much information about the demonstrations was available in any media, and this resulted in international news agencies gathering information based on tweets posted by eyewitnesses of the events. Interestingly, the Malaysian government still opted to use television as the main media to educate viewers on these political developments but chose to create no content whatsoever for social media platforms, let alone online content. This shows a

lack of interest by the government at the time in developing public information content for other platforms, as well as the rigid control exerted over the media even in the 21ˢᵗ century.

Attempts to control the use of the internet have been made by the Malaysian government since the mid-nineties. *Agence France-Presse* (AFP), an international news agency headquartered in Paris, France, stated in 1996 that "Malaysia's media operates under a publishing permit system, which allows the government to revoke permits and shut down media outlets at will" (*Agence France-Presse*, as cited in Hays (n.d.) para. 49). This piece of information is relevant to this thesis as it provides evidence on how the international media perceives the Malaysian government's role in regulating the internet. The government pledged not to censor internet content in 1996, in response to demand from various Malaysian firms and foreign investors[14] (Zittrain et al., 2017). This was part of a larger policy to foster the growth of ICT in the country and steer Malaysia toward a digital economy. Surprisingly, whilst it has been 25 years since the censorship debates of 1996, the desire to see online media free from any government influence was not achieved when it was still under strict government control. The same scenario is still encountered by the Malaysian media today, "although the government has initially claimed to not censor the internet, it has openly and blatantly controlled the Internet content when it comes to protecting their image. Any forms of content that are derogatory to the government are always curbed through indirect laws such as the Official Secrets Act and the Sedition

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[14] Malaysia signed the Bill of Guarantee - The bill was an agreement designed to reassure international investors that Malaysia would not impose any censorship on the Internet (Wok and Mohamed, 2017, p. 47).

Act (Wok and Mohamed, 2017, p. 54). For instance, in 2020, the *International Federation of Journalism* (IFJ) worked hand in hand with its Malaysian ally, the *National Union of Journalists Malaysia* (NUJM), to initiate a media campaign highlighting the importance of media freedom in Malaysia. This campaign is demanding policy reform to enable the progressive development of online media in the country - despite firm guarantees by the Malaysian government that it will introduce fair rules for the regulation of online content[15].

A massive rise in the popularity of YouTube has led to the successful development of online content in Malaysia, which offers video-on-demand (VOD) programming options. Online television in Malaysia began in 2011, and continues to grow rapidly (Abd Latiff et al, 2016). Like YouTube, Video-on-Demand (VOD) allows viewers to download or stream media content from either traditional television broadcasters or other online sources (such as apps and other platforms). Television stations are no longer the primary distributors of television content in this regard (Budzinski, Gänßle and Lindstädt, 2020). The emergence of popular social media platforms, such as YouTube, has changed online content distribution into much more independent activities. However, YouTube content is normally excluded from discussions about VOD due to the competitive interrelations between television and VOD services (Ofcom, 2018). As a result, YouTube content and some other form of VOD services such as SVOD, TVOD, and AVOD are subject to questionable discourse causing disregards by most researchers when they talk about this service. According to Budzinski, Gänßle and Lindstädt (2020), there are four principal reasons why YouTube is

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[15] Malaysia has earned the terrible distinction of sliding the most in the 2021 World Press Freedom Index, plummeting 18 places to number 119 (Source: https://www.theedgemarkets.com/article/malaysia-drops-furthest-2021-world-press-freedom-index-119).

being ignored and highly debatable as a VOD distributor: First, its content production is mostly by independent or semi-professional creators. Second, its major content is meant for a shorter viewing duration. Third, its viewing revolves around mobile device usage as most viewers watch YouTube content on small screens such as mobile phones. Finally, YouTube content is created for social networking purposes, and is therefore interacted with in a different way to conventional television, with viewers commenting, sharing and like-button approving videos.

Despite these differences, content on YouTube has nevertheless had a significant impact within the context of the Malaysian media's relationship with the government. It has proven itself to be of significant use in disseminating information on government corruption cases; it has also had a positive impact upon government transparency, as engagement with social media has promoted an integrated approach to e-government (Gottschalk, 2020). In general, governmental transparency can be measured by three aspects: A determination to combat corruption in the administration; providing the public with open access to government information; and establishing independent instruments of good governance (Vakarelov and Rogerson, 2020). With reference to these three measures of governmental transparency, YouTube has played an important role in distributing online political content of these kinds – information for which the demand constantly exists among Malaysians. Within this context of its political, social and cultural importance, the Malaysian government committed to introduce an independent body to regulate and supervise internet activity and online content amongst Malaysians. The details are illustrated in the following section.

Government Content Supervisory Agencies

With regard to the availability of various kinds of internet content, the Malaysian government has had no choice but to accept the changing nature of the web and how people engage with it. The government has authorised internet content on mobile platforms as another commercially promising medium, particularly in the television industry (Sani, Ahmad and Wahid, 2016). This said, all broadcasting activities in the country must be regulated by the government's policies and fulfil its political aspirations, which have been set forth by the *Ministry of Communication and Multimedia of Malaysia* (MCMM). A specific agency was formed to assist MCMM to implement the Malaysian government's online and television content distribution policy. Under the Malaysian Communications and Multimedia Commission Act (1998), the Malaysian Communications and Multimedia Commission (MCMC[16]) was founded in 1998 to assist the Malaysian government in establishing national media laws and regulations. The MCMC is also responsible for many other aspects of the country's media and telecommunications, such as the film industry, mobile services, broadband, international broadcasting and content development (Ministry of Communications and Multimedia Malaysia, 2019). Up to the present day, the MCMC has played an active role in preparing the Malaysian telecommunication industry to keep pace with global developments.

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[16] The Malaysian Communications and Multimedia Commission (MCMC) is of the view that streaming media such as Netflix, Amazon Prime Video, Viu and iflix services should be classified as different markets compared to traditional broadcasters, due to different playing fields. Thus, no regulation is imposed by MCMC to OTT streaming media at this juncture (Isa et al., 2020, p. 683).

Specifically, Section 211 of the Communications and Multimedia Act 1998, touches directly on media freedom. The rules are as follows: "No content applications service provider, or other persons using a content applications service, shall provide content which is indecent, obscene, false, menacing, or offensive in character with intent to annoy, abuse, threaten or harass any person" (MCMC, n.d., para. 1) However, today the MCMC is facing a new level of challenges in regulating mobile internet content as various forms of illegal content are being made available online for mobile viewing (Hajar et al., 2020). In response to the same developments, in 2019, the MCMC enhanced the legislation of online content to combat issues pertaining to national security and stability - such as racism, religious intolerance and hate crimes (Patto, 2019). The new legislation for internet content will also strengthen the *National Cyber Security Policy* and will address new challenges in the era of digital economy (Laudon and Traver, 2016).

These recent moves by MCMC highlight the fact that the government of Malaysia views issues relating to internet content as important and is creating a robust mobile platform policy through an independent agency in Malaysia. However, the way in which the government has decided to form and direct this independent agency has faced criticism from some quarters. For instance, the government has had an active involvement in shaping MCMC's investigation of decisions. It has been suggested that the MCMC focuses selectively on issues, and especially those involving the opposition party, in order to protect the image of the current ruling government (Sani, 2014).

Recently, the MCMC has been heavily focused on issues related to false online content in association with the recent international debates around *fake news,* as they are the agency responsible for issuing broadcasting licenses for all live telecast programmes on television. Consequently, the MCMC has been very productive in providing guidelines for television industry, without greatly impacting upon the television content marketplace itself. To date, the MCMC has played a key role in regulating online content on mobile phones without focusing on online television content. This helps us to understand the distinctive position the MCMC occupies as a responsible quasi-governmental agency, working to develop and strengthen the mobile ecosystem in Malaysia, while lacking the power of central government itself to make major decisions.

In 2012, the MCMC launched its long-term and ongoing campaign *Klik Dengan Bijak* (Click Wisely). The campaign's main goal is to educate Malaysian society, and particularly youngsters, to consume and share online content wisely and legally. The campaign also has a focus on discouraging internet users from getting involved with issues such as cyber-bullying, and to beware of online scams, confidence tricksters, etc. *Klik Dengan Bijak* also plays a role in encouraging Malaysians to view new information and communications technology as a medium to spread social and moral goodness, to create new business opportunities, etc.

This section has explored the complex relationship between the public and private spheres in the Malaysian media. It can clearly be suggested that the Malaysian media industry is still highly influenced by the government, and that legislation and licensing are the main mechanisms which place pressure on

media organisations and limit the media's freedom of speech. Although the MCMC is ostensibly an independent agency, it can also be suggested that it was founded to protect the government's image in the media, and to promote the government's interests. It is interesting to consider how this approach has influenced the development of mobile technology policy in Malaysia, and whether the industry could have been served better by a different legislative approach.

In promoting the development of sustainable mobile technology policies in Malaysia, this thesis also considers the operational structure of the country's television stations. In the next section, such operational structures are discussed to provide a complete picture for the reader. From this discussion, it is hoped that we may demonstrate the societal benefits of developing systematic mobile technology policies for media practitioners in Malaysia.

The Operational Structure of Malaysian Television Stations

The public broadcasting service in Malaysia was pioneered by *Radio Television Malaysia* (RTM). RTM is a government-owned television network based in Angkasapuri, Kuala Lumpur. At present, it has two television channels – TV 1 and TV 2,[17] which commenced operations in December 1963 and October 1969 respectively. As an official medium for the government, RTM is closely involved with disseminating news or explaining issues or policies connecting the Malaysian government to the citizens of Malaysia. As discussed in the previous section, the Malaysian government is always in control of the media, and there are direct

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[17] Source: https://www.rtm.gov.my

constraints on the freedom of the press in the country (Leong, 2015). From the perspective of the Malaysian government, the philosophy behind this policy is clear: These tight controls are to ensure "political stability, economic development, and social harmony" (Wok and Mohamed, 2017, p. 47). Mainstream electronic and print media both portray the government and its leaders as prime contributors to the country's socioeconomic stability. Hence, there is no room in the mainstream media for opposition parties who are often represented as negative elements that can threaten the stability of the country.

The opposition parties in Malaysia have formed a variety of alternative media sources as a result of not being able to speak out in the mainstream media. "Malaysia's alternative media includes politically contentious professional online newspapers, non-governmental organisation (NGO) websites, and journalistic blogs. The primary objective of these alternative forms of communication is to challenge the consensus that powerful interests try to shape and sustain through the mainstream media" (Wok and Mohamed, 2017, p. 46). Given the obstacles to free speech created by the Malaysian government, the alternative media in Malaysia tends to focus on political issues and criticises the government's decisions. As a result, the alternative media often experiences extreme difficulties in sustaining themselves and are often faced with financial issues and restrictions on license renewals.

Understanding the early development of the public media in Malaysia is fundamental to a comprehensive understanding of the impact caused by changes to the political and regulatory structures of the Malaysian television industry in the years that followed. This is particularly important when we come to examine

and explain the transformations in the Malaysian media landscape brought about by the emergence of private media. After more than two decades of government control within broadcast media during the 1960s and 1970s, the television industry moved into a new era when the concept of media industry privatisation was introduced and implemented in 1983, during the tenure of the fourth Malaysian Prime Minister, Mahathir Mohamad. The privatisation of the television industry was primarily undertaken in the 1980s by the Malaysian government to ensure that television stations became less financially dependent on the government (Ministry of Communications and Multimedia Malaysia, 2019). *Television Malaysia Berhad* (STMB), which is better known by the public as TV3, received its license in 1983 and became the first private television station in Malaysia.

The Malaysian government's strategy to implement privatisation policies did not escape the public's criticism. Although privatisation provides a certain degree of freedom to the media industry to operate freely without the influence of the government, the media industry in Malaysia is still under the control of political parties or businesses with political connections (Sinpeng, 2020). For instance, *United Malays National Organisations* (UMNO), the biggest and oldest coalition political party in Malaysia, owns forty percent of the shares in TV3, making them the broadcaster's main owner and allowing them to exert significant control over the station in their favour (Anwar, 2016). UMNO was formed prior to Independence Day in 1946 and is the main national political party representing the Malay ethnicity in Malaysia. However, in recent years, the public image of UMNO has been tarnished by major issues involving money management, politics, and corruption (O'Shannassy, 2013). Some UMNO party leaders are currently

being tried in the Malaysian courts for various wrongdoings. The party which has dominated Malaysian politics for the longest time span, UMNO is currently experiencing a gradual decrease in support from ethnic Malays, its traditional supporters, thus pushing the party into deeper crisis. Consequently, in the most recent election, on the 16th July 2018, UMNO suffered an important loss, resulting in a change of government. Nevertheless, despite this fundamental change to the government, media policies and regulations have remained unchanged (Murugiah, 2021).

If we compare this situation with the current government's involvement with the Malaysian media over recent years, we see much the same situation. Coalitions of various government companies own *Media Prima Berhad*, which was founded on the 23rd of September 2003. Furthermore, these same government companies currently own an 11.1% equity share in four television stations, Malaysia's three largest newspaper publishers, and three radio networks (Media Prima Berhad, 2017). The Malaysian government remains heavily involved in private media organisations (Kweh et al., 2017), and continues to control the overall media content in Malaysia (Sabran, 2016). It will come as no surprise to the reader, therefore, that this implementation of privatisation policies in Malaysia has been strongly criticised as suffering from a lack of clarity in its execution (Yap, 2018). Considered rationally, the privatisation of the media industry should reduce (rather than increase) the government's involvement in administering media companies and reduce their ventures into business. As Marceddu (2018) has observed, the key problem with the implementation of privatisation in Malaysia has been the absence of transparency concerning political involvement – a problem which needs to be considered in relation to the transformation's efficiency.

Any analysis of Malaysian media practises must begin with an understanding of the country's public and private media structures, as well as grasping the role of the government and political parties in controlling and regulating the Malaysian media. The information above naturally leads one to ask the question: Would the Malaysian government implement a similar approach in regulating content on mobile platforms? In order to seek an answer to this question, it is useful to begin by exploring the basic establishment and development of ICT in the country. In the following section, the Malaysian government's promotion of ICT will be addressed to provide insights into its involvement with the management of online television content distribution on mobile platforms in Malaysia.

Empirical Research on Online Television Content Development in Malaysia

The distribution of online television content through mobile platforms can be considered a second phase in the Malaysian broadcasting industry's move into the internet era. As previously mentioned, the television industry has had to effectively adjust to a variety of different technological frameworks in the past, and mobile technology is only the latest in a long series of broadcasting developments. (Tidd and Bessant, 2018). As a developing nation, however, it is crucial to gauge how rapidly Malaysia's television stations are adapting to mobile technology. Mobile technology is closely associated with the advancement of telecommunications, but there are no previous academic studies which discuss the structural and social factors needed for the technology's adoption by the Malaysian television industry. Very little information is available in relation to Malaysian online content users at all; even in the key areas of mobile user

perspectives, or basic demographic information such age range, motivations, and so on (MCMC, 2018a).

That said, several studies in the existing body of literature do address such factors for mobile technology more generally in Malaysia. For example, Parasuraman et al. (2017) suggested that, in terms of age, the most frequent mobile phone users are young working adults and school-age teenagers. Parasuraman et al. (2017) asserts that these segments of society are overexposed to information, and that the new technology offered by mobile devices is encompassing and directing their daily lives. Such research also argues that digital programming from satellite television broadcasters specifically targets the younger generation; that such content is supplied exclusively through mobile phones; and therefore that such content is rendered ubiquitous for younger people.

Alongside demographic information and user behaviour in adopting mobile technology, De-Sola, Rodríguez de Fonseca, and Rubio (2016) introduce another perspective by looking at the motivational aspects of mobile technology adoption. Their research makes it clear that mobile technology adoption is positively correlated with the impulse to socialise, improves the user's self-image, and that these motivations are actually higher in the older generation than in the younger generation. These studies illustrate the fact that most research on user engagement with mobile platforms revolves around the demographic data relating to mobile users, while many other areas are left unexplored.

Despite the fact that much research has been done on mobile technology and its users, no single study exists that adequately covers the perspective of media organisations, and particularly television stations, in adopting mobile platforms. Part of the value of this thesis, therefore, lies in its examination of mobile technology from the perspectives of media professionals. It is important to highlight this, as the direction this thesis takes will consider various forms of decision-making that the employees of television stations undertake when providing online content to viewers. In the next section, the key developmental phases in the Malaysian television industry's engagement with information technology and the online environment will be discussed, in order to provide a thoroughly contextualised explanation of these recent developments.

The Establishment of Information Communication Technology (ICT) in Malaysia

This section explores the early development of ICT in Malaysia and the emergence of mobile technology, in order to provide a guide to the policies implemented by the Malaysian government in adapting to new technology. There has been a surge in interest in the distribution of online television content for mobile platforms in recent years in Malaysia. The emergence of readily available desktop personal computers (PCs) in the 1980s led the Malaysian government to appoint a government agency responsible for spearheading the rapid national development of ICT. In 1985, the Malaysian government established the *Malaysian Institute of Microelectronic Systems* (MIMOS). In truth, however, the history of mobile technology's development in Malaysia did not begin until the 1990s, when the internet more generally started to attract local attention.

A decade after the establishment of MIMOS, ICT awareness in the country became tangible in 1995, with one out of every thousand Malaysians having access to the Internet – an internet penetration rate of approximately 0.1%, or around twenty thousand users out of a population of twenty million (MCMC, 2017). As a nation with a fundamentally agricultural economy in the 1990s, and with minimal availability of internet facilities, this 0.1% rate nevertheless managed to boost Malaysia's economic competitiveness by encouraging more funding and investment in the Malaysian market (West, 2015). In a nutshell, the development of ICT in Malaysia paved the way for various sectors to prosper, including the broadcasting industry.

In 2019, only a generation later, the internet penetration rate in Malaysia was calculated to be 91.2% and is expected to rise above 97% of the population by 2025 (Muller, 2019). These unprecedented technological changes have seen rapid developments of ICT in many areas. As of January 2020, Malaysia has a population of 26.69 million internet users (Kemp, 2020). According to Volume 1 of the government report *Measuring the Information Society* (International Telecommunication Union, 2016), one of the most significant reasons for the tremendous generational shift towards ICT among Malaysians has been the improvement of mobile broadband services nationwide. Hence, the enhancement of broadband provision, and particularly wi-fi, has been a critical historical turning point for the subject of this thesis; these technological advancements have led to a pattern of internet usage beyond designated ethernet-cabled areas such as homes or office buildings. To acknowledge the importance of this phase, let us now focus on the development of broadband in Malays

Internet Mobile Broadband in Malaysia

Considering the evidence regarding broadband in general, a study conducted by Rittinghouse and Ransome (2016) suggests that the availability of broadband is a primary driving force behind digitisation in the television industry; logically, television content becomes accessible on digital platforms via high-speed broadband (see also Leal et al., 2017). Therefore, it seems clear that broadband technology has the potential to revamp and increase revenues for the media communications industries, by generating a new market for product distribution. While this seems like common sense, critical evidence is essential to prove that broadband has the potential to boost the demand for online content: Recent research by Evans and Gawer (2016) clearly indicates that many broadband subscribers in South Korea getting connected directly created an increased demand for high-speed broadband television infrastructure 'upstream' of delivery. Another South Korean study by Leung and Chen (2017), indicated that a larger number of subscribers being connected to a high-speed broadband infrastructure gave both individuals and businesses access to high volumes of information, showed higher levels of digital communication in their daily life, creating an ever more-connected world (also see Park, 2018; Sacco, 2020).

Although these findings do not relate to the development in Malaysia, they clearly show the general causal relationship between consumers having broadband connections and their demand for online content alongside other forms of mobile media. Returning to the question posed at the beginning of this study, it is now possible to state that *both* the development of internet technology *and* advancements in broadcasting practices play important *parallel*

roles in stimulating the growth of online television content distribution on mobile platforms. Addressing internet facilities, this section will discuss the relevant improvements that have enabled and promoted mobile technology development in Malaysia, and which remain to be undertaken.

The development of broadband in Malaysia has seen a number of major changes. *Telekom Malaysia Berhad* (TM) is a Government-Linked Company (GLC) and a major broadband provider in Malaysia. GLCs are Malaysian companies that are formed by the government with a primary commercial objective to provide support to economic development. Having said that, the Malaysian government has full authority in supervising and influencing major decisions, such as the appointment of management positions, guidelines for the awarding of contracts, internal corporate strategies and marketing development strategies, restructuring and financing plans, acquisitions and divestments (Khazanah Nasional, 2020).

This provides further evidence of the ways in which the Malaysian government involves itself with commercial companies to ensure the development of each company (Tee et al., 2017). Furthermore, this information provides concrete evidence of the control and power that the Malaysian government has wielded over the media and communications industries in recent years; a critical subject of the thesis. As a commercial company owned by the Malaysian government, TM has a responsibility for educating society on new internet technology (Ismail, 2019). Since its establishment in 1946 as a provider of landline telephony, the company's services have been primarily focused on residential users, and they have only recently begun to serve short-range users, and most recently of all to deliver a national broadband network (Telekom Malaysia, 2018).

Due to tireless efforts, by 2014, there were approximately 2.23 million broadband users across Malaysia (Telekom Malaysia, 2015). This has been one of TM's biggest achievements, to create widespread public awareness around new technology for Malaysians (Lurudusamy and Thurasamy, 2016). In 2015, TM reached another milestone when it introduced its inaugural mobile service known as *Webe*. This achievement confirmed the company's position as the leading Malaysian internet service provider. This new mobile network provides great choice and flexibility in comparison to the existing services offered by other Malaysian telecommunications companies such as *Maxis*, *Digi*, *Celcom*, and *U Mobile*. TM has undoubtedly become a competitively successful business within the mobile network industry, regardless of its links to the Malaysian government. Nevertheless, the introduction of *Webe* emphasises the involvement of the Malaysian government in business and profit-making activities. Webe's upgrading of mobile services has made wider internet coverage possible, with improved and increased network quality. On top of that, the various internet packages offered by mobile service providers stimulated great changes for internet users in Malaysia. Figure 2 illustrates the percentage of internet users in Malaysia in comparison to non-users, by age groups.
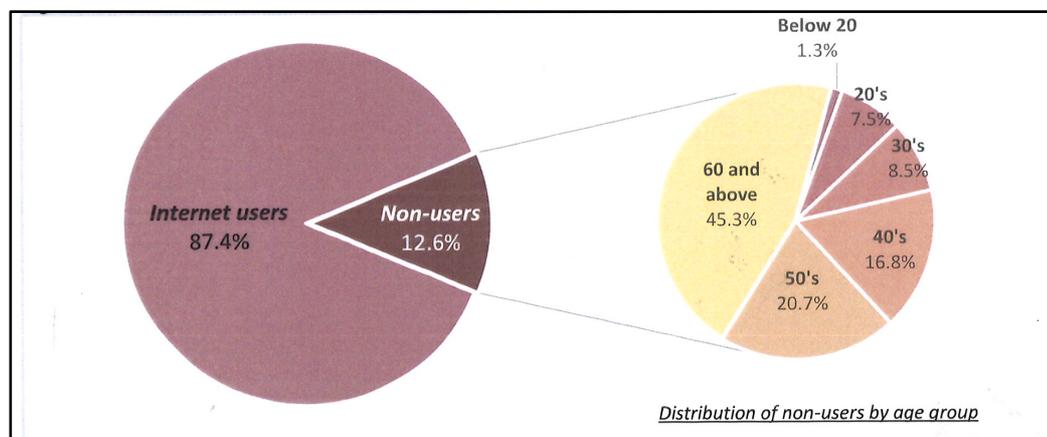
Figure 2: A comparison of Internet users and non-internet users in Malaysia (Source: *Internet Users Survey*, MCMC, 2018a).

Broadband technology provides users with up-to-date smartphone apps, internet services and content that self-evidently benefit their lifestyle and productivity. Equally, from a commercial perspective, broadband provision is clearly another revolution in high-speed internet access technology that is of enormous usefulness and productivity to the television industry as it encourages individualised and personalised viewing behaviours (Molnar et al., 2019; Johnson, 2019).

Television Content Demand on Mobile Platforms in Malaysia

Malaysia's vast and incredibly rapid increase in internet audience size has caused viewer demand to become a driving force for digitisation in the television industry, as television content has become accessible on digital platforms via high-speed broadband. Therefore, media researchers have begun to investigate various applications in the field of broadband technology that have the potential to generate high revenues for the media and communications industries.

The steep upward trend recorded for internet subscribers in Malaysia continues in the present day, as confirmed by the Malaysian Communication and Multimedia Commission through the *Internet Users Survey* (IUS) it conducted in 2018. MCMC conducts the IUS every three years, and its findings have proven extremely significant in measuring attitude changes among Malaysian internet users and recognising new trends and phenomena in the country's digital development (Ramaiah, Sirait and Smith, 2019). Some important findings from this recent survey demonstrate the link between internet usage in general and the use of mobile technology more specifically; findings which greatly

strengthen our understanding of the nature of technological exposure among Malaysians in the modern era.

In terms of this thesis, the most important finding of the 2018 IUS shows a strong link between the recent rise in internet usage in Malaysia and the uptake of mobile technology by the population. This is a critical factor which shows that it is the technology and infrastructure of mobile media which has enabled, and could further boost, Malaysian internet use in the long term. As mobile technology is the centre of this research, the data presented in Figure 3 shows that, outside of the user's own home, 68.1% of Malaysians access the internet 'on-the-go'; in other words, more than two thirds of Malaysians are using mobile devices to regularly access the internet - the most popular method of accessing online content outside the home.

This finding could validate the earlier reason for increased internet use among Malaysians as most public wi-fi internet facilities have seen tremendous upgrades since 2016 (MCMC, 2018b). With internet facilities being upgraded outside of the home, smartphones have become the most popular device to access the internet via mobile, with 77.8% of mobile users spending time accessing television content on smartphones (MCMC, 2018a). It should be evident to the reader, therefore, that the establishment and maintenance of a strong mobile communications infrastructure is essential for local online television content to be able to realise the full potential of their enormous contribution to Malaysia's economic development in the digital age.
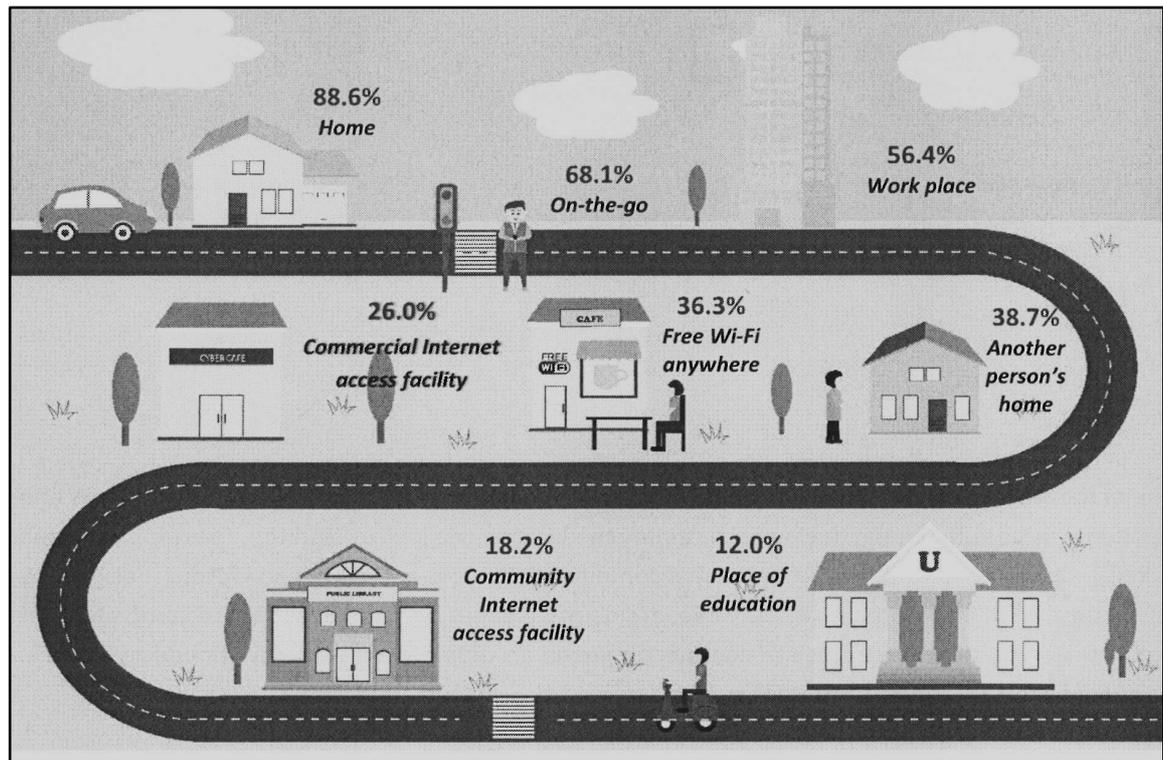
Figure 3: Places Internet is accessed by Malaysian Internet users
(Source: *Internet Users Survey*, MCMC, 2018a).

Another recent study has focused on mobile viewing for entertainment through the popular platform YouTube (Hedvicakova et al., 2016). In 2016, *TNS Research*, a reliable global research agency, worked hand-in-hand with *Google Malaysia* to gather information on YouTube usage amongst Malaysians. A research company that champions issues of particular relevance to the countries where they conduct research, TNS conducted interviews with a large representative sample of 1,000 Malaysians aged between 16 and 64 years old. One of the survey's most significant findings indicated that 85% of Malaysian respondents chose to watch YouTube videos on their mobile devices, and that Malaysian viewers spent on average 80 minutes each in a viewing session – double the global average of 40 minutes. This is a particularly significant fact for this thesis as the majority of YouTube viewing takes place outside of the home (Strangelove, 2020). This reflects a high level of online content demand among Malaysians (El Miedany, 2019). The YouTube study by TNS and Google Malaysia also highlights the fact

that Malaysian mobile viewers are particularly keen participants in a platform that enables users to upload, share, and view their video content. According to Burrett and Kingston (2019), this finding has parallels in Vietnam and the Philippines, and encourages a view of significant differences in the landscape of video viewing and sharing for many countries in Asia when compared with other regions of the globe. However, this finding must be interpreted with caution because the development of mobile technology has not been fully explored in these other Asian countries (Chalaby, 2019). Two questions that need to be addressed further are whether mobile viewing is creating a variety of opportunities for Malaysian media professionals, particularly in the television industry, and whether Malaysian television stations are maximising on those opportunities. To investigate the advantages offered by this technological development, the next section will examine the development of internet content consumption on mobile platforms in a range of specific Asian countries.

A Comparison of the Development of Television Content on Mobile Platforms in Malaysia and Other Asian Countries

Various aspects of content development on mobile platforms seen in other Asian countries are crucial to the arguments of this thesis. In this section, therefore, the achievements that several Asian countries have made in the development of mobile technology will be discussed. This will provide the reader with a clearer perspective on the commitments that Asian countries have made in recent years to transform various industries, in order to maximise the benefits of mobile technology. This data will become of primary significance when we compare Malaysia's efforts to develop mobile technology in the television industry.

From a broader perspective, "Asia is widely regarded as a region that has enthusiastically embraced information technology" (Lim and Goggin, 2014, p. 664). A full understanding of the importance of mobile technology in key case studies, especially the Republic of Korea (South Korea) and Japan, is of enormous benefit when analysing its potential in other Asian countries. Japan became internet-capable early in the 1990s, leading technological innovation in Asia by championing all progress related to mobile communications technology; this included key innovations to the mobile phone and mobile social networking software (Lashitew, Van Tulder and Liasse, 2019).

The promising future of mobile communications has also been demonstrated in South Korea. Like Japan, also a leader in technological developments, South Korea has become a hub for testing a wide range of technical and social media innovations, ranging from mobile television to mobile gaming (Landoni et al., 2019). Despite the fact that South Korea is a country with strict internet and telecommunications policies, as well as concerning issues of state surveillance and the repression of freedom of speech, mobile communications within South Korea have demonstrated significant technological developments (Lee, 2019). Most obvious globally has been the enormous success of the technology giant Samsung, but another notable South Korean contribution has been the development of *CyWorld*, the nation's major social networking system. Additionally, and in part due to the global success of Samsung as the market leader in android smartphone production, South Korea was among the first nations to introduce and popularise a culture of camera phones and locative media (Hjorth, 2013).

Alongside South Korea, China is another country that has been highly criticised for its strict policies on the regulation of the internet and telecommunications. During the 2000s, various innovative mobile communication technologies were developed in both China and India, such as the introduction of microblogging; the major Chinese social networking service application *Jiepang*; and *WeChat*, a Chinese messaging and mobile pay app which became the world's most popular app in 2018 with over a billion downloads). A major turning point in the development of mobile communications in China was the manufacturing of mobile devices such as the *Shanzhai* brand, an affordable smartphone originally cloned from the *Xiaomi* original (Zhou et al., 2017).

India is now actively developing their mobile communications sector alongside China and is about to become one of the largest mobile markets in Asia (Jeffrey and Doron, 2013). Indonesia and the Philippines have also followed suit. In Indonesia, mobile apps are being used by the Muslim community to search for and read Islamic Supplications and to keep track of prayer times (Lim and Goggin, 2014). Meanwhile, in the Philippines, the growing number of Filipino workers abroad has spurred on the development of mobile money transfer services and social networking apps, enabling families distantly separated by work to stay in contact (Madianou and Miller, 2011). Technology developers in each of these Asian countries have been promoting their mobile platforms by actively investing in various internet-based facilities, thus creating content demand from the users, in keeping with the local culture, economic structure and political system.

Despite many good examples demonstrated in these countries, specific efforts by television stations to develop mobile platforms for their content are less easy to find. This chapter of the thesis recognises that government policies surrounding the development of mobile platforms clearly play a vitally important role in capitalising on the benefits of this new digital era. Malaysian television stations have begun embracing new directions in content distribution, but strict broadcasting policies still apply (Leong, 2019). When compared with the cases discussed above outlining the broader Asian perspective, the development of online television content distribution on mobile platforms in Malaysia can be seen to have suffered as a result of the country's strict online broadcasting policies (Aziz, 2019). In comparison to other developing nations such as China, Vietnam and India, this has caused stagnation in the industry's growth in Malaysia. Furthermore, it is hard to ignore the impact of the facts outlined earlier, that the financial structure of the Malaysian media industry is heavily controlled by its political parties and members of the establishment (Baharin and Waheed, 2017).

The Malaysian government has not yet introduced a specific mechanism for the regulation of content that is accessible via mobile platforms (Isa et al., 2019). As a result, the country's television stations have to comply with the strict *Communications and Multimedia Act* (CMA) of 1998, requiring internet content filtering, and with the *Censorship Act* of 2020. Although these acts are primarily intended to provide content guidelines for global broadcasters such as Netflix, they also apply to local broadcasters and television stations. Despite the absence of properly tailored guidelines from the government, television stations in Malaysia still manage to offer internet content on mobile platforms. This

situation is far from ideal, however, and critical questions therefore emerge regarding the government making policy changes which will enable Malaysian television stations to compete with global content providers; as do questions regarding the level of local television stations' preparedness to pursue and execute online content distribution for mobile platforms.

In the case of the television industry, the mobile media is currently a new medium for distribution. The introduction of online television content distribution on mobile platforms has served as a foundational test, determining and demonstrating the full potential of mobile technology more generally. By discussing the advancement of mobile technology in other Asian countries that have set good examples, this section has shown the potential and importance of mobile technology for increasing productivity, efficiency and public happiness in society. As part of the Asian region, it is crucial that we examine, analyse and promote the development of mobile technology in Malaysia, as this technology is developing at a rampant rate all around us.

Conclusion

The television industry in Malaysia has tried to react to global changes in the broadcasting industry brought about by the emergence of mobile media. However, due to the rigid controls imposed by current government policy, the success of its development, both locally and on the regional Asian scale, faces real uncertainty. There is significant potential for mobile platform development to promote growth in the Malaysian television sector, the country's media industry more generally, and the overall national economy. However, due to

inconsistencies in the government's intention and efforts to restructure the broadcasting industry, Malaysian television stations have been unable to capitalise on many opportunities. As a result, the Malaysian television industry has been left behind its neighbours in creating a digital viewing environment parallel to other Asian countries.

Content filtering and censorship are of such importance to the development and economic success of the transition to mobile platform delivery because content availability issues, according to the literature cited above, have been critical factors which hindered the sector's development in Malaysia. There is a widespread need to better understand the direction of the television content distribution industry in this era, and particularly in Asia. Hence, this thesis responds to the gaps in our knowledge, as seen from the perspective of Malaysian television stations, by offering a deep analysis of their preparations for, and execution of, embracing new strategies for content distribution. Finally, there is major gap in the current literature regarding the decision-making processes undertaken by television stations in adopting mobile technology in Malaysia. There is a pressing need to investigate the best possible route for all media professionals to embrace this new technology. These gaps in the literature indicate a vital opportunity to advance our understanding of the role that new technology can play in developing countries such as in Malaysia.

Chapter Three: Methodology

This thesis examines the new direction taken by Malaysian television stations in distributing online television content through mobile platforms, focusing on the specific aspects of their preparation for, and execution of, the technology's adoption. Consequently, it focuses on the local and international contexts of global online content on mobile platforms; its role in transforming the television content industry in Malaysia specifically; and the political, social, and economic factors that may boost or hinder the evolution of television content on mobile platforms in Malaysia.

As elaborated in the previous two chapters, the development of the Malaysian television industry is (broadly speaking) keeping pace with the development of global technology. However, there has been a lack of studies examining development of mobile platforms within the television industry in Asian countries due to strict media control policies. Initiatives have been taken to analyse the use of streaming technology on mobile platforms elsewhere in Asia – in China, South Korea, India, and the Philippines. However, no previous research in this field has managed to engage with or reflect the contemporary scenario in Malaysia. Initial points to be made here are that the internet penetration rate, the gradient of its rise, and the level of mobile technology adoption, are all quite different for each country in Asia. Each national case is unique – as is the local culture, economy and political context. Therefore, to produce truly empirical research on the topic of mobile platform development, we must apply a carefully attuned and comprehensive research methodology to the Malaysian situation.

Among the earliest group of scholars to research television content on mobile platforms, Wong et al. (2014) have described the growth rate of online television content distribution in Malaysia is still in its early stages and requiring further research to explore its potential in the Malaysian media landscape. Similarly, a 2016 report in *The Borneo Post* (2016), and 2018 market research conducted by *AmResearch* (a subsidiary company owned by *AmBank Malaysia* that explores new markets for investment in Malaysia), both define the country's online television content viewing habits as still in their infancy. The full research report from *AmResearch* further expressed the aforementioned uncertainty surrounding the country's online content regulations in general, showing that little of this uncertainty had been dispelled in the two years following the scholarly research project of Wong et al. (2014).

From the perspective of undertaking empirical research, the report by *AmResearch* should come as no surprise, since the area of online content development has been the least researched topic in the field of media, with only twenty-five research projects conducted worldwide between 2000 and 2015 (Rahman et al., 2017). That point noted, Alexander (2020) has observed that, over the same period, there has been a significant and encouraging global trend towards the undertaking of research which focuses on online television platforms. Hence, we can readily deduce that further empirical research in online content specifically for mobile platforms is required. With that in mind, this thesis offers new research insights upon television content in the contemporary technological context.

The research method adopted for this investigation served as an attempt to gain familiarity with the existing industry phenomenon of online content streaming and to acquire new insights informing solutions to its specific problems (Formplus Blog, 2019). In the earlier chapters of this thesis, the recent state and trends within the mobile technology phenomenon have first been established, prior to identifying the relevant issues and problems surrounding the recent development of mobile technology within the context of television stations.

By this stage in the thesis, therefore, it is hoped that the reader has been provided with a solid foundation of knowledge on the emergence of online television content distribution on mobile platforms; it is consequently hoped that the reader will grasp the current challenges of adapting to this new distribution mode encountered by local television stations (Agarwal et al., 2019). Due to the nature of this thesis in exploring a new phenomenon, it is crucial to ask *'What's next?'* for online television content delivery on mobile platforms in Malaysia. One crucial focus for the research has been to look into the impact of some television consumers migrating from general broadcast television to video-on-demand (VOD), as this transition will be dependent upon the ways in which local media companies adapt and respond to the shifting range of technological opportunities (borneopost.com, 2016).

A key point to understand here is that the diversity and complexity of the media industry contributes significantly to the array of research methods available to scholars. Both quantitative and qualitative research have important parts to play in the study of media phenomena – perhaps all the more so because the media has always brought technology and culture into conjunction. Selection of the

most appropriate research methodology allows the researcher to focus their concerns most directly towards the core issues of the research problems – to determine the form of the research data collected, if not the content. The researcher's decisions around how to collect research data then act as "reflections on their research, as part of the process of knowledge production, and the variety of approaches and methods" (Flick, 2002, p. 5). Without the application of comprehensive and appropriate research methods, the changing nature of the world is not something that can be simply anticipated. Rapid social changes demand critical analytical methods for our experience of the world to divulge new knowledge. In choosing the best research methodology, a collection of research questions is established prior to research project commencement, which informs the researcher about the form of data they wish to collect (Sutton and Austin, 2015).

This chapter begins with a brief explanation of the background and merits of the chosen *qualitative research methodology* selected as the best approach for this thesis. As the chapter progresses, I next turn to outlining relevant aspects of the qualitative methodology: elaborating upon the process of undertaking in-depth, face-to-face interviews with key decision-makers and senior departmental personnel from television stations and relevant government agencies in Malaysia. Thirdly, I outline the research processes and benefits involved in dealing with the two focus groups consulted in the research project. Finally, I discuss the specific data management procedures and coding processes involved in transforming qualitative research practices first into usable data, and then into meaningful findings.

Qualitative Methodology

To ensure the deepest possible engagement with all potential respondent for the research leading to this thesis, I have adopted a qualitative methodological approach. Qualitative methods can be defined as "any kind of research that produces findings not arrived at by means of statistical procedures or other means of quantification" (Strauss and Corbin, 1990, p. 17). Hence, qualitative research allows the researcher to explore the selected topic in detail, which illuminates the ways that individuals create meaning through their daily life experiences (Burns and Grove, 2009). The principal benefit of this is that it allows us to access the personal perspectives of research respondents in a nuanced way that quantitative methodologies (statistical analysis of viewing figures, simplified survey questionnaires, and so on) never can. From this accessing of personal perspectives, we can critically analyse a more sophisticated and thought-out set of relevant data inputs, which can enable us to answer our research questions in an enriched way. The idea of diversifying our research approaches begs the question '*why?*' The simplest answer to this is that new ways of looking can become the beginning of exploring new phenomena and generating new knowledge about them.

Exploring new ways of creating knowledge is essential to the explanation of new phenomena, particularly in the field of media. The emergence of new technological solutions in today's media industry often requires industry personnel to develop a deep understanding of that new technology, in order to keep pace with the industry and grow towards further development. The social and cultural analysis of technology in this modern world is certainly achievable

through qualitative research methods, which are particularly useful in establishing the relationship between research respondents' observations, interpretations of meaning, and views on one hand, and their identities, perceptions, interpretations of meaning on the other (Sutton and Austin, 2015).

Furthermore, this researcher believes that the systematic application of qualitative methodologies lies at the heart of a good thesis, as it produces the most comprehensive and reliable analysis of personal perspectives. Of all available research techniques, qualitative methodologies provide the opportunity for a more meaningful exploration which offers profound insights into any given cultural circumstance (Corbin and Strauss, 2008; Levitt et al., 2017). In fact, my decision to choose this approach was motivated by its capability to provide critical criteria in analysing human interactions with our environment. Qualitative methodologies offer a very person-focused research process, through which the data retrieved curate a high level of detail, driven by the research respondents' understanding of real-life experiences (Creswell, 2009).

In addition, the non-numerical data generated by qualitative approaches usefully enhance our understanding of social phenomena within a targeted population and location (Punch, 2013). Hence, this methodology is uniquely associated with garnering the observations and perceptions of the research respondents of a specific social phenomenon in its most natural setting (Mohajan, 2018); observations which are vital to their construction of meaning from daily life experiences (Walia, 2015). This is a core principle in our investigation of new phenomena involving online television content on mobile platforms. Hence, it is

worthwhile to deploy this method in a study that demands qualitative strategies for analysing data retrieved from all research respondents.

From the perspective of quantitative research approaches, previous studies on Malaysian online content on mobile platform have extensively focused on television audience satisfaction; data which can be classified as very descriptive in nature. For example, scholars such as Abd Latiff et al. (2016) have proven a strong connection between television audience demographics and engagement with online television content. Abd Latiff et al. (2016) argued that, despite the increasing attention given by local television stations to creating online television content in recent years, their efforts have mostly managed to engage only younger viewers. On the contrary, a study by Rosmani, Mutalib and Sarif (2020) revealed that half of Malaysia's population has moved towards embracing new trends in television viewing due to the emergence of online content distribution via YouTube and Netflix. These conflicting results indicate that more empirical investigation is needed to study the effectiveness of online television content distribution by examining the question from a range of different angles.

Qualitative methods provide a highly productive approach for looking into this phenomenon beyond the limitations of statistical analysis, as strongly demonstrated by the two research papers mentioned above. Clearly, whilst these research projects successfully investigated the relationship between online content and local television viewers, they mostly failed to investigate and explore the qualitative nature of viewer engagement with new phenomena such as television content distribution on mobile platforms within Malaysia. Hence this thesis attempts to examine the revolutionary nature of online television

content distribution for mobile platform by adopting social research strategies (Bryman and Burgess, 1999). By adopting a qualitative approach, the research questions outlined in the introduction can certainly be answered, and the current state of online television content distribution on mobile platforms within the Malaysian television industry can be investigated. This is in line with a claim made by Domholdt (1993), that a deep understanding of particular phenomena can only be established through close contact with research respondents, leading to the analysis of their behaviour, emotional attachments, natural attitudes, and real-life experiences (Tong et al., 2012). In a nutshell, by deploying a qualitative method in this research, the study can systematically illuminate the phenomenon of online television content on mobile platform. Most importantly, this research used direct inputs from individuals who had been directly involved in creating content and policy.

Several advantages can be realised by employing a qualitative approach to tackle the research problem effectively. For example, the method allows greater engagement with research respondents and focus on those aspects that need more attention for answering the research questions. In addition, to garner the most detail from their engagement, Bowen (2009) stated the importance of connecting with research respondents' feelings, opinions, and experiences to understand the meaning behind every action (Creswell and Poth, 2016; Denzin, 1989). However, as a precaution, qualitative research must involve the interpretation of research respondents' behaviour at every stage. One of this method's most significant criticisms is the fact that a clear line cannot be drawn between researchers and subjects, or between theories and conclusions (Patton, 1990). However – and this is a perspective embraced by this thesis – qualitative

researchers should have the freedom to reflect the specific concerns of their research questions. This freedom plays a crucial role in realising the methodology's capacity to represent the world of the research subjects and including the voices of research subjects alongside the researcher's own voice (Aksan and Baki, 2017).

The Methods of Data Collection

The purpose of this thesis is to examine the new directions taken by television stations in preparation for, and executing, the distribution of online television content distribution on mobile platforms. In doing so, in-depth face-to-face interviews of key personnel within the Malaysian television industry were conducted to investigate policy changes in relation to television content that have responded to the latest trend of content streaming. The rationale behind using in-depth interviews is simply the desire to create an uninterrupted flow of dialogue with the interviewees of this research. This has been especially useful when discussing complex issues, as it has allowed the interviewees to provide further information and clarification, coming to a deeper and richer explanation. In addition, this qualitative research method allows for a nuanced and responsive exploration of the issues, which might not be addressed by other methodologies. Follow-up questions can be asked to elicit additional information by flexibly returning to the key questions selected for the interview session, allows a greater documentation and understanding of the attitudes, perceptions, and motivations held by stakeholders.

When we consider that some interviewees are the departmental heads of government agencies, this method has been particularly important in providing them more opportunity to specify the context of the discussion using their own words and understanding. Hence, they would also be free to include their day-to-day experiences of encountering the topical issues that each interview question focused upon. The complete list of interviewees, and the interview questions asked, can be referred to in Appendix E and Appendix G respectively (at the end of the thesis). Another important beneficial factor, which in-depth interviewing sessions bring, is the way in which it develops the interviewees' trust in the researcher, enabling them to share their ideas without hesitation.

Ironically, the Malaysian Government, by nature, refused to share any information or data that might portray any mistakes or weaknesses in executing its policies. For example, throughout interview sessions with government officials, every question that was asked by the researcher was comprehensively answered by referring to the standard codes of practice, legal Acts, or other approved supporting documents relevant to issues under discussion. Hence, all answers were given to the researcher by quoting from sources which are available online, or from other materials such as government leaflets or handouts. From the researcher's perspective, these supporting materials were shown to highlight that every move or decision made by the officials was in accordance with the stipulated laws or rules. Without neglecting any detail, each response by interviewees was collected based on the available information given.

As an effort to elicit more current and lively responses from the interviewees, the researcher asked follow-up questions based on recent events which had been reported in the mainstream newspapers. In this way, the researcher managed to obtain the interviewees' attention, and thus, the flow of interview sessions improved as they proceeded. Consequently, when considered as a whole interaction, the recorded interviews include both government-approved statements and the real opinions of government officials concerning the research topic. Based on this experience, the researcher believes that the decision of interviewees to highlight government-published sources is a defence mechanism to show that everything has been done, and has been communicated, in accordance with their role as government servants. By providing correct and accurate response with reference to the laws and relevant codes, their credibility would be protected.

Undoubtedly, creating a safe and reliable environment became a priority in the data gathering process, as most of the interviewees were concerned that they were expressing their thoughts related to the television industry without having to fear that the input they shared would be manipulated by irresponsible parties (Macintosh, 2009). To overcome this issue, the researcher had to develop and maintain a certain level of trust with interviewees, in order that they would be willing to discuss the issues or questions with transparency. Thus, the researcher agrees with the importance of establishing rapport in investigative research (Abbe and Brandon, 2013). According to Abbe and Brandon, "rapport can play a facilitating role in supporting the goals of an investigative interview, to include developing a working alliance between interviewer and source, exercising social influence, and educing information from a source" (p. 237). Hence, establishing

rapport is an essential core skill in any interviewing process (Shawyer, Milne and Bull, 2013). To develop a good rapport with interviewees prior to the session, the researcher shared complete information in terms of the session's objective, the process of data inputting and management, and how the input will be used in generating the findings of the thesis. Interviewees were also made aware that all input shared by them would be confidential and anonymous unless they stated otherwise, and no information given would be used in the thesis without their written consent. These conditions have been adhered to in the findings chapters that follow.

There has been some debate concerning the optimum number of interview sessions that should be undertaken in a data collection process. Put most simply, a researcher must ascertain the required number of interviewees to be included in their study, and then engage with that number of interviewees, for their findings to be considered representative of the phenomenon under examination, and therefore valid. Termed *data saturation*, this concept seems to be a very problematic term (Dey 1999; Bowen 2008; O'Reilly and Parker 2013). Speaking numerically, Adler and Adler (2012), suggest that graduate students collect between 12 and 60 samples, with the average being 30 samples; alternatively, Ragin (2014) proposed 20 samples for a Masters dissertation and 50 samples for a Ph.D. thesis. Nevertheless, to date, no conclusive quantity of interviews has been widely agreed as a valid saturation level. Therefore, it is difficult to determine and to specify the necessary quantity of interviews needed to complete a research study.

Saunders et al. (2018) elaborate on this difficulty by observing that it is primarily derived from different interpretations of the goals of interviewing. Generally, in this respect, although no specific number can be given as a valid *data saturation* level, the quantity of interviews should reach the saturation level (Morse, 1995). Fusch and Ness (2015, p.1408) stated that "failure to reach saturation has an impact on the quality of the research conducted." Poletti et al. (2007, p. 511) go even further, suggesting the need to fill gaps in the data beyond saturation, as this allows for a more in-depth understanding (*cf* Naegeli et al., 2013, p.3). At the same time, Bernard, Wutich and Ryan (2016) point out that reaching the level of data saturation in a research area is a variable undertaking: The quantity of interviews should depend on the complexity of the data being gathered. Moreover, Alan Bryman (2012) stated that data saturation is a challenge to achieve in reality, as "it forces the researcher to combine sampling, data collection, and data analysis, rather than treating them as separate stages in a linear process" (p. 5).

While these debates on interview *quantities* and data saturation will undoubtedly continue, Malterud et al. (2016) alternatively suggest that researchers should rather focus on the *quality* of their interview sessions, to provide the richest possible body of information which greatly emphasises the aims of the study. They point out that small interview samples can generate very meaningful data, and create a good representation of the real scenario, depending upon how the analysis has been conducted, and how the data has been interpreted. Consequently, this research project conducted twenty-four in-depth, face-to-face interviews which provide the opportunity for understanding the direction of online television content on mobile platform in Malaysia.

Interviews with key personnel in the television industry were conducted with the aim of constructing a comprehensive representation of the current online television content phenomenon in Malaysia, through systematic interview strategies. During each interview session, all data were collected by audio recording interviewees' direct responses. The interview sessions focused on clarifying the processes, meanings, and policies involved in establishing a clear direction for online content on mobile platform within Malaysia's television industry, and by discussing specific pivotal events that have caused changes in the industry in recent years. Each session was carefully initiated to ensure a deep engaging discussion with interviewees by encouraging them to identify those relevant events and scenarios which they felt might contribute information to answering the research questions concerned. At all points, interviews have been conducted with a focus on establishing the true nature of this new trend in the television industry.

In terms of sampling preparation, potential interviewees were selected and approached on the basis of their belonging to one of two categories: 1) Government representatives; and 2) Private sector/independent individuals. Within the first category, all interviewees comprise the heads of governmental departments, who play prominent roles in executing government policies on television broadcasting. These interviewees have been actively involved in various discussions at the ministry level pertaining to the development of policy on television content in Malaysia. The second category of interviewees consists of industry practitioners and independent individuals who are familiar with local the television station broadcasting system; key personnel in television stations, former producers of television content, internet telecommunication providers,

and content producers from independent production houses. They provide reliable and constructive opinions on the current direction of television due to their background and experience in the media industry, as both content creators and consumers. These two categories of interviewees therefore represent a wide spectrum of stakeholders in Malaysian television content production and policy. As a result of this diversity of participation, we can paint a bigger picture of online television content distribution at the present time, and of its evolving nature and challenges in the near future.

Interviewing the Elites

Clearly, these two categories of interviewees comprise credible and important personnel in their respective organisations. Whether they are the representatives of government agencies or private sector businesses, ten of these individuals occupy high-ranking organisational positions and may be referred to as members of the Malaysian media 'elite'. I strongly believe that the inclusion of such elite interviewees in this study will greatly enhance our understanding of the topic. By incorporating the elite's perspectives and behaviour as leaders in business, we can move rapidly towards establishing a clear impression of the direction in which online content on mobile platforms is moving (Harvey, 2011). In doing so, this researcher applied specific data management techniques during the phase of data collection, to eliminate any methodological hindrances (McDowell, 1998).

Whilst the 'elite' within any industry may be a group who are relatively easy to identify subjectively, it remains a term with some empirical uncertainty around it. Both inconsistencies and differences of opinion may exist in the definition of

the elite groups within any organisation. Zuckerman (1972) sheds light on the definition by emphasising the powerful role that elite members play in directly influencing an organisation's operational aspects in both the short-term and the long-term. In response to Zuckerman's definition, other scholars have questioned whether the power and status of elite individuals can be recognised from research interview sessions alone (Smith, 2006), as their elite power is most clearly demonstrated by their enforcement of specific policies within the organisation.

From the perspective of this thesis, the definition of the elite needs to be clarified to prevent any misconceptions over the contribution of this important group, and to strengthen the validity of the research findings. Furthermore, Stephens (2007) has urged that a clear line needs to be drawn between the elite and non-elite, as the membership of an elite is sometimes interpreted as a social status in society, regardless of any member's actual role within relevant organisations. Hence, to ensure this necessary clarity, the elite group must be clearly defined and treated fairly: This thesis defines the media elite as those individuals who occupy senior management positions within an organisation (Harvey, 2011), and who are responsible for social networking, social capitalising, and essential planning for skills development that can influence the organisation's overall direction (Burt, 1992; Parry, 1998; Woods, 1998; Cochrane, 1998; Smith, 2006). In summary, during the interview sessions, a greater focus was directed towards the media elite as important decision-makers who can create new opportunities for the development of the organisation.

I believe that elite members in media organisations must be approached in a systematic way to first gain, and thereafter maintain, their trust beyond the interview session itself (Ostrander, 1993). With that in mind, I employed strategies to ensure good rapport both before and after the interview session. Before the interview, an email was sent that provided complete information relating to the researcher's background and the details of the study being undertaken. All practical and ethical aspects of the interview were explained, including the expected duration of the interview; how the collected data was to be used; and how the input from the interview would be incorporated into the final doctoral thesis.

On top of that, I took pains to explain the projected benefits of this research, as well as explaining how the resulting research product could potentially enhance the operational efficiency of their organisations. This preliminary email engagement with the selected elite members occurred indirectly; in fact, all interactions took place through their personal assistants, supplying them with extra information on the study and fixing the date for the interview itself. This process transpired in cyberspace, as I was still conducting research preparations in Glasgow during the last few weeks before departing for Kuala Lumpur, Malaysia, on 4 July 2016. I remained in Kuala Lumpur until 28 September 2016, conducting the three-month process of data collection.

In making my preparations prior to conducting each of the interviews, I took the initiative to familiarise myself with the elite members' positions and their significant roles of boosting morale and efficiency within their organisation. The researcher found this background information particularly useful during the

"small talk" prior to beginning the formalised questions-and-answers of the interview session; both for settling the interviewee and demonstrating a familiarity with their work.

Open-ended questions were carefully prepared for the interviews with elite members. Aberbach and Rockman (2002, p.674) explain the main justification for choosing this question format: "elites especially - like other highly educated people as well – do not like being put in the straitjacket of close-ended questions. They prefer to articulate their views, which explain why they think what they think." Rivera, Kozyreva and Sarovskii (2002) also point out that the use of open-ended questions is highly recommended for asking follow-up questions in interviewing members of an elite, and this practice was also followed to ensure successful interviews.

To discuss the structure of my interview questions further (again, please see Appendix G), the interview begins with general questions revolving around the interviewee's perceptions of global developments in television content. Secondly, the questions move on to elicit a deeper discussion of complex themes in the contemporary television industry - such as how traditional linear television broadcasters have been perceived as losing their audience share following the emergence of mobile platforms. During this phase of the interviews, I considered it vital to avoid asking any provocative questions, and each question was asked in accordance with the recent official reports published in the mainstream newspapers or other valid documents. Thirdly, the interview questions turn to the purpose of attaining insights on the personal perspective of elite members regarding the adaptation of mobile platforms for content distribution, and vice

versa. The fourth and final part of the interview focused more tightly on the challenges facing the television industry in the current climate and touched upon regulatory issues and obstacles to be overcome in embracing new broadcasting methods. It is worth mentioning that, to avoid topic fatigue during the interview session, I carefully constructed the interview questions based on a range of different topics, and occasionally provided information on how much longer the interview would take. At the end of each interview session, I typically asked the elites if there were any specific subjects they themselves wished to raise or discuss with regard to the topic being discussed. The questions completed, I always took the opportunity to thank them and to ask for suggestions of other potential interviewees who might possibly contribute to the research.

In general, each interview session was conducted over a period of forty to sixty minutes, and the conversations were audio recorded. Permission to record the interviews was requested clearly in the first email sent to interviewees. Interviewees were made fully aware that the interview was to be recorded well in advance and had already provided the written informed consent before the scheduled interview began. Furthermore, the recording of the verbal content of each interview session can enhance the research experience, as it provides the researcher with more freedom to observe the interviewee's spontaneous responses such as facial expressions, emotional reactions, and body language. This noted, there are some difficulties to be encountered with making voice recordings of elite interviewees. For example, Byron (1993) considered elites to be 'more relaxed,' often taking the view that their opinions need no recording whatsoever. Peabody et al. (1990) agreed with this observation of elite

reluctance to be recorded, but interpreted it as meaning that the elites prefer to talk 'off the record' without any recording device being used during interview sessions. These possible obstacles to voice recording were largely avoided in undertaking this research project, as the participating elites had already given written consent to proceed with recording. Nevertheless, one elite interviewee did decline to be recorded at the last minute. On this occasion, the researcher (of course) had to respect the request and use pen and paper to record their input during the session.

To close with a consideration of research ethics, the interview structure was approved by the *Research Ethics Committee* of the *College of Arts* at the *University of Glasgow* prior to leaving for Kuala Lumpur (the relevant ethics approval document can be seen in Appendix A below). Before leaving the interview venue, and for the purpose of keeping systematic records, every elite interviewee was asked to complete and return a signed ethics consent form (see Appendix C). As a gesture of gratitude and after-care, emails were sent to the elite interviewees expressing my appreciation of their willingness to spend time assisting with the research study. Thereafter, as is considered best practice with all types of social research interviewing, a complete transcript of the interview was emailed to each elite interviewee, to ensure that every recorded statement was agreeable to them and suitable for use in generating the findings of this research.

In-Depth Interviews with Industry Figures

To initiate interview sessions with the rest of this study's interviewees, they were contacted via email, with the details of the study attached for perusal. The potential interviewees were approached by the researcher; some were gathered from the researcher's pre-existing social network in Malaysia. Prior to sending out formal emails inviting their participation (see Appendix B), the researcher compiled a list of potential interviewees by conducting online research to ascertain the interviewees' contact details, their career backgrounds, and their roles within the institutions they were employed by. I followed up on those invitees who did not respond to the initial request for participation by sending a first reminder email after three days. Most of the time, the potential interviewees would respond after the first reminder. However, some potential interviewees did not reply to the first reminder email either. I would then send a second reminder email to refresh the invitation. If there was still no response after the second reminder email, the individuals were recorded as uninterested interviewees and their names were replaced by other potential interviewees with a similar background in the television industry. Other than by email, some interviewees were approached via social media, such as Facebook. The majority of individuals approached in this manner were already part of the researcher's own social media network. Potential interviewees who were approached through the social media route, and who agreed to participate, were offered the choice of receiving further details on the research project by social media or email.

Once an individual had agreed to participate, I emailed them a complete outline of the research project, providing a comprehensive overview of the research focus and research questions. In this way, the researcher ensured that each interviewee was fully aware of the research topic and prepared to express themselves on that subject during the face-to-face interview session. In some cases, I was also asked for a full outline of the interview session format, which I provided (including a thematic overview of the questions to be asked).

All in all, the procedure of selecting, approaching and confirming potential interviewees took approximately three weeks to complete. I was able to undertake this process while still in Glasgow, before flying to Malaysia in July 2016 to conduct the fieldwork itself. In this way, I was able to maximise the efficiency of my available research time in Kuala Lumpur. Other essential preparations were completed well in advance of my departure for the research field. Among a number of Important items developed during this preparatory phase, I compiled a comprehensive interview checklist to ensure that each interview was conducted in the same manner, and that every necessary element was completed. Items on the checklist included: All of the related forms (such as the ethics consent form), key policy documents and publications to bring along, the interviewees' contact telephone numbers and email addresses, reminders for myself on the technical preparations required for the interview session, a record of funds allocated for travel to the interview site, and travel plans. This interview checklist was an invaluable tool in ensuring that the research was conducted in a thorough, professional and systematic manner.

Moving on to discuss the process undertaken during each interview session in greater detail, at the beginning of each session, interviewees were informed about the voice recording, and were told that it would continue throughout the whole interview session. Consequently, it became a routine for the researcher to discuss the recording process and ask the interviewee's permission to record the session. On top of that, small conversations were initiated by the researcher to ensure that every interviewee was in the most comfortable position, and a fairly relaxed but alert state of mind, before proceeding with the session. In these ways, I took the opportunity to use 'ice breaker' strategies at the beginning of the interview session.[18]

The effort of creating a conducive interview session was challenging in some cases, since several interviewees were the representatives of government agencies. As mentioned earlier, some of these interviewees were reluctant to disclose or share their views and relied upon quoting from government publications only in delivering answers. The researcher therefore had to carefully modify certain questions to reassure the interviewees that every single input was meant for research purposes only. Another – although not entirely unrelated - challenge arose from the specific reluctance that some interviewees had expressed around being identified. For this study, two interviewees were eager to contribute to the research, but had refused to be identified by name if they were to do so. To acknowledge this need to protect the integrity of the research process, I therefore granted both interviewees their requested privacy and anonymity for the purpose of developing trust, establishing good rapport

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[18] 'Ice-breakers' can be defined as a set of opening questions or discussions which are intended to create the most conducive atmosphere prior to the formal interview session beginning.

with them, and coming to a realistic representation of the range of different views on the media industry in modern Malaysia (Baez, 2002).

In doing this, I found it vital to discuss information confidentiality with all of the interviewees prior to their scheduled interview (Crow et al., 2006). A firm agreement was made with both anonymous interviewees, assuring them that 'all identifying characteristics, such as occupation, city, and ethnic background, will be changed' (Sieber, 1992, p. 52). Therefore, I used this opportunity to explain and emphasise protocols of data confidentiality and identity privacy before the official interview session started. In terms of quoting relevant materials from the interviews with non-anonymous interviewees, the thesis includes relevant details, such as their name, position, and year of the interview. These details allow us to connect the interviewees' background with the discussed themes. Each of the interviews with figures in the television industry lasted between twenty and forty minutes. Interviews were all recorded with a voice tape recorder, and more than sixteen hours of actual interview duration with interviewees were recorded between July and September 2016. In total, the researcher spent nine hundred and sixty hours transcribing, translating, managing and analysing the data derived from these recorded interviews.

The interview structure begins with general questions on the development of online television content for mobile platform in Malaysia, before moving on to explore interviewees' personal experiences in dealing with television content delivered on mobile platforms. The questions later extend to explore interviewees' opinions and views regarding television content on mobile platforms, before ending the session with questions on the implementation of

policy relating to online television content distribution. The researcher reminded interviewees that every session would be transcribed in full, and a copy of the transcript would be sent to them. In this way, every interviewee has been given the opportunity to revisit what was said in the session, to reconsider it with the benefit of hindsight, and to request removal of any part that they should not wish to be included in the thesis. For the record, I should state that none of the interviewees was reluctant to share their input, and all were content and open about being quoted in the research thesis.

Before concluding each interview session, the researcher would express gratitude to all interviewees for their cooperation and contribution. Interviewees were later asked to suggest other potential interviewees who might also be able to contribute an interview for the research fieldwork phase (this is sometimes termed a "snowballing" technique). Finally, all interviewees (including the two who wished to remain anonymous) were asked to sign the research ethics consent form, which had already been approved by the *Research Ethics Committee* of the *College of Arts* at the *University of Glasgow*. After concluding each interview session, I also took the initiative to write and send an email of appreciation and gratitude to all interviewees within twenty-four hours. These emails thanked the interviewees for their willingness to join the research process leading to this thesis, and expressed appreciation of their opinions and views with regard to this research topic.

Focus Groups

Moving on to explore the second principal format of data collection employed in this study, focus groups were used to reveal the perceptions and opinions of personnel from television stations and internet providers with regard to the state of online content in Malaysia. They also uncovered focus group participants' interpretations of current developments in distribution of online television content on mobile platform by television stations. Focus groups can be defined as guided collective sessions that are both managed and fully monitored by a researcher (Morgan, Krueger and Scannell, 1998). Incorporating focus groups into the doctoral research project helped to provide greater detail and brought several advantages. For instance, the use of focus groups enabled me to identify some issues that were not raised in one-on-one interviews but came to the fore in collective discussions (Kitzinger and Barbour, 1999). By viewing videos together or setting a range of standard questions for discussion among the focus group participants, a focus group format can also generate a rich understanding of focus group participants' experiences (Bloor et al., 2001). For example, many detailed reactions can be identified during the more interactive engagements that occur in focus group sessions. It is very interesting to observe each focus group participant's attitude, feelings, belief, experience, and reactions in the very natural manner of conversation.

Nevertheless, the focus group method is employed in a carefully organised setting and should only occur in a specifically controlled collective mood which is explicitly not natural or spontaneous (Gibbs, 1997). The main aim of incorporating focus groups into the doctoral research was to thoroughly explore

the direct responses of industry practitioners to the new directions taken by television stations in expanding their content distribution through new platforms. As this discussion of new platforms was primarily concerned with mobile platform, the focus group sessions provided information on how focus group participants would retrieve online television content, and how they perceived such viewing experiences. Considering the significant time and financial cost involved in conducting them, only two focus groups were conducted during the field research leading to this thesis, with twenty focus group participants in total.

Both focus group sessions were conducted in Malaysia, and in the Malay language. Both focus group sessions took place at Meeting Room 1 of the TM Tower in Kuala Lumpur on August 19th and 20th, 2016. Fern (1982) suggests that the number of focus group participants in each focus group can vary from four to fifteen participants without the research methodology losing its operational efficiency. Kruger and Casey (2000) note that it is widely agreed that six to eight focus group participants offer the optimum number of interacting viewpoints. In this respect, I believe that significantly larger focus groups will not necessarily provide meaningful new insights. With regard to gender-balance, ten male and ten female focus group participants were involved in the two sessions. Each focus group included an even mixture of five female and five male focus group participants. The researcher did not encounter any issues in gathering the focus group participants for these two focus groups, as many people were keener to be interviewed in a group rather than undergoing a one-to-one interview. When asked, most of the focus group participants stated that they felt more comfortable in a larger group. Furthermore, several also expressed the opinion

that it felt more correct to disclose a shared complaint than individually in a private one-to-one interview. As a result, the anonymity component was given special attention, and all information acquired during these two focus group meetings will be kept strictly confidential. The majority of focus group participants were drawn from the list of candidates for one-on-one interviews. The method of recruiting focus group participants began with the identification of potential participants based on their prior experience with online television content development and dissemination. As a result, one of the key criteria for selecting focus group participants is their tenure of work. The official invitation arrived in the form of an email. Sixteen of the twenty focus group participants came from the original one-to-one interview list who were hesitant to be interviewed alone. The four remaining focus group participants were suggested by one-on-one interviewers during earlier sessions. Those four focus group members were invited using the same procedures, with secrecy and anonymity being prioritised (See Appendix F).

Before I conducted these focus groups, clear procedures particularly on confidentiality had been established to provide each focus group participant with guidelines to the whole process. Participants in focus groups were reminded that some general information, such as age, sex, and job title, would be used in the study document without revealing their full names. The focus group session started with my welcoming each of the focus group participants, explaining the research objectives of the session, and highlighting the core research questions of the thesis. Next, all focus group participants were asked to complete the informed consent form and reassured verbally that their identities would remain anonymous. This is done with the same consent form that was used for the one-

on-one interview. The researcher moderated and facilitated the group discussion throughout, ensuring that every focus group participant had a fair chance to express their opinions. Each session took approximately forty to sixty minutes to complete. The questions presented to the focus groups were framed in an open-ended way to give the group greater opportunities for deeper engagement and freer expression amongst all focus group participants. The structure of the questions was developed to reflect the key research problems of the project. Their main focus pertained to focus group participants' perceptions of online television content distribution; the issues and obstacles relating to online viewing; and patterns of online television content consumption on mobile platforms. Even though each of the questions had been formulated to lead the focus group participants' discussion to explore a specific direction, one of the great strengths of the focus group methodology is that their responses often led other themes to emerge during these sessions, and these were certainly not ignored by the researcher. All discussions were audio recorded.

Transcription and Translation

All face-to-face interviews and focus groups sessions were conducted in the Malay language. Although all interview sessions were conducted in the Malay language, all questions for the in-depth interviews and focus groups had been prepared and written in English. During all sessions, both languages were used, as the researcher would read out the questions in English first and then proceed with the discussion in Malay. During each session, several interviewees and focus group participants used English vocabulary in the discussions to express their opinions. The usage of English words during these sessions did not conflict with

the whole process of interviewing. In fact, it provided freedom for the interviewees and focus group participants to express their opinions in the most comfortable way. In doing this, my aim was to provide each interviewee and focus group participant with the freedom to express their opinions in their native language.

While this certainly provided more freedom for the interviewees and focus group participants to express themselves naturally and fully, this of course meant that the researcher had to expend a great deal of time transcribing and then translating the oral conversations into comprehensive texts in the English language. This was one of the most difficult and time-consuming tasks of the entire research project, as "the level of transcription should complement the level of the analysis" (Drisko 1997, p. 190). Providing a comprehensive in-depth description of the knowledge, attitudes, values and beliefs of a group of individuals leads to a greater number of lengthy units of text (Harvey, 2015). All of the interviews and both focus groups were transcribed into English by the researcher. While this process was undeniably very laborious, it provided me with an opportunity to enhance and refine my critical reflections obtained during the interview sessions themselves. In fact, the transcription process provided me with an initial analytical phase before proceeding to more thorough analytical processes. This is explained further in the next section.

After the completion of transcription, a copy of the complete transcript was emailed to each of the interviewees and focus group participants for checking and approval. This ensured that every part of the transcribed conversation was considered a valid reflection of their opinion by the interviewees and focus

group participant, and that the content could therefore be used to develop understandings which answer the research questions. In doing this, it was also important to consider the interviewees and focus group participants' emotional reactions, bodily gestures, tone of voice, and repetition of words. Overall, the researcher found that the translation of the data collected from in-depth interviews and focus groups was extremely challenging. In particular, the researcher had to take great care to eliminate potential bias in this process, by detecting different contexts of meaning being used by different interviewees and focus group participants – a factor which can be highly influenced by language and socio-cultural elements (Chen and Boore, 2009; Esposito, 2001; Squires, 2009; Temple, 1997; Temple and Young, 2004; Twinn, 1997). For example, I took great care to avoid getting entangled in debates around the use of some terms in Malaysia, such as *mobile television* or *media events* - particularly when interviewees and focus group participants were making a direct connection between digitalisation and its contribution to online television content viewing. From the researcher's observations, all terms were used in the sense conventionally employed by the country's media practitioners. Nevertheless, all of the relevant terms were clearly defined and explained at the beginning of each session, so it can be inferred that the interviewees and focus group participants adhered to this understanding during the sessions.

On the other hand, even though Malay is also the researcher's native language, coming to a resolved single meaning for an interviewee and focus group participant's statement was not always as easy as it might seem. There were several occasions upon which I had to reconnect with the interviewees and focus group participants by email, in order to clarify their opinions and feelings during

the sessions. As a result of this further dialogue, however, clearer meanings were constructed which helped the researcher to identify crucial elements for interpretation. The need to convey meaning from the interviewees and focus group participants' perspectives is central to this phase of data processing. In doing so, the researcher must ignore their own personal judgements while translating, in order to access meanings based on the interviewees and focus group participants' experience and voices (Van Nes et al., 2010; Wong and Poon, 2010). This was a critically important stage in the process of interpretation, as my translation needed to be as close as possible to the meanings conveyed by the original data.

Data Management and Analysis

Once all of the original research data was collected through the interviews and focus groups, it was time to organise that data through the development of a coding procedure which would build a bridge to the interpretation of meaning (Charmaz, 2005). The aim was to develop a comprehensively organised set of outputs based on the project's research questions, by categorising processes to create a relationship between the interviewees and focus group participants' statements and the research study's particular areas of focus (McCracken, 1998). To extract responses related to online television content on mobile platform, I establish a strategy of identifying strongly relevant text. This was simply done in three steps. To begin the process, it was first necessary for me to read all of the transcripts and build a preliminary understanding of their content. Next, it was useful to eliminate any irrelevant content, before moving on to the final step of categorising the text.

The first stage of the process had given me an opportunity to develop an initial system of *coding* categories for the data (Charmaz, 2014). From the perspective of generating research findings, this *coding* phase is a very useful step, as it leads the researcher to subdivide and classify all of the gathered data into a set of categories, and to expand that set of categories where new themes emerge in the classification of the data related to online television content distribution for mobile platform in Malaysia (Dey, 1993). By linking constantly repeated ideas through this coding process, the researcher labelled and dispersed the interviewees and focus group participants' phrases, sentences and paragraphs into specific categories. I found that this demanding process was most successfully completed by pooling all of the segmented data into large-scale categorisations first, before carefully segregating them into major themes. In doing so, the researcher was particularly sensitive to words or phrases that strongly conveyed approval or disagreement in the interviewees and focus group participants' responses, and this was cross-checked by careful comparison with my handwritten interview notes, and by replaying the audio recordings. This process resonates with Delamont's (1992) statement that there are no shortcuts to be taken in the process of analysing qualitative data, as it demands a substantial amount of time and energy.

Subsequently, I undertook a thorough analysis of the themes that emerged from each category. The term *theming* represents a critical process which creates specific themes that represent the data gathered from interviews and focus groups through the collecting together of interviewees and focus group participant quotations. In this way, we derive themes from the transcripts, which are therefore both the source of the researcher's interpretations and support

them with empirical evidence. Through this process of data analysis and theming, I was able to develop the key structural features of the thesis's findings chapters, including determining their section headings and sub-headings. Once this thematic structure was determined, other coding elements, real-life examples given by interviewees and focus group participants in the transcribed interviews, and my own research interpretations, were added in to elaborate upon the meaning of those themes. Each analysis of categories and sub-themes was then integrated with my reading of the scholarly literature to support, refine and interpret my original research data, as well as the arguments and discussion in the next three chapters of the thesis. Finally, this chapter may not be complete without touching on questions of validity. In this respect, Miles (1979) pointed out some of the major validity issues that trouble a qualitative approach:

> The most serious and central difficulty in the use of qualitative data is that methods of analysis are not well formulated. For quantitative data, there are clear conventions the research can use. But the analyst faced with a bank of qualitative data has very few guidelines for protection against self-delusion, let alone the presentation of unreliable or invalid conclusions to scientific or policy-making audiences. How can we be sure that an 'earthy', 'undeniable' 'serendipitous' finding is not, in fact, wrong? (Miles 1979, p. 590).

Although this statement was made more than forty years ago, it remains relevant today. The researcher needed to ensure that aspects of 'self-delusion' were reduced, as it is a natural human tendency to form early subjective judgements during the research process, prior to the outlined phases of transcription, coding, theming and careful interpretation that produce a conclusive and representative set of findings. While a qualitative approach to research is inevitably subjective, and its findings are always open to criticism,

the systematic and methodical approach taken here offers the best route to coming closest to an even-handed, objective perspective. To achieve this aim, the findings presented in this thesis were generated under the strictest possible guidelines on the application of qualitative methodologies – guidelines which aim to make research findings as relevant as possible to the general population of the research setting.

Conclusion

This chapter has provided an overview of the qualitative methodological approaches used here to explore the development of television content on mobile platforms in Malaysia. It has explained the research design and research methodology; the design and execution of the research fieldwork; and the processes of data analysis, coding and theming used to come to the findings that follow. In the early parts of the chapter, I examined the rationale underpinning the adoption of a qualitative research method for investigating the impact of online television content on mobile platforms, and mobile platforms on online television content. There, I emphasised the potential of qualitative methods to reveal a more accurate, complex and person-focused set of results than can be achieved through quantitative surveys and market research alone.

Thereafter, I discussed my decision to separate my interviewees into two categories. Firstly, I elaborated on the interviews with ten members of the governmental elite, who hold reputable positions in the Malaysian television industry and are "highly skilled, professionally competent, and class-specific" (McDowell, 1998, p. 2135). Secondly, I provided an explanation of the preparations and processes involved in interviewing the industry-based

interviewees. All aspects of interview sampling, conducting the interviews, and the overcoming of various obstacles have been discussed. As I have mentioned, one-to-one interviews with the representatives of some government agencies featured an issue of details only being shared when they portrayed the positive efficiency of government policies. As a result, the researcher was obliged to use creative ways to ensure that relevant data input could be retrieved from the interviews. Overall, this creativity and use of open-ended questions was an effective approach, even though the researcher had to invest more time and energy in developing such strategies to encourage a deeper engagement by the interviewees. My discussion of dealing with focus group interviews revealed the practicalities involved in organising each session, as well as highlighting some relevant aspects of the focus groups that can enhance this thesis. It is interesting to note that the focus group format created a more conducive research environment among focus group participants, in a social context where many were reluctant to participate in a one-to-one interview.

Another important methodological element of this research was its use of the Malay language as the research medium. Although all questions for in-depth interviews and focus groups had been prepared and written in English, the Malay language was used in all sessions. Naturally, this decision was made for the sake of offering comfort to all interviewees and focus group participants. As a result, interviewees and focus group participants were less hesitant in sharing their opinions; this significantly boosted their engagement rate, particularly in the focus groups. Although the manual translation process from Malay to English undertaken by the researcher was extremely time-consuming, I believe its value can be seen in the analytical findings that follow.

Chapter Four: Findings

Inconsistent Development in the Malaysian Television Industry Despite Advancements in Global Technology

The previous three chapters presented the research background, the two-part literature review on the global online content distribution via mobile media and its impacts on the Malaysian television industry, and the methodological approach of this thesis. This is the first chapter that presents the key findings from the face-to-face interviews and focus groups with key media professionals in Malaysia. The interviews and focus groups aimed to determine the nature of the new directions that the Malaysian television stations are taking in distributing their online television content on mobile platforms; and to determine which factors are shaping the television station's level of preparation and execution of platformisation. This chapter specifically addresses the project's first research question:

To what extent does the global television industry influence the nature of content distribution by local television stations in Malaysia?

This question was specifically constructed to investigate the recent trends in distributing television content by examining the evolution of online content in Malaysia and the role played by the television stations in adapting to new distribution strategies.

As I highlighted in Chapter Two, the Malaysian media are currently moving in a new direction with the arrival of new technology which enables television content to be streamed on other platforms. Furthermore, external factors such

as the positive global reaction to mobile platform development within the television industry have led Malaysian television stations to take internal decisions that it was necessary to keep pace with these new technological solutions. Following the introduction of mobile streaming (MCMC, 2016), Malaysian television stations decided to embrace these new strategies of content distribution on mobile platforms. The following analysis builds on the background knowledge provided by the general overview given in previous chapters to investigate the new directions taken in television content distribution, and to identify how television stations are responding to changes in the government's broadcasting policy in a repressive and regulated environment.

To equip the reader with a comprehensive understanding of the Malaysian media environment, this chapter begins by describing the structure of television stations and providing an overview of content management within them. The structure of the Malaysian media is explained by focusing on the relationship between the state and the local television stations. By mapping out the government's philosophy and motives in regulating television content, we are thus able to establish its contextual involvement in the distribution of television content. In this way, identifying the role of television in Malaysia's multicultural environment can provide us with insights on how television stations function.

The analysis here then moves on to explore the major themes that emerged during the fieldwork phase of data collection with key media personnel in the television industry. The themes are presented in two sections. The first section discusses themes surrounding television stations and their new direction and includes interviewee's' perceptions of the social roles of modern television. The

second section is devoted to presenting and analysing the emerging theme of television content delivered through streaming services. It mainly focuses on the challenges that television stations face in creating content for new online platforms. Finally, this chapter wraps up with a conclusion.

Content Management Within Television Stations

Media research has shown that the broadcasting of television content plays a significant and important role in cultural nation-building, as well as reflecting the nation's durability in the face of global technological changes (Hassan et al., 2015); as technology changes, so must the broadcasting representation of the nation change to reflect modern realities. Within the context of Malaysian media broadcasting, Sani (2020) argues that television also plays a unique and critically important role in demonstrating the people's level of freedom by disseminating content to the public. According to Aziz (2019), at the beginning of Malaysia's broadcasting history, radio provided an example of *guided broadcasting* – containing persuasive messages from the British colonial state during Malaysia's pre-independence era. From the viewpoint of the involvement of the authorities, Sulaiman (2018) explains that the British saw the role of both public radio and television as instruments of public persuasion; as a vehicle via which the government can transmit policy-related information as well as other types of content such as entertainment and education, with a major focus on establishing racial harmony amongst Malaysia's various ethnic groups.

Malaysia's multicultural background was lavishly influenced by its colonisation by the Portuguese, the Dutch, and the British; each period of occupation

contributing to the nation's multiple layers of social structure, culture, and lifestyle. According to Willnat et al. (2013), the three major ethnic groups were clearly divided on the basis of their economic roles: Malays were normally involved with governmental administration; the Chinese were actively involved with economic activities; and finally, the Indians were less developed and economically disadvantaged, often working in manual labour. In terms of how these ethnicities engage with television these days, a dedicated channel has been established which broadcasts using each ethnic group's native language. For instance, TV3 largely focuses on content for Malays, while 8TV and NTV7 are home to Chinese content (Firdaus, 2006). Despite these dedicated channels, the Malay language remains the country's official language, even to those who speak English (Izzudin, 2018, as cited in Leong, 2018).

Despite the fact that the media plays a massive role in cultivating and promoting the assimilation of Malaysia's different peoples into a multicultural society, it is undeniable that television in Malaysia is strongly influenced politically by the government (Harris and Han, 2020). Discussed in earlier chapters, this practice has led to a double standard in media governance practices, which allows monopolies to exist in media ownership (Ali and Manan, 2020)[19]. For the record, it should be noted that the current television industry does not practise this type of monopoly, but it is common knowledge that monopolies were rampant among the Malaysian television stations during the mid-1990s (Syed Agil, 2016).

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[19] What is happening in the Malaysian television business, on the other hand, is an oligopoly market structure where a small number of major firm engage with one another, compete, and control a significant amount of the market (Ishii, 2021). Nonetheless, the establishment of conglomerate companies such as Media Prima Group has altered the Malaysian television landscape market structure. Through their networks like as TV3, NTV7, 8TV, and TV9, Media Prima Group takes advantage of every opportunity to broadcast every television programme in the country. This resulted in the creation of a monopoly in the free private television market.

Nevertheless, one of the interviewees disagreed that the phenomenon of monopolies has disappeared:

> There are always monopoly practices in Malaysian media. One thing is for sure, it comes in different forms. Nowadays, television content is controlled by hidden hands within the television stations and it is totally political (Anonymous, Former Television Producer A, interview with author, July 2016).

This response reflects what has happened within the government's television station, *Radio Televisyen Malaysia* (RTM). Recent years have been considered a bad period for all local television stations (Dawam et al., 2015), particularly regarding how the production of content, such as drama, has been treated (Muneer and Munir, 2020). The government's broadcasting stations, like RTM, have not been immune to this issue. Previous regulations in Malaysia allowed for media monopoly merely because the government owned the single national television channel, RTM 1, originally known as Rangkaian Satu, which was established in 1963. (Kee et al., 2015). Today, for instance, a bias can clearly be seen within the allocation of broadcasting slots and the purchase of content by government-owned television stations (Dawam et al., 2015). The introduction of a tendering system for content by RTM clearly favoured selected production companies; other production companies had to compete to pitch their ideas, but their efforts were wasted (Loh, 2019). As a result of this bias, television content broadcast on RTM is less creative due to the absence of a truly competitive element in commissioning.

Whilst this happens openly on government-owned television stations such as RTM, a similar scenario also takes place on the private stations belonging to *Media Prima* (Dawam et al., 2015). The establishment of *Primeworks Studios* as a subsidiary of Media Prima enabled them to produce their own content

consisting of programmes and telemovies for broadcast on all of the networks owned by the main company Media Prima: TV3, NTV7, 8TV, and TV9 (Media Prima Berhad, 2017). Therefore, all activities such as content creation, distribution, and broadcasting were totally dominated by Primeworks[20] (Alavi and Azmi, 2019). There is an obvious direct impact of content monopoly within Malaysia's television stations. For instance, Media Prima has managed to attract the largest share of television viewers (47 per cent) and has become the most influential private television company in Malaysia[21] (Dawam et al., 2015). If we put aside the issue of content-production monopolies, however, it is a surprising fact that TV3 has managed to secure the status of the most-watched private network in Malaysia *specifically for* its liberal approach to content delivery. Furthermore, TV3 has ignored and violated most of television content broadcast code, resulting in a slew of lawsuits[22]. Ironically, these violations of government regulations occur continuously without the government taking any legal action, due to the station's strong political influence[23].

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[20] Primeworks Studios Sdn Bhd (Primeworks) was founded in August 2008 and quickly rose to the top of the content production for television sector, producing more than 5000 hours in a single year, making Primeworks Malaysia's largest production company (Dawam et al., 2015).

[21]In terms of viewership, Media Prima TV Networks attracted an average of 1.5 million people per day in the first quarter of 2020.
(Source:http://www.insage.com.my/Upload/Docs/MEDIA/IB%20presentation%20Q1%202020_Final%20210520.pdf).

[22] For example, after broadcasting a defamatory news report linking opposition leader Anwar Ibrahim to the Lahad Datu intrusion in Sabah in 2013, TV3 was ordered to pay RM1.1 million in damages to Anwar Ibrahim (Bernama, 2018). The narrative was based on a report from Utusan Malaysia (a print publication owned by the Media Prima group), which acknowledge that the item was untrue and defamatory to Anwar and agreed to pay him RM50,000 in damages and issue a statement of apology. Despite this, TV3 and Shaharudin Abdul Latif, the then-Managing Director of Media Prima Bhd and Current Affairs Radio and Television Group, refused to settle the lawsuit, claiming that TV3 was acting as a responsible news distributor because the news was retrieved from international media and that no effort was made to harm Anwar's reputation. On May 3, 2021, the Court of Appeal allowed TV3 and Shaharudin's appeal to decrease the cost of damages to RM600,000 (Ikram, 2021).

[23] The government turned a blind eye to the Media Prima group and other media outlets under their control since the group displayed a double standard in news reporting and (repeatedly) favoured the government's agenda, which centred primarily on its manifestos and policies. When engaging with the public, the Media Prima group strives to convey to viewers or readers the picture of a clean, competent, and always positive and professional administration government. On the other

This explains why the term "monopoly" no longer refers to a single corporation (Dawam et al., 2015). Even in a market that is perceived to be "open," the presence of two enterprises (duopoly) or a small number of companies (oligopoly) can result in a monopoly. Friedman (2016) defined monopoly as; when a single person or firm (enterprise) has sufficient control over a certain product or service to dictate absolute conditions. Even if there is another person or company who can absolutely attend or participate at the same moment. However, due to monopoly, only the corporation with the most control (power) can set the terms. Bowles and Edwards (1985) also said that monopolistic power exists when a corporation or a group of firms can push out the competition.

While monopolies are generally understood to be detrimental to industry and the public good, it's worthwhile to acknowledge that the Malaysian television industry's monopolistic policies have helped television stations in some ways: both government and private television stations can control the supply and the price of content production (Sulaiman, 2018). For instance, the buying price to air an hour of television content on TV3 is between RM80,000 to RM85,000, whilst RTM's buying price is only slightly higher and starts from RM90,000 to RM100,000 (Itar, 2012)[24]. Despite the comparable but slightly higher sale value

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hand, the opposing manifesto or political convictions were perceived as less productive, racist, divisive, rioters, unpatriotic, and received negative media coverage. These messages were carefully crafted in a persuasive manner and broadcast on a range of programmes (such as chat shows, documentaries, and so on), including prime-time news programmes. Surprisingly, government-owned television stations, RTM, used a more balanced tone and unbiased perspective, despite their support for the government's policies. Other independent newspapers, such as China Press, Sinar Harian, and MalaysiaKini (Malay edition), have similarly refrained from employing a negative tone and controversial manner (Venkiteswaran, 2020).

[24] Gobind Singh Deo, the current Minister of Communications and Multimedia, announced new updated procurement prices that would take effect in April 2020. He added that telefilm rates have climbed by 20 percent to 60 percent, while drama series rates have increased by 30 percent to 60 percent. The rate for documentaries ranged between 10% and 30%, while animated programmes saw a 30% increase. The RTM rate for a 30-minute drama is RM23,000, for a drama with an hour-long episode is RM43,000, and for a telemovie is RM110,000. In contrast to RTM, TV3 may be able to provide a lesser rate of RM95,000 per telemovie. (Source:

offered by RTM, the majority of production companies prefer to sell their content to the private network TV3 due to its significantly higher viewing figures (Munirah, 2019). Another dimension of television content monopolies concerns premium or pay-per-view content, and I will examine those issues further in the next chapter.

The issue of content production monopolies is part and parcel of the Malaysian television industry, which is currently worth RM 400 million (PriceWaterhouseCooper, 2019). Compared to the feature film industry, ninety percent of Malaysian content producers depend primarily on the television market, due to the lower business risks involved. Historically, the dominance of the television industry has been the main reason that Malaysia's cinema industry has progressed very slowly (Alavi and Azmi, 2019). In general, Malaysian households can afford a television set. Viewers can effortlessly enjoy various kinds of content at home, usually free at the point of consumption. At the same time, the cinema industry depends on good casts and production to attract movie-goers out of their homes on special occasions to increase ticket sales, whereas television is considered a daily family entertainment medium. As a result, the Malaysian cinema industry struggles financially to produce high quality films and struggles to recoup the production investment in general (Hon and Yen, 2019). For instance, Malaysian films produced in 2014 had an average production budget of RM1.2 million each (FINAS, 2014, as cited in Dawam et al., 2015), but 30%[25] of those films experienced losses at the box office (Aznam,

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https://themalaysianreserve.com/2019/12/20/govt-urged-private-tv-stations-to-revise-rates-to-stay-in-the-game/.)

[25] Authors' own calculations based on data from FINAS for Local Feature Films 2012–2020 (Source: https://www.finas.gov.my/en/industry-information/cinema-admission-by-language/).

2017). Thus, many production companies cannot rely on cinema film production due to this uncertainty in returns on their investment.

In contrast with the film industry, the market for pay television content distribution[26] is more promising, with eight free television channels, and a further 170 channels offered by the country's sole satellite television broadcasting company, *All-Asian Satellite Television and Radio Operator* (ASTRO). Besides ASTRO, the major internet service provider *Telekom Malaysia* Bhd. (TM) also owns several television channels on their *HyppTV* service, an Internet Protocol TV (IPTV) service. According to Jurey Latif Rosli, President of the Malaysia Television Producers Association (PTVM), approximately 752 productions companies were actively producing content for local television stations in 2011, but they were struggling to sell their content to Malaysian television stations and were losing money as a result (Abdul Rahman, 2012 as cited in Dawam et al., 2015). That number had more than doubled by 2012 (Rosli, 2015 as cited in Dawam et al., 2015) and according to the recent data from the Malaysian Communications and Multimedia Commission (MCMC)[27] as of 2020, there are almost 1000 legally recognised production companies[28] that constantly produce content.

Despite this enormous variety of both television networks, and content producers, however, content producers in Malaysia have struggled to sell their

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[26] The Malaysian pay television business is classified as an oligopoly market, with only a few service providers (Dawi et al., 2018). As a result, clients are more inclined to continue with their current service provider, regardless of their level of satisfaction.

[27] Source: https://www.bharian.com.my/hiburan/selebriti/2021/06/823759/hanya-10-peratus-daftar-keahlian-ptvm.

[28] These production companies work on a wide range of projects for television stations and corporate clients in Malaysia. For example, a television commercial, corporate video, talent scout, animation, and so forth.

content because the market in television content itself is beginning to shrink (PriceWaterhouseCooper, 2019). The most logical explanation for this unusual scenario is that situation discussed above: Content management monopolies. This is a strong sign that the time is right for television stations to revamp their linear broadcasting and content commissioning methods, because telecommunications convergence has created a new field of content delivery opportunities in television broadcasting (Isa et al., 2019). Due to technological advancement, the dissemination of television content via the internet has increased content mobility, but the opportunities created by this mobility must be capitalised upon in order to benefit the industry as a whole. While the vast potential of the internet for disseminating television content is obvious, there is a need for thorough revision of the regulatory frameworks to ensure the existence of fair content distribution in the market. The next section sheds light on how the Malaysian government has responded to the use of new technologies in television content distribution.

Malaysian Television Industry Governance

This section presents an overview of content management in the television industry, by linking the efforts of television stations to distribute content over the internet with the government's efforts to regulate the new and alternative channels of television content distribution. Despite various changes that have taken place within television stations' management and delivery of content for public viewing, the role of television in Malaysia remains largely traditional, with many aspects still waiting to be explored. For instance, the government's aspirations are still dispersed through the two channels on the government-

owned network *Radio Television Malaysia* (RTM), for which content is strictly controlled by the Ministry of Information (Dragomir, 2018). Therefore, RTM functions primarily as a medium for disseminating government information and policies.

Media practitioners are concerned about this development. For example, interviewees in this study stated that "we are now being brainwashed through television content" (Muhammad Helmi, Senior Officer, Customer Experience, TM, interview with author, August 2016), and that "television's role has never changed, and this is what the government wanted" (Najib Mohd Amin, Producer, Malay segment content in ASTRO, interview with author, July 2016). In fact, interviewees directly described contemporary Malaysian television as the government's tool for propagating its own ideology (Bjola and Papadakis, 2020). The "government still plays a big role in filtering content on television" (Muhammad Amirul Hafiz Rosly, Marketing Executive, Telekom Malaysia (TM), August 2016) with the aim to "force the general public to take the news on television as the truth" (Muhammad Hafidz Jaafar, Assistant Manager TM Sales Telekom Malaysia (TM), August 2016). With the arrival of alternative media, however, there is a tendency for interviewees to compare the representations on different channels, evaluate them and come to a conclusion of the truth based on the range of media they have retrieved the information from (Zimmer and Reich, 2018). Online content has rapidly come to be perceived as the most reliable sources of information (Seto, 2017). One interviewee put voice to a typical Malaysian experience in dealing with television content nowadays:

> I turn on my phone and search for the same information online. Sometimes I found different versions of the stories. I tend to doubt all news or information on the television, to be honest. (Marlina Adzmi,

Assistant Marketing Manager, Telekom Malaysia (TM), interview with author, August 2016).

She went on to say:

I watch television now and then, but just to pass the time. Sometimes it is on in the background when I do chores around the house. (Marlina Adzmi, Assistant Marketing Manager, Telekom Malaysia (TM), interview with author, August 2016).

It has become obvious at this stage, that the role which television plays in Malaysian society is limited by the government's involvement in controlling the content being broadcast by television stations as agreed by interviewees in this study. While television content continues to spark public debate, it is generally identified with the government's aspirations rather than the truth.

Gabriel (2015) attempted to rationalise the government's decisions and efforts to censor content as motivated by an aim to maintain a certain level of multicultural identity within Malaysian society. He suggests that the government considers multiculturalism to be an important national issue, and therefore that it feels responsible to ensure messages of multicultural unity are widely disseminated throughout the country. Nevertheless, multiculturalism is only one of several practical concerns demonstrated by the Malaysian government's censorship policy: Sinpeng (2020) highlighted that the government's attention to filtering messages from television content seeks to ensure that all broadcast messages contain information in line with national policies. Such actions are legal in Malaysia, and it is obvious that the government will continue to participate in controlling the content of television by legal means, by introducing relevant acts that will supervise the broadcasting of television content.

This chapter also examines another aspect of media control in Malaysia, particularly revolving around the form of television content. With regard to the regulation of media content, it can be observed that the station RTM was founded by the government as a national television station to solidify and exemplify a standard content broadcasting policy (Hassan et al., 2015). As an official government broadcasting department, RTM has always been committed to producing news content for the public. In 2009, however, RTM underwent a rebranding programme with the aim of becoming more diverse; since that time, it has offered a wider range of programme genres, including magazine shows, talk shows and documentaries. Over the years, RTM's content has shown Malaysians that the country's broadcasting policy was shaped by two major needs: Firstly, the need to provide deeper explanation of government policies that would ensure a high level of understanding among Malaysians; secondly, the need to create public reactions that would spark societal changes in line with the government's guidelines and requirements.

It has always been a huge challenge for the Malaysian government to implement such a broadcasting policy successfully. Nevertheless, the government quickly realised that a specific parliamentary act was needed to initiate this. Hence, the *Broadcasting Act* (1988) was passed by parliament, with the aim of enabling the government's involvement in ensuring that television content would be distributed according to global standards without compromising the expectations of local viewers. We can easily recognise that the introduction of such regulations was directly driven by the worldwide advancement of television content distribution technologies. As it became clearer over the 1990s that new distribution technologies had become the focus of change within the media

industry, the *Broadcasting Act* (1988) was revised and became the *Multimedia and Communications Act* (1998). Within the 1998 Act, the government placed tremendous emphasis upon television content distribution via satellite and free-to-air television, focusing on Direct-to-Home (DTH) subscription-based broadcasting and Video-on-Demand (VOD) Services.

Due to the unstoppable international development of television content distribution technologies, this act has been subsequently amended twice, first in 2002 and again in 2004. By doing so, the government has significantly increased the *Multimedia and Communications Act*'s power to assist in the transformation of the Malaysian television industry, in line with the new strategic directions in content distribution recently taken by television stations. It should be clear to the reader that the government's decision to regulate Malaysian media through the introduction of the *Multimedia and Communications Acts* (1998, 2002, 2004) has been strongly connected to the emergence of new television content broadcasting technologies. Further dimensions of this regulatory framework's impact upon the industry will be elaborated and critically examined in Chapter Five.

One aspect of Malaysia's broadcasting regulations that has never changed since their introduction in 1988 has been the government's legal authority to play a key part in the development of Malaysian television stations' broadcasting structures (MCMC, 2020). Therefore, every Malaysian television station must abide by the government's legal requirements to ensure that all of its content can be broadcast. One interviewee was clear that "in this scenario, we do not have other choices; we need to be responsible for our content" produced for

public viewing, so "everything we have produced was entirely based on government content guidelines" (Sofwan Mahmood, Group General Manager News Operations for Television and Radio Networks, Media Prima Berhad, interview with author, August 2016). The most important point to realise here is that all the television stations in Malaysia are aware that failure to comply with the government's content guidelines would mean that their applications to renew their operating licences would be rejected, and the station would face permanent closure (Latif et al., 2013).

Another way that interviewees viewed the introduction of the *Multimedia and Communications Act* (1998) was as a "very commercial" move by the government; that it was an "opportunity for the government to control media freedom" economically as well as culturally or politically (Abdul Mulod Zainal Abidin, Assistant Sales Manager, Telekom Malaysia (TM), interview with author, August 2016). This makes complete sense, as the Act undermines public awareness by preventing the broadcast of fair and neutral content, thereby attempting to imply positivity in all of the government's actions (Mustaffa et al., 2017). Ironically, some scholars have expressed consensus with the government actions. For example, Rezaldi et al. (2020) suggest that the act will function as a legal "do-and-don't" document in directing new transformations within Malaysia's television stations. While Rezaldi et al. (2020) attempt to rationalise the government's intervention as a positive factor, this perspective was not shared among the country's media practitioners themselves. One of the interviewees responded as follows:

> The objectives are still same, but they were upgraded to convince the media community on the need to regulate content on television. I

think that [the government] don't realise, or perhaps they forget, that the availability of new technology offers more opportunities for people to get content and it seems likely that television will soon be replaced. (Amir Muhammad, television /film producer, interview with author, July 2016).

The tone in this response illustrates a strong disagreement with the government's involvement in determining what material can or should be broadcast by television stations. It also strongly suggests that the government is attempting to control the media and to treat television as a tool for the delivery of propaganda (Zain, 2016). Such claims resonate with the public's view of television's traditional function during the era of its early development in Malaysia, where pro-government content was disseminated through television to promote greater trust in the viewing public (Loganathan et al., 2020). As a consequence of this government practice, the Malaysian public perceived television as a government-controlled medium which had given very little attention to what the viewers themselves desired to see.

This absence of widespread public trust in the government-owned television channels drives the subscription-based television channels, such as *ASTRO Awani*, to use a more balanced and objective approach in their news reporting; this boosts new subscriptions and allows them to compete with the government's Free-to-Air channels (Tapsell, 2013a). It was initially a very unusual experience for Malaysians to see ASTRO Awani's efforts to introduce neutral news reporting. However, the economic success of this journalistic strategy has managed to motivate other private television channels to follow suit – this time with the main intention of garnering viewers' attention, indirectly leading to better profit margins. For instance, *Media Prima*'s TV3 was once highly influenced by the government's political agenda. However, it has recently changed its internal

approaches to news editing, becoming more neutral by interviewing members of the general public for their opinions on certain issues within the country. This transformation towards more objective news reporting can only become possible when television stations in Malaysia are committed to undergoing internal editorial changes that will allow them to increase their profits, because they must act despite constant pressure from the government.

The scenario demonstrated in the case of TV3 has become a common means for television stations to increase their popularity among Malaysia's viewers. TV3 is now regularly viewed by more than 50 per cent of Malaysian households and has become the most watched television channel in the country (Selamat, 2018). However, new and different approaches to news content production also need to be paralleled by better distribution strategies. Despite the government's strict regulation, Malaysian television stations have the right to alter some aspects of their company policies to promote more profitable business models. In the next section, therefore, I present further details on the emerging new directions that television stations are taking to create more profitable ways of working.

New Directions for Malaysian Television Stations

By this stage of the thesis, the research has provided an overall perspective on issues of content production for television stations; the management of content production by television stations which leads to monopolies within the industry; and a comprehensive overview of the government's role in regulating Malaysian television content. Furthermore, the above discussion has openly explained why television stations have been treated in such a way by the government. Through the discussion laid out in the previous section, readers were introduced to some

aspects of freedom that television stations have in terms of decision making; the clearest of which is that television stations retain the freedom to make internal decisions for the sake of future development, and particularly in the pursuit of financial profit.

As profit-making is increasingly becoming a major aim in the television industry, the possibility of combining new technology with traditional broadcasting methods for television content holds the potential to enhance and change the future of television viewing in the country. This is the first theme to emerge from the data analysis when it comes to new technology in content distribution. As the role of mobile technology in television content distribution is still quite new in Malaysia, its emergence has sparked mixed reviews from the country's media practitioners. For instance, the streaming of television content still has not received enough attention by local television stations and remains under-developed; this has delayed the overall development of the local television industry.

According to Burhanuddin Md. Radzi (Managing Director at Les Copaque Production Sdn.Bhd.), the television industry should be more actively involving itself in pioneering new technological solutions for content broadcasting. As a prolific television content producer in Malaysia, Md. Radzi is also renowned for creating a popular animation series for local television. His animation product, *Upin and Ipin*, has won a variety of local and international awards, and has been sold internationally for viewing in several other South East Asian countries, such as Brunei and Indonesia. Regarding the technological advancement of the Malaysian television industry, he claimed:

> The television industry has to reform. All television stations should know, and think ahead, about embracing new technology. Content distribution is one thing; however, do not forget that television could be replaced with another medium if broadcasters are not proactive. Television stations need to understand their viewers and provide what they want in the most appealing ways. (Burhanuddin Md. Radzi (Managing Director at Les Copaque Production Sdn.Bhd., interview with author, July 2016).

In line with Burhanuddin's perspective, Zulkifli Mohd Salleh, Group General Manager of Group Corporate Planning, Media Prima Group, observed that the Malaysian television industry is currently at a critical juncture; it is in the process of creating a safe position for itself as the most influential medium in Malaysian society. New technology in content distribution should be a top priority in the industry's development policy, in line with Malaysia's digital policy aiming for the country to becoming a digital hub within the Asian region (MDEC, 2018). By putting technology on the development agenda of television stations, Nankervis, Connell and Burgess (2020) argue that the broadcasting industry can also be enhanced across the board. Clearly, there are no shortcuts to doing this; thus, television stations must develop and maintain a comprehensive knowledge of new technology and be fully prepared to embrace the opportunities it offers, in order to compete successfully in the global arena.

As I have emphasised elsewhere in this thesis, it is important to foster a widespread basic knowledge of accurate technological terms and concepts to avoid misunderstandings and ensure prosperous development without interruption. In relation to maintaining up-to-date knowledge on recent technological developments, the key personnel of television stations who are responsible for decision making should equip themselves with essential knowledge and become well-versed with technical terms, in order to see through

the jargon to the broadcasting opportunities. A simple example of the problems that can be avoided by this means surfaced during an interaction between the researcher and one interviewee, when the interviewee incorrectly equated 'online content streaming' with 'mobile television,' while the latter is a sub-set of the former. To ensure the success of the session, the researcher took some time to explain in detail the difference between the two terms, in order to stress the focus of this research. A failure to understand the technology surrounding the contemporary television industry can create significant delays in the industry's development in Malaysia. If television stations make plans without fully understanding the appropriate technological definitions, this will surely result in poor corporate decisions, as key activities in content distribution management, such as video streaming, fail to be fully understood and perceived.

Another interviewee stated that "it seems like our television industry misses the opportunity of new technology and somehow hesitates to adapt new technology" (Anonymous, Former Television Producer B, interview with author, July 2016). This statement resonates with the attitudes expressed by key television industry personalities, like Zulkifli Mohd Salleh. In fact, he was rather confident about the current direction of television stations in the country, as he convincingly expressed:

> We don't copy any system from other countries. We use trial-and-error approaches to establish this new platform for our station. We believe this is a new way of enriching the viewing experience in this country. (Zulkifli Mohd Salleh, Group General Manager, Group Corporate Planning, Media Prima Berhad, interview with author, August 2016).

A failure to embrace this positive attitude to new technologies is one of the factors that creates a massive gap between some other television stations and

the exploration of new technology in Malaysia. It is this reticence which has caused some stations to miss opportunities for expanding their content distribution effectively. Such a view was also expressed by Dave Rajah (Producer of ASTRO's Indian segment, interview with author, July 2016). Rajah explained that opportunities were being missed because mobile technology-based services were being offered to viewers without a cultural context or technological familiarity with online viewing: "Streaming is a new concept in television content delivery and a new worldwide trend, but we need more time to establish the culture."

What happens in Malaysia, according to the anonymous interviewees, is vastly different in a variety of ways. They continued to clarify the word 'different' by discussing relevant examples: "[The] development of the television industry in developed countries such as the United Kingdom was guided by clear guidelines from the government for its effective development, [leading to a] good impact on the economy in the long run" (Anonymous, Former Television Producer A, interview with author, July 2016). The interviewee was referring to the introduction of a comprehensive digital plan in the UK (Michalis and Smith, 2016). As a consequence of the smooth digital transformation in the UK, the BBC developed its platform *BBC iPlayer*, which is a prominent online platform and has set a global standard for online content services (Grainge and Johnson, 2018).

Various media practitioners in Malaysia have expressed doubts about the approach of television stations to adapting new technology in the content delivery systems. However, Sofwan Mahmood, Group General Manager of News

Operations for TV3, NTV7, 8TV, and Radio Networks at Media Prima Berhad,

offered quite a different perspective. Mahmood's career shows him to have a

very good track record, as it was he who took responsibility for revamping news

content for Media Prima Group's channels. Regarding the new opportunities for

enhancing content delivery, Sofwan explained that his network's decision to

offer online content to viewers was not sudden, but had been planned years in

advance. He stated:

> People talk a lot about mobile platforms in this technological age. As a leading television station in Malaysia, we are determined to give a great service to our audiences. However, more campaigns to raise awareness need to be run if we want to see second screen [viewing] adopted more widely. (Sofwan Mahmood, Group General Manager News Operations for Television and Radio Networks, Media Prima Berhad, interview with author, August 2016).

He also explained:

> [Delivering] News programmes on mobile platforms was the original plan, to give a credible impression of all news programmes from this station (TV3). We realised that more viewers tend to believe online reporting in comparison to traditional reporting. Moreover, they can view the content anywhere, anytime at their convenience. (Sofwan Mahmood, Group General Manager News Operations for Television and Radio Networks, Media Prima Berhad, interview with author, August 2016).

We can easily realise that Media Prima Group's decision to include internet-

based technology in news content distribution was taken in response to new

trends in content broadcasting and viewing that have changed the landscape of

linear television (Abreu et al., 2017). This firm decision within a Malaysian

television network has been a key effort to recognise the new delivery methods,

as "online content appears to be a huge opportunity for television stations to

improve their public image and their brand amongst mobile users" (Nasharuddin

Tajuddin, Head of Television News Networks, Media Prima, August 2015).

However, other research interviewees were less positive about Media Prima's decision to embrace new delivery methods, and described it as "desperate measures to get more viewers" (Anonymous, Former Television Producer A, interview with author, July 2016), and "very rushed" (Anonymous, Former Television Producer A, interview with author, July 2016); several interviewees attributed this to the fact that other video streaming platforms, such as YouTube, had started to gain popularity in Malaysia (Cher and Arumugam, 2019). No doubt, the television industry in Malaysia was inspired by the widespread popularity of YouTube channels, as they had become the most watched channels among Malaysians in 2016 (Low, 2019). These two, very polarised, responses best describe the range of interviewees' views on television stations' attempts to redefine their distribution channels; to stay influential and relevant in the digital era, and to increase profit (Setianto, 2015). In the next section of this chapter, we will look more closely at the efforts of television stations to generate greater profits, by incorporating streaming services within Malaysian media.

Television Content Streaming Services

The discussion in this section continues to consider recent decisions taken by Malaysian television stations in adapting to new content distribution technologies. As I mentioned in the previous section, profit making can be viewed as the primary motivation that drives television stations to embrace new technology in content distribution methods. However, another crucial theme (also outlined above) is the belief held by television stations that new technology can become a tool for transforming the television industry, in order to upgrade the broadcasting sector as a reliable source of public information. Zulkifli shed further light on this latter aspect in the quote below:

> The television industry is becoming increasingly relevant. New technology will not force television out of the broadcasting industry. Mobile platforms help our audience to watch their favourite content and involve so much more, too. Our advertisers also seem to acknowledge our efforts. (Zulkifli Mohd Salleh, Group General Manager, Group Corporate Planning, Media Prima Berhad, interview with author, August 2016).

To some degree, it is clear that Malaysian television stations are intentionally taking a 'friendly approach' to new technology and are ensuring that it can benefit the television industry. The above quote is significant, as it will help the reader to understand the viewpoint of television stations on new technological developments. Salleh's perception of streaming technology was purely driven by the revolution in global television content broadcast, which has made television one of the most profitable industries in Malaysia (Poushter, 2016). At the heart of this new profitability lies content streaming on internet-based platform, offering the media industry an entirely new kind of infrastructure and economic model (Chau, 2010).

On the other hand, the need to rebuild the reputation of television through the use of new technology is intended to "gain public trust" (Shazuin Shahri, Assistant Director, Market Research Department, Malaysian Communications and Multimedia Commission (MCMC), interview with author, August 2016). Repositioning television as a powerful medium by incorporating new technology in content delivery expresses a lot about the social potential of this digital era. Since these efforts are believed to offer the opportunity of restoring the public's trust in television, embracing new technology will also be fundamental to developing new content enhancement strategies. Regarding content delivery methods, the most influential television station, TV3 has committed to exploring new strategies that will live up to the viewers' expectations. Zulkifli was very confident in TV3's ability to raise the bar and set the standard for effective online content delivery in the country. He claimed:

> We see a tendency among viewers to use mobile phones everywhere. I think there lies our biggest motivation to go mobile. Additionally, in this era, people are more concerned about the ways in which they can retrieve television content. I think that is what we generally try to bring to Malaysian viewers. (Zulkifli Mohd Salleh, Group General Manager, Group Corporate Planning, Media Prima Berhad, interview with author, August 2016).

It is easy to make sense of the quote above, when we consider that Malaysia has the highest *per capita* percentage of mobile users in Asia (Muller, 2019). According to the MCMC, the main cause underlying the high percentage of mobile users in the country has been the huge market penetration of smart telecommunication devices. Even though Salleh did cite such statistics, his viewpoint is supported by the *Hand Phone Users Survey* (MCMC, 2016), which showed that streaming videos and films on mobile devices is a popular activity among 82.7% of Malaysians mobile users. At a glance, we can see that this

remarkably high percentage of mobile video viewing is a good sign of the potential demand for streaming content among Malaysians.

In contrast to these views and statistics, however, empirical research conducted by Bentley and Murray (2016) suggest that mobile devices are not a common way to access television content, which is usually viewed on desktop or laptop computers or on traditional television. On top of that, another study (McNally and Harrington, 2017) confirmed that there is a high tendency among millennials to use mobile devices to watch user-generated videos on platforms such as Instagram, YouTube and Snapchat, rather than viewing television content. Therefore, despite the promising statistics presented in the MCMC survey, the high percentage of mobile video viewing cannot be interpreted as representing the actual demand of Malaysian mobile users for television content itself.

Findings like this would seem to suggest that the governmental or commercial market survey data we currently possess are insufficient to help our television stations generate effective strategic decisions, particularly in relation to long-term planning. The dangers of using simple quantitative market observations is that they often only consider the simple aspects of a phenomenon, leaving out crucial details that can explain key features, and fundamental changes, in user behaviour. Consequently, misunderstandings such as these have led to unsuitable strategic decisions being made by television stations.

Conclusion

This first of the three findings chapters has aimed to answer the research question: To what extent does global television industry development influence local television stations' content distribution? The chapter began by presenting an overview of television content management and focused on the common practices within the television stations. It explored the principal reasons for the existence of content-commissioning monopolies within the industry and looked at its impact on content distribution in this country. The local television business was turned from an oligopoly to a monopolistic market, with media conglomerates developing strict monopoly content management. As I argued above, we can see that commissioning monopolies have become a tool for television stations to control both the price and the supply of television content, and to also attract more viewers through specific content. Despite the abundant opportunities in the local television industry, this system of monopolies practiced by the television stations in Malaysia has meant that local production companies have been struggling to sell their content.

The discussions in this chapter were based on several themes that emerged during interviews and focus group sessions with media professionals working for Malaysian television stations, internet providers, and the government's regulatory bodies. These findings were used to identify the new directions that have been taken by Malaysian television stations in distributing television content on mobile platforms, and to identify the factors that are shaping our industry's preparation for, and execution of, online television as seen in other countries. The proliferation of new media distribution platforms within the

international telecommunications and broadcasting industry poses another significant question relating to television content distribution: how far does the global television climate affect the local television industry? This question requires a relevant answer in this digital era, part of which must lie in determining the changing functions and roles of television in Malaysian society.

The success or failure of recent efforts to explore the new possibilities evolving around new technological solutions could determine this strategy's level of success for television content distribution. As Dave Rajah stated in the interview quote cited above, we must build and develop the present opportunity to create a brand-new broadcasting market for the television industry (Abreu et al., 2017). Speaking in general, culture-creation and market-creation must become the main factors that influence the business models of television broadcasters (Medina, Herrero and Etayo, 2015). Within the context of the Malaysian television industry, it will only be possible to implement new content distribution strategies if the television stations themselves are determined to change their internal policies by embracing new platforms (Barker and Wiatrowski, 2017).

Another theme that has emerged from analysis of the interviewee interviews is the fundamental necessity for industry personnel to understand the new broadcasting technologies better. From the introduction of this thesis onwards, the researcher has mentioned the existence of a certain level of confusion among industry personnel in defining and mastering the basic technological terms involved in online content distribution for mobile platform. This undoubtedly leads to the misinterpretation of online content distribution's

operation and is unquestionably contributing to the detrimental issues surrounding our uptake of mobile distribution.

The Malaysian television stations still have an under-developed level of understanding about mobile platforms and how they work. In other words, the television stations in Malaysia have become users of the new broadcasting technology, but they have failed to exploit the full potential of that new technology to boost their performance in various ways. Hence, it should be clear that television broadcasters, in general, need to focus more attention on this issue. One of the critical aspects here is the need for Malaysian television stations to understand the practical essence of this new technology, if they intended to use it to overhaul the entire reputation of the television industry. Therefore, and with reference to the findings of the last section above, we must methodically study the engagement of Malaysian viewers with these alternative channels for television content distribution, to ensure that the content provided can suit the viewing habits of Malaysians. The next findings chapter moves towards addressing this knowledge gap, by answering my second research question, which concerns itself with the availability of, and demand for, streaming television on mobile platforms among Malaysians.

Chapter Five: Findings

The Monopoly of Sports Content Due to
the Malaysian Media's Ownership Structure

Despite the decreasing viewing trend of traditional media, television viewing still remains the dominant choice over other media (Cho and Lee, 2016). Nevertheless, the emergence of a digital era means that television content is now also frequently watched on personal computers, smartphones, tablets and other mobile devices, in addition to the traditional television set (Lee and Lee, 2015; Bondad-Brown, Rice and Pearce, 2012). Furthermore, the market in mobile internet services has shown rapid growth and development after smartphones and wireless internet became mainstream. This has contributed enormously to mobility in television content viewing, and to the personalisation of content consumption (Park and Chon, 2010). Consequently, television viewers now have the freedom to watch television content without barriers of time or location.

On the other hand, content providers such as the traditional television stations are strongly motivated to profit from the streaming of their in-house content on mobile platforms, as they do from linear broadcasting. Streaming services for online content distribution were established when television stations began to broadcast their content through the internet. Although the prospect of streaming services is beneficial to the television industry, it has sparked some concerns regarding the nature of online content for the streaming services.

This chapter tackles the second major research question of the thesis: What are the adjustments in content distribution that have been made by Malaysian television stations to embrace streaming services? The chapter therefore explores the attempts made by television stations to introduce mass-market content that will attract viewers to engage with content streaming. As a central part of coming to an answer for this question, the chapter also includes a discussion of exclusive or pay-to-view television content for streaming services. The high viewer demand for sports content has attracted many subscribers for paid television content packages (Bozek et al., 2017). In discussing the issues surrounding paid television content for streaming services, it is important to highlight the development of local sports content on television stations, as well as the government's involvement in monitoring the exclusive content distribution rights for international sports events.

This chapter describes the details of content distribution management for the streaming services delivered by the television stations. The discussion here is made in further reference to Chapter Four's initial examination of monopolies. As I discussed there, independent production companies face significant challenges in selling their content due to the monopoly system that exists within the commissioning, distribution and broadcasting structures of the Malaysian television stations. This issue has caused a lack of competition in content creation, which has discouraged content diversity for the streaming services as much as it has the linear broadcasting services (George and Venkiteswaran, 2019; Wok and Mohamed, 2017). In the case of streaming services, however, it is especially important to deliver varied content because the success of streaming services is more directly determined by the choice and demand of viewers

(Behrens et al., 2020). Hence, this chapter will consider two major perspectives on the question of variety in online television content distribution within the Malaysian television industry: First, it discusses the ability of local television stations to broadcast content for streaming; second, it examines and explains how international television content is used to influence viewers' active engagement with streaming services.

The Rise of Online Broadcasting

The rise of streaming services has laid a strong foundation for television content distribution via the internet in Malaysia (Abd Latiff et al., 2016). The distribution of digital television content, where internet users can watch television content at any time on their personal mobile devices, has come to be known as Online Television (Johnson, 2019; Wajcman, 2015). From a historical perspective, this has been a major turning point in the Malaysian television industry as every television station in the country has begun to introduce digital content through streaming services. Television broadcasting is currently experiencing a new phase of dynamism and the quantity of digital content available online is rapidly growing, as the new value chain structure of online television takes root in the country. The proliferation of mobile devices in Malaysian society has become a catalyst for the digitalisation of television content, leading to greater media convergence, and a direct impact on the way that television viewers retrieve audio-visual content. As a result, television content can be now broadcast in Malaysia via various VOD platforms such as Internet Protocol Television (IPTV) and Over-the-Top (OTT) services (OECD, 2016). These technological changes are reflected in the television industry in Malaysia.

The current growing popularity of streaming services around the world is greatly influenced by streaming's ability to provide viewers with the content they want to see, regardless of the traditional television broadcasting schedules. This instant access to content enables the viewer of streaming services to go one step beyond the previous viewer habit of 'time-shifting'. Time-shifting was the process of downloading video content into a data storage facility (such as a hard drive), which enabled users to save satellite or internet television content for later 'catch-up' consumption at their convenience. Beyond the enhancement of time-shifting to allow complete viewer freedom of choice, another quality that enhances the popularity of streaming services is the trend for binge-watching multiple episodes of a show at one sitting, which I discussed above. These qualities of enhanced time-shifting and binge-watching make content streaming a significantly enhanced distribution service. Besides the advantages in viewer experience that streaming services offer, the key element to their success seems to be the provision of television content that can attract a large share of viewers, and offer enjoyable, high-quality content (Ulin, 2013; Shin and Shim, 2017).

The growing enthusiasm for transforming the traditional means of television content distribution shows that television stations are willing to create new business opportunities that capitalise upon the distribution of television content through new platforms. This development was addressed by one interviewee, who expressed the opinion that the major factor motivating mobile streaming trends in Malaysia is its engagement of the young. The interviewee made the critical observation that the level of mobile usage – and more *complex* usage – varies greatly among Malaysians. According to Burhanuddin Md. Radzi, Managing

Director, Les Copaque Production, younger Malaysian television viewers are much more ready to embrace streaming technology:

> I believe that more youngsters like to watch their favourite series on mobile devices, and the decision by television stations to start developing OTT (Over-the-top) services for mobile devices is on point. (interview with the author, July 2016).

It is very noticeable that television stations in Malaysia have started to invest more in online content due to the proliferation of over-the-top (OTT) video streaming. OTT has developed tremendously and has established itself as a critical component in the distribution of online content. (Hutchins, 2016). As a former television station producer, Md. Radzi's opinion can be interpreted as largely shaped by the fact that a majority of Malaysians spend eight or more hours per day engaging with internet content (San, Omar and Thurasamy, 2015). Considering this trend from a global perspective, by the end of 2020, the number of Video on Demand subscribers had grown by 47 million to 949 million worldwide, with the number of subscriptions expected to reach over 1.1 billion by 2025. (Stoll, 2021). Thus, we can clearly see that the necessity for, and opportunities offered by, the introduction of streaming services is entirely in line with global developments.

According to another interviewee, mobile platforms were developed with the focused aim of normalising and embedding the use of streaming services in Malaysian society. This process of normalisation set out to increase the public visibility of streaming services and link them to the provision of additional attractive media features over-and-above what linear television broadcast can provide. As the person responsible for dealing with customer satisfaction at

Telekom Malaysia (TM), Muhammad Helmi Abdul Rahim is the ideal person to provide insights on this matter. He stated the following:

> The young generation are no longer watching television as they can watch the same content on mobile [devices]. With that, they will pick and choose what they want to see. (Muhammad Helmi Abdul Rahim, Senior Officer, Customer Experience, Telekom Malaysia (TM), interview with author, August 2016).

While it seems certain, therefore, that younger viewers are exercising more choice over their consumption of television content than older viewers, this view is more problematic than it might seem, as closely associating streaming only with teenagers targets a relatively small group of television users. Wong et al. (2014) make a close connection between younger viewers and the consumption of entertainment content via mobile streaming platforms. Streaming has a particularly good reputation for providing "joy and pleasure content" as claimed by another interviewee, Muhammad Amirul Hafiz Rosly (Marketing Executive of Telekom Malaysia (TM), interview with author, August 2016). Nevertheless, we should ask whether this close connection between the youth market and entertainment content is as simple as it may seem on the surface; online content viewers derive entertainment and joy from various types of content depending on their personal interests (Van Cleaf, 2020).

Even though the responses of interviewees indicate that streaming services have been particularly well received by younger mobile users, I would argue that this should encourage us to develop a more sceptical and critically aware understanding of the phenomenon: If the industry is to capitalise on the full potential of streaming technology, it must become the dominant means of content-access for the majority of other users throughout the viewing community. Engaging the vast majority of viewers with streaming is essential, in

the sense that the transition to consumption via streaming services is considered to be a major global trend. Therefore, it must affect and engage everyone in society, in order to provide its huge potential benefits for the broadcasting industry (Chen and Chang, 2017). Thus, the added value to be garnered from the delivery of streaming services is dependent upon our ability to influence the majority of users to become 'anytime anywhere' mobile consumers of streamed content (Steiner and Xu, 2020).

While it is easy to recognise that television stations are attempting to build a foundation of viewer engagement with streaming services in Malaysia, we can also clearly see that the stations are deliberately targeting younger mobile users to promote streaming services. On one level, this makes sense, as young people are well-known to be one of the main niche communities that will explore and engage with streaming services at the early stages of their roll-out (Spilker and Colbjørnsen, 2020). However, although target groups like young mobile users will help to kick-start streaming services by providing an early core of viewers, focused attention must also be given to streaming's sustainability over time. The breadth and diversity of content must be enhanced, if we are to similarly enhance the broadcasters' market value and maximise their profit-margins; it is this strategy that will ensure the long-term success of viewer engagement with streaming services in Malaysia (Heo, Kim and Yan, 2020). Financial sustainability is built through securing huge numbers of subscribers or supporters, and these come from ensuring the viewers' trust in, and brand loyalty to, the product offered. This means that broadcasters need to exploit streaming services by delivering content that has the highest potential to enhance the service's relevance, and doing so for a sustained period of time. Hence, the next section

examines the nature of current television content in Malaysia, as provided by free-to-air television stations.

Current Television Content on
Free-to-Air (FTA) Television Stations

As I mentioned above, providing popular, high-quality content for streaming services is vitally important for their economic success, because they rely more-than-ever on viewer choice. Despite this fact, Dev Rajah (Producer, Indian segment Content at ASTRO, interview with author, July 2016) described the linear television content which Free-to-Air television stations offer for streaming as "dull, lacking in creativity, and only meant for drama lovers." This low quality of content constitutes a serious threat to the development of mobile streaming in Malaysia. Unsurprisingly, very few other interviewees used different terms to describe FTA television content, and others characterised it as "super-boring" (James Lee, Television/Film Producer, interview with author July, 2016) and "nothing good to talk about" (Najib Mohd Amin, Producer, Malay Segment Content of ASTRO, interview with author July 2016). These statements are hard, but we must view them as justified by the economics of the industry: In a newspaper report, Puspadevi (2017) recorded that Media Prima Berhad, Malaysia's biggest media conglomerate, suffered vast losses of RM 171.4 million in 2017; something which must be considered as a huge disaster for the television industry as a whole. Although Media Prima Berhad (2017) claimed that the losses were associated with slow economic growth that year, this statement is hard to reconcile with the poor performance of the free-to-air television sector overall, which elsewhere suffered a loss of RM 20.7 million in the same

year. Newspaper reports such as this are relevant to the current content crisis in the Malaysian television industry as they are based on the economic performance of the industry.

These huge losses reflect several important themes that relate to Malaysian television content and its multicultural viewing public. Most television content in Malaysia is locally produced through direct content sales, co-production, or local adaptations of foreign television formats (Sabran, 2016). Malaysia's strict broadcasting regulations have meant that the country's television stations are unable to import foreign content for broadcasting to the general public. On top of that, most of the free-to-air (FTA) television stations provide enough content for the Malay and Chinese ethnic communities but produce a limited and inadequate quantity of content for the Indian community. These are driving causal factors behind the low viewership of FTA television content in Malaysia.

Despite the bad reputation that Malaysian television content has, even among the industry's own personnel themselves, Burhanuddin Md. Radzi speculated that the appearance and popularity of streaming technology, and the emergence of new distribution platforms which it has engendered, provides us with a long-overdue opportunity to revamp the country's television content (see Hanchard, 2016). In our 2016 interview, Burhanuddin Md. Radzi argued that "it is crucial that broadcasters create hit content" for free-to-air broadcast, which is then delivered on-demand through their streaming platforms. In this way, Md. Radzi rationalised that broadcasters will generate widespread public awareness of streaming services, as it is the availability of hit content online which ensures that viewers expand and change their viewing habits to watching television

online. In this way, Burhanuddin directly connected the success of new streaming technology with the overall quality of television content in Malaysia.

However, other interviewees expressed different opinions on the key factors needed for the success of streaming services; for example, Laurel Tan Bee Hiong (Deputy Director Content and Industry Development, MCMC, August 2016) took the view that a "fresh approach in content management is important to ensure that streaming services develop and extend the function of television." This perspective on a need for fresh programming contrasts with Burhanuddin Md. Radzi's view of offering programming online which has already proven itself to be "hit content" when traditionally broadcast on television beforehand. The *re-broadcast* concept suggested by Burhanuddin (see Okereke and Oklobia, 2020) directly contrasts with an effort to develop content specifically for mobile platform streaming (see Schuurman, De Marez and Evens, 2009). In these two distinct opinions, we can clearly see that an inconsistency and lack of agreement exists among media personnel regarding the most promising approach to taken in promoting streaming technology.

Although Malaysia's free-to-air television stations have recently introduced premium content services on their mobile platforms at an affordable subscription fee, the quantity of content produced is still minimal. However, this does not stop television stations from promoting their mobile services as offering fresh and new "quality content which is thoroughly different from free content," as claimed by Zulkifli Mohd Salleh (Group General Manager, Group Corporate Planning, Media Prima Berhad, interview with author, August 2016). To give a more objective view, media scholars such as Bhatt (2019) have rather pointed

out that the quality of content on mobile platforms depends on three key factors: The offering of diverse and distinctive channels; the offering of unique content *only* available online; *and* the re-broadcast of most of the content available through traditional television broadcast. On the same note, a number of interviewees were less impressed than Zulkifli with the content offered on mobile platforms by free-to-air television stations:

> Most of the time, I watch content on my mobile phone to kill time, and some of the programmes are not interesting at all. Plus, the content is no different to what is made for the television screen. (Marlina Adzmi, Assistant Marketing Manager of Telekom Malaysia (TM), interview with author, August 2016).

When I read Zulkifli the above quote, he responded:

> Our hands are tied. Popular online content such as the English Premier League is fully controlled by ASTRO, and we do not have the privilege to broadcast such content to our audience. Anyway, we are heading in the same direction, by introducing some original content for our mobile subscribers. (Zulkifli Mohd Salleh, Group General Manager, Group Corporate Planning, Media Prima Berhad, interview with author, August 2016).

An important point that needs to be considered here is the fact that free-to-air television stations actually have introduced premium content for all their subscribers. Despite the fact that demand for the live broadcasting of popular sports tournaments strongly affects consumers' viewing choices (Weeds, 2016), FTA broadcasters being 'in the game' for premium online viewers, and offering competitively priced premium packages, is a strategy that can successfully increase their market shares and enable them to overcome their rivals. Nevertheless, and regardless of the cheap subscription fees applied to all these

premium content packages, they still fail to surpass the demand for sports content in general.

Before I move on to discuss the sports and other premium television content packages offered by ASTRO and other satellite television stations in Malaysia, I want to conclude this section by making some observations on the provision of internet services in Malaysia; provision which has a direct impact on the quality of viewer experience when engaging with streaming services, and the viewer's ability to engage at all. Of course, full access to the internet is fundamental in empowering the viewers' access to television content on mobile streaming platforms. However, recent observations by the interviewees in this study have raised concerns on this topic. Right up until today, there is still major disagreement among the Malaysian public regarding the statistics provided by the authorities that relate to the internet penetration rate, and the quality of internet connections, in Malaysia.

Issues concerning internet coverage in this country rarely surface in any official trajectory reports published by the authorities. In 2018, MCMC projected the nationwide internet penetration rate as 85% of the population. While MCMC is certainly in the position to clarify this statistic, interviewees described experiencing quite a different reality. M. Zaidi Ismail (Marketing Manager, Telekom Malaysia (TM), for example, described what he considered to be "the opposite reality of the report by the authorities":

> This is because, with an alternative platform such as mobile viewing, the viewers need to use an unlimited internet data service. To use unlimited internet data, you need to spend a lot in Malaysia. This is the 'no fun part' of online content in Malaysia. (M. Zaidi Ismail,

Marketing Manager of Telekom Malaysia (TM), interview with author, August 2016).

This simple point on data-affordability raises significant concerns regarding the whole framework of streaming services offered by television stations: The country needs both comprehensive and affordable internet facilities to assure the success of its television industry's streaming services; this is a holistic problem that demands a holistic solution. To date, comprehensive internet facilities are made fully available in urbanised areas across Malaysia, with the Klang Valley conurbation around Kuala Lumpur recording more than 80% internet penetration overall (MCMC, 2018b). With so much attention given to urban areas, however, efforts to provide good internet coverage have been compromised in outlying areas. This poses a huge dilemma for mobile users, as these issues still hinder all initiatives to promote the public's full embracing of mobile streaming services.

While there may still be some way to go on the provision of affordable internet services in Malaysia, the pattern of mobile usage is skyrocketing across the country (Dawi et al., 2018). This shows that mobile platforms remain a vitally relevant area within research on streaming technology in the country. As the comments quoted above show, the recent trends in streaming sports content on OTT platforms are an essential research focus. Focusing in on this huge demand for sports content, the next section describes the role played by ASTRO as a major holder of broadcasting rights for exclusive content in the country such as the English Premier League (EPL). In doing this, the following section also seeks to reveal how television sports content can affect the success of free-to-air services in Malaysia.

ASTRO as a Leading Paid Streaming Content Provider

While free-to-air television stations struggled to introduce premium content to revive subscription rates, sports content effortlessly became the most profitable content on satellite television stations in Malaysia such as ASTRO. In fact, ASTRO became the first satellite television provider in Malaysia to introduce a mobile streaming service, which it named *ASTRO Go* (formerly known as ASTRO-on-the-Go), offering interesting sports packages as a complimentary service to all subscribers to boost their subscriptions (ASTRO, 2018). Undoubtedly, the increase in demand for streaming sports content on mobile platforms has helped to strengthen ASTRO's position as the major provider of exclusive sports content in the country. The unstoppable growth of global media sports (Hutchins, Li and Rowe, 2019) became the key factor that enabled ASTRO to introduce its premium content paid streaming service on mobile devices, ASTRO Go. As might be expected, the established potential for sports content to attract subscribers on over-the-top television services is significantly enhanced when live sports experiences are also broadcast across various devices such as the PC, tablet, iPad, and mobile phone.

There is a strong connection between the public's demand for sports events and the national policy of promoting a multicultural Malaysian identity through such events; a connection which has generated a widespread acceptance and promotion of sports television content throughout Malaysia (Ishak, 2020). It seems that the government has perceived sports as a means of generating profit, enhancing local economic growth, and promoting national unity. These themes can clearly be seen in the quote below:

> Put aside political ideology. Sports content is not about winning; it teaches players and can also educate the fans to respect each other on the field. Through sports activities, we are united as one strong nation. It is also hoped that sports can be developed as a stable and profitable industry. (Johari Zainal Abidin, Director of National Communication Sports Council Malaysia, interview with author, September 2016).

As a multicultural nation, the Malaysian government has decided to use sports as a means of promoting an agenda of harmony, solidarity and patriotism among Malaysians (Ramalingam, 2011). They have achieved this by establishing the *National Sports Council* under the supervision of the *Ministry of Youth of Malaysia*, which aims to reach younger members of the community in an effort to disseminate information promoting social unity (Daud, 2007). Furthermore, sporting activity has been made a compulsory part of the educational curriculum at all levels from preschool through to tertiary education (Ramalingam, 2011).

Sport has become a focal point of the national psyche and is used to unite Malaysians as one nation. This central national focus on sport is (understandably enough) also reflected in the high demand for sports-based content among Malaysian television viewers. Thus, sporting events provide an ideal opportunity for television stations to aggressively promote content which fits the national agenda perfectly. This leads to a healthy process of content development, because most of the sports content concerned has been developed specifically for distribution on streaming platforms (Whittle, 2018). Ben Ibrahim, Athlete Development Officer for the National Sports Council Malaysia, mentioned his personal experience of encountering sports content on mobile platforms:

> Sometimes I follow the discussion after the [football] match. I find this very interesting content, because I cannot watch content like this

on linear television. (Ben Ibrahim, Athlete Development Officer, National Sports Council Malaysia, interview with author, September 2016).

By the current stage of development in sports content broadcasting, it has now become well established that streaming technology provides the primary means by which sports fans stay connected and aware of the latest match updates. In other words, streaming services have brought sports fans closer to the action, by enabling totally mobile and time-independent access to the viewing of sports content (Deloitte, 2019). As Ben Ibrahim stated, receiving the latest information updates on their preferred sport, team or game plays a very significant role in ensuring that sport fans remain loyal to a media provider. Driven by this determining influence of fan loyalty, media providers have ensured that the experience of watching sports content on television has become simple, cheap, and easy. Sports fans only need to connect to the internet to watch their preferred content or live matches.

Malaysia's satellite television industry has entered a new dimension in content distribution as it moves to extend its presence online, delivering content across multiple mobile platforms through television apps (Duraisamy, Mohd Nasir and Rajanendaran, 2017). This was first seen in Malaysia when Astro introduced Astro Go, which pioneered the concept of television on the go. This was also the point at which digital broadcasting first began to develop, allowing Malaysian audiences to watch television content on their mobile screens. There is no denying that Astro Go "which was introduced back in May 2012, is a versatile service that enables all Malaysians in Malaysia to enjoy a seamless and personalised viewing experience and access the best of Astro's TV, radio and Video on Demand (VOD) services across multiple devices and platforms" (Yau,

2013, para. 3). It can also be suggested that ASTRO's early commitment to providing streaming services has played a significant part in nationwide improvements to telecommunications, which have helped the country to maintain the pace with global telecommunications developments.

As we have discussed above, mobile streaming platforms offers an alternative to linear television which gives the viewer more freedom of choice, greater mobility and localisation, and more convenient time-usage (Barwise, Bellman and Beal, 2020). Based on these revolutionary factors, the necessity for television stations to adapt to streaming technology by adjusting the nature of television content production is inevitable. These adjustments must provide content solutions which ensure that streaming services can attain their maximum potential in the Malaysian television content distribution market. In the case of ASTRO, the company's vast and sustained effort to build new streaming services began first by reviving the distribution of high-quality archived content, thus attracting more subscribers. Following the universal assumption that the influential format which has allowed internet video providers such as YouTube to flourish indicates the nature of public demand, ASTRO were first motivated to introduce selected television content on its official website:

> It was long before mobile content streaming was introduced. This offered a place for subscribers to re-watch some of the content they were interested in. Most of the programmes are local entertainment content. (Najib Mohd Amin, Producer, Malay Segment Content ASTRO Malaysia, interview with author, July 2016).

Before the era of mobile technology, ASTRO first established a web portal, which was known as *murai.my*. Murai.my was a major platform for ASTRO subscribers to watch a variety of live programmes online, particularly live football matches. This early attempt to develop the delivery of exclusive content such as sports events through an alternative medium for viewers was ahead of the curve. Across the world, exclusive content services have benefited television stations enormously, where the emphasis on exclusivity has produced a new revenue stream in relation to paid content (Stennek, 2014). One interviewee mentioned the economic importance and interest-value of exclusive sports content during their interview:

> It feels like sports content has become a major business concern in the television industry. Also, without content like this, television would remain uninspiring. (Najib Mohd Amin, Producer Malay Segment Content of ASTRO, interview with author, July 2016).

In general, we can say that providing access to sports content has made an enormous contribution to the introduction of streaming television content for mobile users, as it strongly connects the provider with the viewers' personal priorities. Certainly, this has been the main success factor for mobile streaming services in ASTRO's case. As we can see by the interviewee's statement above, accessing sports content is also the major motivation for many Malaysians to watch television, and therefore is a major factor in television's overall role as an influential medium. From a certain perspective, then, the nature of television content has managed to change viewers' perceptions of the role of television in society.

Since the introduction of internet television, and then mobile television, television users have witnessed how the format of television content has evolved to fit more smoothly with the digital broadcasting mode. Previously, television content was (of course) limited to linear broadcasting on the television set. Now, the media convergence brought about by integrating television content with internet technology has created a new distribution mode with more complex and branching, choice-driven and hypertext-like pathways of consumption. One interviewee stated that "apart from [the original linear] television content, it also comes with exclusive interviews and news gossip columns." (Najib Mohd Amin, Producer, Malay Segment Content ASTRO Malaysia, interview with author, July 2016). The interviewee mentioned that the primary content was presented alongside additional videos which add value, are "fun to watch and include exclusive information." This producer mentioned that the aim was for ASTRO's service to "[feel] like reading a magazine, but with video in it".

The widespread demand for streaming sports content on mobile platforms comes at a huge price, though, as ASTRO has been obliged to take drastic actions to provide high levels of satisfaction for its mobile users. One of these drastic actions has been "cutting drama allocation slots and erecting more dedicated channels for sports content," as Dev Rajah (Producer, Indian Segment Content ASTRO Malaysia) explained. He continued, "new channels such as ASTRO ARENA are dedicated to all of the news and updates within the Malaysian sports industry, besides there being other dedicated channels for other sports at the international level." This statement shows the extent to which ASTRO value their sports content, as a major attraction central to all its subscription packages, which also promotes mobile streaming at the same time.

However, ASTRO's strong narrative of value, built around the delivery of sports content on its mobile streaming platforms, imposes a significant financial cost on mobile users. As the only major broadcasting rights holder for international sports in Malaysia, ASTRO has complete control over the level of subscription charges it imposes on subscribers. With no competitors in the supply market to other distributors, major issues have often occurred among sports package subscribers in Malaysia. Johari Zainal Abidin, Director of Communications, National Sports Council Malaysia, noted that "ASTRO has become very greedy, increasing the cost of sports packages and causing huge debate everywhere." This issue has been so contentious, it sparked the involvement of the government, where "it…was tabled in the Malaysian parliament in 2005" (Ben Ibrahim, Athlete Development Officer, National Sports Council Malaysia, interview with author, September 2016). As a result of these deliberations in parliament, the government has guaranteed to monitor the prices of sports packages in the future for the benefit of subscribers (Aziz, 2019).

In response to the viewer interest in international sports content, a channel has been introduced which is dedicated to the broadcasting of local Malaysian sports content. It has been hoped that this local sports content will draw the attention of Malaysian sports fans, but the impact of this remains quite small. Ben Ibrahim considered this channel as "really not having an impact on local sports development, as the coverage of the sports content is not interesting." (Ben Ibrahim, Athlete Development Officer, National Sports Council Malaysia, interview with author, September 2016). This kind of perception is due to the atmosphere surrounding local sports events, which lack the intensity of the highly funded foreign league games and are therefore less popular among the

viewers. In addition to this, other interviewees felt that the quality of local football players on the field is "nothing compared to the international players" (Nasharuddin Tajuddin, Head of Television News Networks Media Prima Berhad, interview with author, August 2016). Despite massive investment by ASTRO to promote local sports content to Malaysian sports fans, the fans and subscribers still prefer to watch international sports content, which is in high demand. Thus, the government's aim to develop a profitable broadcasting industry around local sports content seems incompatible with the real situation in Malaysia.

Although Malaysian sports fans appear to have a lack of interest in local sports content, there has nevertheless been a significant increase in patterns of sports viewing on mobile apps in recent years. Mobile devices are regularly used for the viewing of entertainment content, but research by Lee, Kim and Wang (2017) indicated that the consumption of sports content exceeded that of entertainment content on mobile platforms in 2017. According to one interviewee, the fact that there may not be such a clear-cut distinction between sports and entertainment content forms is an important point that needs to be considered:

> (Local sports fans) watch sports as entertainment, not as sports themselves. There is a professionalism in sports which viewers absorb when they watch. They pay close attention to the technicality of it, instead of just watching it for interest [in the game itself]; that's why my friends watch it and they talk about it in the office afterwards (Anonymous, Former Television Producer B, interview with the author, 20 July 2016).

Of course, this affinity between sports and entertainment content has not been missed by media scholars. Boyle (2014) wrote that television plays a major role

as a mediator of sport content, and that sport exerts a particular fascination upon us, as it occupies an intermediate position somewhere between news and entertainment. Roone Arledge, the late President of ABC Sports News and ABC News, described sports content on television as "central to the power of sports as presented on television are the same elements that are identified as "news values" in the press in general and as "entertainment values" in commercial media. The sporting event is programmed for television because it is "a story." It has a narrative sequence in which protagonists and antagonists, heroes and villains, engage in direct conflict resulting in victory and defeat" (Arledge, as cited in Real and Kunz, 2020, p. 265).

Hutchins and Rowe (2013) have discussed how the broadcasting of sports content has revolutionised traditional industry methods of distributing and accessing sports footage, highlights, and both in-game and league fixture information - thereby developing the economics of broadcasting and generating greater revenue. This leads us on to another interesting aspect of the way that sports content production and editing are changing for mobile viewing (Lee et al., 2018). As I have discussed above, the nature of mobile video content is generally short and direct, as users are not static as they watch (Zhou, 2013). Re-editing sports content to align with these conventions of mobile viewing makes it easier to watch. Several of the interviewees offered informative insights on their personal engagement with mobile sports content that show how the mobile viewing experience enriches their experience of the action:

> I like to keep watching how the player scored the goal, again and again. (Muhammad Amirul Hafiz Rosly, Marketing Executive Telekom Malaysia (TM), interview with author, August 2016).

> I spend a lot of my time re-playing the video of the player scoring the goal from different camera angles, and its very impressive! (Muhammad Helmi Abdul Rahim, Senior Officer, Customer Experience, Telekom Malaysia (TM), interview with author, August 2016).

> The most interesting part for me is when the camera focuses on the audience's expressions when a player fails to score the goal. I think that it's amazing, as I can repeatedly watch any part of the content the way I want it. (Nasharuddin Tajuddin, Head of Television News Networks, Media Prima Berhad, interview with author, August 2016).

These statements represent the maximum level of satisfaction felt among mobile users while streaming sports content on mobile devices. We can see that sports viewing has become cathartic for users in creating such high levels of enjoyment as a result of their mobile viewing. Consequently, we can easily see that a stable and constant demand for sports content on mobile platforms now exists in Malaysia, which is surely a sign that the mobile media industry will continue to last and expand in the future.

Sports Content Broadcasting Rights

By this point in the thesis, and particularly in light of the previous section, I hope that the reader will have accepted the fact that providing sports content for viewers is an absolutely essential part of building meaningful audience figures around online content services in Malaysia. In line with this development, issues around sports content broadcasting rights have become a critical area of debate within the television industry. This issue is very significant, as it focuses in on policies which have been constructed by broadcasters which are fundamental for commercial media corporations to secure exclusive television broadcasting rights on both linear and mobile platforms. According to Boyle (2015, p.1) "The position of copyright in the arena of sports content rights and

property rights of sporting organisations is an area of growing legal and

commercial interest in the digital age." While copyright issues are a complex

topic in the field of sports content broadcasting, an understanding of this issue

should begin with the negotiation between the broadcaster and the sports rights

owners:

> In the negotiation (between broadcasters and sports rights owners), they might or might not want to transmit the content (sports events) to mobile devices. This is a major factor in determining their subscription rate. This is an issue that needs to be addressed and we've been working really hard on this issue for 5 or 6 years. (Muhammad Razali Anuar, Director, Strategy and Policy Initiatives Department of MCMC, interview with author, July 2016).

With the issues under negotiation far from resolved, this drawn-out

process has a complex and direct impact on Malaysian mobile users'

budgets. Several interviewees expressed the difficulties of being hit with

a sudden increase in their monthly subscription fees. Interviewees also

expressed the difficulties involved in creating an awareness of the users'

perspective among broadcasters such as ASTRO, who are prone to freely

increasing the monthly subscription cost. This also signals a

communication gap between broadcasters and the Malaysian authorities,

as it appears that the broadcasters have chosen to avoid communicating

certain aspects pertaining to the negotiation process with them. These

causes for concern were addressed in the interviews:

> We discussed with the broadcast content owners their tendency to change or revise their [subscription] rate; that to raise prices might be concerning to users or viewers. At this time, a lot of [the sports content broadcasting rights] are commercially negotiated, but we still think it is relevant for us to supervise the process in the interest of the viewers. (Faisal Hamdi Mohammad Ghouth, Head of Digital

Creation and Distribution Platform Department, MCMC, interview with author, August 2016).

This reveals how commercial broadcasters in Malaysia deal with the purchasing of international sports content in general. In this respect, the government agency, MCMC admitted that, "there is no systematic mechanism to oversee the negotiation process between commercial broadcasters and international sports content copyright owners." This is because the details of the negotiation between the owner of the sports rights and the broadcasters are concealed for business development purposes. However, the scenario changes when it comes to negotiations involving broadcasting rights for local sports content, particularly regarding its live transmission:

> If [sports content] is licensed for broadcast in Malaysia, [the broadcaster] must automatically get approval from MCMC. As usual, they have to apply to us and we will give the approval so they can broadcast it [on television or mobile devices]. (Faisal Hamdi Mohammad Ghouth, Head of Digital Creation and Distribution Platform Department, MCMC,interview with the author, August, 2016).

Here we can see that MCMC have given a clear explanation of the negotiation process between rights holders and broadcasters, and the major (although limited) role played by government institutions in them. Nevertheless, little is known about how this negotiation process directly or indirectly contributes to the development of sports content on mobile platforms. The President of the *Football Association of Malaysia* (FAM), Crown Prince Tunku Ismail Sultan Ibrahim, established the connection between copyright negotiations and its impact on the availability of mobile sports content:

> Television broadcasting rights are a big problem in my country. In successful European countries, television broadcast funding is the backbone of financial support for a football club, whereas in Malaysia we have to rely almost entirely on sponsorship. The funding of television broadcasting rights we receive is inadequate, as our football associations have decided to take a bigger cut for themselves and instead donate it to all participating teams in the country. Television should provide more support for local sports. Large companies need to spend more to promote football in Malaysia and Southeast Asia. (Speech by Crown Prince Tunku Ismail Sultan Ibrahim, President, Football Association of Malaysia (FAM) at the 2016 World Football Summit in Madrid, Spain).

With regards to local football broadcasting rights in Malaysia, the Football Association of Malaysia (FAM) is the body responsible for dealing with potential official broadcasters and for managing the local football leagues. It is a widespread practice in the sports industry to *joint sell* exclusive broadcasting rights to more than one buyer (Evens and Lefever, 2011). The *Joint selling* of television rights is a situation where sports clubs assign their rights to their association, which sells the collective broadcasting rights on behalf of the clubs. FAM has appointed MP and Silva as its media rights advisor, securing a guaranteed profit of RM 1.26 billion over 16 years. As part of the joint sale agreement negotiated by MP and Silva, plans include expanding the dissemination of information related to local leagues on the internet, as well as providing opportunities for sports fans to interact directly with local league football clubs on their mobiles. However, the vagueness of the agreement has resulted in the absence of a clear monitoring system for mobile sports rights ownership, which in turn has caused uncertainty among policy makers:

> Speaking personally, I think the [legal] landscape has not matured enough for Malaysia and a lot of other South East Asian countries to broadcast sports content by mobile. For example, in Malaysia, the rights to broadcast the SEA Games are basically negotiated at the public broadcaster level. So ABU [the *Asia-Pacific Broadcasting Union*] will negotiate for the content transmission rights, which does not

include provision for broadcasting as mobile content. This is unlike other countries, where the contract [for transmission rights] extends beyond [the linear transmission to include mobile content broadcasting]. Some local broadcasters would like to broadcast on mobile, but they cannot do that because of the framework governing the transmission rights. (Anonymous, Former Television Producer A, interview with the author, July 2016).

The content broadcasting rights for the 2017 Southeast Asian Games, hosted in Malaysia, were managed by the sports media agency *Dentsu Sports Asia*, which attracted more than 3000 broadcasters worldwide, and reached more than 400 million viewers. In terms of coverage, the 2017 SEA Games was broadcast to 10 ASEAN countries and generated a profit of over RM 350 billion across multiple platforms. In the light of this massive scale of distribution for live mobile sports content, its impact on audiences has become a major concern among scholars and industry professionals alike. Consequently, in the next section, I will examine the natured of sports content distribution further, by addressing the question of sports content monopolies within the Malaysian television industry.

Sports Content Monopolies Within the Malaysian Television Industry

In Chapter Four, I discussed monopolies in local content production within Malaysian television stations, including mentioning favourable slot allocations and a partial price-control mechanism instituted by in-house commissioning. However, when we turn to consider international television content, and particularly sports coverage, the Malaysian government is still enforcing tight control over the awarding of exclusive broadcast rights to specific television stations. As Ramalingam (2011) discusses, the exerting of such control was an attempt by the government to avoid unhealthy competition between Malaysia's

television stations, and primarily took the form of a tendering system. Despite these efforts by the government to combat injustice in the allocation of international sports broadcasting rights, the subscription-based satellite television station ASTRO has been the sole broadcaster for all international sports events in Malaysia since 1997, and has currently secured a three-season deal for English Premier League coverage until 2021 (*EPL Rights Again to ASTRO*, The Edge Market, 26th Sep 2018; Toh, 2018). This means that ASTRO is the sole provider of international sports content in the country, dominating the sports content market with 4.2 million sports package subscribers. "At present, Astro has greater control over broadcasting rights on sports events that has prevent its competitors from having an opportunity to broadcasting similar sports events" (Isa et al., 2021, p. 603). This obviously shows that ASTRO has secured an international sports content monopoly, and particularly for EPL, in this country.

Within such a situation, free-to-air television stations have clearly been obliged to enter into partnerships with ASTRO, in order to broadcast international sports content in Malaysia. Whilst ASTRO holds the exclusive rights for broadcasting EPL matches, other broadcasters offer the same content to local sports fans. As the major holder of international sports rights, ASTRO is in a controlling position to decide whether to release the content to other distributors, or to limit its distribution to their own channels alone. Understandably enough, coming to terms with this development triggered enormous discomfort among the other television stations. One interviewee, who used to deal directly with the negotiation process of securing shared partnership rights from ASTRO for international sports broadcasting, described this situation as simply "a new form of monopoly," and as "injustice in sports content distribution".

According to M. Zaidi Ismail, Marketing Manager for Telekom Malaysia (TM), ASTRO took the decision in 2015 to terminate the international sports broadcasting partnership rights of Telekom Malaysia's IPTV platform *UNIFI TV* (discussed further below), thereby cancelling UNIFI's rights to broadcast more popular sporting events such as English Premier League games. This came about due to ASTRO increasing the cost of partnership rights beyond TM's purchasing budget. As a reaction to the partnership termination, TM announced a new bundle of premium sports channels for UNIFI by introducing four Fox channels offering various live international sports events, including Grand Slam Tennis, Masters Golf, Formula 1, Moto GP, and other football matches. Although TM have reacted to this loss of the EPL coverage by creating new opportunities that have generated interest in other types of international sports, prominent international content such as the EPL is still relevant to millions of local football fans. In the next section, I will discuss the attempts that have been made to break ASTRO's monopoly as the major sports content distributor in Malaysia and describe some progressive developments in sports content broadcasting.

Attempts to Replace ASTRO as the Major Sports Content Provider in Malaysia

At this point in time, it is important to recognise that the mobile technology has cultivated a change in the viewing habits of Malaysian audiences, towards the consumption of global content. This recent change in the Malaysian lifestyle has been directly and heavily influenced by the direction of mobile technology developments. Telekom Malaysia's Annual Report for 2016 stated that positive developments in the television industry, and in modern lifestyle habits throughout the country, motivated the company's internet provider service to

competitively introduce an Internet Protocol Television (IPTV) service in 2010 that would complement its High-Speed Broadband (HSBB). The most significant result of the emergence of this new service was that 700,000 Telekom Malaysia customers could now watch a variety of television programmes on TM's mobile app *UNIFI TV*. This was introduced as part of a triple package: Telephone line, broadband connection, and the IPTV service UNIFI TV – which subscribers could view both at home and on their second screens. This was a transformational change for TM's internet subscribers, as they could now easily watch popular content, such as live sports programmes, on their mobile devices.

From a marketing perspective, UNIFI TV garnered TM the added value of encouraging higher internet usage by promoting online viewing. From the perspective of content distribution, TM has used its strong reputation in the Malaysian sports industry to broadcast major local and international sports content on both their UNIFI television channels and the UNIFI mobile app. From the perspective of strategic marketing, the availability of sports content on both the television and mobile platforms has boosted mobile viewing habits among Malaysians, as all TM internet subscribers can watch sports content anywhere anytime.

The increasing levels of internet awareness and smartphone penetration in the Malaysian market have boosted TM's confidence to actively disseminate quality sports content to all of its subscribers. Their great commitment to this sports content business strategy was demonstrated by the introduction of a specific channel for various international sports tournaments, both inside and outside Malaysia. Highly reputable and internationally recognised tournaments, such as

the Tour de Langkawi (cycling), the Monsoon Cup (yachting), and the SEA Games, have bolstered TM's image as a strong media brand in the Malaysian sports industry. The Rio de Janeiro Olympic Games in 2016 placed TM at the top of its game, when it was selected as one of the official IPTV channels for the Games. According to TM's official statements, establishing the mobile platform allowed all Malaysian sports fans to engage with the Rio 2016 updates 24/7, and enabled a fully digital content viewing experience. Through high-profile international sporting events like this, TM has committed to developing a comprehensive public awareness of its digital media presence across all platforms. As the first step in this effort, TM established a strong collaboration with the *National Sports Council of Malaysia*, and the *Olympic Council of Malaysia*, creating a fan club to support the country's national teams while they were competing locally and internationally.

To ensure the smooth development of digital infrastructure in Malaysia, TM has recently undertaken the acceleration of their mobile internet services by introducing a new mobile telecommunications network, *Webe*. Regarding this development, M. Zaidi Ismail (Manager, TM Sales and Services) expressed his confidence:

> This is the most comprehensive service we offer to all Malaysians. Soon we are going to release Webe; this product completes our role as the major telecommunications player in Malaysia. I am proud to say that we are currently able to offer a better and more stable service in comparison to our competitors. (interview with the author, 22 August 2016).

Launching under the philosophical motto *Start Here, Go Anywhere*, TM's development of *Webe* is fundamentally based on offering its customers a mobile package with unlimited SMS texts, internet access and mobile data; clearly reflecting a direct response to the 'no fun part' of mobile internet television's expense in Malaysia mentioned by interviewees above. It is notable that TM has put a tremendous amount of effort into overcoming connectivity and mobility issues, and the introduction of Webe[29] has become one of the best options for ensuring better value for money. With its competitive package fees, Webe represents TM's latest strategy to drive forward higher levels of mobile viewing among Malaysians, and to encourage more information exchange through quota-free internet data packages. This same confidence in Webe was shared by Salleh Said Keruak in 2016, at that time the Multimedia Minister of Malaysia:

> People need more data, and as the data traffic gets larger, the challenge we face right now is in meeting the demand for data. Of course, data must also be fairly priced. This is why I am pleased to note that Webe provides a worry-free experience on their service, giving Malaysians access that is affordable. (Salleh Said Keruak, Minister of Multimedia).

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[29] Webe was officially introduced to the local market on 16th Aug 2016. It was launched to strengthen TM's position as a digital mobility provider in Malaysia by offering affordable mobile Internet packages (TM Officially Launches Webe, 2016).

Conclusion

This chapter aimed to answer my second research question regarding television content on mobile platforms: What adjustments in content distribution are made by Malaysian television stations to embrace mobile streaming services? Over the early pages of this chapter, we examined the efforts made by local free-to-air television stations to develop content for streaming services, primarily through re-broadcasting linear television content. However, as noted above, these efforts have largely failed to attract mobile users to subscribe to streaming the content. The weak response of mobile viewers to this strategy can be closely linked to their demand for live streamed content, specifically sports, which is not offered by free-to-air television streaming platforms.

As I discussed above, sports content in Malaysia, broadly speaking, is heading in the right direction. Nevertheless, there are major aspects of government policy and regulations, especially around broadcasting rights monopolies, that need to be strengthened to ensure the smooth development of this technology. The central debates outlined in this chapter revolve around the main provider of sports content and satellite television in Malaysia, ASTRO. The discussion has explained the political issues surrounding the management of sports content in Malaysia, which closely relate to the negotiation processes involved in the acquisition of sports content broadcasting rights. The details of these negotiations are unclear and remain transparent only to the higher authorities and the major industry players. Even at the executive level within the industry, which many of the interviewees represent, there is clearly also a lack of information. As I noted above, this lack of transparency issue has also directly

affected the role of MCMC where, even as a government agency, they could not cap the increasing monthly service charges imposed on mobile subscribers.

It is clear that a new model has been established for the distribution of online content and its broadcasting rights within the television broadcast industry. This new distribution model has provided broadcasters such as ASTRO with the power to introduce bundle packages for sports content that are offered to partnership channels and potential public subscribers at a premium price. This has had a detrimental impact on the sports broadcasting of free-to-air streaming services. ASTRO has monopolised the distribution of foreign sports content in Malaysia as the only rights holder for major international sports content such as the English Premier League. In addition, these exclusive rights have given ASTRO the full authority to dominate the broadcasting of local sports content as well, thus extending their monopoly into domestic sports too. The involvement of the Malaysian government in managing sports content rights internally was linked to ASTRO's ascent to dominance in sports content. As a commercial television station, ASTRO has managed to secure a stable position in content broadcasting by offering a variety of local and international content via hundreds of channels.

A strong financial track record has enabled ASTRO to develop a robust business framework that secures its rights for premium international sports content in Malaysia. Even though the Malaysian government has the authority to renew (like any other broadcaster) ASTRO's broadcasting license on an annual basis, in reality the regulatory power imposed on giant stations such as ASTRO is very minimal. As a result, there is a discrepancy between the implementation of the rules between domestic Malaysian stations and commercial international

television stations such as ASTRO. Furthermore, mobile users' constant demand for sports content has caused other streaming services to become increasingly commercialised in favour of partnership broadcasting with ASTRO, thus oppressing and controlling the streaming services of free-to-air television stations. Policymakers must address this issue in managing and regulating the credibility of online content, and the television sector overall (Evens and Donders, 2016). In response to ASTRO's monopoly on international sports content such as EPL, we also saw how alternative international sports content has become an option for subscribers and a business solution for ASTRO's competitors. As discussed, we looked at one diversifying solution to ASTRO's control, which TM came to for UNIFI TV.

Research into television content for streaming services by local television stations in the country has revealed that the Malaysian industry is currently experiencing major challenges from content streaming technology. Nevertheless, some aspects remain unchanged, particularly in relation to the distribution rights of premium sports content. Although the distribution system for content has not shown any improvement over this short and early period of streaming technology's emergence, we can be certain that this will (and, indeed, must) change in the future. We can see the beginning of these changes towards greater freedom in the shape of streamed content distribution by local television stations in their exploration of potential alternative contents for their platforms. Besides revealing these emerging changes in the Malaysian media due to the rapid development of global mobile technology, this chapter has analysed the availability and affordability of online television content distribution on mobile platforms, and highlighted these issues where they impact upon the growth and

development of the Malaysian industry's content development. To support the

industry's long-term development, however, appropriate regulation is all

important. The analysis in the next findings chapter, therefore, focuses on the

regulatory framework relating to mobile platforms, in order to ensure the

development of the television industry in Malaysia.

Chapter Six: Findings

The Disorganised Management of Regulatory Policy

for Online Content in the Malaysian Media Landscape

The two previous chapters have analysed the foundation of future mobile streaming platforms in Malaysia. Chapter Four explored how the international climate has influenced the recent directions of the Malaysian television industry. Then, Chapter Five continued by investigating the impact that streaming technology developments have had on online television content distribution in Malaysia, with a particular emphasis on the management of sports content. In this final analytical chapter, I hope to extend the reader's knowledge on the development of mobile streaming services for television content, by shifting our focus to the regulatory aspects concerned. This will enable us to address my third research question over the pages of this chapter: What role do local political, social, and economic elements play in the development of mobile policies in the Malaysian television industry?

In depth, this chapter covers the changes that have occurred within the relationship between the regulators and the Malaysian television industry. At the same time, the chapter maps out and critically evaluates the capacity of the current policy framework to monitor the convergence of traditional broadcasting with new telecommunications technologies. The findings presented here have been obtained from a wide diversity of participants. Most of the data supporting this chapter was gathered during the two focus group sessions with internet users, former television station executives, and the representatives of the

regulatory bodies in Malaysia. The most pertinent reason for including the range of responses given here rests in describing and hearing the criticisms of the focus group participants. The researcher believes that the debates and arguments of the thesis can be enhanced through highlighting all relevant responses in this chapter. The regulatory perspectives of the Malaysian government are influencing changes within the television industry which directly affect the television stations' long-term content distribution planning. Hence, this chapter seeks to provide a compass-bearing to aid exploration of the regulatory landscape. In this way, we can bridge and eliminate any gaps of mutual understanding between researchers, regulators, television viewers, and local television stations. By this elimination of misunderstandings, we can come through to valid arguments that can meaningfully enhance the success of the industry, and the debates surrounding its achievement.

To that end, the chapter begins with a discussion of the recent status of the regulatory framework for online television content distribution in Malaysia. It is particularly important to explore the roles that the regulatory bodies play in providing adequate support to inform and assist the Malaysian television industry with the development of online content distribution. Next, the chapter examines the relationship between the regulatory bodies and the television stations in creating an effective set of guidelines for online content distribution. Finally, the last section of the chapter discusses the impact which the regulatory system has upon other online content in Malaysia.

Television Stations and the Current

Regulatory System for Content in Malaysia

Video-on-Demand (VOD) is one example of audio-visual content distributed via the internet, delivered by way of online streaming. Its emergence has entirely changed the distribution of media and must be considered a watershed in the history of modern broadcasting. As a consequence of streaming VOD's appearance, various business sectors worldwide have undergone rapid development. To take Malaysia as one example, public demand for online television content had risen to around seventy percent of the population in 2017, and that figure has been on an upward trend since that time (Rosnan and Abdullah, 2018). For more than two decades now, video streaming services have garnered global attention, with constant interest from academics and industry professionals alike. There is widespread consensus that streaming video offers countless new opportunities, and that it holds the potential to make a very significant contribution to the Malaysian television industry, provided that the industry can adapt to become a major provider of digital content in the country.

Recently, however, streaming services have sparked concerns over whether the existing rules and regulations are up to the job of facilitating and coping with this vast, unprecedented development within the television industry. These recent concerns have arisen largely in response to the massive growth of streaming services offered by the major media players in Malaysia: *Radio Televisyen Malaysia* (RTM), free-to-air TV channels in the *Media Prima Group*, *ASTRO,* and TM's *UNIFI TV* (aka *HyppTV*). The prospect of these services' vibrant development in the country has triggered uncertainty among some sectors of the

industry, as it is now clear that online television content broadcasting has created an entirely new media market. Regarding the perennial issue of broadcasting regulations, several of the focus group participants were able to offer opinions on the country's recent media regulation:

> Let's not go there just yet. I can talk about how I think that television content has developed so far, but in terms of the regulations, I feel like we're still trapped in the '90s. There's far too much red tape involved. Ironically, the government cannot stop talking about re-inventing broadcasting in this country. (50-year-old, male, former television staff G2P5, 2016).

> Most of the television audience are ready to go online nowadays. It's a worldwide phenomenon. Although, if you ask me whether our television has been regulated very well, that's hard to say. (38-year-old, female, TM Malaysia staff G2P8, 2016).

> To understand the [regulation of] television, you have to study the political scenario in this country. That says a lot about how the media has been regulated. (40-year-old, male, television personality G1P4, 2016).

These quotes are crucial in representing the focus group participants' ability to offer insights on how to rectify the current state of regulations for the Malaysian television industry. Some focus group participants clarified that their responses were based on their first-hand involvement with facilitating television stations' adherence to the Malaysian government's broadcasting rules. In general, what transpired from these quotes implies that Malaysia is still subject to strict press control with the aim of maintaining political stability, economic growth, and multi-racial harmony (Wok and Mohamed, 2017).

Focus group participants expressed a clear perspective that recognised the Malaysian government's key role in monitoring the television industry, but which equally implied that only minimal changes have occurred in terms of the degree

of government control since the early development of the country's media industry. Another aspect worth highlighting is the fact that the focus group participants associated the heavy involvement of the government with actions done by politicians towards television laws. As one focus group participant phrased it, "this is what happens when politicians get involved in the broadcasting business" (29-year-old, male, television station staff G2P1, 2016). Political involvement has clearly had a strong impact on media regulation. The impact of strict government regulations encouraged one focus group participant to indicate that:

> The media in Malaysia is still facing big issues, in terms of being honest in reporting. The television industry is no exception to this. Various laws and rules imposed by the government limit the effectiveness [of reporting] in these modern days. (35-year-old, male, broadcaster G1P3, 2016).

Another focus group participant highlighted that:

> At some point, this is one of the biggest crises in the television business: Making people believe in our content. (37-year-old, male, television producer G2P4, 2016).

A third focus group participant boldly stated that:

> Too much political involvement in facilitating television laws harms public trust. (40-year-old, female, television producer G1P9, 2016).

It is very clear that some of the research focus group participants strongly believe that media laws in this country have hindered the progressive development of the media's function, and that this has resulted in the limitation of free speech and undermined democratic practices (Zanuddin, 2017; Ali and Manan, 2020). Traditional media forms, such as linear broadcast television

channels, are heavily affected by this; the viewers give them less attention, due to the general public's perception that they lack transparency in terms of disseminating accurate information (Isa et al., 2019). These responses also suggest that further understanding of media regulation within the television industry is essential to the development of a robust regulatory structure in the country.

The Regulatory Structure of Malaysian Media

Apart from the lack of public trust revealed above, which industry personnel feel the recent state of media regulation has fostered, another emerging theme discovered during fieldwork concerns the internal structure of media regulation. As a country with tight administrative controls, the prospect of how the government regulates Malaysia's electronic media has always caused continuous debate among industry professionals, right up to the present. The government's role in governing and overseeing television broadcasters in the country is one of the most heavily criticised concerns. "The laws in Malaysia were designed in such a way whereby all Free-to-Air (FTA) television stations will be under the Ministry of Home Affairs while satellite television such as Astro will be under the regulation of Malaysia Communications and Multimedia Commission, which sparked some debates on the different regulation between FTA channels and satellite channels" (Kee et al., 2015, p. 233).

None of the research focus group participants were clear on the reasons why ASTRO and the other FTA television stations were placed under different authorities. However, focus group participants attempted to relate such a

scenario to the working culture within the regulatory bodies concerned. For example, one of the focus group participants claimed that:

> Media people are not in the position to question any political decision like that; it involves hugely influential persons behind the television stations. Plus, we are all expected to give full commitment and focus on our own working responsibility, that's all. (45-year-old, female, ASTRO staff G2P10, 2016).

This response from the focus group participant is significant, because (as I discussed earlier in the thesis) both Media Prima and ASTRO are currently owned by political figures within the country's prominent ruling party (Kee et al., 2015). Therefore, the influence of heavy political control in Malaysian media is reflected by media company ownership, and by the degree of regulatory control on the companies in question (Kamaruddin and Rogers, 2020).

The responsibilities of regulatory bodies in regulating television content are classified into two categories: licencing and legislative affairs, and judicial regulation. Within the latter category, it is the MCMC which has full authority to issue penalties or to revoke the broadcasting license of a television station should it breach any of its licensing conditions following the submission of a public complaint. Considering the former category, the Malaysian media industry is subject to several legal frameworks, including the *Telecommunication Acts* (TA, 1950), the *Internal Security Act* (ISA, 1960), the *Printing Presses and Publications Act* (PPPA, 1984), and the *Broadcasting Act* (BA, 1988). To increase their relevance to the contemporary media scene, some of these parliamentary acts have been upgraded by the government based on certain aspects deemed necessary. Among the latest additions to the existing legal frameworks are the *Communications and Multimedia Act* (CMA, 1998) and the *Security Offenses (Special Measures) Act* (SOA, 2012). Within the context of broadcasting

television content, all television stations and content creators must abide by the *Film Censorship Act* (FCA, 2002) and the *Communications and Multimedia Act* (CMA, 1998), which was amended in 2004. Failure to follow the tight guidelines stipulated in these laws could lead to the revocation of a television station's operating licence.

The Ministry of Home Affairs uses the judicial system in its regulatory control of content broadcast within the television industry. The Ministry's main aim is to ensure the welfare and safety of television consumers while they are dealing with online content, which it does through enforcing the *Consumer Protection Act* (1999) and the *Personal Data Protection Act* (2010). In doing this, the Malaysian government expects to regulate the broadcasting industry based on its aim to provide three pillars of consumer protection: The right to safety; the safeguarding of personal data security; and granting the right to information. This is in line with a statement made by Zulkifli (Group General Manager, Group Corporate Planning, Media Prima Berhad, interview with author, August 2016), who explained that policies and regulations are essential instruments for the protection of consumers' rights, in terms of access to resources, prices, privacy, information and services.

In the previous section, we saw that a central issue raised by Malaysian television industry personnel is that the government's tight controls are considered to have been a factor limiting the industry's growth. With the new proliferation of television content on the internet, however, we can see that mobile platforms provide new challenges to the regulators just as much as the

developers of existing television content. One focus group participant at MCMC provided his perspective on this new trend:

> Viewing television content online is an entirely new way to enjoy television programmes. Clearly, it is a 'must-have' platform, as the internet now dominates every industry. However, I must say that this is a very complicated platform for us to manage. (30-year-old, male MCMC staff G1P2, 2016).

Further opinion on television's online content was recorded as follows:

> A new hope for the television industry is here. Nevertheless, the government should act fast to introduce a new set of regulations that will encourage the long-term development of television content distribution. (25-year-old, female, media observer G1P6, 2016).

A third focus group participant revealed their personal perspective of encountering television content online:

> I enjoy watching television content online very much. It's a refreshing experience for me, as I don't have to share my screen or my choice of programmes with anyone else. When I go online to watch TV, I expect a greater variety of programmes with less censorship. (25-year-old, female, media observer G1P6, 2016).

These responses gathered from the focus group participants provide us with a good indication that viewers of online television content have a strong awareness of the need for regulations that are *both* robust *and* flexible. One of the focus group participants was able to point out specific areas that need further consideration by the regulators, and this conveys a significantly high level of public concern and expectation about how television's online content should be regulated in the country.

Online television content has not only grown to dominate the local Malaysian market in television content, but (more importantly) it also embodies a spirit of

stiff competitiveness in this era of globalisation, serving as a catalyst toward building a stronger Malaysian media industry, and a stronger nation (Rosnan and Abdullah, 2018). This can be achieved by further developing and enhancing the essential regulatory frameworks that control digital television content for Malaysian television viewers. The rapid emergence of online television content is a major sign of globalisation in television content distribution. It also marks the end of an era of tight government domination on the media. According to Tryon (2013), digital online content is a new phenomenon which promotes the democratisation of media, as the changing role of media technology enhances the consumer's personalisation of preferences with an ever-widening variety of choices.

These positive dimensions of online content consumption have developed and changed the needs of the Malaysian public beyond the local status of internet penetration rates, and now influence their demand for faster download speeds and lower costs for broadband data. Unfortunately, in some Asian countries, including Malaysia, these latter two measures of connectivity are mediocre to say the least. This could possibly interfere with the pace of online television's development, but further commitment to increase infrastructure will provide vast opportunities for television stations to become increasingly competitive online content providers as well. Thus, this research offers appropriate analysis and evaluation of the government's central role in creating a safe, productive and growing online content environment through its provision of a comprehensive regulatory structure in Malaysia.

Hence, in our efforts to constructively scrutinise the regulation of television's online content in Malaysia, the responsible government agencies must come into the picture. As stated in earlier chapters, MCMC is a crucially important institution for the diligent governing of online content in Malaysia. Some focus group participants from the MCMC revealed their direct involvement in the process of regulating television content:

> We at MCMC and other relevant government agencies are committed to providing clear guidance for all internet users, to ensure their safety online. Regarding television stations in Malaysia, we provide advice on their licensing issues. (Muhammad Razali, Head of Division Policy of MCMC, interview with author, July 2016).

Another focus group participant responded that:

> Broadcasters, primarily television stations, call us the broadcasting police. They label us as a government spy, which is only looking for opportunities to find faults with them. (35-year-old, male, broadcaster G1P3, 2016).

These two responses convey the clash of ideas within Malaysian society around the roles and functions of regulatory bodies, and the perceptions of television station operators with regard to the governance of television content. In general, the regulatory bodies have clearly identified their roles in governing television content with approaches that involve filtering and blocking some content, fixing the types of news to be aired, and setting up boundaries against accessing certain information (Mahmud and Pitchan, 2017). All these actions are considered by television content operators to be extremely punitive. This disparity in perceptions has created tension between television stations and the regulatory bodies, hindering effective cooperation in the process of content regulation. As a result, the level of transparency and trust between television

stations and the regulatory bodies remains low, causing major disruptions in information flow.

Up to this stage, the emerging issues raised by focus group participants have attracted the researcher's attention, as they reveal the state of relationships between regulators and television stations in Malaysia. One interviewee, however, analysed and reflected upon the reasons why relations have been discordant between regulators and television stations, stating that:

> Most of the regulators do not have a proper awareness of the broadcasting system, and the need for it to evolve to fit with global phenomena. The regulators are made to ensure the government looks good in terms of protecting customers' needs. I personally think this is another form of the government's attempts to manipulate laws for their own benefit. (Anonymous, Former Television Producer B (G1P5), interview with author, 2016).

The general impression we get from this quote is that regulators lack the initiative to engage with television stations to encourage and explore potential new opportunities relevant to the global television industry. Despite comprehensive standard operating procedures prepared by the regulators, no space is provided for the rules to evolve and develop further in response to new technologies of content distribution. This causes a slower response in terms of facilitating changes within television stations in the country. Their minimal understanding of the current broadcasting market model has been alleged to be the main reason for a widening gap between regulators and television stations.

What transpires in this section signals the clear need for our regulatory bodies to update themselves with the nature of current technology, and its potential to boost the local television content industry of Malaysia. Minimum progress has

been made in the advancement of media policy due to regulators' lack of proactive attitude in discovering and understanding relevant television new technology. Consequently, media policy in Malaysia has been administrated without considering global changes to the industry. To significantly alter this scenario, rapid enhancement is needed through various academic and market research explorations. As a continuation of the concerns above, the next section extends our exploration to consider how issues in media policy can affect other online sectors related to television content distribution.

Awareness of Online Television's Online Content
on Mobile Platforms and Regulatory Issues

Undeniably, the proliferation of internet technology has introduced different business models in the television content distribution market. The basic understanding of these models relies on how Free-to-Air (FTA) and subscription-based television services co-exist, which may alter the dynamics of business models in the broadcasting industry. For instance, the current FTA services depend directly on advertising revenues to pay for the distribution of free content to viewers, whilst online television service providers rely entirely on subscription fees (Calvano and Polo, 2020). Due to a variety of interesting content bundling offers, subscription-based or 'Pay TV' services have risen to dominate the television market in Malaysia (Hanchard, 2015). As Calvano and Polo (2020) discuss, this has broken the value chain of existing infrastructure, such as broadcast towers, cable lines, and satellites. Today, with the dominant economic model in the industry revolving around attracting subscribers, the concept of 'content is king' has become all-important.

As I discussed in earlier chapters, subscription-based television services have been able to capitalise on their initial flush of success in IPTV delivery to create new waves of digital television content, and to reshape viewing habits. The key driver behind this transformation has been the viewer's perceived freedom to retrieve content whenever or wherever there is internet infrastructure or connectivity. As a result, there has been a drastic shift of preference among television viewers, from traditional linear broadcast to online content. Consequently, the dynamics of television content distribution have created a massive library of digital television content that continues to keep viewers away from traditional television broadcast. To put the situation most simply, the mobile ecosystem redefines how television content reaches viewers and has rapidly made fixed television scheduling obsolete.

As a consequence of this new content delivery landscape (caused in part by inadequate industry support from the regulators), television stations have to create more opportunities for themselves in order to boost the broadcasting industry to more successful levels. For instance, the decision to provide streaming content online was made due to the positive response from Malaysian mobile users. The proliferation of social media platforms, which has enabled the independent production and broadcasting of television content online, has also played (and can continue to play) a major role in this transformation. While the momentum and direction of this media transformation are increasingly accepted by Malaysian television viewers every day, a new regulatory framework pertaining to the delivery of television content on streaming platforms remains elusive. Both of the quotes below, given by focus group participants, clearly highlight these issues:

> Television stations in Malaysia need to be able to pursue online services, in order to be able to compete [for the public's attention] with other social media platforms. (30-year-old, male, broadcaster G2P2, 2016).

> I'm not trying to criticise the current government, but the issues around the regulation of online content are taking forever to solve. Nothing serious has been done, and no proactive role has been taken, in order to deal with this issue once and for all. (40-year-old, male, former television producer G1P5, 2016).

The general impression these responses convey is one of the industry's personnel being widely concerned that the government should consider doing more to amend the existing regulations, which were only relevant to traditional television broadcasting, in order to more effectively manage online television content. A new approach and definitions are certainly required in response to television content now being delivered via the internet; urgent questions have emerged concerned the relevance of both the *Film Censorship Act* (2002), and the *Malaysian Communications and Multimedia Content Code*. Equally, other questions are posed to media professionals themselves: Will the complete and holistic guidelines on the definition of Malaysia's media content, issued by the Department for Information at the Ministry of Communications and Multimedia, be applicable to television content on streaming services?

Nevertheless, it is essential to remember that, even today, the Malaysian government has not undertaken any form of strategic action specifically directed towards the regulation of content that can be accessed via Over-the-Top (OTT) platforms. The absence of such a regulatory framework was admitted by one of the interviewees:

> So far, the same rules and regulations apply to linear broadcast and online television content. I think television stations in this country are

aware of their limitations in producing content for the public. We try not to interfere in their corporate decisions, but we are willing to provide them with support and assistance on other matters within our jurisdiction. (Muhammad Razali Anuar, Head of Policy, MCMC, interview with author, July 2016).

The quote above depicts the state of television's online content regulation in recent years. There is clear evidence of a lack of regulatory support and guidance from the government. From the perspective of the regulators, decisions taken by television stations to introduce streaming services constitute a part of the stations' business plans, so they are not required to intervene. By taking this attitude towards the regulation of online television content distribution, the government lacks the determination to support online content distribution growth, which has had a detrimental impact on the television industry's development as a whole.

This ironic lack of governmental engagement with online television's regulation came as a surprise to the researcher; internet activity has been an excessively huge concern for the government, and they have tried to filter all content on the internet for local usage. Nevertheless, within the context of this thesis, possible explanations can be given as to why the government has decided against introducing any regulations for online television content, despite the Malaysian government's repressive relationship with internet technology in the country. This revelation has encouraged the researcher to investigate the anticipated impact of this media policy as it develops in the near future. Based on this discussion, we can certainly see that media policy and regulatory frameworks demand some change to ensure that the Malaysian media industry, particularly in the television sector, continues to pursue progressive development. To ensure the relevant changes in the television industry come to pass, a solid foundation

in policy making is essential. Therefore, the next section will address this matter further.

Towards the Liberalisation of Media Regulation

Since the early development of the internet in Malaysia, it is believed that online content has been blamed for promoting immorality (Othman et al., 2018). To preserve the national culture of Malaysia, a government policy of cultural protectionism was embedded in programming for linear television content. Thus, it can be argued that specific attempts were made to eliminate and discard platforms and content that could potentially promote foreign cultural elements. As globalisation becomes increasingly prevalent, it is natural that a liberalisation of this attitude should start to emerge in the government's administrative system. It certainly appears that globalisation and liberalisation are somehow unavoidable in the era of digital media, but immorality is certainly not; globalisation and media liberalisation can actually contribute greatly towards a robust foundation of public wellbeing for the nation (Tapsell, 2013a). Hence, the liberalisation of media laws in the broadcasting of online television content poses huge challenges: On one hand, internet media liberalisation must take place in order for the attainment of national aspirations that Malaysia should become a technology and digital hub; on the other hand, internet users must be protected from exposure to uncensored content which could disturb or promote inappropriate behaviour among viewers.

Meanwhile, global efforts to establish a regulatory framework for content broadcast over the internet face material challenges simply because the internet phenomenon has not been properly defined (Isa et al., 2019). At the present

time, no draft framework has been produced on how to regulate such content. Beyond Malaysia (Hanchard, 2015), other parts of the world, such as the nations of the European Union, South Korea, Australia, Bosnia Herzegovina, Taiwan, India, and Botswana (Isa et al., 2019, p. 461) are all still struggling to develop regulatory frameworks that can tackle the issue. Nevertheless, the international scenario is totally different from that within Malaysia, because the Malaysian government is trying to curb the development of online television content, and their decision to allow Malaysians to enjoy online content was made only because they had no choice.

The ambivalent and ambiguous nature of the government's approach has had a huge impact on the development of a regulatory framework. This can be seen most clearly in the guarantee given by the government in Section 3 of the *Communications and Multimedia Act* (1998), that no censorship of internet content will be enforced, which directly contradicts other sections of the same act, and the *Film Censorship Act* (2002). Despite the apparent openness of online content regulations, the government is inclined to believe that television audiences must still be guided, especially in relation to content selection, in order to ensure the decolonisation and modernisation of Malaysian society (Sulaiman, 2018). Furthermore, it is considered that internet technology may be able to harm or threaten the nation's public culture. Therefore, the Malaysian government established the *Communications and Multimedia Content Forum* (CMCF) to develop written laws and content codes for the Malaysian media community, as well as to play an important role as "mediator between MCMC and the broadcast media industry (Kee et al., 2015, p. 240).

The establishment of CMCF marked another significant government action in the effort to curb what it perceived as negative social influences from television content. CMCF has scrutinised proper guidelines and has been working actively hand in hand with all television stations in Malaysia. Even though content codes (content ratings) should help to guide television stations in both classifying and commissioning their content accordingly, the broadcasting of television content is still subject to the *Film Censorship Act* (2002). Apparently, a tighter set of guidelines is imposed upon the content of Free-to-Air television stations than other providers such as ASTRO, and the same content codes apply to each broadcaster's online content.

Despite attempts to make media policy more relevant to the contemporary and increasingly globalised situation, through progressive efforts towards liberalisation of the regulatory system, the major take-away finding of this section is that Malaysian media policy is still highly influenced by the government. Although some compromises have been reached in relation to certain regulatory aspects of the industry, allowing for progressive growth in the television industry, the opportunities provided by this relaxation of censorship laws have been seized upon by international online content providers, such as Netflix, rather than local Malaysian television stations. This has allowed Netflix and others to enter the local content market and challenge the existing infrastructure of domestic television content distribution. The next section reveals more of the detail relating to this outcome.

Malaysian Streaming Policy and the Rise of Netflix

First and foremost, it is worth noting that this section emerged from interesting discussions in the two focus group sessions during data collection. As mentioned above, the absence of clear guidelines for local television stations in Malaysia to develop online television content distribution paved the way for international providers of online content to develop streaming services more quickly. In recent years, the Malaysian demand for online content on Netflix has grown dramatically, with a particularly massive spike in the number of subscriptions occurring in the period of June-October 2018 (MCMC, 2020). Netflix entered Malaysia in 2016 as a new platform for retrieving television content from the net. It was first introduced with a one-month free trial upon first time registration (Yin and Ponnan, 2016). Most Malaysian viewers are most interested in Netflix's action and romance content. It was most informative, however, to learn how focus group participants from within the television industry appraised the content on Netflix:

> I'm a huge fan of the international series. I can stream them on my phone today and watch the whole season without any interruption if I want to. I get so excited every time I think about it! (29-year-old, female, junior executive, TM Malaysia G2P6, 2016).

> I keep all my favourite programmes under my favourites list, and I can watch them anytime I like. I feel connected to viewers worldwide when I become part of the conversation about programmes I have watched on Netflix. (30-year-old, male, junior executive, TM Malaysia G2P3, 2016).

> It's so original. I love watching all the original dramas, and Netflix keeps me updated about the latest drama content to become available. (25-year-old, male, IT executive, TM Malaysia G1P1, 2016).

> I was amazed by Netflix's documentaries – they involved really good camera techniques with great storylines. (45-year-old, female, television producer G1P10, 2016).

> Netflix has everything for everyone. (29-year-old, female, junior executive, TM Malaysia G2P6, 2016).

Judging from the responses quoted above, focus group participants expressed genuine delight about watching Netflix content. Most importantly, their statements reflect a level of critical engagement beyond the entertainment value of content, when they point out Netflix's significant marketing techniques, online community creation, and high production values (Barker and Beng, 2017). Besides these factors, it is particularly notable that none of the focus group participants expressed any dissatisfaction with optional online television content suppliers such as Netflix. Even their monthly subscription fees were considered affordable and good value-for-money.

Ironically, despite these remarkably good responses from local subscribers to Netflix, some politicians have attempted to curb or review Netflix's operations in Malaysia. For instance, in March 2019 one Member of Parliament raised an issue with Netflix's content, claiming that most of its programmes are unsuitable for Malaysian viewers. He argued that decisive action was needed to censor inappropriate content, such as sex scenes, and LGBTQIA+ (Lesbian, Gay, Bisexual, Transgender, Queer, Intersex, Asexual) themes, in all of Netflix's dramas and movies (Isa et al., 2019). Consequently, this sparked a heated debate in parliament and the media, leading some to suggest that Netflix's services should be blocked in Malaysia. To date, Netflix's services are still available in the local OTT television market, and their public popularity shows

no sign of slowing down (Netflix, 2016), as subscription rates are in fact increasing at a tremendous rate.

With the rising popularity of other online content providers penetrating the local market in digital content distribution, Malaysian television stations have no other option but to adapt to the changing media landscape brought about by Netflix. Not only has an entirely new business model been introduced, but Netflix has also raised the bar so high, in terms of content creation, that major improvements by local television stations are now inevitable. Such transformed levels of audience expectation place additional pressures on the content creation strategies of television stations, because the regulators' perception of current Malaysian television content is wholly unprepared to compete with international providers such as Netflix. The following is the opinion from one of the interviewees of the Head of Department, who are responsible for determining appropriate digital content for OTT platforms:

> Television programmes totally underestimate the audience's intelligence. Dramas are far from representing the truth. It's all fantasy and love stories. Lately, all the [soap operas] are adapted from bestselling novels. All I can say is that peoplin the television industry have lost their creative touch. (James Lee, interview with author, July 2016).

The struggles of local television stations to produce good content for OTT platforms was highlighted in the previous chapter of this thesis. As a prominent digital content producer and international award-winner, James Lee has become a leading example in Malaysia's digital film movement. James's opinion is based on his experience of dealing with internet technology to market his films online, and his experience as a television content producer, giving him a clear capacity

to critically evaluate the state of technology application within the local television industry. Consequently, the above response showcases how unable television stations are to create good content worthy of competitive subscription fees. In the above quote, however, we can also see that the interviewee diverted the focus away from the fact that regulations should generate a healthy streaming environment to promote the local development of interesting content.

While drawing comparisons with an international giant such as Netflix might seem unfair to local television stations, the rapidly changing media landscape shows that the time is right for local content developers to target Malaysian viewers with products that can withstand the critical standards of a wider market beyond Malaysia. Noticeably, local television content is not considered a big treat by Malaysian television viewers. Nevertheless, it is worth noting that television stations still broadcast some international content for public viewing. This section has elaborated on the competition brought by international content providers, notably Netflix, into the local television market. Netflix has become a significant example in understanding the value of supplying good content to boost streaming services. While it functions with a completely different business model, the presence of Netflix in the local television market has provided local stations with unnecessary and unexpected rivalry. With so much freedom of content choice in the hands of Malaysian television viewers, the government has developed another useful mechanism to encourage the filtering of content without its being directly involved; namely, self-regulation, to which I turn next.

Television Content and Media Self-Regulation

An important milestone in the Malaysian broadcasting industry occurred in 2011, when the previous Prime Minister announced a major change in restructuring the media laws to establish greater media freedom (Weiss, 2013). By doing so, the government was seeking to move the media industry in a new direction towards embracing practices of self-regulation. This change has been particularly relevant to internet users, who are exposed to a variety of television content online. This was an opportunity for television stations to become part of the regulatory process, making them accountable for the content produced. The new role for television stations was explained in the quote below:

> This was a turning point in broadcasting history. I still remember when all stations in Malaysia united to accept this new regulation system. In developing or broadcasting any program, national aspirations became our reference point. This became our shared responsibility, and the government began to trust the viewers more… At that time, we considered this to be a part of our corporate responsibility to all Malaysians. (Anonymous, Former Television Producer B, interview with author, July 2016).

Through the liberalisation of the administration of television content, the media were theoretically freed from the direct influence of the regulators. In the response quoted above, there are strong signs that the participation of the public, the viewers, is vital to media self-regulation. However, the extent to which the awareness of Malaysia's television viewers was raised in 2011 concerning their need to self-regulate media consumption is highly doubtful. Nevertheless, this perspective is contradictory to the definition of self-regulation suggested by Campbell (1998), who asserted that the responsibility should be shouldered primarily by industry players, such as television stations.

The term primarily reflects the behaviour of media organisations or television stations in relation to the legislative process of developing a set code of practices for the government to enforce as a standard operating procedure adopted by all media organisations. At this level, the government's role should be limited to monitoring and providing guidelines that assist media organisations to abide by the regulations. It can therefore be understood that the official role of creating new television regulations and environments cannot be the sole responsibility of media organisations. Nor can it be that media organisations use such regulations, through their corporate activities, to enhance the reputation of their television stations among viewers. Thus, major confusions have engulfed television stations regarding the role and purpose of self-regulation up to the present day.

Quite to the contrary of the above set of issues and perspectives, focus group participants expressed a different and much more personal view of the meaning and relevance of self-regulation:

> I don't see self-regulation as an opportunity that allows me to watch any show I like. I still feel like I am being watched by the government. (35-year-old female, writer G1P8, 2016).

> I think it is more about personal choice than self-regulation. With or without this regulating system, I still decide on the suitability of a programme for myself and my family. Self-regulation hasn't made any obvious changes to my experience of watching television programmes at all. (42-year-old female, corporate department officer, TM Malaysia G2P9, 2016).

> If television stations are involved in so-called self-regulation, we are not suffering in our selection of good shows to watch these days. (30-year-old male, broadcaster G2P2, 2016).

As shown by the tone of the responses above, several of the focus group participants expressed doubts about, and were unimpressed by, the role that television stations have taken in adopting self-regulation in relation to the broadcasting of content. For instance, the concept of self-regulation was defined far beyond debates about inappropriate themes or scenes within television content, and much broader themes of high-quality content were brought up during the session. Most of the focus group participants associated the concept of self-regulation with the notion of higher-quality content production, involving the delivery of a variety of content that could enhance their joy and create more viewing pleasure through good storylines; highly researched topics relevant to the current reality; and good acting talent. This suggests that television stations should provide or produce contents that reflect current relatable scenarios in the society.

It is refreshing to consider the concept of media self-regulation from the perspective of television viewers. Television viewers should also be provided with opportunities to take part in the national development of media, both through complaints and reports on the television content that they watch. In fact, the idea of involving the general viewing public in shaping national broadcasting laws is remarkably interesting to behold. As part of the recent development of self-regulation, government agencies such as the MCMC have established services to gather responses and feedback from internet users, including viewers of online television. Regarding the involvement of television viewers in this development, focus group participants expressed mixed views:

> I know where to go if I have concerns about something I see on television. (30-year-old female, media observer G1P7, 2016).

> I have serious doubts that action will be taken in response to all complaints. I don't see major changes taking place in television stations these days. I don't think I'm going to waste my time complaining to them (MCMC). (32-year-old female, broadcaster G2P7, 2016).

> They (MCMC) should play a more proactive role in educating society. What I mean is, more commitment should be given to creating public awareness, rather than putting stress on the penalties imposed by the government. (40-year-old male, television personality G1P4, 2016).

One criticism that can be extracted from the responses above touches on the main role of the MCMC in regulating the country's online content. Limited and imperceptible changes of online content regulation should satisfy online content viewers these days. The responses above are also significant in determining the true nature of the relationship between regulatory bodies and viewers of online content in general. Even though the establishment of MCMC was meant to bridge the gap between the regulatory bodies and online television viewers through the official complaints service launched by them, the execution of this strategy appears to have been ineffective. Kee et al. (2015) strengthen this interpretation by highlighting the fact that regulatory bodies in Malaysia will only take action in response to official complaints from the public; in the case of MCMC, "Efforts are made to screen and censor broadcast media content, but actions are taken only upon public complaint" (Kee et al., 2015, p. 236).

The analysis above refers to the regulatory system for online content which is normally and currently practiced in Malaysia. It reflects the government's principles in governing internet content and online television content distribution, and highlights the role played by regulatory bodies in interacting with television stations, providing essential services and advice. In the next

section, the analysis continues to examine the impact of regulatory frameworks on other kinds of online content, which are interconnected with the development of online television content in Malaysia. Most of these other forms of content dominate discussions around the development of television content in the country today.

Television Content and Other Types of Online Content

Besides television content, other forms of interesting content have recently emerged in the context of the Malaysian internet. This section temporarily shifts the reader's attention away from online content distribution for television to online content creation for social media known as *viral videos*[30]. According to Burgess (2008, as cited in West, 2011, p. 77), "viral video is born when user-led distribution causes a clip to become wildly popular. Furthermore, she claims that a viral video must contain some element that appeals to the popular culture of the time". Nonetheless, there have been widespread concerns about the influence of viral videos on the society if content creator "do not prioritise and set boundaries in providing, receiving, and distributing an issue or popular subject that attracts public attention, viral can be a virus that divides society and threatens the harmony and tranquilly of social institutions (Zolkipli, 2015, as cited in Ramli, Zalay and Fauzi, 2021, p. 62).

As one of the themes emerge during data analysis, online content creation for social media platform is considered as other form of online content, which

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[30] To avoid any misunderstanding among readers, this section will focus solely on new aspects of online content issues in Malaysia that have emerged from data analysis, rather than on the television industry. As a result, the term "viral video" will be largely used in this section to discuss another form of online content administration in Malaysia.

currently face a range of relevant issues relating to their administration and development in Malaysia. These content types are similarly regulated by the same laws enforced on television stations, and it is both surprising and fascinating to examine the way in which such online content is associated with online television programming, and how the development of this content is promoting changes to the way that online content is being regulated in this country.

It cannot be denied that the proliferation of viral video is garnering more public attention online day-by-day, and this phenomenon has motivated the researcher to learn more. The popularity of viral video has emerged due to the Malaysian government's policy of imposing no censorship on the internet, leading to a much more open and diverse range of content than terrestrial media. The immediate impact of this liberalisation in Malaysia has been the increased use of the internet for publishing audio and video content (Hopkins, 2014). In this section, I will look at the influence that viral video distribution is having among Malaysians and examine how this trend has started to replace the role of television more generally. The popularity and prominence of viral video in Malaysia today is largely due to Malaysians using the internet's uncensored status to express their thoughts and views on a myriad of local and international issues. On a positive note, therefore, it can be argued that viral video allows the Malaysian public to expose taboo subjects, raise them for discussion, and share information for the sake of the general public's civic awareness (Lim, 2013).

As a form of online content, the popularity of viral video has rapidly grown to steal the attention of Malaysian television viewers. According to France, Vaghefi

and Zhao (2016), the viral video phenomenon uniquely involves online word-of-mouth sharing and recommendation activities. The notoriety or relevance of a video can be gauged by the number of clicks, views, or likes it receives when viewers access an external URL link or enter certain keywords into an internet search engine. Although every news item has the potential to become viral, therefore, De Bruyn and Lilien (2008) stress that this happens somewhat randomly and cannot be properly planned. However, Liu-Thompkins (2012) has suggested that a video content producer could possibly increase the chance of a video becoming viral through the consistent and sensible use of special characteristics, such as raising viewer awareness with taglines that are emotionally appealing and relevant to viewers (Sabri, 2017; Holland, 2016). As a country with tight media controls, political issues normally generate more attention among Malaysian viewers, and one of the interviewees admitted closely monitoring online television content with political themes:

> As a former television programme [producer] myself, issues revolving around politics in this country are extremely important to me, and they instantly become popular among online viewers. Nowadays, the more you provide [online video] content concerning matters such as political scandals, the more likely it is to become viral. (Anonymous, Former Television Producer A, interview with author, July 2016).

Two aspects that can be drawn out of the quote above relate to the elements that increase the potential of an online video becoming viral. Firstly, online viral content prove that the internet is a place where uncensored content can be freely propagated and gain more public attention than traditional television. Secondly, as viral video typically contains provocative content, viewers can use

their watching of viral video as an opportunity to clarify, verify, and validate additional news information that is unavailable on mainstream media content.

Both of these aspects to the popularity of viral video can be closely linked to a negative perception of mainstream media expressed by most of the research participants; that they were "tired of the government's influence" in disseminating "provocative content that generates a positive appearance of the government executing a certain policy." In contrast to this perception of a pro-government bias in the mainstream media, several participants expressed the opinion that "viewers are getting smarter," and are keen to "get involved in information seeking." Unfortunately, viral online media are deemed by the government to have appalling connotations for Malaysian culture, as the government considers all viral video to be untrue and harmful to the development of society (Postill, 2012).

On the contrary, according to Lim (2013), this new direction in the public dissemination of viral video can be understood as the people participating in a civic responsibility to highlight relevant issues in society. It is based on the idea of *participatory culture*, which is defined as "a culture in which fans and other consumers are invited to participate in the creation and circulation of new content actively" (Jenkins, 2006, p.7, as cited in Sayilkan, Cansaran, and Saglam, 2021, p. 427). Lim's perspective on viral video includes the idea of participatory culture (Jenkins, 2014), such as the signing of online memoranda or petitions, which develops democratic processes beyond normal cultural boundaries and aims to unite Malaysians towards the creation of positive social and political changes. In relation to these developments, it is highly relevant

that the interview response from one content regulator's perspective was directly in line with Lim's positive evaluation (2013):

> All content in online videos is treated as additional information to verify that which is available on television. (Anonymous, Former Television Producer B (G1P5), interview with author, 2016).

The quote above is especially interesting to scrutinise as it comes directly from a regulator's perspective. This can be taken as a significant indication that not all of the regulators are 'on the same page' when it comes to enforcing the government's instructions in the regulation of content on the internet. The evidence in this case shows that, at the present time, the internet is used for information seeking purposes and can be directly linked to social or political changes in Malaysia that tend towards greater public freedom of information.

One pertinent example is the recent 1MDB international political scandal: Between 2013 and 2018, it is alleged that a multi-billion-dollar unauthorised funds mismanagement occurred within a government-linked company, *1-Malaysia Development Fund Berhad* (1MDB). This corruption scandal directly implicated the seventh Malaysian Prime Minister, Najib Razak, who is alleged to have been the main person responsible for unlawfully transferring illicit funds through individual and global companies. What happened at 1MDB shows significant weaknesses in its governance, and poor internal control within local banks, prompting law enforcement bodies to take appropriate action despite heavy political control over the system at the time (Jones, 2020).

To this day, the trial is still running in Malaysia. Meanwhile, in the recent development of the case outside Malaysia, the US *Department of Justice* has returned the laundered fund of USD 300 million (RM 1.3 billion) to the Malaysian government as a result of this international corruption scandal, and continues to work to retrieve the remaining funds, which have been invested abroad (The Star, 2020). During 2018, when the scandal was revealed, 1MDB became the highest sought-after topic on internet search engines in Malaysia (MCMC, 2020). This clearly indicates that viral video consumption is playing an important role in Malaysians accessing uncensored news content and public opinion.

So far, we have learned that mainstream television content is inspiring local viewers to search for online videos that can clarify or verify their content. Video distribution through the internet has become the most effective strategy for exposing various scandals in Malaysia, and the audience figures for mainstream television news seem to have been decreasing alongside this development (Steiner, 2019). This phenomenon of widespread public disbelief in the mainstream media also plays a highly significant role in explaining the appearance of a new generation of opinionated Malaysian video-makers with revolutionary ideas (Alam et al., 2014). Thus, viral video has become an alternative method of news and opinion broadcasting that paves the way for individual freedom to interpret a variety of public issues in the community.

As a result, online content distribution "has enabled Malaysians to access them electronically and redistribute them" (Lim, 2014, p. 204) through other internet platforms, such as *blogs*. A blog is basically an electronic journal available on the web. It becomes another space for internet users to express their

disappointments or disagreements in relation to local current affairs. Blogging is different from other electronic media, as it invites users or followers (i.e. readers) to take part in, and respond to, each uploaded instalment of material (termed an entry or a post). However, the Malaysian government takes the perspective that any online content from independent producers, such as bloggers, will not be suitable for local television broadcast, with a statement claiming that:

> The information is posted by people with no authority and may be provocative, politically motivated, or inaccurate, and is in any case mostly rumours floated for the interests of certain parties. (Information Minister Zainuddin Maidin, in Bernama.com, 2007).

Zainuddin Maidin gave the above quote in 2007, at a time when blogs had become an unstoppable trend in Malaysia, and many political activists were using this online medium to communicate their messages to their political followers. Even though this newspaper article was published over a decade ago, it has played a significant part in establishing the government's internet policy. Most importantly, it is contradictory to the government's policy of not filtering the internet. Hence, it provides clear evidence that, despite the announcement of such a policy, the Malaysian government is still cautious about political material that is available online, and especially those that relate to their public image (Wok and Mohammed, 2017).

The Malaysian television audience's realisation of discovering reliable information in an atmosphere of transparency has led to an unexpected turn towards internet media. This has strongly contributed to the rise of the "popular social media form – the video blog or v-log" (Lim, 2014, p. 518). Due to the

growing popularity of v-logging, numerous studies have been launched to

establish the prevalence of the practise in society, including "A six-nation study

funded by the International Development Research Centre (IDRC, Canada)

between 2009 and 2011 on Youth, Information Communication Technologies

(ICTs) and Political Engagement in Asia revealed increasing interest among

Malaysian youth in engaging with v-logs and participating in v-logging activities.

This ranged from identifying as fans of video bloggers to sharing videos on

YouTube and being directly involved in the production of 'viral videos'

 (Lim, 2014, p. 519). With the major involvement of youngsters in the country,

coverage of more current issues has surfaced online. V-logging is concerned with

publishing videos and exploring the potential for linking up via online

technologies (Hopkins, 2019). The following quote reveals the popularity of the

v-log as it emerges to complement existing blog platforms:

> V-logging is popular among the younger generation these days. I
> believe this is how they use such platforms to express themselves.
> From the government's perspective, this only attracts a small sector
> of the young audience, and not the overall Malaysian audiences. (Amir
> Muhammad, television/film producer, interview with author, July
> 2016).

The quote above exemplifies how the Malaysian government perceives emerging

media formats like the v-log. As a response to all types of online content, the

Malaysian government has launched a dedicated website known as

sebenarnya.my (literally meaning 'actually') to ensure negative or false news is

not widely spread. All internet users can visit this website to verify uncertain

news or any speculations based on recent government policy or action (Daud and

Zulhuda, 2020). From the government's perspective, the rise of unsubstantiated

online content is considered illegal in nature and may contribute to the

development of *fake news*. According to research conducted in 2017 by Micro Trend, fake news is a new form of information meant to promote and propagate false news articles on the internet. This news is designed to influence or manipulate internet users on certain topics, to gain specific objectives and to encourage untrue versions of the actual content.

However, despite proactive measures taken by the government to curb the distribution of false news on the internet, criticism of these efforts can still be heard, as Daud and Zulhuda (2020) note that a balance must be attained to provide enough space for Malaysians to voice their own opinions and views. By doing so, information on government policies can be distributed successfully. Thus, the time is right for the Malaysian government to look at internet technology as a useful medium capable of generating a good and positive image of it in the long run.

This section has investigated the influence and contribution of internet video content to the development of online political content. The emergence of viral video has demonstrated how internet users in Malaysia are discovering and sharing certain sensitive information pertaining to the government's activities. This trend of viral video has paved the way for understanding other internet media such as blogs and v-blogs, which have been linked to both the distribution of uncensored news, and the propagation of *fake news*. In the next section, we will broaden out the topic to show further developments in alternative content which can be related to the same trend.

Alternative Online Content for Television Broadcast

In contrast with the previous section, this section turns to scrutinise original online content and its contribution to creative video-making. The distribution of "short films and independent video productions made popular through online portals ranging from YouTube and Vimeo to more activist-centred sites" (Lim, 2014, p. 518). This scenario is confirmed by one interviewee, Amir Muhammad, an independent Malaysian filmmaker who became Malaysia's first digital feature film producer in 2000, with the release of his creative work, *Lips to Lips*. Several of his works, such as Lelaki Komunis Terakhir (The Last Communist), a semi-musical documentary and *Apa Khabar Orang Kampung* (How Are You, Villagers), have been banned by the *Film Censorship Board of Malaysia* (FCBM). According to Muhammad, the guidelines used by television stations in Malaysia are purposely designed to adhere to the requirements imposed by government policy, which has a detrimental impact on the artistic development of filmmaking in the country:

> Television companies have certain things they want to show. Anything experimental, anything that doesn't fit their production or technical standards, won't go to television; that's true everywhere. (Amir Muhammad, television/film producer, interview with author, July 2016).

This quote reveals how other content forms, such as short films, have been wrongly perceived by media professionals in Malaysia. It is common to hear independent content producers described stereotypically, including by more established filmmakers; such productions are stereotyped as being 'underground', low budget, and produced by non-profit-oriented 'guerrilla' filmmakers, who would release content without any consideration for the

mainstream viewing guidelines (Cheng, 2010). Nowadays, underground

content has emerged as a media vehicle for examining and portraying taboo

subjects in Malaysian society (Chang, 2017). Responses from the focus

group participants portrayed a clear range of perspectives on this:

> I consider this new trend to be a very fresh approach in disseminating messages to all viewers. At least [independent content producers] are creative enough to portray such negative or sensitive issues in society. (40-year-old, male, former television producer G1P5, 2016).

> I see this as offering a new opportunity to express how we feel about something, and to create job opportunities. (37-year-old, male, television producer G2P4, 2016).

> I think the government is trying to deny Malaysians the right to explore, or discuss, or talk about, taboo issues in the country. (25-year-old, female, media observer G1P6, 2016).

> The government acts like films examining negative themes can easily have a direct impact on the viewers. That's wrong! (35-year-old, male, broadcaster G1P3, 2016).

> I think this is the way government thinks: 'Don't show the people bad things, let's provide them with positive values according to our interpretation.' For me this is "bubble government," trying to create a very unrealistic view of society. (37-year-old, male, television producer G2P4, 2016).

The social impact of alternative content can be clearly understood from the

responses above. There is public demand for new content which accurately

represents global and universal themes that are, indeed, prevalent in Malaysian

society. While public demand for such content is increasing day-by-day, the

government (on a mission to promote social stability around themes of religion,

race, and nationhood) has decided to curb those themes in the mainstream media, which they consider will be harmful to viewers (Langvardt, 2017). This is precisely the reason given by the Malaysian government every time such an issue emerges.

In numerous cases, the *Film Censorship Board* has banned local films from being aired on television because they were deemed to provoke racial tensions, or to have the potential to lead to political unrest and social disorder (Mahmud et al., 2011). Malaysian television stations refuse to broadcast such provocative content, posing a significant hurdle for "alternative voices to reach the public via mainstream media" (Abbott, 2004, p. 82 as cited in Tapsell, 2013b, p. 4). It seems possible that such restrictions result in undermining the audience's ability to choose the right content for themselves on television, thus challenging their capacity for self-censorship or self-regulation (Nawang, Mohamed and Mustaffa, 2020).

On the contrary, some alternative content is meant to liberate the audience's minds and create awareness of global issues (Vandrick, 2011). Nevertheless, despite the high public demand for such content, the mainstream television industry must follow the guidelines set out by the government. Thus, it is unfortunate to see that there is still no space for independent filmmakers to broadcast or distribute their content on national television stations in Malaysia. This situation has resulted in rampant, free online content distribution by local independent producers seeking to engage with viewers (Yee, 2016). The free sharing concept is common amongst viewers, video creators, and independent filmmakers alike, wherein online platforms like YouTube and Vimeo are used to

search for newly released material, and alternative film blogs are used to promote film releases (Hernandez, 2012). This development once again focuses attention on the progressive direction taken by creative players in the Malaysian media industry. Responding to this situation in a local newspaper interview, filmmaker Lee expressed a confident opinion that future will include the creation of new broadcasting markets revolving around new platforms that can benefit local film producers in general:

> I don't think I've lost all faith in the traditional way of screening my films in cinemas, but the reality is we're competing with huge blockbusters like Marvel's superhero franchise and Star Wars. I am just changing the market and platform where we would be able to sell our content. (Quoted in *The Sun Daily*, 4th January 2017).

Based on the quote above, it is obvious that mobile video content on social media platforms is particularly driven by devoted video creators, who are committed to good video production values, with proper distribution planning (Burgess and Green, 2018). At this point, the establishment of YouTube as a major platform for the discovery of filmmaking talent comes with massive obstacles. While YouTube can offer seemingly unlimited volumes of video content and can function as a major platform for viewers to interact with products, some content is still exclusively restricted to those subscribers who pay a monthly fee. However, another perspective provided by one of the interviewees challenged the notion of popular content. The interviewee, Faisal Hamdi Mohammad Ghouth, Head of Department, Digital Creation and Distribution Platform (MCMC), suggested the following:

> Even if unique content is available online, there is unlikely to be sufficient market penetration for it to become a medium of

communication. At this point, the mobile broadcast of content offers more of a conversation starter than its original version broadcast on television. We surmise that, to be a success, mobile viewing will require both popular content from other media *and* content generated specifically for this service. (Faisal Hamdi Mohammed Ghouth, Head Digital Creation and Distribution Platform, MCMC, interview with author, August 2016).

Regarding television content development, the same interviewee, Ghouth, also stated that "television content is influenced by popular culture, is very commercial, and ignores the aspect of social development." One possible effect of accepting this view of television content is the impedance of our attaining national ambitions for the industry, as a lack of creativity has been highlighted as one of the major problems within the television sector (Au-Yong, 2019). We are at a significant turning point for free public and private television stations in Malaysia; addressing the viewers' demand for more creative content is absolutely vital, should they wish to co-exist commercially with online media. It can be suggested that this is the main reason why the majority of Malaysians now choose to watch online content and ignore linear television (Vanattenhoven and Geerts, 2015).

This section has uncovered another form of online content consumption that has emerged to steal away the attention of Malaysian television viewers. Viral video is currently a significant interest among mobile viewers, and this phenomenon seems to be closely linked with the consumption of blogs and v-logs in Malaysia. Undoubtedly, alternative videos, blogs and v-logs offer a popular alternative medium for Malaysian viewers to learn more about news, political updates and other sensitive issues in the society.

Conclusion

This chapter has explored a number of highly relevant themes which reveal the complex relationship between the current liberalisation of media policy in Malaysia and the impact which media regulation has had upon other forms of online content apart from conventional television programmes. Overall, this chapter has aimed to answer the final research question: What role do local political, social, and economic elements play in mobile policy development within the Malaysian television industry? The analytical data obtained from two focus group sessions significantly revealed the less-than-straightforward connection between regulatory bodies, television stations, and viewers. The study has raised substantial questions regarding the success of efforts to establish a more robust framework of media regulation in Malaysia.

In reviewing the development of the country's media policy, it makes sense to reconsider the current policy when governing new technologies in the broadcasting industry, particularly the television industry. In Malaysia, the television industry is currently under the supervision of two major government agencies, namely MCMC and CMCF. MCMC is responsible for all online content, while CMCF's role focuses on the rating of content and issuing rating codes for content on all television stations in Malaysia. So far, there has been no specific set of regulations issues for regulating television content distributed on the internet. In this situation, television stations must rely on the current broadcast guidelines for traditional linear broadcast.

From the data uncovered during interviews with a range of media professionals, this chapter has concluded that a major gap in understanding exists between the media professionals and the Malaysian government in coordinating a transformation plan suitable for adaptation to the new mobile technology environment. This study has also found that industry insiders have issued numerous calls for guidance and support from the government, which have gone unacknowledged – a fact which potentially endangers the success of the industry. By listening to industry professionals, and by exploring revolutionary new approaches to policy for the media industry, this study can serve to offer guidelines for the Malaysian government in this regard. It is imperative that the government considers the widest possible range of policy and regulatory alternatives at this crucial time, as it an openness to the new which will be the most important factor of our embracing the opportunities of internet technology, and our cultivating a healthy online content environment. Therefore, we can clearly see that our broadcasters and independent content creators in the Malaysian industry should be given incentives and proper direction.

This widely held view is still considered by some to be problematic when it is applied to the Malaysian context, because the Malaysian government's current policy of imposing tight restrictions on the internet has led to the heavy censorship of television content. As a result, the country's current regulatory system for online content has not been fully developed, and this lack of appropriate development continues to exclude Malaysians from today's global mainstream experience. Consequently, the efforts of Malaysian industry professionals to facilitate our country's television industry's inevitable transformation are being hampered and wasted.

Although this chapter has considered the social effects and potential of other forms of viral and alternative online content, it is clear that all such minor developments in online content creativity have been overshadowed by the rise of Netflix in Malaysia. The absence of a clear media policy, particularly on the platformisation of local Malaysian content for streaming television, has helped Netflix to grow and become a dominant rival in the streaming television sector. Existing Malaysian media professionals are threatened by the runaway success of Netflix, which can offer more interesting content to Malaysian viewers because it is not subject to the same framework of censorship imposed on domestic broadcasters. We have seen that Malaysian viewers greatly enjoy the content which Netflix provides, and they are very satisfied with the subscription fee - a surprising situation because Malaysian viewers are usually reluctant to pay for any content on the television.

In the early pages of this chapter, the investigation revealed a clear public view that MCMC has shown ineffectiveness as the government agency responsible for disseminating information on the content of streaming television. It appears MCMC is itself confused about the television industry's plans to place their content on mobile platforms – surely indicating that more dialogue and transparency are needed. It was also found that, as an independent agency, MCMC should advise the government to promote its fuller understanding of the technological and economic benefits of establishing online content services for mobile platform in the country. Besides this, it was clearly felt by interviewees that MCMC should possess clearer information about the media industry's plans and attempt to collaborate more closely with media professionals. It can be

deduced that MCMC has little intention to widely educate the public on the benefits of mobile technology.

In conclusion, it is clear that both the Malaysian government and media professionals should investigate the enormous opportunities and potential economic benefits of mobile technology more thoroughly, especially if we are to ensure the sustainability of the country's television industry. There is a clear need for us to reconsider the wide range of television platformisation options offered by the internet to safeguard the future of the television industry and benefit the viewers. This completes the findings chapters of the study. The next section presents a comprehensive conclusion to the thesis and includes an assessment of the study's limitations and suggestions for further investigations in the future.

Chapter Seven: Conclusion

This thesis was developed to explore the new directions that Malaysian television stations have taken to distribute television content on mobile platforms. Its specific focus concentrated on the level of preparedness and execution undertaken in the industry to adapt to this new world of online television content distribution opportunities, with a particular concern for the internal decisions made within television stations. Although the transmission of television content via the internet has been extensively studied internationally in the past decade, the online distribution of television content in Malaysia has remained relatively unexplored. In this research, I have capitalised on that untapped research potential to present and discuss Malaysian television stations' preparedness to embrace internet platforms in the distribution of television content.

In undertaking this study, several important external factors were taken into account, including the country's policy frameworks and regulations, and the impact of international media organisations on the local market, in order to establish the most effective route to a robust online, mobile platformisation of television content in Malaysia. In doing so, it was absolutely vital to situate the thesis's scope within the current global climate around mobile technology; to consider the overall significance of television content for mobile platforms; and to analyse the implementation and workability of existing regulatory systems that govern television content for mobile platforms in the country.

At the heart of this thesis was the examination of media industry professionals' perspectives, ranging from the key personnel involved in content production inside television stations to the major decision-makers involved in structuring the regulatory system in the Malaysian broadcasting industry. In polling this great diversity of involved personnel, semi-structured face-to-face interviews and focus groups were used to great effect. While the researcher acknowledges the inherent difficulties involved in retrieving transparent data input during social research, particularly from government participants, a range of views were gathered by conducting anonymous focus group interviews with some participants. This has ensured that the research project was able to gather a balanced range of opinions, and also provided the researcher with opportunities to scrutinise all of the relevant issues in the industrial setting with greater traction.

The research findings presented in this thesis are both timely and significant, as the primary goal of the project has been to understand the range and level of impact that global television content distribution strategies can have on the local Malaysian television industry. It is only since 2014 that mobile technology has begun to receive substantial attention in the Malaysian television industry. Hew et al. (2015) undertook a study projecting the future of online content distribution in Malaysia, while Ooi and Tan (2016) followed up on this initial interest with an update on online content distribution's advancement in Malaysia. Between these two early studies and today, however, little further investigation has been undertaken into online television content distribution on mobile platforms in Malaysia, while local television stations themselves have adopted a range of ineffective content distribution strategies. The research

leading to this thesis was, therefore, significantly driven by a severe lack of research into this important developing area of the Malaysian television industry, and particularly research which directly considered the perspectives of media professionals and regulators. The thesis has focused on providing fresh insights on the challenges and opportunities present in the establishment of online content for local television stations. Furthermore, I have provided a range of justifications for the urgent renovation of the country's policy and regulatory framework, in order to facilitate the widespread implementation of mobile platforms within Malaysia.

This thesis has championed three research questions concerning the opportunities, strategies, and actions that television stations and Malaysia's regulatory bodies need to adopt and take, in order to establish the country's online content framework:

RQ1: To what extent does the global television industry influence the nature of content distribution by local television stations in Malaysia?

RQ2: What are the adjustments in content distribution that have been made by Malaysian television stations to embrace streaming services?

RQ3: What roles do the political, social, and economic elements specific to Malaysia play in the development of mobile policies within the country's television industry?

Chapter Four addressed the first research question, which aimed to explore the opportunities presented to television stations by the global changes in television content transmission. Chapter Five focused on the second research question, which explored the strategies undertaken by television stations to introduce appropriate streaming services for television content. Finally, Chapter Six, expose the action needed to construct a cohesive set of policies that will support the long-term development of online television content distribution for mobile platform in Malaysia's television sector were discussed. In this conclusion, I will first summarise and discuss the findings of the previous three analytical findings chapters. Next, I will expand the discussion out to address the wider implications of the analysis for the practices of television stations and for Malaysian policymakers. Finally, I will conclude the thesis by highlighting the limitations of this research and offering suggestions for further areas of the topic meriting exploration in future research.

Summary of Findings

The Changing Landscape of Malaysian Media

Chapter Four sought to answer the first research question, which concerns the prospects created by current changes in the Malaysian media ecosystem as a result of global television content distribution. As we saw, there is strong international evidence that streaming technology has rapidly grown to become the dominant new form of television content distribution and consumption. Recent changes in the television industry worldwide have been primarily motivated by this trend in media consumption, as mobile platforms extend the

viewers' ability to consume whatever television content they want, wherever they want, and whenever they want (Flayelle et al., 2017). Chapter Four found that internal political issues within Malaysia are reflected in a low public estimation of the transparency and credibility of traditional linear television news reporting, and that these factors of public mistrust are also starting to influence the current direction that Malaysian television stations are taking in their news reporting. The chapter has confirmed that people consider television news content distributed on mobile platforms to be an alternative to mainstream news media, which is generally more credible than mainstream news, especially that broadcast linearly on television.

The government's involvement in television content distribution can be seen in its attempt to filter or censor television news content by introducing several parliamentary acts, policy frameworks and regulatory bodies, which are widely believed by the public to control the broadcast of any content which is not in the government's favour. We examined the political landscape of media ownership in Malaysia to examine the basis of these public beliefs, showing that political party influence and ownership extends to private television stations as well as the government-owned broadcaster. As a result of the lack of transparency and biased news reporting described by interviewees, we saw that traditional television viewership has decreased dramatically in Malaysia. To regain the viewers' trust, we saw that private television stations have changed their news policy by producing less politicised reporting and introducing online television content distribution for mobile platforms. It is ironic that, for television stations to adopt this new politically unbiased direction, they have had to neglect the government's regulations. So far, the government has not

directly reacted to this new direction in news reporting taken by private television stations, as both parties view it as an attempt by the broadcasters to stay relevant and garner viewers in the television business.

Oddly, despite the government showing little direct concern about the availability of television content on mobile platforms, the Malaysian Communications and Multimedia Commission (MCMC) has begun augmenting the government's supervision of media and television broadcasting activities. This serves to show that the government is not ready to allow the Malaysian media to function freely, or to adapt to global technological changes in order to remain in step with current global realities. MCMC has been enforcing strict government regulations in the television sector, and any television station's failure to comply with those rules will result in license revocation. In such a strict environment of media regulation, the significance of regulation and the actions of the country's regulatory bodies became a topic for comprehensive analysis in Chapter Six.

The influence of social media platforms globally has managed to attract a higher number of young users, which is shaping the nature of television content distributed on mobile platforms. This has created a new viewing culture among younger viewers in Malaysia. The broadcasting of television content on mobile platforms presents a massive opportunity for television stations to capitalise on new media consumption patterns and boost their viewership by tapping into the younger generation's emerging media consumption patterns. Understandably enough, this viewing pattern has been directly associated with the massive market in Malaysia's mobile phone industry. From the perspectives of the television stations, this is a major indicator of the demand for online content on

mobile platforms in society. However, I have argued here that misunderstandings (and a lack of solid research data) about the relationship between market demand for high-quality television content on the one hand, and mobile video viewing habits of the young on the other, has led to significant misunderstandings about public demand by Malaysian television stations when introducing streaming services for online content. To date, the launching of television content on mobile platforms and streaming services has been disorganised in Malaysia, as the decisions to offer mobile services were hastily made with a lack of information about online broadcasting guidelines, and therefore poorly executed (Hesmondhalgh and Lobato, 2019).

The Unlimited Control of Exclusive Sports Content Distribution for Free-to-Air (FTA) Television Stations by ASTRO

Despite uncertainties in the Malaysian television industry's direction and execution when embracing new technologies such as streaming services, Chapter Five of the thesis found that television stations have continued to adapt to the new strategic landscape of digital distribution. This can be seen in the launch of high-demand, premium television content services, which have boosted the use of mobile platforms considerably. Chapter Five showed conclusively that international sports content, such as the *English Premier League* (EPL) games, has become the most popular content for the subscription-based satellite television station ASTRO. EPL matches have also been extremely popular on the station's mobile app *ASTRO Go*, where users can stream live matches.

The chapter found that ASTRO's ability to hold exclusive distribution rights in the country has led to its full autonomy (or monopoly) in controlling the distribution of international sports content. ASTRO has demonstrated little consideration for the Malaysian public, or its partnership distribution stations, in its decision to relentlessly raise the price of its sports packages, resulting in expensive subscription costs that have stirred up resentment among local sports fans. We saw that the widespread concern expressed by viewers became an issue of national concern debated in the Malaysian parliament, forcing the government to intervene to resolve the pricing issue. Nevertheless, this was a futile gesture, as ASTRO then decided to increase the price of its service once again, citing the increasing cost of production values. The chapter firmly concluded that ASTRO's dominant control of exclusive sports content appears irrepressible.

Based on the literature review conducted in the opening chapters, Chapter Five interpreted ASTRO's seeming monopoly over international sports as *prima facie* evidence of a strong governmental influence in Malaysian sports media. ASTRO's extreme dominance over exclusive international sports content in the country, such as their control over broadcasting rights for the EPL, yet again provides evidence of a link between media ownership and Malaysia's political parties. At the time of writing, no details of the negotiations and agreements between the Malaysian government, ASTRO, and the international sports rights holder have been disclosed to any third party, including the regulators. This raises many unanswered questions, as it also invests ASTRO with the authority to control the broadcast of EPL matches, according to their inclination and their pricing structure, on other television stations in Malaysia. ASTRO may strike a

partnership deal with any television station, but it may equally decide to terminate that partnership at any time if its own services, and its business model, become threatened. Little other than the existence of a state-sanctioned monopoly could explain ASTRO being given continuous exclusive sports broadcasting rights in the country without the conducting of any transparent negotiation process, and therefore, Chapter Five largely confirms the existence of a significant monopoly on sports content in Malaysia's broadcast media.

We saw that one of ASTRO's recent partnership terminations involved *UNIFI TV*, the IPTV service owned by *Telekom Malaysia* (TM), Malaysia's major internet provider. Chapter Five explored the significant initiatives undertaken by UNIFI TV to end ASTRO's dominance over international sports, by becoming the official broadcaster of local sports events and other ASEAN sports events, such as the SEA Games in 2017. This bold move by TM introduced a new competitiveness in sports content broadcasting in the country, which had not existed before. However, we saw that the alternative sports content offered on UNIFI TV is still quite new for the viewers, and still require further effort in order for it to become well-established. Finally, it is worth closing my summary of Chapter Five's findings with the observation that, even though sports content broadcasting plays an extremely important role in Malaysia's television industry, the influence of the broadcasting industry is not critical to the development of the country's actual sports industry, and it is worth remembering that.

Dilemmas in Malaysia's Media Laws and Regulatory System

While sports content certainly helps to increase mobile viewing, Chapter Six found that the government has not provided an adequate set of guidelines for its regulatory bodies to effectively supervise the online distribution of television content. We saw that, to date, all television content for online distribution has been produced on the basis of guidelines designed for the regulation of traditionally broadcast content. This is somewhat ironic, as the absence of such guidelines contradicts the government's former keenness to filter internet content labelled as harmful to eastern values. Chapter Six identified that the government's decision to embrace such openness is driven by the aim of developing a more commercially competitive television industry. This approach has led to a liberalisation of media regulations by the government to a certain degree, allowing the Malaysian television industry to successfully adopt internet technology for content distribution.

Crucially, we saw that this liberalisation of internet regulation has allowed major television content providers to penetrate the Malaysian market in online television from outside, more successfully than local stations have been able to. We looked at the emergence of Netflix as a new content provider in Malaysia, and saw how it has enjoyed stellar success by offering original, well known and high-quality content with an affordable monthly subscription fee. From one point of view, that of the consumers, this development provides new opportunities for local viewers to access a variety of excellent and high-quality international content. However, Netflix has also come to represent a new challenge for the local television industry. Even though efforts have been made

by local television stations to match this level of international competition by producing some original content for mobile users, their impact is minimal, as the viewers feel that most of Netflix's content has better storylines and remarkably high production values.

Chapter Six has shown us that industry responding to consumer demands for sound, high-quality productions is deemed critical to the success of Malaysian television stations in the future. We saw that the creating the opportunity to achieve higher-quality, more attractive content production is closely linked to self-regulation by industry professionals. The industry moving towards self-regulation has offered the government with a way to become less involved in monitoring television content, transferring this role to the regulators and television stations themselves. It is abundantly clear that modern Malaysian viewers expect a greater variety and higher quality of content on television nowadays, and the move to self-regulation was seen by many as promising the possibility of delivering this. Sadly, however, this approach has so far failed to attract viewers' attention, as television stations have not been able to provide them with a wider variety of content. Once again, this supports the notion that television stations in Malaysia are heavily influenced by political parties that refuse to initiate major changes in the television industry.

As television stations currently offer good content ineffectively, or struggle to effectively produce good content, Chapter Six also turned to examine another video phenomenon which has demonstrated runaway online success: the rise of viral video. We saw how the success of viral video is directly associated with the mainstream media's inability to provide fair news reporting and the widespread

understanding that mainstream media providers play a role in distracting viewers' attention away from discussing the sensitive issues in contemporary Malaysian society. As a result, viral video is being produced in association with blogs and vlogs to allow Malaysians to discuss current issues, particularly current politics. Equally, we have seen that various forms of creative video content, such as short films, are being produced and distributed online by the creative community to address taboos in society, such as the existence and validity of the LGBTQIA+ (Lesbian, Gay, Bisexual, Transgender, Queer, Intersex, Asexual) community, the sovereignty of the king and royalty, and religious issues. Despite the government's negative view of viral video content, therefore, Chapter Six has shown evidence that these video media are fulfilling a social need in providing local viewers with the opportunity to safely air and exchange their views, and expose themselves to, and interact with, the international community. Viral video has become a clear alternative for local users to widen their exposure to international issues, away from local political influence.

The Implications of the Research

Based on the range of perspectives outlined above, this section argues that a lack of clarity in regulatory guidelines for television content production has resulted in uncertainty among television industry professionals, which has hampered the effective development of the mobile environment by local television stations. Despite the clear willingness of television stations to develop online platforms for content distribution demonstrated in Chapter Four, the issues revolving around content monopolies and market domination revealed in Chapter Five demand instant attention. Whilst online television content

distribution is a worldwide strategy adopted by various media agencies, the regulatory systems in Malaysia need to be effectively enhanced, updated and systematically recrafted to ensure an outcome that can strengthen the industry in Malaysia, which will ultimately benefit viewers, television stations, independent content creators, and policymakers alike.

Addressing the implications of the thesis for policymaking around online content, there is an urgent need for a standard framework of guidelines for online television content distribution in Malaysia, which will guide television stations to adopting a profitable and sustainable distribution model for online television content. To achieve this, policymakers and producers should consider Malaysian television content as a highly profitable commercial commodity capable of competing in the international market. Television stations should focus their energies on producing original content formats, exploring new filming techniques, and creating more appealing and creative storylines. All of these things are possible and achievable through systematic research, cultivating talent, and long-term investment commitments. What needs to come into being alongside this initiative is the willingness of policymakers to adjust certain facets of the regulatory framework in order to better fit current, and future-ready, production demands. In bringing about such changes, it is also essential to ensure that development within television stations remains uninterrupted, constant and consistent.

Something which this thesis has observed, time and again, is the need for the development and administration of Malaysia's media, and specifically its television industry, to be neutral and free from any political influence. This

impartial administration can be easily achieved by forming a team of independent regulators to observe the legal system around broadcasting, and to ensure that all of the guidelines are fully adhered to by all players in the media industry. New hopes for the formation of such a regulatory body of observers may come to fruition following recent calls by media activists in Malaysia for the formation of a 'media council.' At the top of the list of demands made by such media activists is the abolition of the *Printing Presses and Publications Act* (PPPA) 1984, which currently gives the government full licensing control over the media in Malaysia. With or without the abolition of the PPPA, however, the creation of such a 'media council' would face major challenges; the previous Malaysian government staged a coup in mid-2018 and forcefully took back control of the country, and discussions on this matter are still underway, with the current government considering new research on the matter.

Nevertheless, the biggest challenge to media regulation in Malaysia is ensuring that individuals involved in political parties, and particularly those in a sitting government, are not also associated with the ownership of media organisations. Although the steps needed to redesign the structure of Malaysian media into an ideal form are clear, taking them is, in fact, difficult to achieve and will take a long time to complete. This is because the country's media and the judiciary are under the prime minister's control, and any decision to enact restructuring changes will require the prime minister's approval. Nor will such changes be possible without massive policy changes being made within television stations in Malaysia. Television stations in Malaysia need to play a role in shaping the atmosphere of content management by focusing on creating a more efficient and enabling system of administration.

Considering the implications of this thesis's findings in relation to online content demand, there is a clear need for Malaysian television stations to reduce their dependence on imported television content, especially in the arena of sports. As the wrangles between ASTRO, its partnership stations, the Malaysian government and the public showed in Chapter Five, there is a tendency to be highly dependent on internationally recognised sports broadcasting, such as the English Premier League (EPL), which has become detrimental to the industry as a whole. Although this author must admit that such reputable content may take a long time to replace with other sports content to the public's satisfaction, a shift needs to take place which introduces different sports content for consumption. For instance, in recent years, the Asian sports industry has been improving and receiving decent recognition worldwide (Lee and Tan, 2019), and if we don't champion Asian sports in Asia, who else will?

One particular area of growing interest has been the pioneering of regional telecommunications technology by several Asian countries, such as China, Taiwan, and South Korea, which mean they lead and dominate in e-sports. E-sports were introduced as a demonstrative event in the 2018 Asian Games, and went on to become an official competitive component of the 2019 Southeast Asian Games. Pike (2019) anticipates that e-sports will become a dynamic sector of sports in the future global sports industry, particularly in Asia. Clearly, this is an area of convergence between online viewing and sports that needs to be explored by television stations in Malaysia. Alongside the availability of such content, the role of advertisers and sponsors needs to be included from the outset; advertisers need to see the exposure potential that local or international

sports content can provide, allowing revenue-generation to grow hand-in-hand with new forms of viewing experience for the audience.

A second major concern of this thesis in relation to online content management for mobile platforms, has revolved around the important role that government agencies, such as the *Malaysia Digital Economy Corporation* (MDEC), can play in enhancing digital content in Malaysia. MDEC can play a potentially crucial role in improving television content, by providing upskilling opportunities and funding that can promote the development of fresh new content for television broadcast. In recent years, MDEC has offered various grants to independent content creators to enable them to explore new production areas, such as animation. This thesis predicts that MDEC will come to be seen as a major solution-provider in relation to television content issues, as long as television stations are ready, willing and able to open their doors to independent content creators. These questions of willingness are major issues that need to be addressed, which will involve building closer relationships between MDEC and television stations in Malaysia. If this can be achieved, however, it holds the promise of bringing in a new era of digital content for television stations.

Something which my consideration of alternative online filmmakers strongly indicates is that television stations developing an 'open door' policy to young content creators is essential and desperately needed. It can be argued that the Malaysian media industry is losing some of the country's most creative young people to the internet, and bringing them 'in the door' would greatly strengthen the industry, and (managed correctly and carefully) would not have an impact on the regulatory system as a whole. Another role television stations in Malaysia

can take on is to develop new ideas and techniques in content delivery. Television stations should look to other platforms, such as YouTube, not as rivals for viewer figures but as a long-term investment which highlights new talents that can be scouted for. Recently, there has been a significant increase in YouTube videos being posted by creators specifically to promote public awareness of their content creation skills. Television stations should open the door to such individuals and allow them to share their creative works nationally.

Another key reason for television stations to undertake these moves is simply this: It is impossible for television stations to overhaul the whole regulatory system in the country on their own; given this fact, extreme efforts and lateral thinking of this kind are necessary to ensure the development of television content to suit viewers' demands. These moves can strengthen the status of television stations, allowing viewers to understand television as a medium where they can consume unbiased content and express their unfiltered opinions. Only this will serve to dispel the public perception that television content in Malaysia is still under the government's influence. In line with current global developments, it is time for television stations in Malaysia to explore new publishing techniques to ensure that production quality continues to improve. The use of telecommunications devices, such as the iPhone, to produce and publish, should be considered. Although emerging digital content opportunities like these require a longer form of research to fully assess, television stations need to act proactively to feature quality content on television screens and mobile devices.

The Limitations and Future Scope of the Research

This research has sought to create a foundation of research aimed at understanding the efforts of television stations in adapting to new content distribution strategies during a phase of new technological development. While it has managed to uncover the details of transformational stages in content management, policy making, and regulation, it is also clear that further empirical works need to be done which follow up on the findings outlined here.

The main limitations of this thesis relate to questions of face-to-face interview participant sampling and selection, and particularly to the openness of some interviewees to answering all of the questions related to this research. Ironically, some of the interviewees were eager to be interviewed and offered very useful insights on the topics raised, but decided later not to allow the researcher to use the information given, because they had concerns about their personal and job safety. Many of the interviewees, particularly those from the government sector, refused to allow the inclusion of some details as they were afraid that any information they shared might be used against them. Equally, due to their concerns about the possibility that the interview sessions would not be as anonymous as they are conveyed here, many interviewees tended to portray existing mobile technology systems, policies, or regulatory frameworks as being more efficient than they truly are. Therefore, it became clear to me that it would be difficult to assess all of the interviewee input seriously without attempting to investigate the issues in different ways; hence, I turned to the conducting of focus group interviews as a way to offer interviewees greater anonymity. In addition, some interviewees declined to give interviews at the last

minute, although they had initially agreed by email. These needed to be replaced by other interviewees who hold similar roles as them, but in other government agencies. Unquestionably, this hindered the researcher from obtaining distinct perspectives from certain organisations. This thesis interacts with various parties, either private or government representatives, to obtain comprehensive and detailed information on various facets of the research.

A second limitation of this thesis must have been the translation process. To obtain data for analysis, each interview session was conducted in Malay, the national language of Malaysia. While translation might seem like a straightforward process to those who haven't undertaken it, Malay and English are very different languages, and there are real difficulties with translation when one is dealing with industry terminology, and with academic language. A number of the interviewees insisted on changing certain terms, or the whole vocabulary, when they read the English translations; in some cases, I felt that this reduced the impact of the statements' detail. Equally, there are some things one can say easily in Malay that one cannot say easily in English, and *vice versa*. The interview transcripts were altered based on the interviewees' interpretations, but this has sometimes had the effect of interrupting the directness of their critical and instant reflections on the topics concerned. As a solution, the researcher has compromised by making the changes requested by the interviewees and trying to replace those terms with the closest equivalent terms, in the hope of conveying most closely in English the original meaning in Malay.

Concerning future research directions in the field, it would be extremely valuable to further explore the *Information Communication and Technology* (ICT) dimension of the mobile media phenomenon, particularly to explore the impact of new mobile technology in other areas of the Malaysian media, such as in the print media. Quite distinct from the television industry, print media is heavily involved in digital book production, and this area also seems to be benefiting from the development of mobile technology in the country. It would be immensely useful for future research to investigate the relationship between mobile technology, e-books and book readers, in order to develop parallel arguments to this thesis based on the perspectives offered by that research. By doing so, one can anticipate that we may be allowed to come to a collective perspective in this area, thus shedding greater light on some of the more relevant general understandings of the role that mobile technology is currently playing across the media.

Another area surely worth exploring further is the impact of the remarkable emergence of Netflix in the local broadcasting industry. Although the presence of Netflix in Malaysia has still not had a significant effect on the local terrestrial television industry, there is a clear need for anyone involved in the television industry to look closely at its business model. This is highly relevant in Malaysia, given that local television stations face such a pressing need to learn how to stay competitive at both the local and international scales. Moreover, to date, no detailed study has been done on the impact of Netflix on the Malaysian economy, nor on the special regulatory aspects that surround its relationship with the local television environment.

Supplementary to these undertakings, it is clear that a study of the emergence of online content on mobile platforms in Malaysia would be greatly enhanced by comparative insights into the emergence of the same phenomenon in a parallel national case. Great knowledge could be gained by conducting research into the impact of mobile technology on the television industries of other countries and geographical areas. It would be particularly useful to examine how the development of mobile technology has occurred in other Asian countries, and this should be further explored through similar empirical studies. While mobile technology presently has enormous potential to promote radical economic growth in developing Asian countries, that potential remains to be explored, and to be capitalised upon. Many of the current cultures and political climates of such countries are still quite conservative. Comparing and contrasting the efforts made in different nations would provide us with great insight into the global phenomenon of mobile technology's adoption, creating understandings which would be noteworthy and contribute significantly to future knowledge.

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Appendix A: Ethics Approval

Dear Abdul

Ethics Application 100150138: Ethics Approval

Ethical approval is given for your research. Please note that an end of project report is required by the Ethics Committee. A brief report should be provided within one month of the completion of the research, giving details of any ethical issues which have arisen (a copy of the report to the funder, or a paragraph or two will usually be sufficient). This is a condition of approval and in line with the committee's need to monitor research. Further, it is your responsibility to inform, as appropriate, your supervisor, advisor or funding body of the outcome of your Ethics application. You should also indicate successful receipt of ethics clearance on the acknowledgements page of the approved project.

In addition, any unforeseen events which might affect the ethical conduct of the research, or which might provide grounds for discontinuing the study, must be reported immediately in writing to the Ethics Committee. The Committee will examine the circumstances and advise you of its decision, which may include referral of the matter to the central University Ethics Committee or a requirement that the research be terminated.

Information on the College of Arts Ethics policy and procedures is at http://www.gla.ac.uk/colleges/arts/research/ethics.

Yours sincerely

Iain

Dr Iain Banks

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Appendix B: Invitation Letter to Participants

University of Glasgow | Centre for Cultural Policy Research

(Date)
(Participant correct name and address)
Dear _____,

You are invited to participate in a research study on Malaysian television content in the mobile environment. This interview session will require about 30-60 minutes of your time. During this time, you will be interviewed about your experiences dealing with mobile communications development and issues pertaining to second screen phenomena in Malaysia. The interviews will be conducted at a location of your preference (e.g. in your office), and will be audio-recorded.

Hopefully, you will find the interview session to be very enjoyable and rewarding, as mobile communications have undergo major development and now benefit many sectors including the broadcasting industry. By participating in this research, you may also benefit others by helping the public to better understand the current direction of mobile communications in Malaysia and open doors for other opportunities (which wait to be discovered) for the benefit of people from all walks of life.

Data will be securely stored in hard and digital formats. With regard to the digital format, all information will be kept in a researcher's password-protected personal laptop and only available to the researcher throughout the research. Hard copy data will be kept in the researcher's personal file and locked in a specific drawer/filling cabinet. The results of this study are intended for completion of a PhD research thesis and may be presented at conferences/seminars and published in peer-reviewed journals, as an on-line article or section in a book or report.

Your participation in this study is voluntary. No monetary reward will be provided. No explanation or justification is needed if you choose to not participate. Your decision, if you not want to participate or continue to participate, will not disadvantage you or involve any penalty. You are free to withdraw your consent for further involvement in this project at any time. You also have the right to withdraw any personal information that has been collected during the research.

If you require any information about this study, or would like to speak to the researcher, please call Abdul Hadi Che Hassan at +44 7804985353 or email hadiaqasha@gmail.com. If you have any other questions regarding your rights as a participant in this research, you may also contact the Centre Administrator, Centre for Cultural Policy Research (CCPR) at the University of Glasgow at +44 0141 330 3806 or ccpr@glasgow.ac.uk.

If you are happy with the above, then I would ask you to sign the following consent form.

I have read (or have been read) the above information regarding this research study on mobile communications and second screen phenomena development in Malaysia, and consent to participate in this study.

_____ (Printed Name)
_____ (Signature)
_____ (Date)

Appendix C: Consent Form

**University
of Glasgow**

CONSENT TO THE USE OF DATA

University of Glasgow, College of Arts Research Ethics Committee

I understand that <u>Abdul Hadi Che Hassan</u>
                             (name of researcher)

is collecting data in the form of

taped interview

_____

for use in an academic research project at the University of Glasgow.

The aim of this research project is to examine the effects of mobile communications within Malaysian society. The research will look at the elements of mobile media and their connection to the social media era and closely examine the major components in relation to the adoption of new technology in society. It will focus on how mobile media evolved and how their effects can benefit Malaysian society. This research also will investigate the impact of social media platforms in relation to television viewing behaviour. Overall, the research will be linked to the current topic of the 'second screen' and will explore how second screen phenomena have synchronised with and complemented television screen content. Through this research, two research questions will be asked: i) How have mobile communications and second screen phenomena influenced television viewing in Malaysia? And, ii) What are the key trends of television viewing and social media consumption towards the evolution of broadcasting and creative industry in Malaysia?

I give my consent to the use of data for this purpose on the understanding that:

- The material will be treated as confidential and kept in secure storage at all times.
- The material will be retained in secure storage for use in future academic research
- The material may be used in future publications, both print and online.

Signed by the contributor:_____   Date:

Researcher's name and email contact: Abdul Hadi Che Hassan(hadiaqasha@gmail.com)

Supervisor's name and email contact: Lynn Whitaker (lynn.whitaker@glasgow.ac.uk)
                                        Raymond Boyle (Raymond.Boyle@glasgow.ac.uk)

Department address: Centre for Cultural Policy Research, University of Glasgow
                       13 The Square, Glasgow, G12 8QQ

Appendix D: Data Collection Report

DATA COLLECTION REPORT – FIRST PHASE (JULY – SEPTEMBER, 2016)

SUMMARY

I decided to divide my interview process into three stages. In every stage, I managed to interview ten to twelve respondents and all of the interview sessions were recorded using a voice recorder on iPhone. For this phase I managed to interview 24 respondents. A major alteration on the interview schedule was needed due to personal requests from the respondents. All of the interview questions were based on the specific objectives derived from the research proposal. However, the sequence of the questions was altered based on the direction of each interview session. For example, some later questions were asked first due to the recent flow of the discussion. This was crucial to ensure the smooth flow of the interview session and to avoid repeated questions. Minor issues did surface when one of the respondents refused to be tape recorded. He asked me to use conventional note taking.

Before proceeding with the interviewing process, I also looked for other sources of information. For this field trip, I had the opportunity to attend the opening ceremony of KL CONVERGE 2016, organised by the Malaysian Communications and Multimedia Commission (MCMC). This annual event was organised to gather digital content developers from all over the world in order to strengthen the quality of digital content internationally. The main objective of this event is to create healthy digital ecosystem by exploring opportunities in digital space. Prominent speakers and experts from various digital content areas were invited to share their insight and skills with participants.

METHOD

The chosen methodology (face-to-face interviews) was driven by the ability to communicate directly with the industry experts. I certainly can keep myself on track with the current development in the industry while stay alert to future transformations. My research topic was best explored through a qualitative methodology, whereby the researcher can interact with the respondents and probe deeper into the social interactions surrounding the aim of the research. The respondents generated robust data regarding the best environment for cultivating healthy mobile viewing habits. This method also provided an interpersonal perspective which will enhance understanding of this phenomenon.

RESPONDENTS

Background

Respondents were selected based on their role in the Malaysian communications industry. Most are highly qualified and credible enough to provide accurate information to answer all research questions in this study. Their experiences and expertise will be useful in understanding the trends and latest directions. The respondents were carefully selected based on their designation, such as senior executive in the organisation. Some of them are the head of their department and are directly involved in the decision making process.

Respondents selection process

Respondents were identified from multiple channels and methods. From government agencies, information about potential respondents were retrieved from the official website. At this point, all communication was done through email. In order to complete my investigation, the perspectives of private parties / individuals on this topic were also considered. Most of them were chosen based on their contributions to the industry. As for private parties, I used social media platforms such as Facebook and Twitter to communicate with potential respondents about my research.

RESEARCH PROTOCOL

Before respondents were interviewed, each of them was given full details about the aim and objectives of the research, including all processes involved during the interview session. It was also mentioned that the respondent had the right to withdraw from this research at any time. Next, several dates were proposed for the meeting to be considered by the respondents. Prior to the meeting date reminder notices were sent to all respondents via email. On the meeting day, respondents were again reminded about their option to withdraw at any time from the interview process. Most interviews took less than 30 minutes. As a token of appreciation, small gifts were offered to each respondent. To complete the whole process, an appreciation letter was sent to all respondents.

CLOSING

I am currently transcribing some of the final interview sessions, which process is expected to be completed in the next two weeks. A typed copy of the interview transcript will be emailed to the respective respondent to have them verify the contents of the transcription. The verification process will be completed before moving to the analysis and findings stage of dissertation process.

Appendix E: Face-to face Interview Participants List and Position

No	Name	Title	Date	Place
1	Abdul Mulod Zainal Abidin	Assistant Sales Manager Telekom Malaysia (TM)	15 August 2016	Meeting Room 1, TM Tower, Jalan Pantai Baharu, 50672 KL
2	Amir Muhammad	Film Director/Producer/ Publisher	18 July 2016	Fixi Book store, Jaya Shopping Centre, Jalan 14/17, Section 14, 46100 Petaling Jaya, Selangor
3	Burhanuddin Md. Radzi	Managing Director Les Copaque Production	30 July 2016	Les Copaque Production Sdn. Bhd., No. 1, Jalan Boling Padang G13/G, Section 13, 40100 Shah Alam, Selangor
4	Ben Ibrahim	Athlete Development Officer National Sports Council Malaysia	26 September 2016	National Sports Council, Jalan Bukit Jalil Indah 2, Bukit Jalil, KL
5	Dev Rajah	Producer, Indian Segment Content ASTRO Malaysia	10 July 2016	All Asia Broadcast Centre, Technology Park Malaysia, KL
6	Faisal Hamdi Mohammad Ghouth	Head of Digital Creation and Distribution Platform Department	13 August 2016	MCMC Tower 2, Jalan Impact, Cyber 6, 63000 Cyberjaya, Selangor
7	James Lee	Former Television Producer/ Independent Film Director/Producer/ Writer	21 July 2016	Starbucks Jaya Shopping Centre, Jalan 14/17, Section 14, 46100 Petaling Jaya, Selangor

8	Johari Zainal Abidin	Director of Communication National Sports Council Malaysia	26 September 2016	National Sports Council, Jalan Bukit Jalil Indah 2, Bukit Jalil, KL
9	Karyabudi Mohd Aris	International Marketing Manager Les Copaque Production	30 July 2016	Les Copaque Production Sdn. Bhd., No. 1, Jalan Boling Padang G13/G, Section 13, 40100 Shah Alam, Selangor
10	Laurel Tan Bee Hiong	Deputy Director Content and Industry Development Malaysian Communications and Multimedia Commission	19 August 2016	MCMC Tower 1, Jalan Impact, Cyber 6, 63000 Cyberjaya, Selangor
11	M. Zaidi Ismail	Marketing Manager Telekom Malaysia (TM)	19 August 2016	Meeting Room 1, TM Tower, Jalan Pantai Baharu, 50672 KL
12	Marlina Adzmi	Assistant Marketing Manager Telekom Malaysia (TM)	19 August 2016	Meeting Room 1, TM Tower, Jalan Pantai Baharu, 50672 KL
13	Muhammad Amirul Hafiz Rosly	Marketing Executive Telekom Malaysia (TM)	20 August 2016	TM Malaysia, Jalan Pudu, City Centre, 50150 KL
14	Muhammad Hafidz Jaafar	Assistant Manager TM Sales Telekom Malaysia (TM)	20 August 2016	TM Malaysia, Jalan Pudu, City Centre, 50150 KL
15	Muhammad Helmi Abdul Rahim	Senior Officer, Customer Experience Telekom Malaysia (TM)	20 August 2016	TM Malaysia, Jalan Pudu, City Centre, 50150 KL

16	Muhammad Razali Anuar	Director, Strategy and Policy Initiatives Department Malaysian Communications and Multimedia Commission	26 July 2016	MCMC Tower 1, Jalan Impact, Cyber 6, 63000 Cyberjaya, Selangor
17	Najib Mohd Amin	Producer, Malay Segment Content ASTRO Malaysia	10 July 2016	All Asia Broadcast Centre, Technology Park Malaysia, KL
18	Nasharuddin Tajuddin	Head of TV News Networks Media Prima Berhad	14 August 2016	TV3 TV Station, No. 3, Sri Pentas, Persiaran Bandar Utama, 47800 Petealing Jaya Selangor
19	Shazuin Shahri	Assistant Director, Market Research Department Malaysian Communications and Multimedia Commission	13 August 2016	MCMC Tower 2, Jalan Impact, Cyber 6, 63000 Cyberjaya, Selangor
20	Sofwan Mahmood	Group General Manager News Operations for Television & Radio Networks Media Prima Berhad	14 August 2016	TV3 TV Station, No. 3, Sri Pentas, Persiaran Bandar Utama, 47800 Petealing Jaya Selangor
21	Syed Mokhsein Syed Mansor	Head Department of Digital Surveillance Division Malaysian Communications and Multimedia Commission	14 August 2016	TV3 TV Station, No. 3, Sri Pentas, Persiaran Bandar Utama, 47800 Petealing Jaya Selangor
22	Zulkifli Mohd Salleh	Group General Manager Group Corporate Planning Media Prima Berhad	25 August 2016	Media Prima Berhad, Balai Berita, 31 Jalan Riong, Bangsar, 59100 KL

| 23 | Anonymous | Former Television Producer A | 10 July 2016 | Secret Recipe Restaurant The Curve,
G01, Ground Floor, The Curve, Mutiara Damansara, 47820 Petaling Jaya, Selangor |
| 24 | Anonymous | Former Television Producer B | 15 July 2016 | Mines Waterfront Business Park,
3, Jalan Tasik, Mines Wellness City, 43300 Seri Kembangan, Selangor |

Group: One
Date   : 19 August 2016/Friday
Time   : 12 – 1 PM
Venue: Meeting Room 1, TM Tower, Kuala Lumpur

Group One	Sex	Ethnicity	Age	Occupation	Address	Years of Employment
Participant one (G1P1)	Male	Malay	25	IT executive, TM Malaysia	Jalan Pantai Baharu, Kuala Lumpur	4 years
Participant two (G1P2)	Male	Malay	30	MCMC staff	Cyberjaya, Selangor	5 years
Participant three (G1P3)	Male	Malay	35	Broadcaster	Bandar Utama, Selangor	7 years
Participant four (G1P4)	Male	Chinese	40	Television personality	Bandar Utama, Selangor.	7 years
Participant five (G1P5)	Male	India	40	Former television producer	Technology Park Malaysia, Bukit Jalil, Selangor	10 years
Participant six (G1P6)	Female	Malay	25	Media observer	Selayang, Kuala Lumpur	5 years (Freelance staff)
Participant seven (G1P7)	Female	Malay	30	Media observer	Kelana Jaya, Selangor	5 years (Freelance staff)
Participant eight (G1P8)	Female	Chinese	35	Writer	Bandar Utama, Selangor	3 years (Contract basis)
Participant nine (G1P9)	Female	India	40	Television producer	Technology Park Malaysia, Bukit Jalil, Selangor	12 years
Participant ten (G1P10)	Female	Malay	45	Television producer	Technology Park Malaysia, Bukit Jalil, Selangor	10 years

Group: Two
Date   : 20 August 2016/Saturday
Time   : 12 – 1 PM
Venue: Meeting Room 1, TM Tower, Kuala Lumpur

Group two	Sex	Ethnicity	Age	Occupation	Address	Years of Employment
Participant one (G2P1)	Male	Malay	29	Television station staff	Bandar Utama, Selangor	5 years
Participant two (G2P2)	Male	Malay	30	Broadcaster	Bandar Utama, Selangor	5 years
Participant three (G2P3)	Male	Chinese	30	TM Malaysia staff	Jalan Pantai Baharu, Kuala Lumpur	3 years
Participant four (G2P4)	Male	Malay	37	Television producer	Bandar Utama, Selangor	10 years
Participant five (G2P5)	Male	Malay	50	Former television station staff	Bangsar, Kuala Lumpur	20 years
Participant six(G2P6)	Female	Chinese	29	TM Malaysia staff	Jalan Pantai Baharu, Kuala Lumpur	3 years
Participant seven (G2P7)	Female	Malay	32	Broadcaster	Bandar Utama, Selangor	10 years
Participant eight (G2P8)	Female	Malay	38	TM Malaysia staff	Jalan Pantai Baharu, Kuala Lumpur	10 years
Participant nine (G2P9)	Female	Malay	42	Corporate department officer	Jalan Pantai Baharu, Kuala Lumpur	12 years
Participant ten (G2P10)	Female	India	45	ASTRO staff	Technology Park Malaysia, Bukit Jalil, Selangor	15 years

Appendix G: Basic Interview Questions

1. Tell me your thoughts on the evolution of mobile communications within the media field in Malaysia.

2. As a regulator / government agency / private party, how does that relate to your understanding of mobile platforms?

3. How do you measure adaptation to new technology within the media field in this country?

4. From your perspective, what is the major motivation which encourages viewers to watch television content on mobile devices, and to connect themselves to social media?

5. Based on your answer to Question 4, how you determine the potential of mobile platforms for disseminating television content? And why?

6. From your point of view, what are the biggest obstacles to introducing television content on mobile platforms in Malaysia?

7. Personally, do you think mobile platforms provide opportunities for other types of content to develop?

8. How do you determine appropriate television content for mobile platforms?

9. How do you regulate television content on mobile platforms?

10. What do you think are the benefits and challenges of implementing a mobile platforms policy for Malaysia's media environment?

11. Are there any other things you would like share?