

India's first Digital Content
Measurement PaaS

2023 COTT Annual Report





“

The current OTT subscribers in India stand at 21.6 Mn across all active platforms like Netflix, Hotstar, Prime Video, etc., which in 2 years will grow to cross the 30 Mn mark...

”

Pankaj Krishna

Founder & CEO, Chrome DM



“

As the world evolves, so does our entertainment. The growth of OTT platforms isn't just a trend; it's a testament to our evolving tastes and the power of technology to bring stories to our fingertips.

”

Bharat Dabholkar

Actor & Advertising Professional

Digital Revenue

63,200 Cr

Total Digital Media Revenue (in INR)
(Source: COTT, 2024)

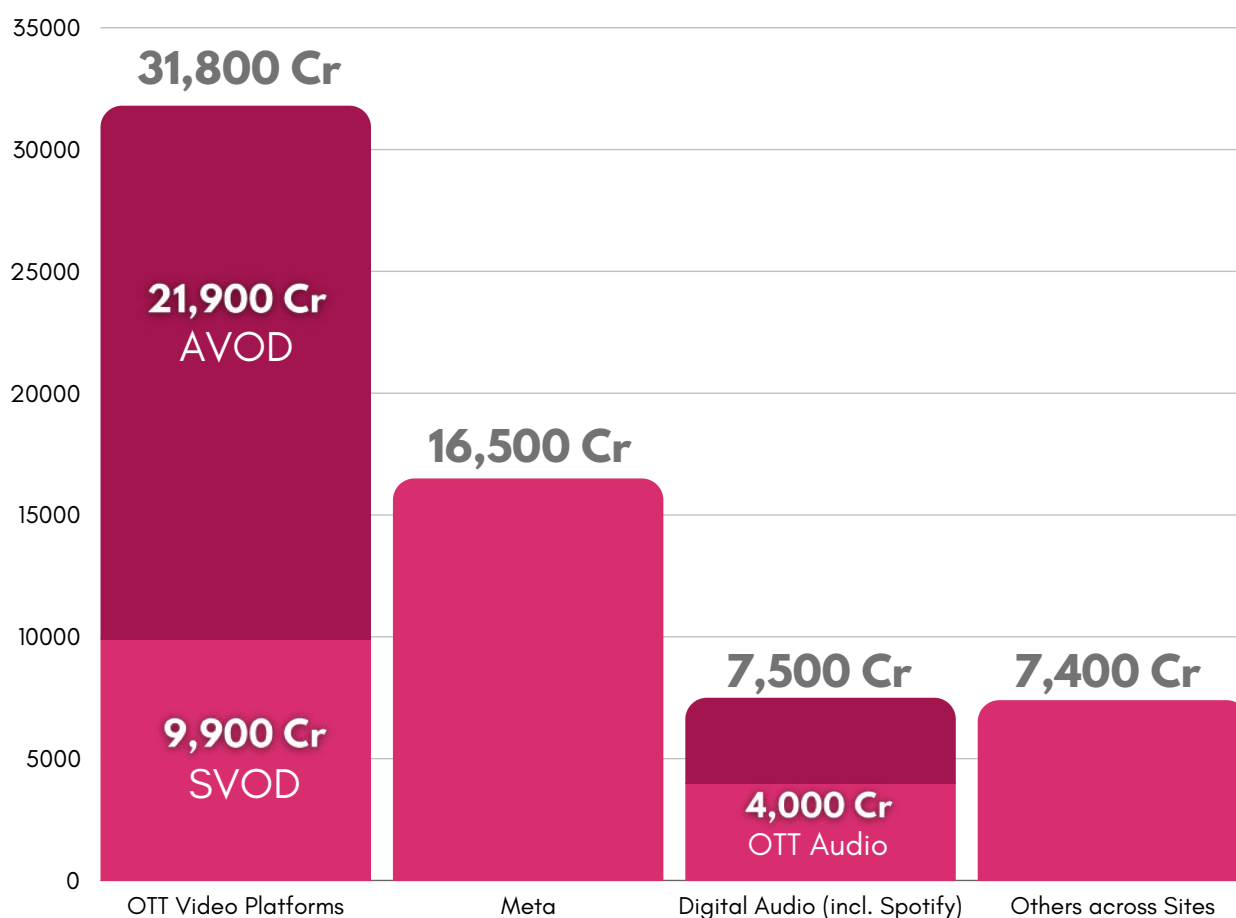


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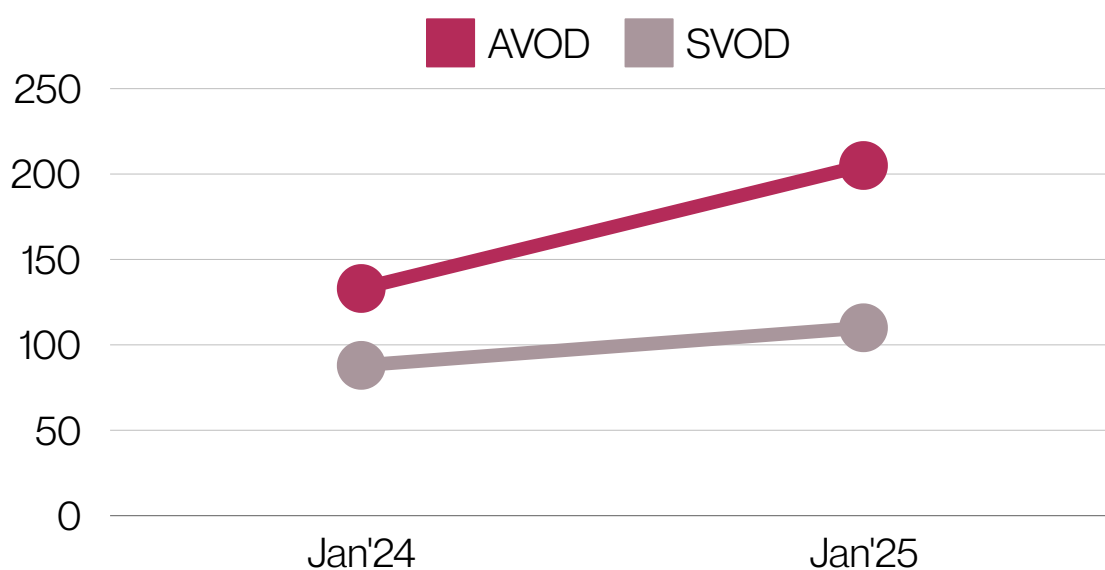
2023 content and genre trends with demographics bifurcation

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AVOD / SVOD

Unique viewers

All primary inputs are a hybrid of auto generated data via 1,45,346 Chrome DM's SDKs & captured content consumption via Chrome DM's survey apps. E.g. Top Platforms & Top Shows modules are auto generated from SDKs, whereas artiste affinity/ awareness scores come from the Chrome DM's survey apps.



	Jan'24	Jan'25P
AVOD	133	205
SVOD	88	110

(In Millions)

Source: COTT Unique viewers = CTV subscribers *3 (3 viewers per subscription) + Mobile subscribers*1.1 (1.1 viewers per subscription)

Viewers' Bifurcation (India)

1440 Mn

Total Population



888 Mn

Internet Users



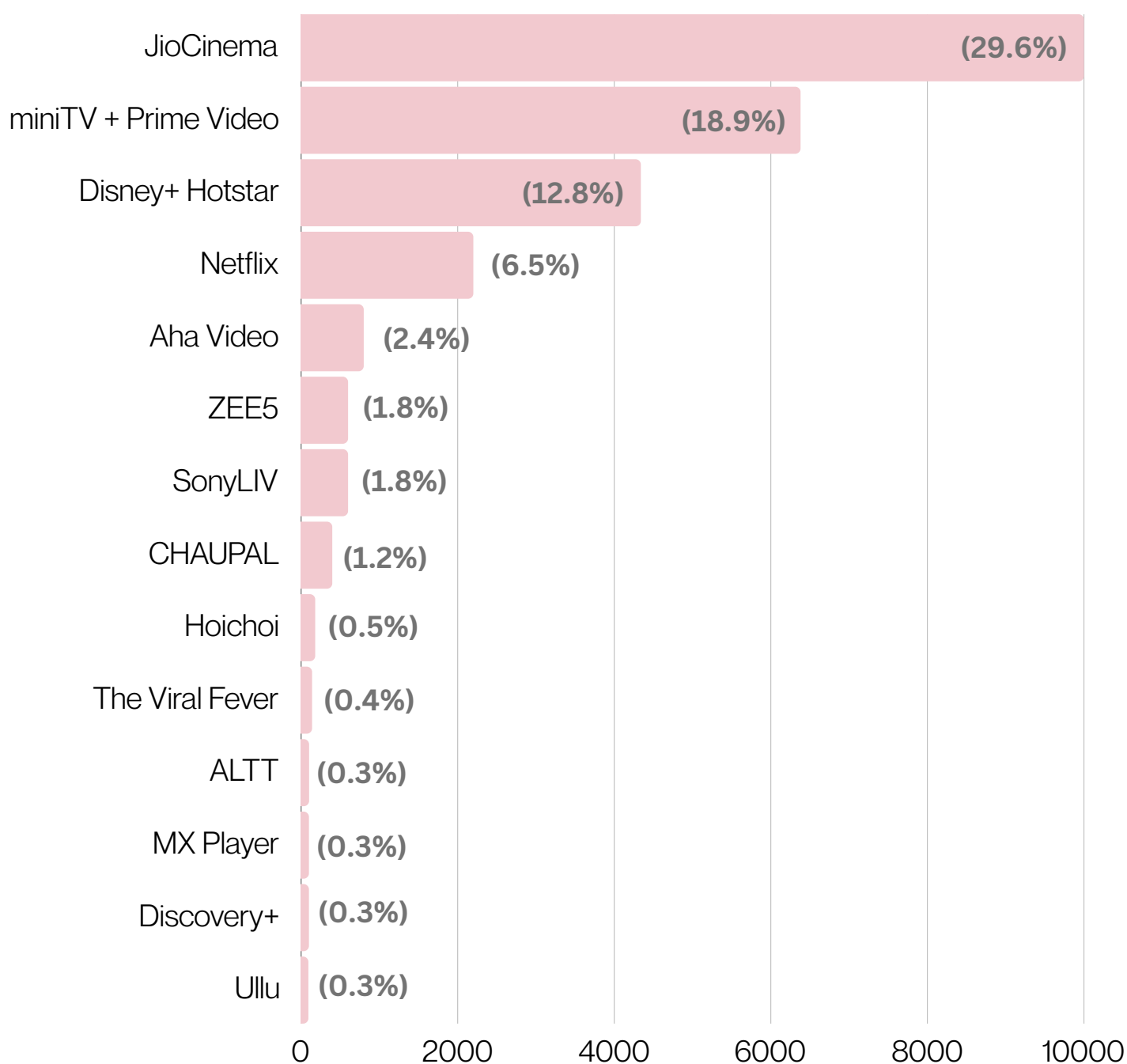
504 Mn

OTT Viewers / Total Viewers

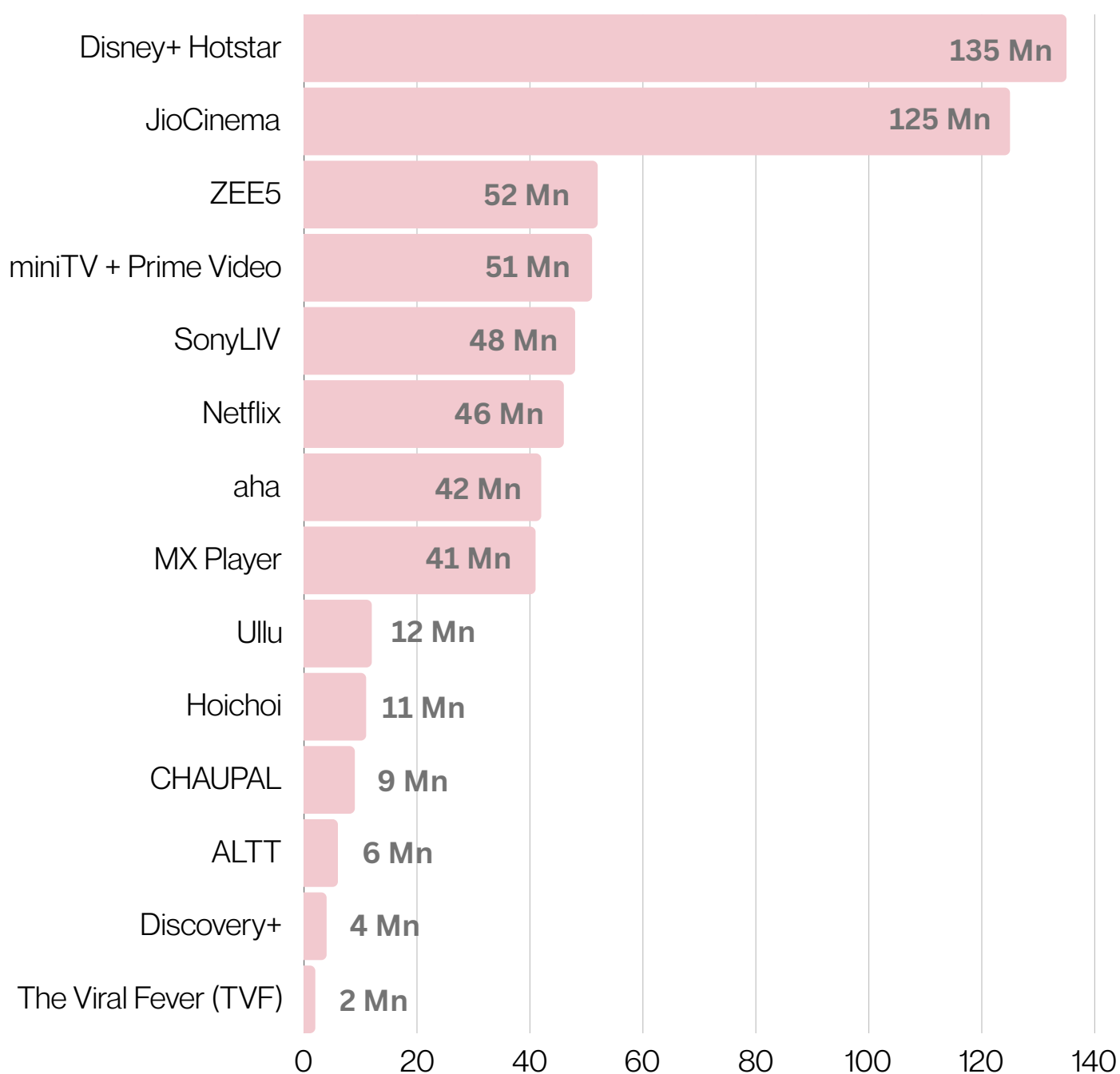


OTT Penetration of Digital Universe

Total Revenue Share



Unique Viewers by Platform

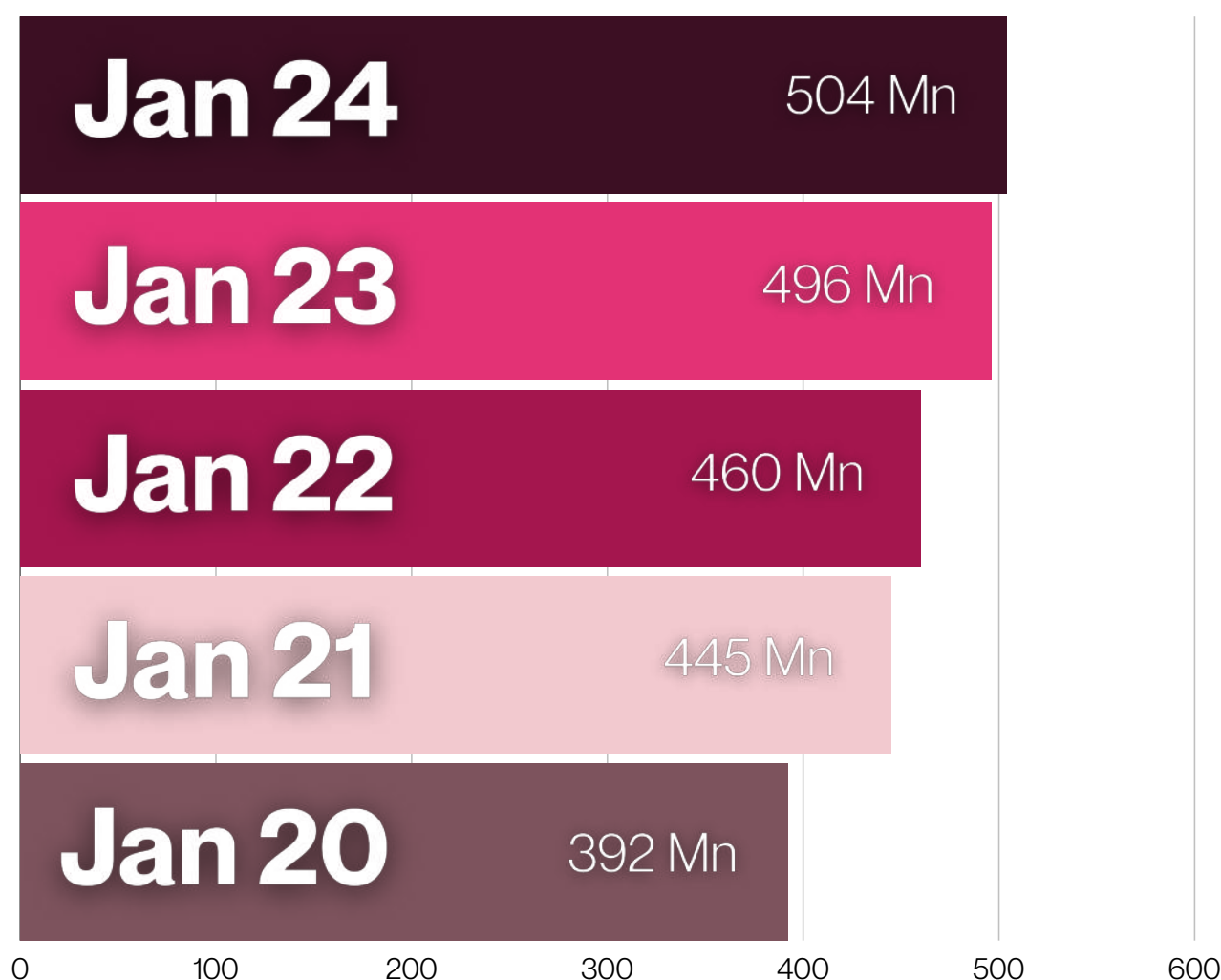


Source: Chrome DM SES, Mkt - All India, Dec'2023, OTT = 504 million, 3,16,010 surveyed HHs

Source: Unique viewers = CTV subscribers *3 (3 viewers per subscription) + Mobile subscribers*1.1 (1.1 viewers per subscription)

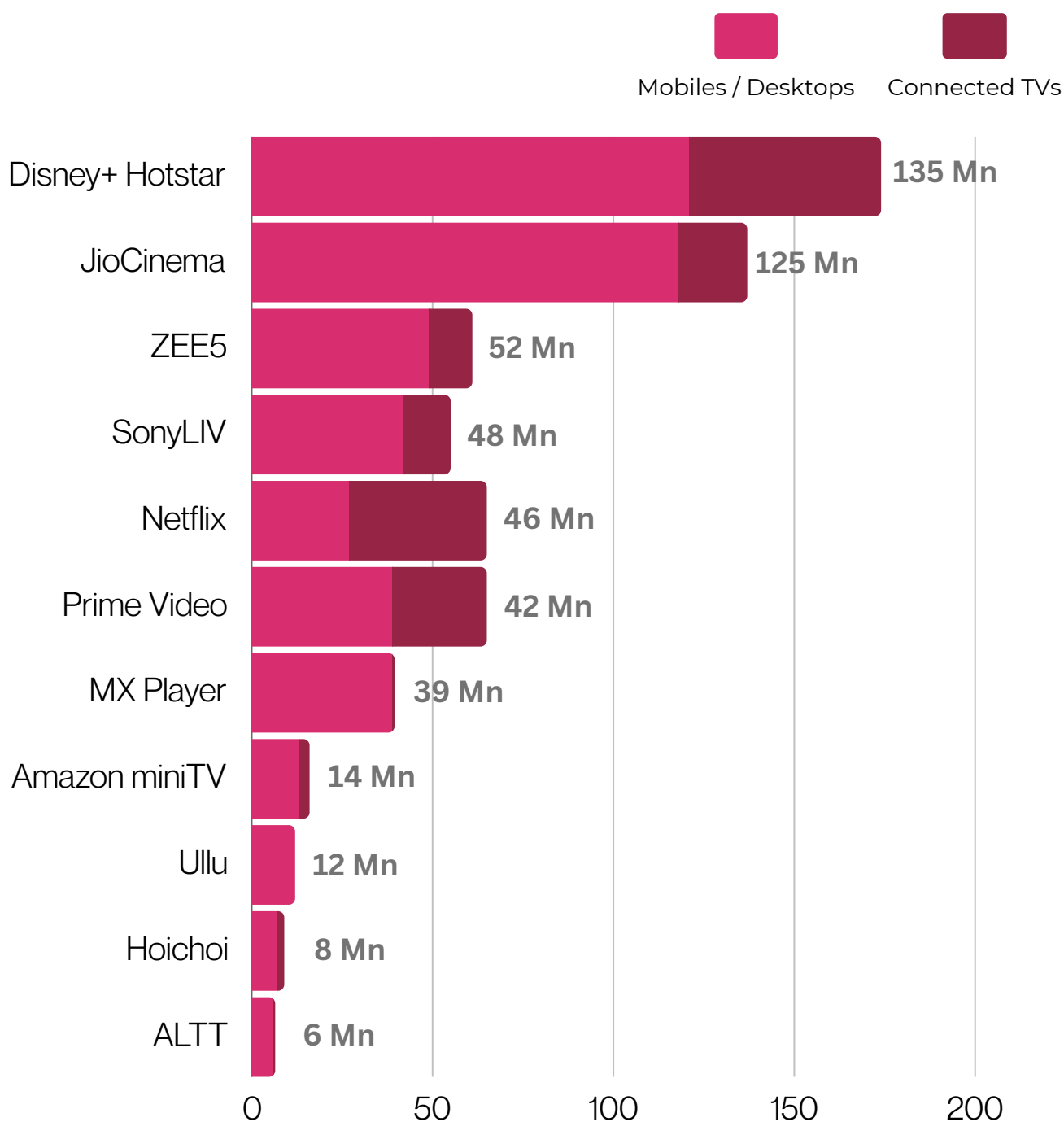
Yearly OTT Viewers

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Access modes

Total Unique Viewers

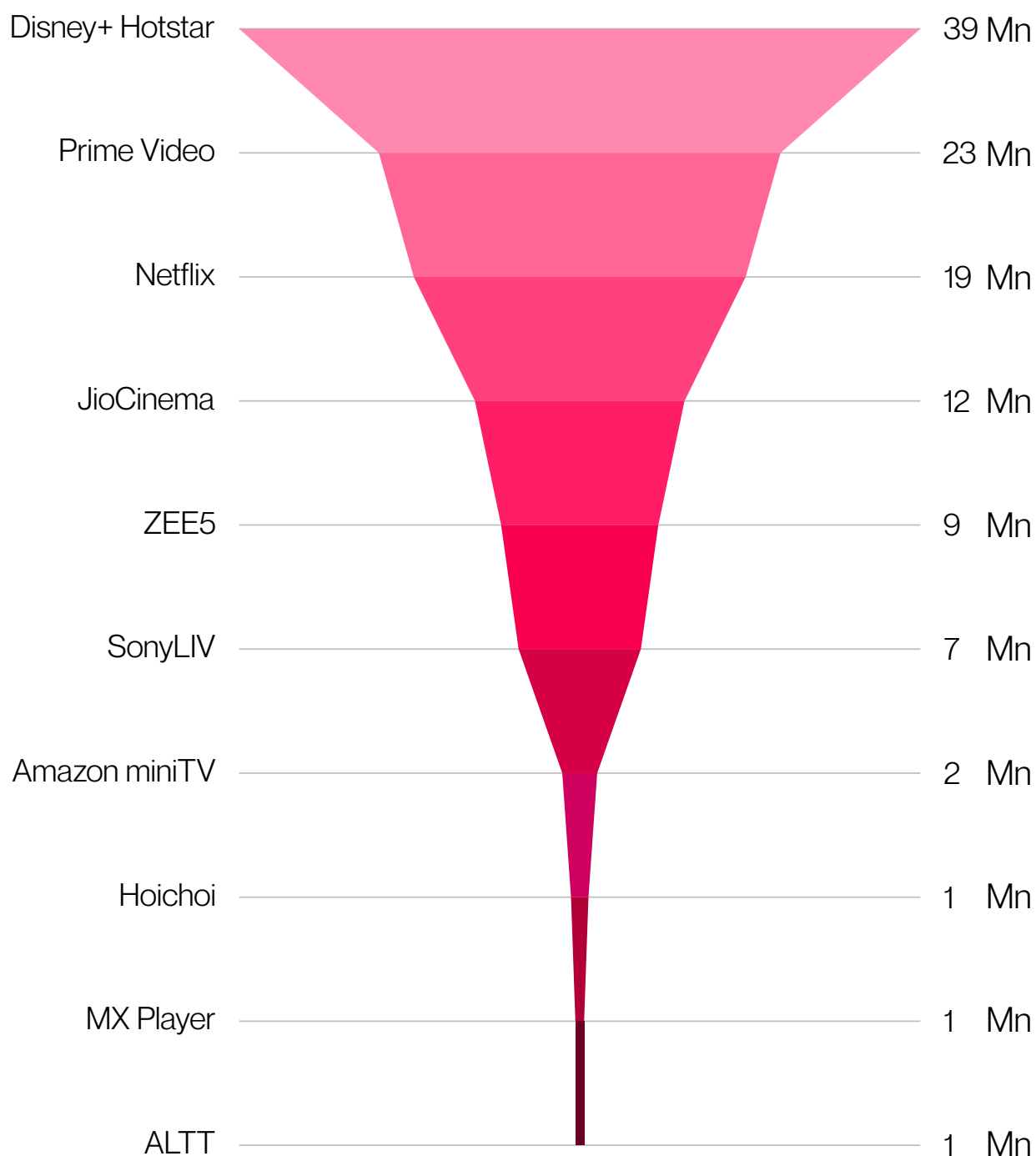


Source: Chrome DM SES, Mkt - All India, Dec'2023,








OTT = 504 million, 3,16.010 surveyed HHs

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 min viewing across 24 hours.

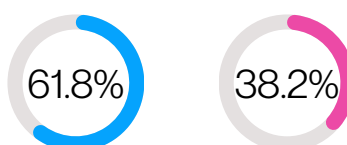
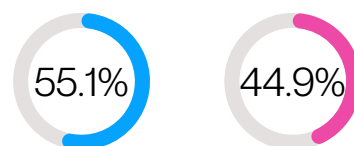
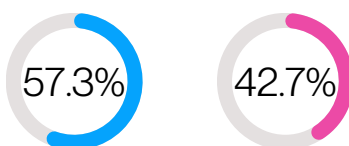
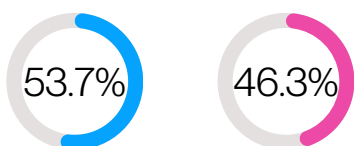
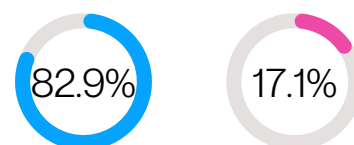
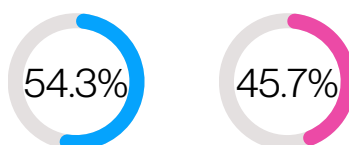
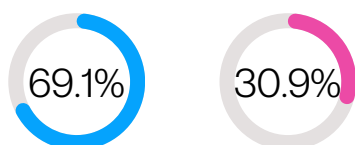
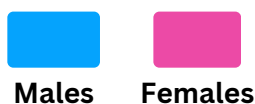
Access modes Overlap (CTV + Mobile)



Watchtime Platform wise

OTT Platform	Average Watchtime (Weekly in Minutes)
	171
	149
	142
	139
	125
	104
	88

Gender Composition



Source: Chrome DM SES, Mkt - All India, Dec'2023,

OTT = 504 million, 3,16,010 surveyed HHs

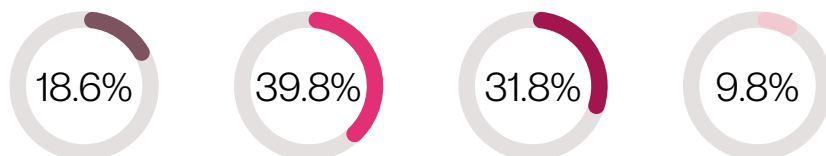
Jio Cinema - 125 mn, Disney+Hotstar - 135 mn, ZEE5 - 52 mn, Amazon (Prime+mini TV) - 51 mn, Sony LIV - 48 mn,

Netflix - 46 mn,, MX PLayer - 41 mn

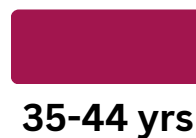
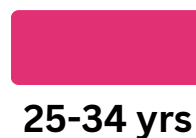
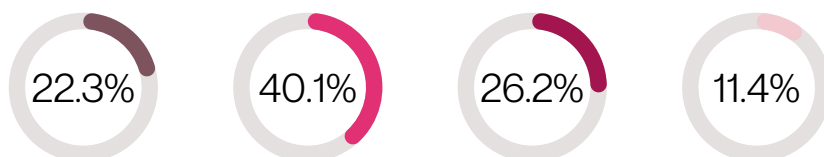
Age Composition



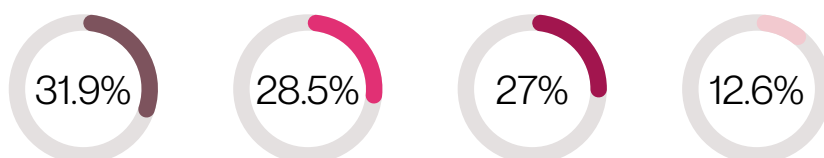
JioCinema



Disney+ hotstar



prime video



Source: Chrome DM SES, Mkt - All India, Dec'2023,

OTT = 504 million, 3,16,010 surveyed HHs

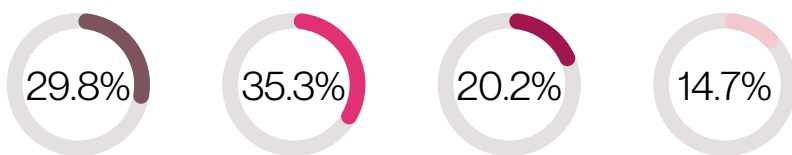
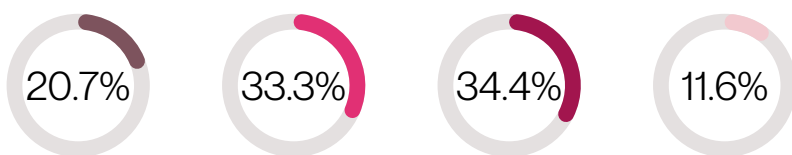
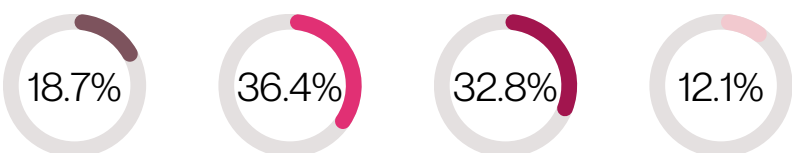
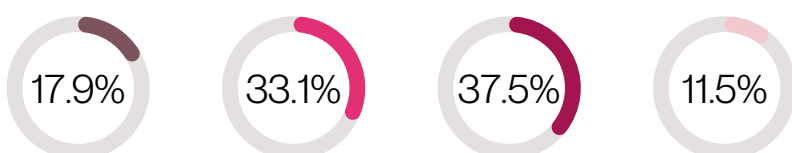
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Age Composition



NETFLIX



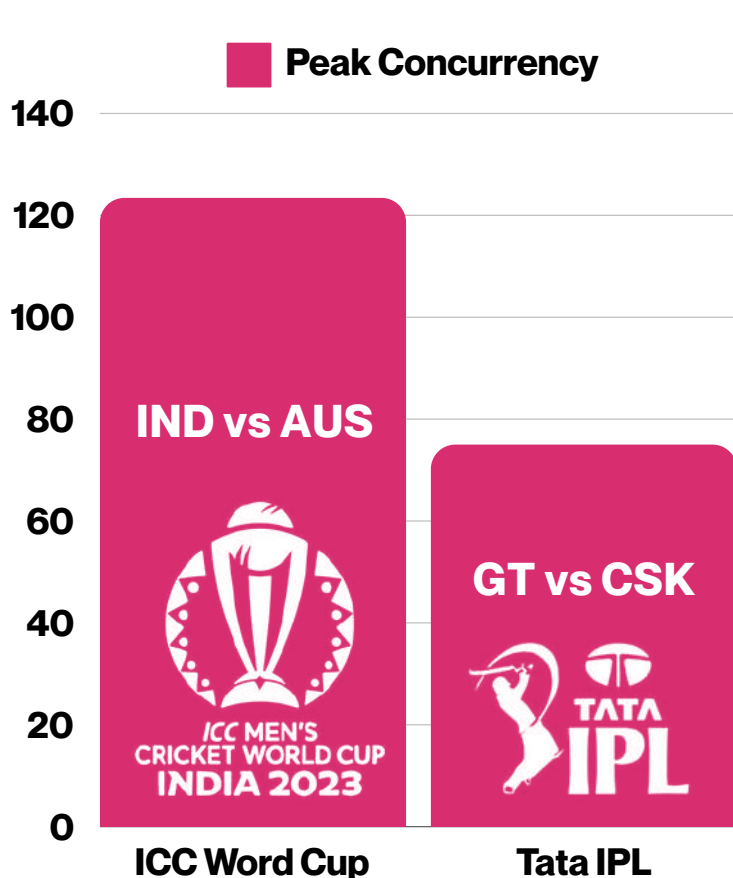
Source: Chrome DM SES, Mkt - All India, Dec'2023,

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Jio Cinema - 125 mn, Disney+Hotstar - 135 mn, ZEE5 - 52 mn, Amazon (Prime+mini TV) - 51 mn, Sony LIV - 48 mn,

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Major Sporting Events



ICC World Cup

Highest Viewership in week 47'2023 marking 24.4% of total OTT Users.

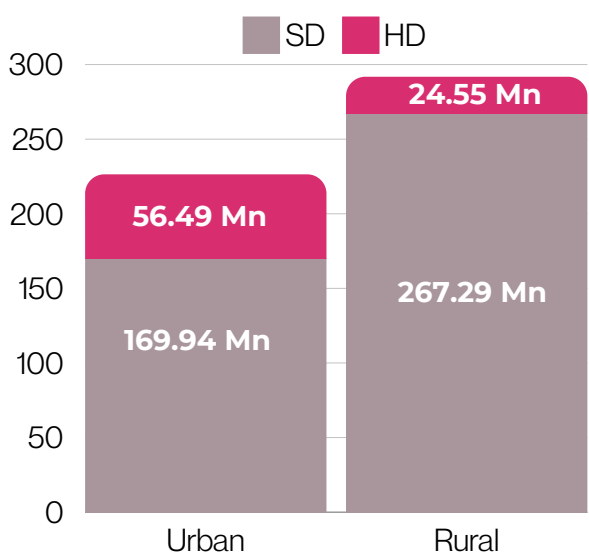
TATA IPL

Highest Viewership in week 22'23, marking 14.8% of total OTT Users.

Platform	Event	Match Name	Week	In %	In Mn
Disney+ Hotstar	ICC World Cup 2023	IND vs AUS	47'2023	24.4%	123.43
JioCinema	Tata IPL 2023	GT vs CSK	22'2023	14.8%	74.98

ICC World Cup 2023

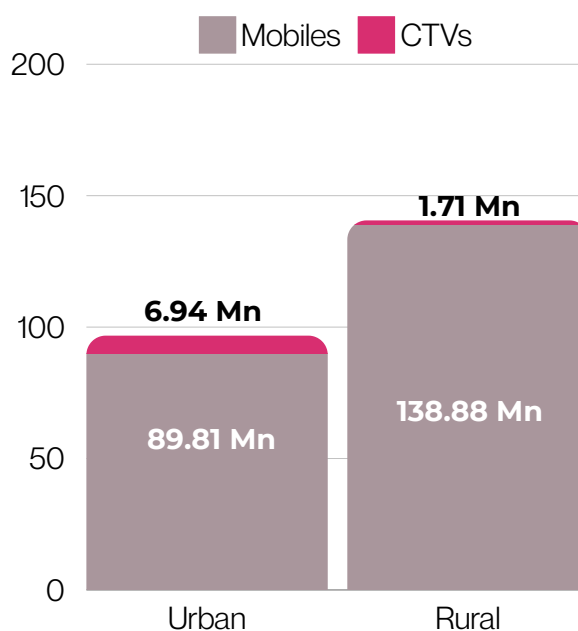
TV (Claimed Viewership) In Mn



Market	Total
Urban	213.64
Rural	300.26

Disney+ Hotstar (Viewership) In Mn

Market	Total
Urban	90.19
Rural	140.51



Source: Chrome DM SES, Mkt - All India, Dec'2023,

OTT = 504 million, 3,16,010 surveyed HHs

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 min viewing across 24 hours.

The totals across categories will not tally with the sum total of individual splits owing to overlaps within the same

ICC World Cup 2023

Overlap (In Mn)

Market	Disney+ Hotstar (Mobiles & CTVs)	TV (Viewership) & Disney+ Hotstar
Urban	6.04	69.77
Rural	1.54	111.12

Market	HD TV (Viewership) & Disney+ Hotstar CTVs
Urban	5.14
Rural	1.19

Market	SD TV (Viewership) & Disney+ Hotstar Mobiles
Urban	68.5
Rural	109.67

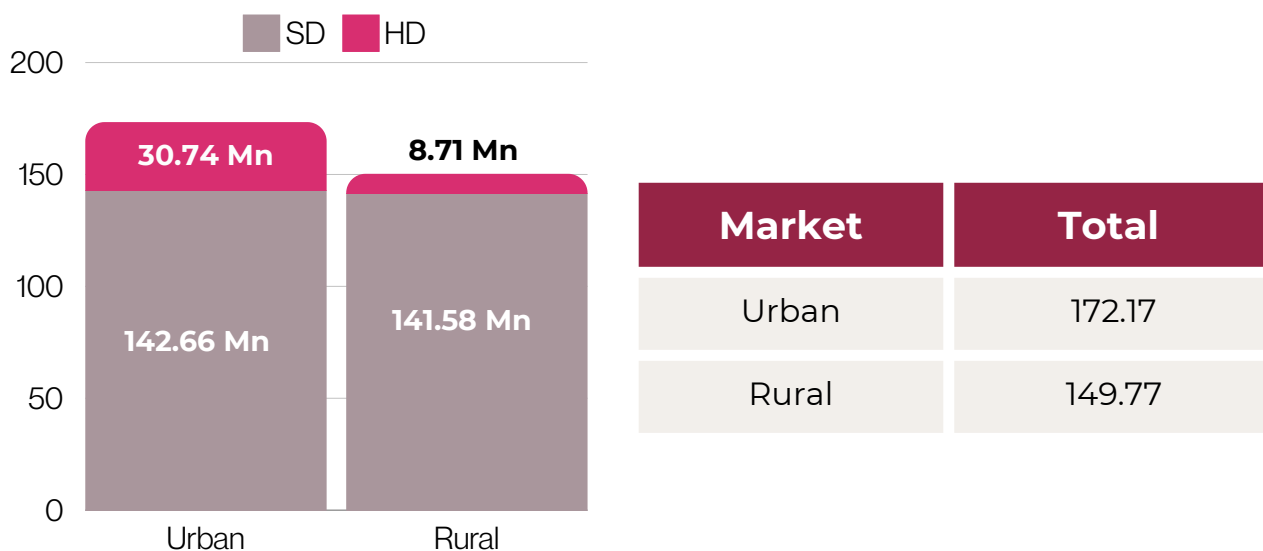
Source: Chrome DM SES, Mkt - All India, Dec'2023,

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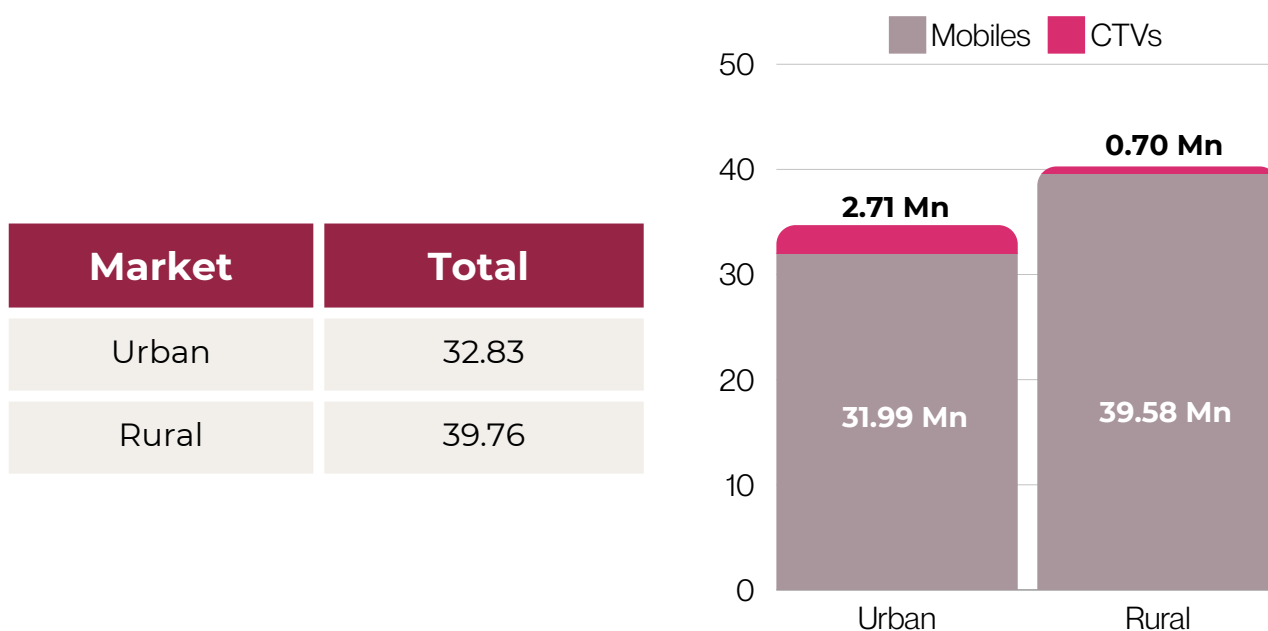
The totals across categories will not tally with the sum total of individual splits owing to overlaps within the same

TATA IPL 2023

TV (Claimed Viewership) In Mn



JioCinema (Viewership) In Mn



Source: Chrome DM SES, Mkt - All India, Dec'2023,

OTT = 504 million, 3,16,010 surveyed HHs

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TATA IPL

2023

Overlap (In Mn)

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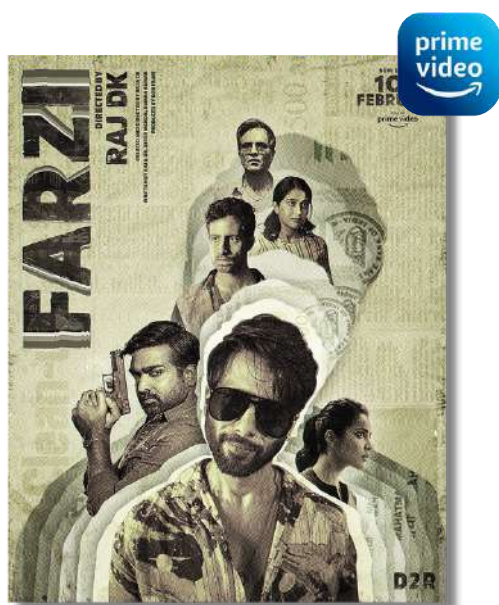
OTT = 504 million, 3,16,010 surveyed HHs

The totals across categories will not tally with the sum total of individual splits owing to overlaps within the same

Top 10 SVOD Shows 2023 (NCCS A)



Top #1 SVOD Show



Farzi

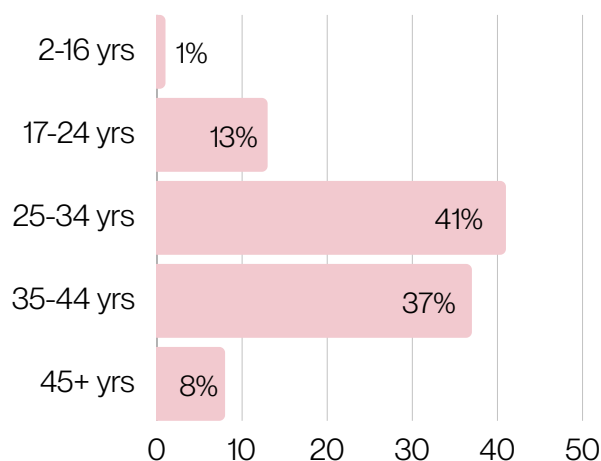
22.50 Mn*

Watched In Mn

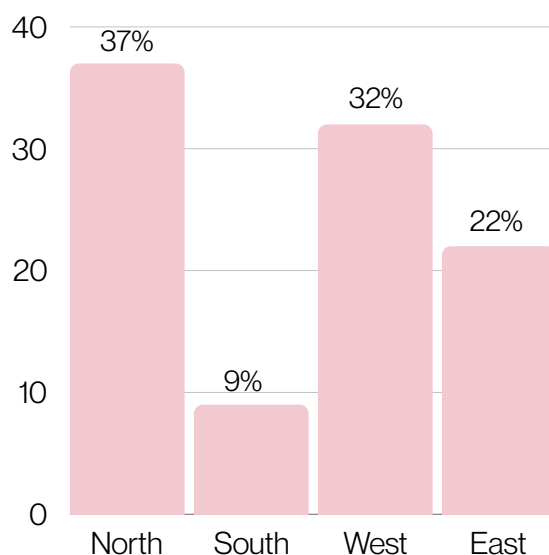
62%

38%

Males / Females



Age Group (in %)



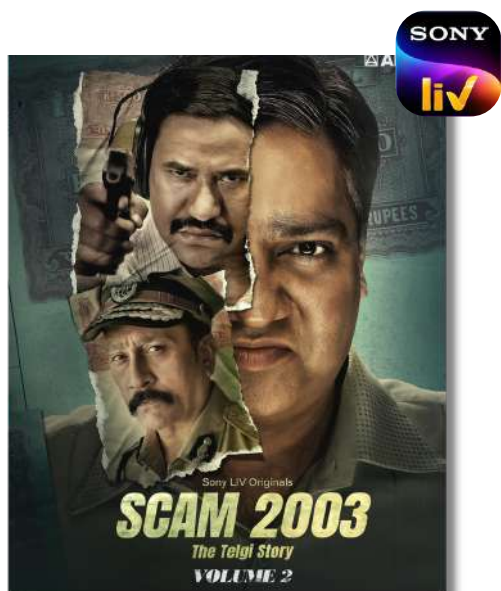
Region (in %)

Source: Chrome OTT, Shows of Year 2023. NCCS A, All India, 2+

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 minute of continuous viewing for the said period.

*Unique viewers = CTV subscribers *3 (3 viewers per subscription) + Mobile subscribers*1.1 (1.1 viewers per subscription)

Top #2 SVOD Show



Scam 2003: The Telgi Story

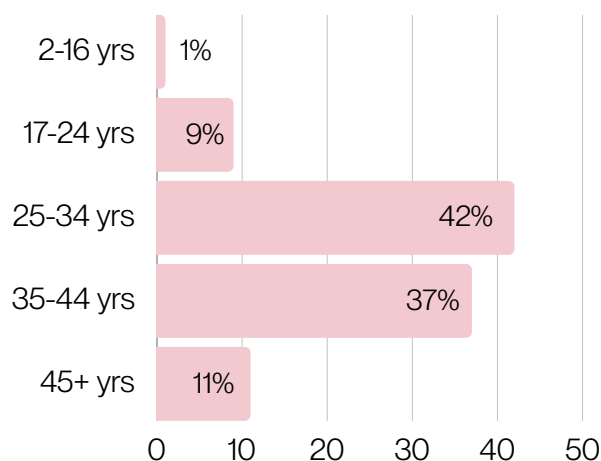
13.35 Mn*

Watched In Mn

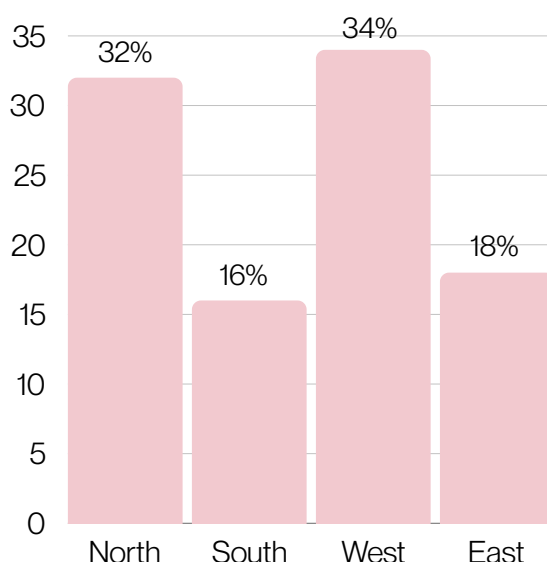
65%

35%

Males / Females



Age Group (in %)



Region (in %)

Source: Chrome OTT, Shows of Year 2023. NCCS A, All India, 2+

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 minute of continuous viewing for the said period.

*Unique viewers = CTV subscribers *3 (3 viewers per subscription) + Mobile subscribers*1.1 (1.1 viewers per subscription)

Top #3 SVOD Show



The Night Manager

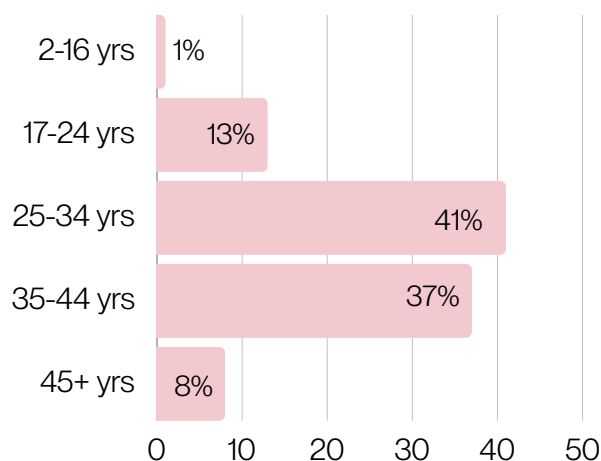
12.17 Mn*

Watched In Mn

55%

45%

Males / Females



Age Group (in %)



Region (in %)

Source: Chrome OTT, Shows of Year 2023. NCCS A, All India, 2+

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 minute of continuous viewing for the said period.

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Top #4 SVOD Show



Aakhri Sach

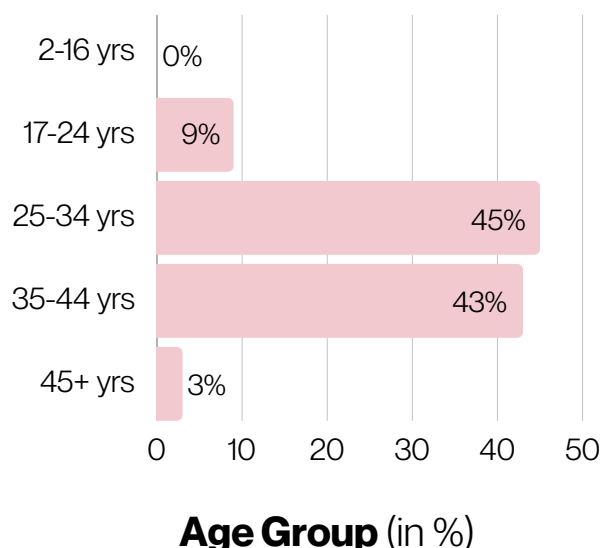
12.16 Mn*

Watched In Mn

52%

48%

Males / Females



Source: Chrome OTT, Shows of Year 2023. NCCS A, All India, 2+

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 minute of continuous viewing for the said period.

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Top #5 SVOD Show



Permanent Roommates

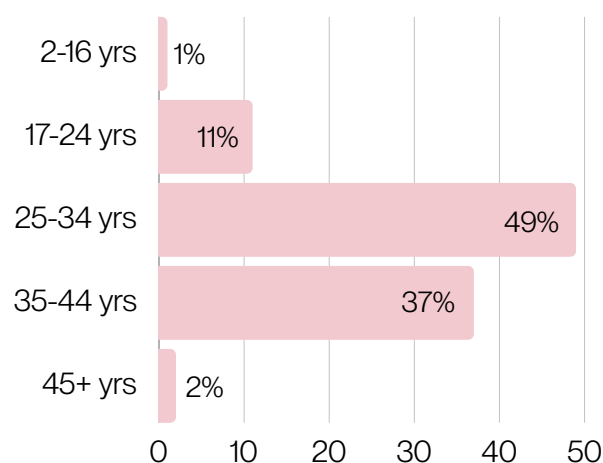
8.97 Mn*

Watched In Mn

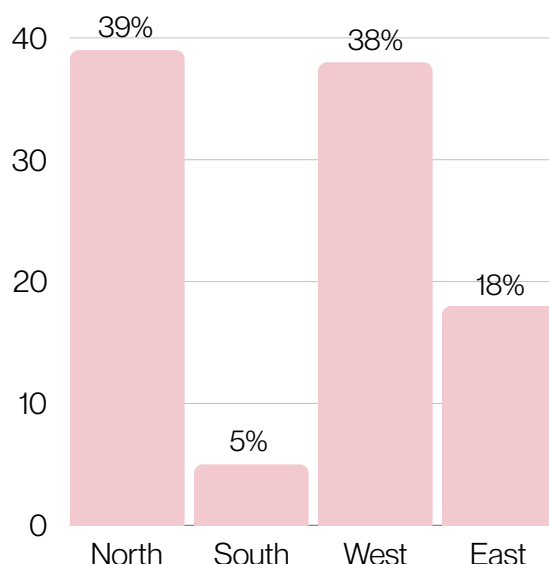
51%

49%

Males / Females



Age Group (in %)



Region (in %)

Source: Chrome OTT, Shows of Year 2023. NCCS A, All India, 2+

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 minute of continuous viewing for the said period.

*Unique viewers = CTV subscribers *3 (3 viewers per subscription) + Mobile subscribers*1.1 (1.1 viewers per subscription)

Top #6 SVOD Show



Rocket Boys

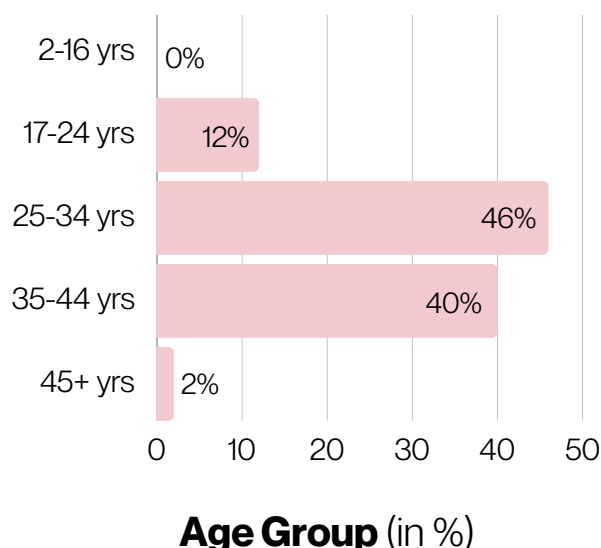
7.80 Mn*

Watched In Mn

68%

32%

Males / Females



Source: Chrome OTT, Shows of Year 2023. NCCS A, All India, 2+

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 minute of continuous viewing for the said period.

*Unique viewers = CTV subscribers *3 (3 viewers per subscription) + Mobile subscribers*1.1 (1.1 viewers per subscription)

Top #7 SVOD Show



Guns & Gulaabs

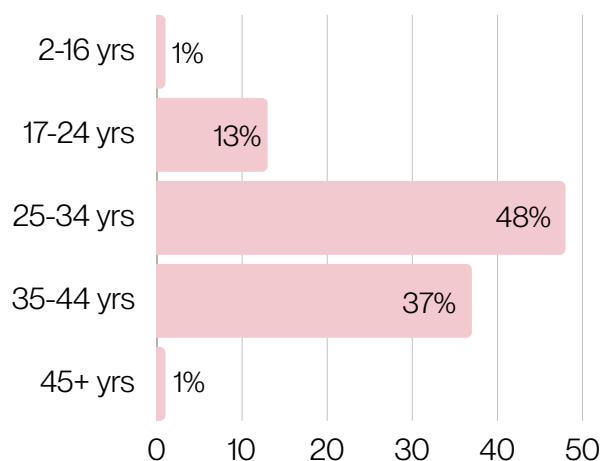
6.76 Mn*

Watched In Mn

72%

28%

Males / Females



Age Group (in %)



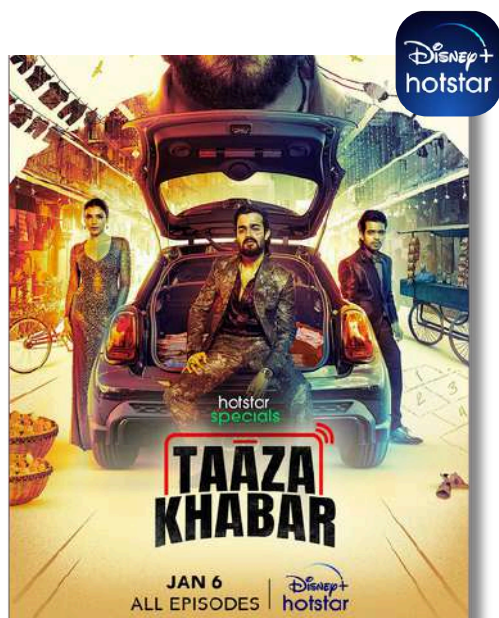
Region (in %)

Source: Chrome OTT, Shows of Year 2023. NCCS A, All India, 2+

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 minute of continuous viewing for the said period.

*Unique viewers = CTV subscribers *3 (3 viewers per subscription) + Mobile subscribers*1.1 (1.1 viewers per subscription)

Top #8 SVOD Show



Taaza Khabar

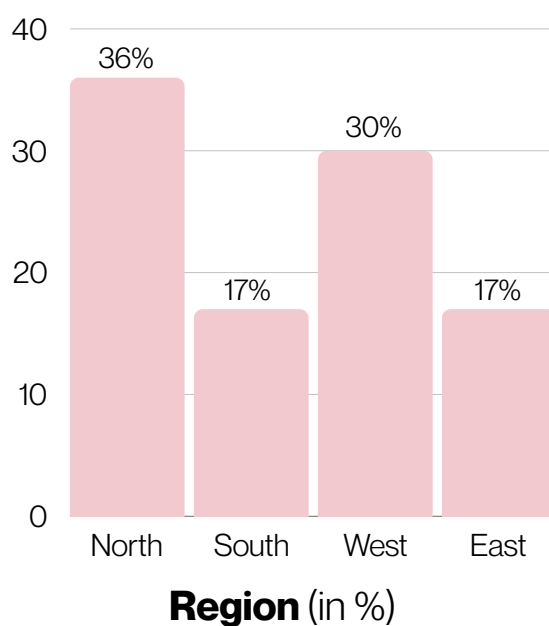
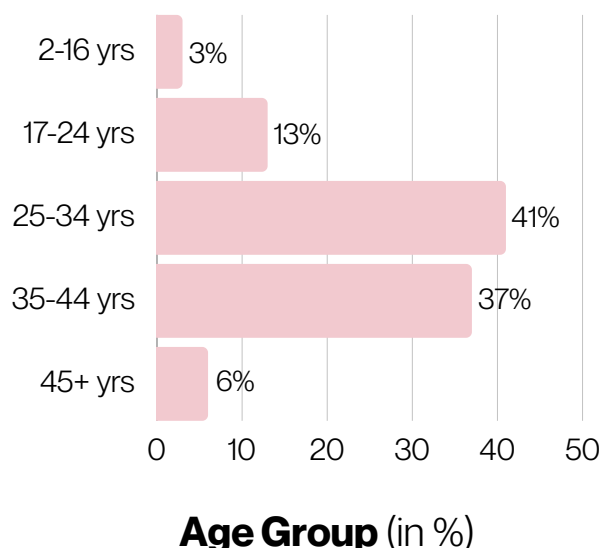
5.99 Mn*

Watched In Mn

59%

41%

Males / Females

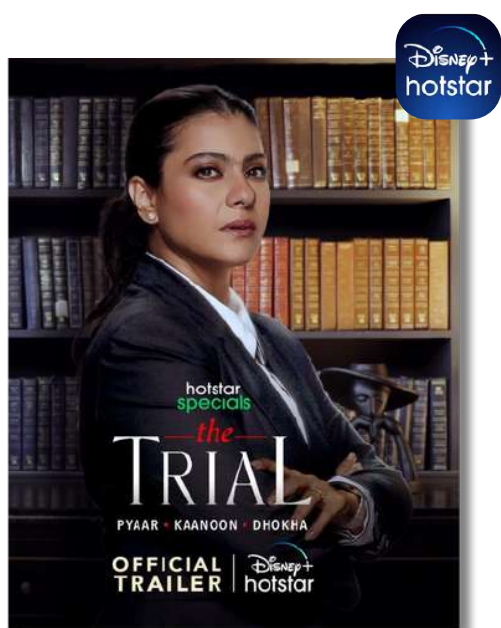


Source: Chrome OTT, Shows of Year 2023. NCCS A, All India, 2+

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 minute of continuous viewing for the said period.

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Top #9 SVOD Show



The Trial

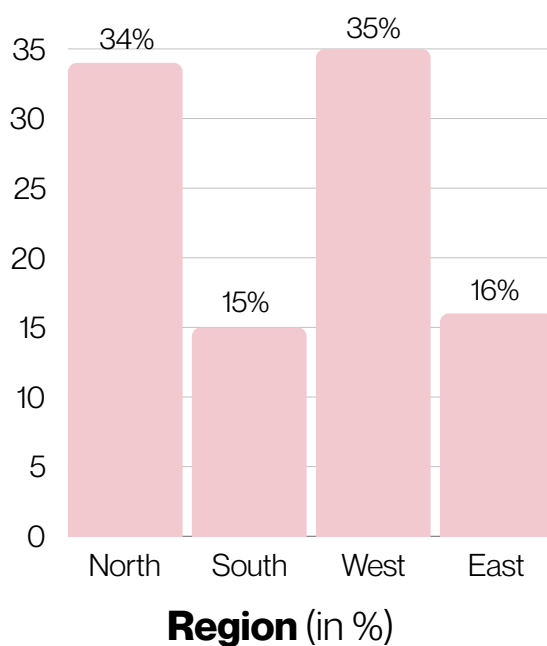
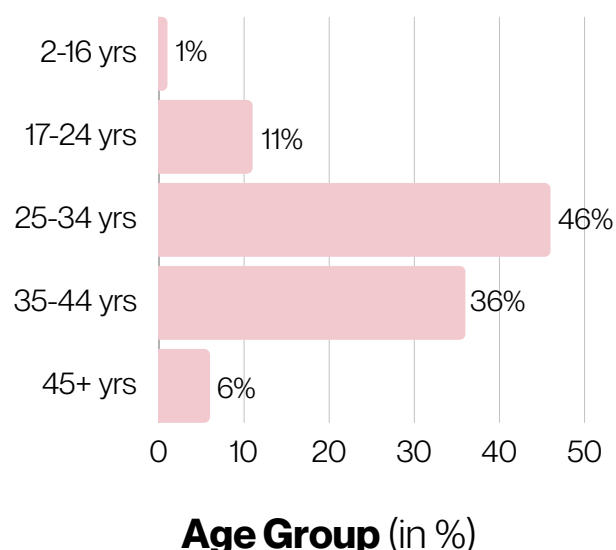
5.96 Mn*

Watched In Mn

53%

47%

Males / Females

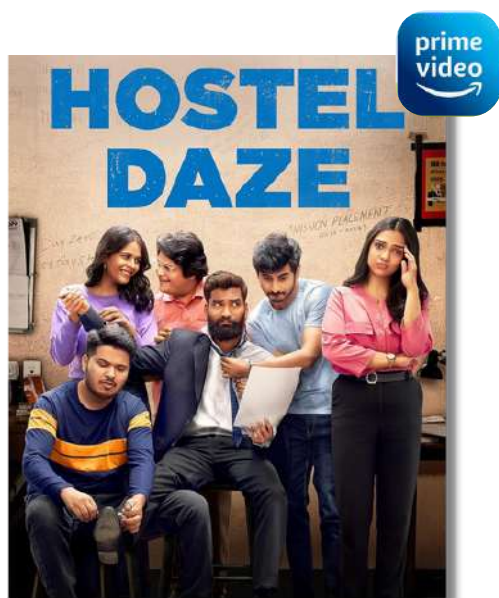


Source: Chrome OTT, Shows of Year 2023. NCCS A, All India, 2+

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 minute of continuous viewing for the said period.

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Top #10 SVOD Show



Hostel Daze

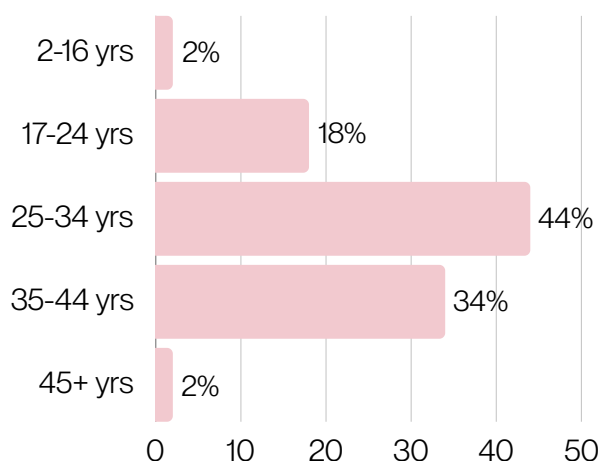
5.89 Mn*

Watched In Mn

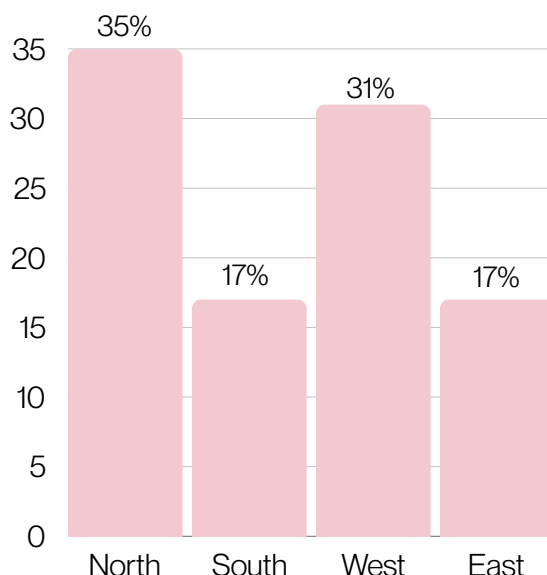
57%

43%

Males / Females



Age Group (in %)



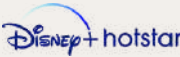


Region (in %)

Source: Chrome OTT, Shows of Year 2023. NCCS A, All India, 2+

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 minute of continuous viewing for the said period.

*Unique viewers = CTV subscribers *3 (3 viewers per subscription) + Mobile subscribers*1.1 (1.1 viewers per subscription)

SVOD Top 10 Original Movies






Rank	Movie	Platform	Total Subscribers	*Unique Viewers	Interactivity Score
1	Lust Stories 2	NETFLIX	6.5 Mn	17.72 Mn	35%
2	An Action Hero	NETFLIX	6.5 Mn	15.86 Mn	44%
3	Jaane Jaan	NETFLIX	6.5 Mn	15.72 Mn	61%
4	Chor Nikal Ke Bhaga	NETFLIX	6.5 Mn	14.74 Mn	67%
5	IB71		37 Mn	14.36 Mn	37%
6	Heart of Stone	NETFLIX	6.5 Mn	14.23 Mn	72%
7	Bawaal		24.5 Mn	12.39 Mn	39%
8	Apurva		37 Mn	10.71 Mn	63%
9	Khufiya	NETFLIX	6.5 Mn	10.7 Mn	53%
10	Extraction 2	NETFLIX	6.5 Mn	10.33 Mn	58%

*Source: Unique viewers = CTV subscribers *3 (3 viewers per subscription) + Mobile subscribers*1.1 (1.1 viewers per subscription)
Interactivity Score: Percentage of the viewers duplicated across word-of-mouth interactions through social media or in person

Source: Chrome OTT, Shows of Year 2023. NCCS A, All India, 2+

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 minute of continuous viewing for the said period.

SVOD Top 10 Movies

Rank	Movie	Platform	Total Subscribers	*Unique Viewers	Interactivity Score
1	Drishyam 2		24.5 Mn	25.02 Mn	59%
2	Black Panther: Wakanda Forever		37 Mn	21.3 Mn	63%
3	Mission Majnu	NETFLIX	6.5 Mn	19.8 Mn	51%
4	Jailer		24.5 Mn	18.09 Mn	47%
5	Lust Stories 2	NETFLIX	6.5 Mn	17.72 Mn	35%
6	Pathaan		24.5 Mn	17.07 Mn	59%
7	An Action Hero	NETFLIX	6.5 Mn	15.86 Mn	44%
8	Jaane Jaan	NETFLIX	6.5 Mn	15.72 Mn	61%
9	Avatar: The Way of Water		37 Mn	15.6 Mn	57%
10	Jawan	NETFLIX	6.5 Mn	14.77 Mn	68%

*Source: Unique viewers = CTV subscribers *3 (3 viewers per subscription) + Mobile subscribers*1.1 (1.1 viewers per subscription)
Interactivity Score: Percentage of the viewers duplicated across word-of-mouth interactions through social media or in person

Source: Chrome OTT, Shows of Year 2023. NCCS A, All India, 2+

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 minute of continuous viewing for the said period.



Top 10
Content
2023 -
Female
Protagonists

Top #1 Female Protagonists



Taali

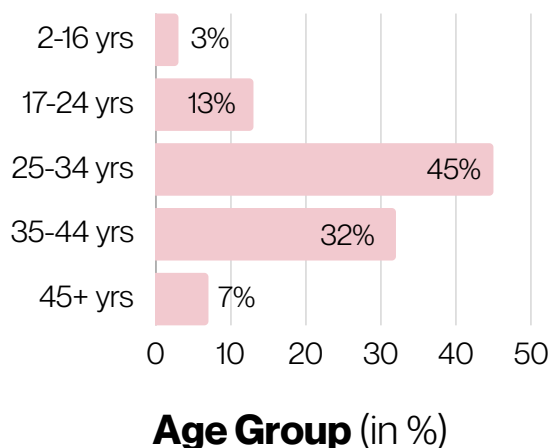
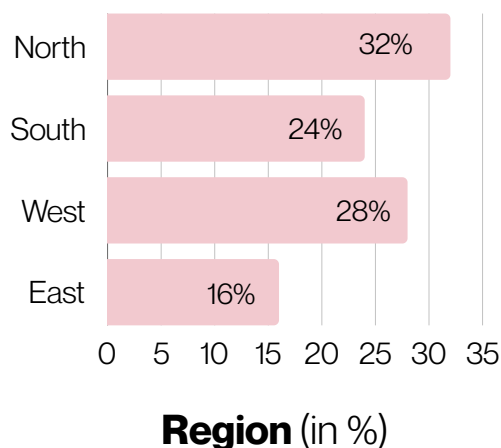
40.98 Mn*

Watched In Mn

42%

58%

Males / Females



Source: Chrome OTT, Shows of Year 2023. All India, 2+

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 minute of continuous viewing for the said period.

*Unique viewers = CTV subscribers *3 (3 viewers per subscription) + Mobile subscribers*1.1 (1.1 viewers per subscription)

Top #2 Female Protagonists



Aashiqana S4

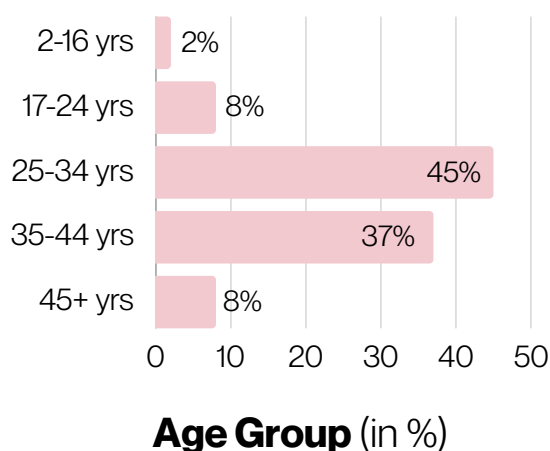
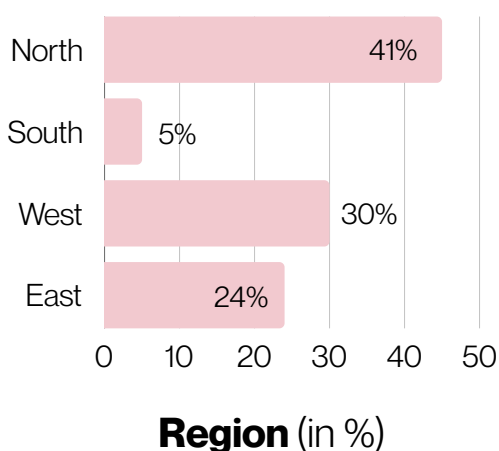
30.65 Mn*

Watched In Mn

27%

73%

Males / Females



Source: Chrome OTT, Shows of Year 2023. All India, 2+

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 minute of continuous viewing for the said period.

*Unique viewers = CTV subscribers *3 (3 viewers per subscription) + Mobile subscribers*1.1 (1.1 viewers per subscription)

Top #3 Female Protagonists



Aakhri Sach

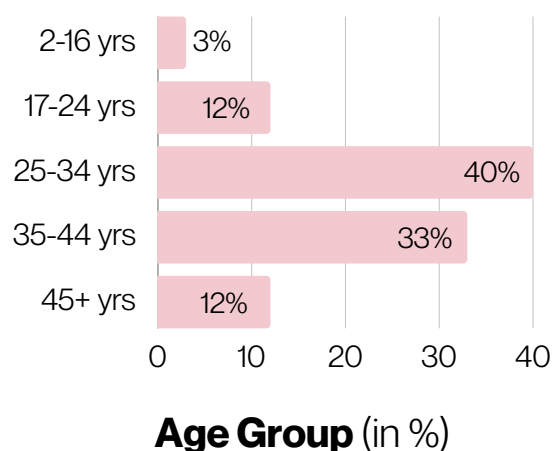
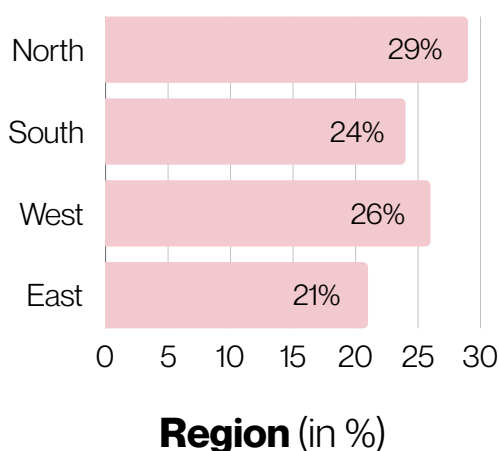
25.7 Mn*

Watched In Mn

41%

59%

Males / Females



Source: Chrome OTT, Shows of Year 2023. All India, 2+

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 minute of continuous viewing for the said period.

*Unique viewers = CTV subscribers *3 (3 viewers per subscription) + Mobile subscribers*1.1 (1.1 viewers per subscription)

Top #4 Female Protagonists



Saas, Bahu Aur Flamingo

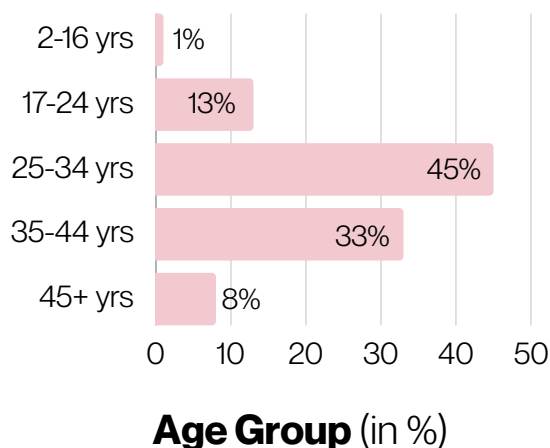
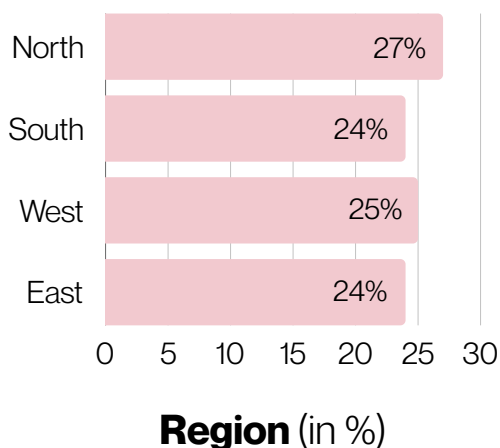
23.33 Mn*

Watched In Mn

49%

51%

Males / Females

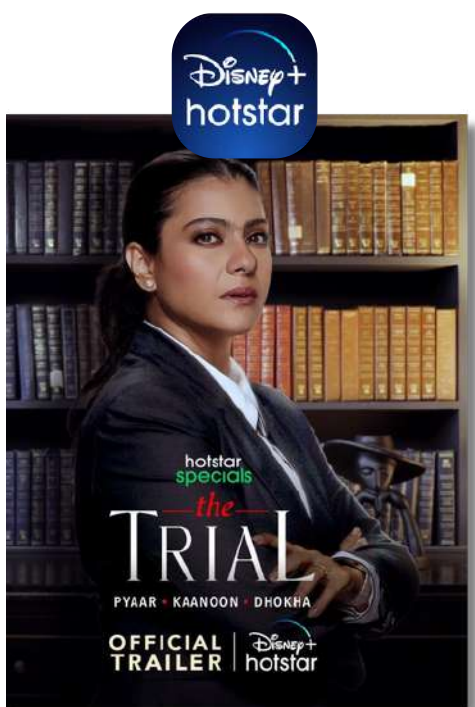


Source: Chrome OTT, Shows of Year 2023. All India, 2+

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 minute of continuous viewing for the said period.

*Unique viewers = CTV subscribers *3 (3 viewers per subscription) + Mobile subscribers*1.1 (1.1 viewers per subscription)

Top #5 Female Protagonists



The Trial

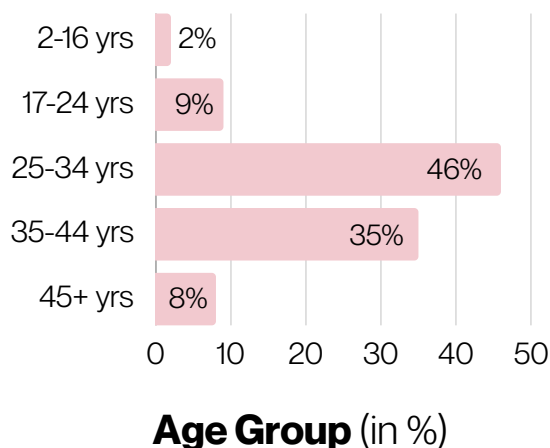
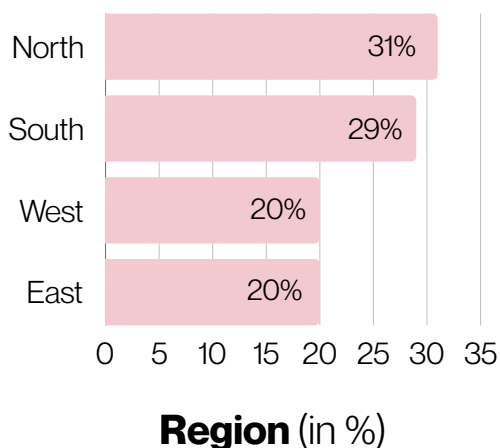
22.4 Mn*

Watched In Mn

34%

66%

Males / Females



Source: Chrome OTT, Shows of Year 2023. All India, 2+

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 minute of continuous viewing for the said period.

*Unique viewers = CTV subscribers *3 (3 viewers per subscription) + Mobile subscribers*1.1 (1.1 viewers per subscription)

Top #6 Female Protagonists



City Of Dreams S3

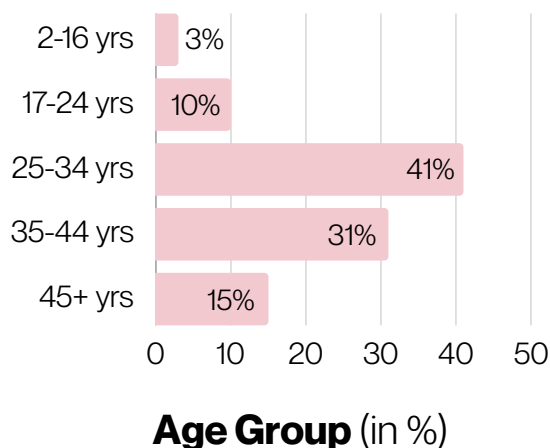
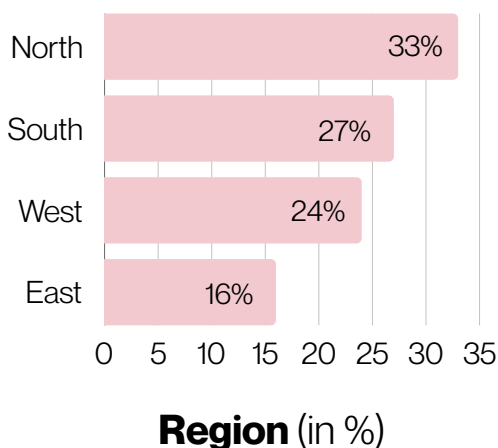
22.1 Mn*

Watched In Mn

35%

65%

Males / Females



Source: Chrome OTT, Shows of Year 2023. All India, 2+

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 minute of continuous viewing for the said period.

*Unique viewers = CTV subscribers *3 (3 viewers per subscription) + Mobile subscribers*1.1 (1.1 viewers per subscription)

Top #7 Female Protagonists



Temptation Island India

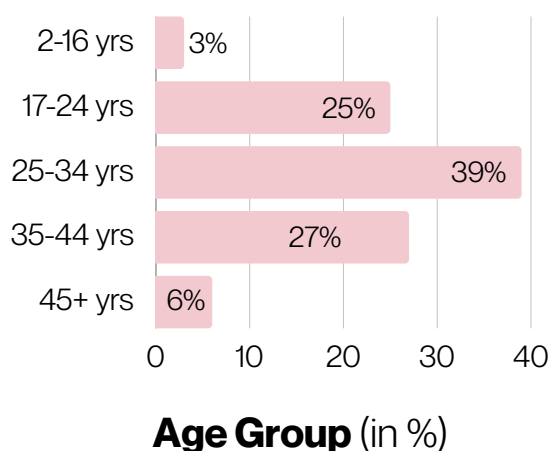
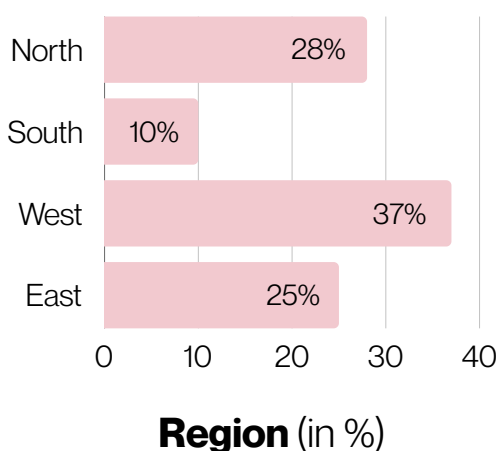
20.95 Mn*

Watched In Mn

27%

73%

Males / Females



Source: Chrome OTT, Shows of Year 2023. All India, 2+

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 minute of continuous viewing for the said period.

*Unique viewers = CTV subscribers *3 (3 viewers per subscription) + Mobile subscribers*1.1 (1.1 viewers per subscription)

Top #8 Female Protagonists



Permanent Roommates S3

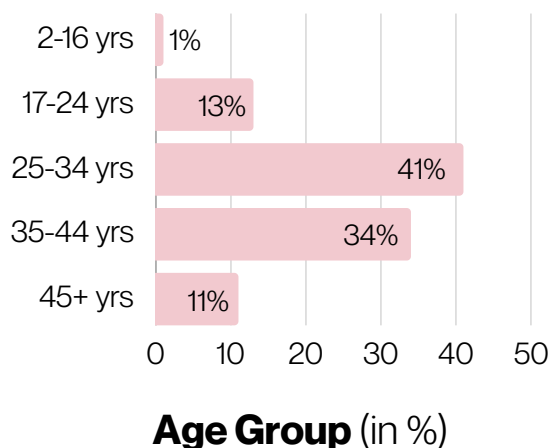
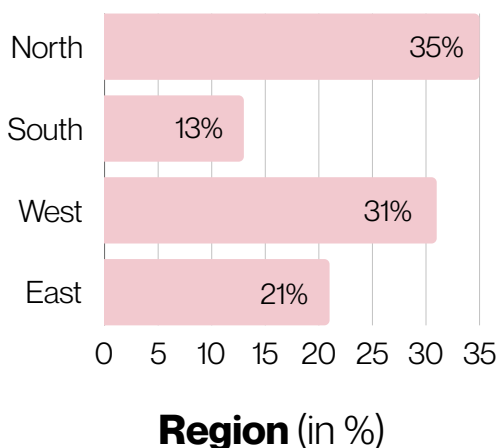
18.73 Mn*

Watched In Mn

47%

53%

Males / Females



Source: Chrome OTT, Shows of Year 2023. All India, 2+

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 minute of continuous viewing for the said period.

*Unique viewers = CTV subscribers *3 (3 viewers per subscription) + Mobile subscribers*1.1 (1.1 viewers per subscription)

Top #9 Female Protagonists



Jhansi S2

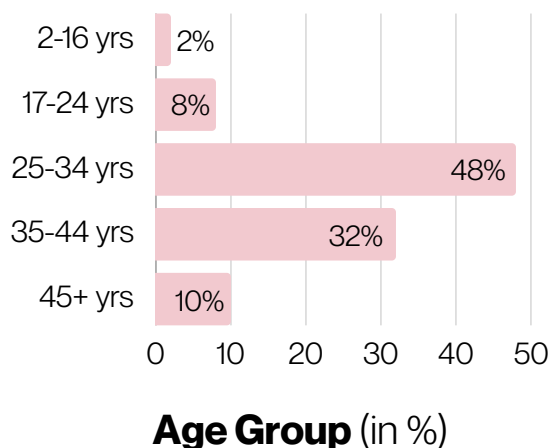
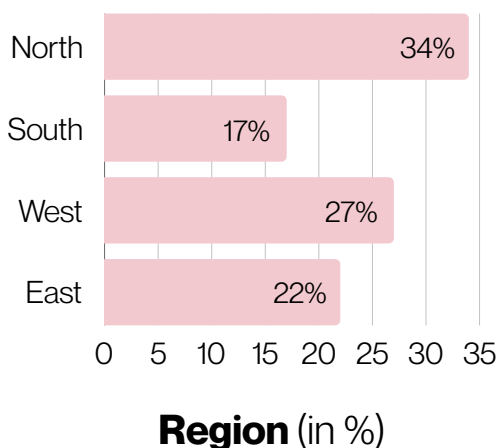
18.29 Mn*

Watched In Mn

25%

75%

Males / Females



Source: Chrome OTT, Shows of Year 2023. All India, 2+

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 minute of continuous viewing for the said period.

*Unique viewers = CTV subscribers *3 (3 viewers per subscription) + Mobile subscribers*1.1 (1.1 viewers per subscription)

Top #10 Female Protagonists



Aarya S3

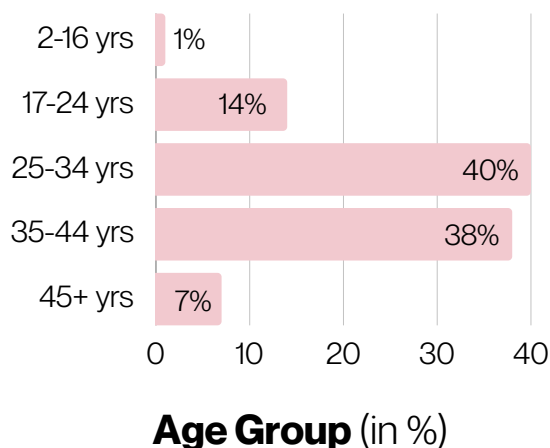
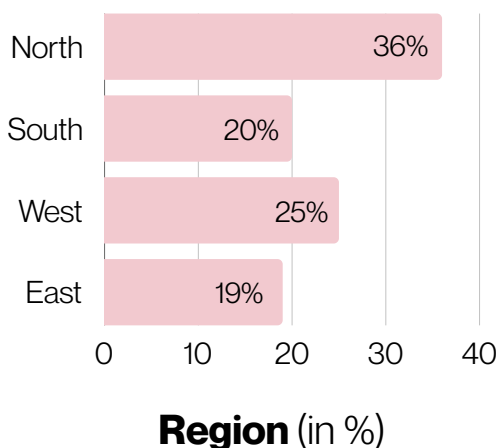
18.03 Mn*

Watched In Mn

55%

45%

Males / Females



Source: Chrome OTT, Shows of Year 2023. All India, 2+

Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 minute of continuous viewing for the said period.

*Unique viewers = CTV subscribers *3 (3 viewers per subscription) + Mobile subscribers*1.1 (1.1 viewers per subscription)

Glossary

- **OTT** - The delivery of video content over the internet, bypassing traditional cable or satellite providers and allowing direct access to streaming services on various devices.
- **AVOD** - A streaming service that offers free access to content supported by advertisements rather than requiring a subscription fee.
- **SVOD** - Subscription video on demand.
- **SDK** - Software development kit.
- **CTV** - Connected TV.
- **Unique Viewers** - Unique viewers consider a 1.1x multiplication factor for mobile subscriptions, and a 3x multiplication factor for CTV subscriptions.
- **NCCS** - New Consumer Classification System.
- **Mn** - Million.
- **ICC** - International Cricket Council.
- **IPL** - Indian Premier League.
- **SD** - Standard Definition.
- **HD** - A digital television or display format characterized by a higher resolution, providing clearer and more detailed images than standard-definition formats.
- **Pay TV** - A television service requiring a subscription fee for access to premium channels and content.
- **CTV** - Connected TVs are either connected externally with devices like Fire sticks, Airtel Xstream etc., or are integrated with OSs such as Tizen, Android, Oxygen, etc.
- **Free TV** - Television broadcasting that is publicly accessible without the need for a subscription fee, typically through over-the-air signals or basic cable channels.

Glossary

- **Smart TV** - A television set with integrated internet capabilities, allowing access to online streaming services, apps, and other interactive features.
- **Smart Box** - An external device that adds internet capabilities to a standard television, enabling access to online streaming services, apps, and interactive features.
- **Linear TV** - Referred to as traditional broadcast TV.
- **Overlap** - Where one can access any two between Pay TV, Freedish and CTV.
- **Mobiles / Smartphones** - Mobile devices that combine phone capabilities with computer-like features, including internet access, app.

Acknowledgements



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Let's Connect !

