

India's first Digital Content  
Measurement PaaS

# 2023 COTT Annual Report





“

The current OTT viewers in India stand at 216 Mn across all active platforms like Netflix, Hotstar, Prime Video, etc., which in 2 years will grow to cross the 300 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.

”

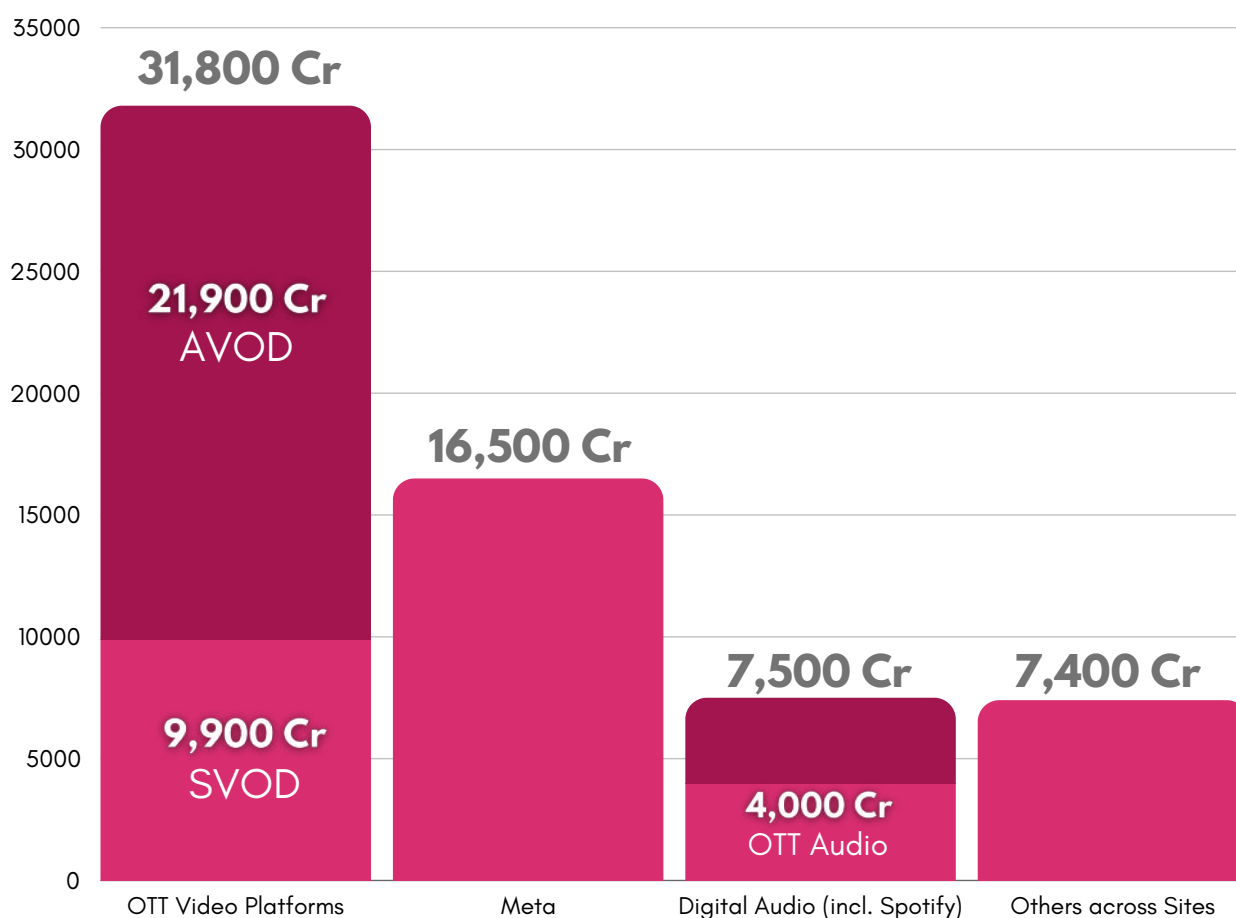
# Bharat Dabholkar

Actor & Advertising Professional

# Digital Revenue

**63,200 Cr**

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



# Table of Contents

**01**

## **Overview**

India OTT Market 2023, historical data and projections  
By Revenue and Viewers

**02**

## **By Access type**

- Desktop
- Smartphone
- CTV
- Overlaps between devices

**03**

## **By Revenue model**

- SVOD Platforms
- AVOD Platforms

**04**

## **By Deployment type and Internet service**

- Operating Systems
- External Devices (Smart Boxes, etc.)
- Wifi
- Hotspots
- Smart Boxes
- Others

**05**

## **By Demographics**

- Age
- Region/State
- NCCS/ISEC

# Table of Contents

**06**

## **Drivers of the shift**

**07**

## **Current audience trends**

**08**

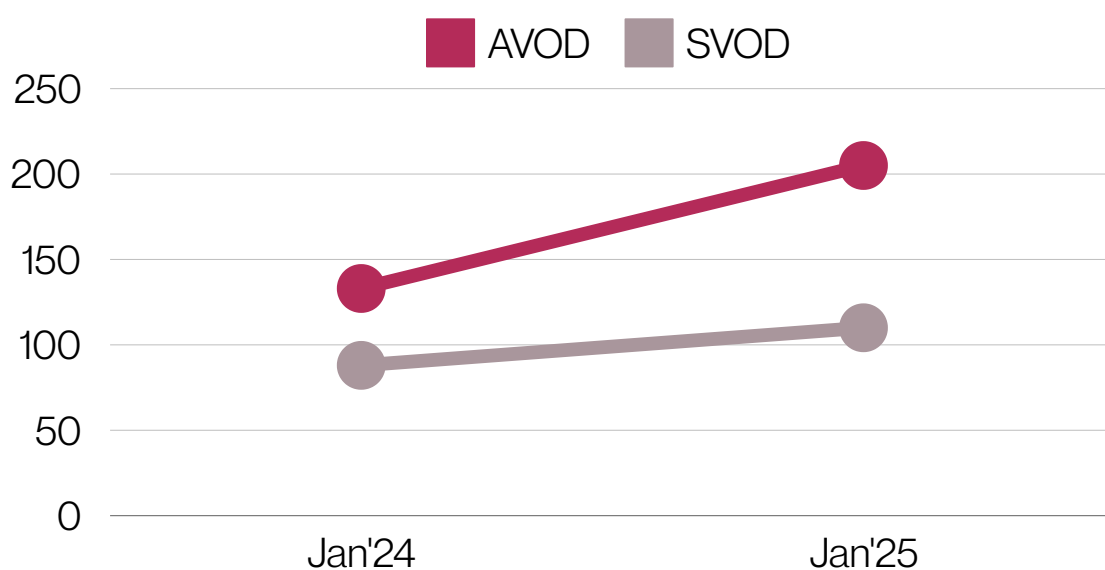
## **2023 content and genre trends with demographics bifurcation**

- Top 10 SVOD Original Shows
- Top 10 SVOD Original Movies
- Top 10 SVOD Movies
- Top 10 Content - Female Protagonists

# 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**

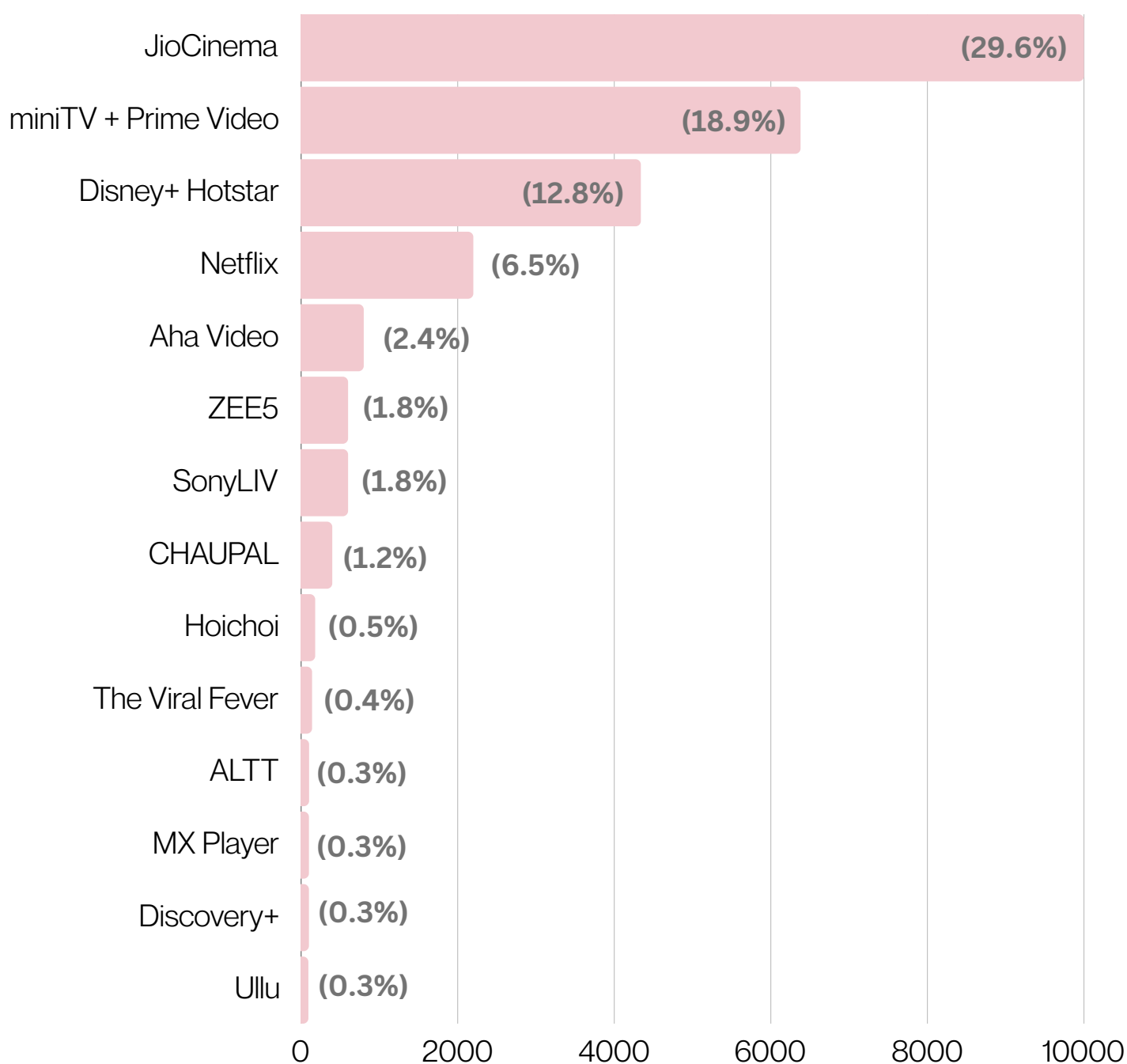
OTT Viewers / Total Viewers



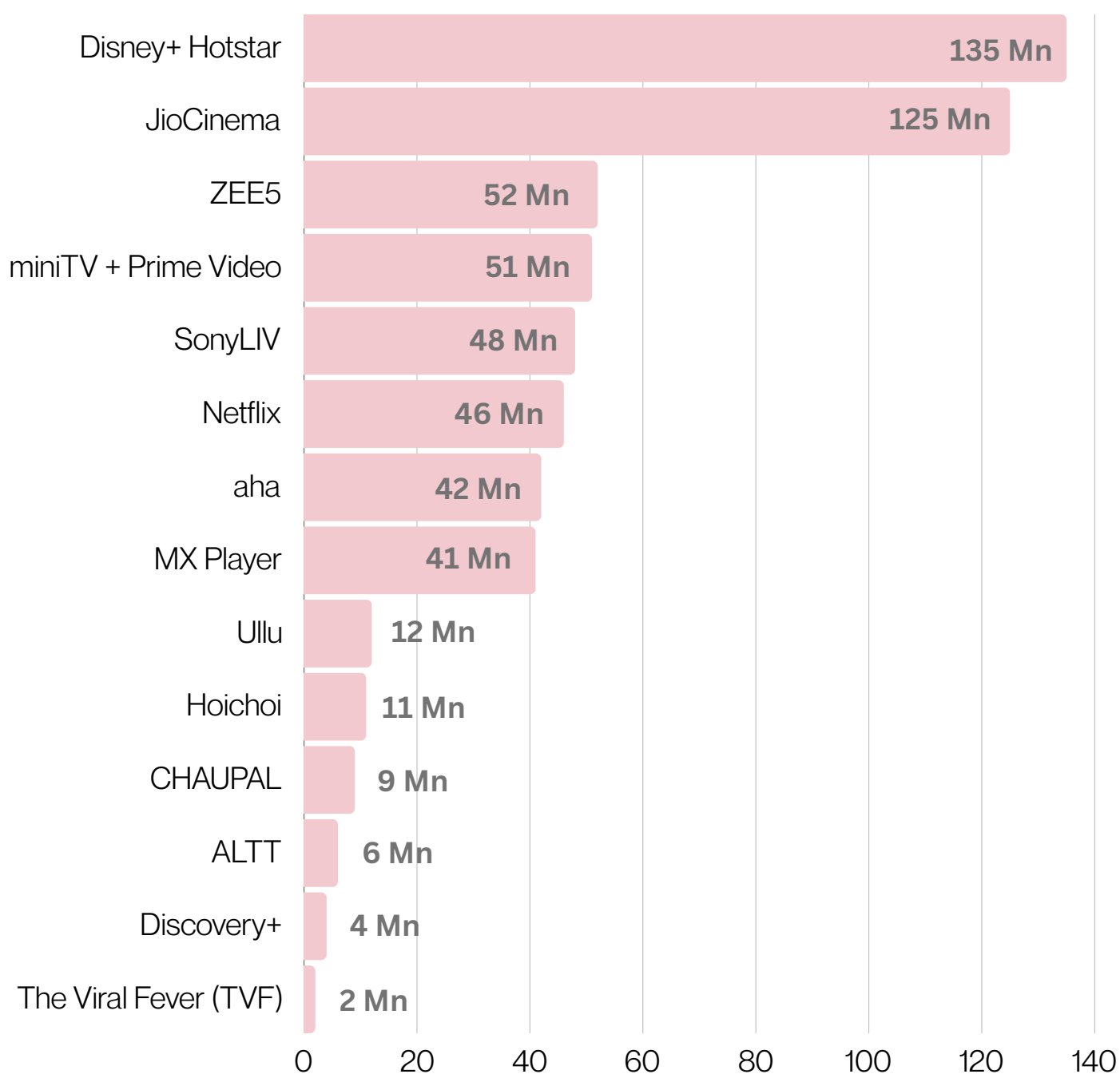
OTT Penetration of Digital Universe



# Total Revenue Share



# Unique Viewers by Platform

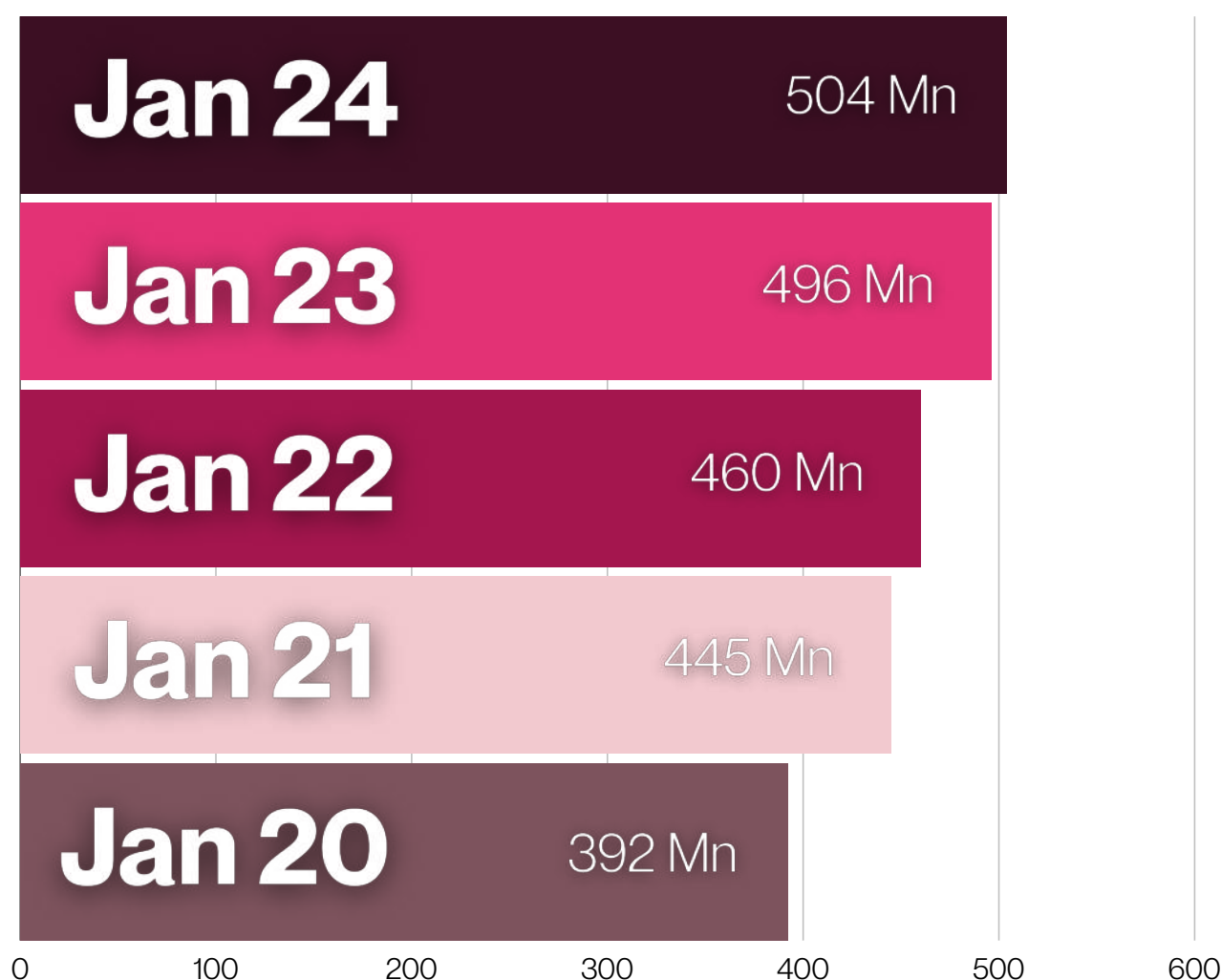


Source: Chrome DM SES, Mkt - All India, Dec'2023, OTT = 504 million, 3,16,010 surveyed HHs

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

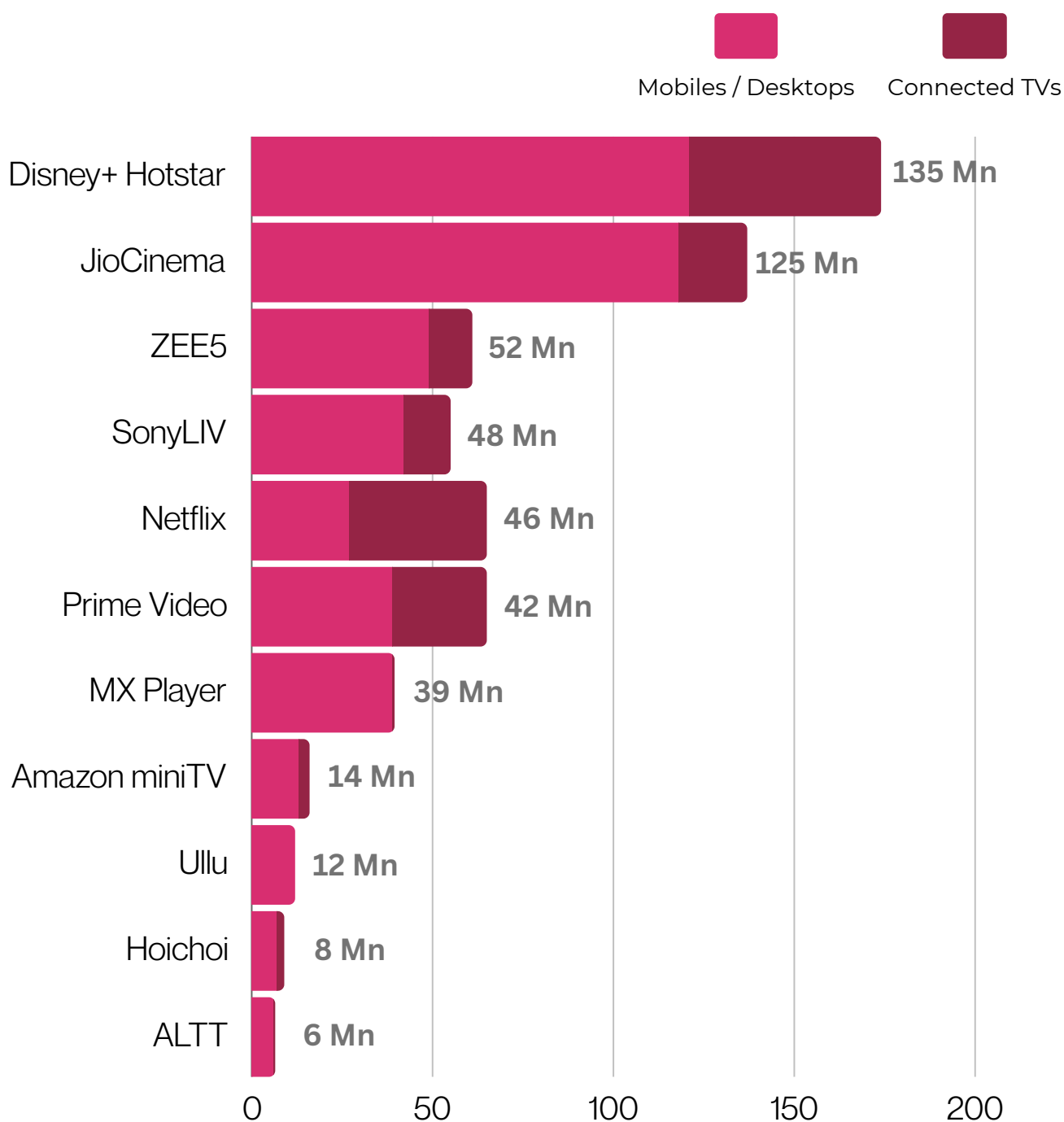
# Yearly OTT Viewers

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.



# Access modes

# Total Unique Viewers



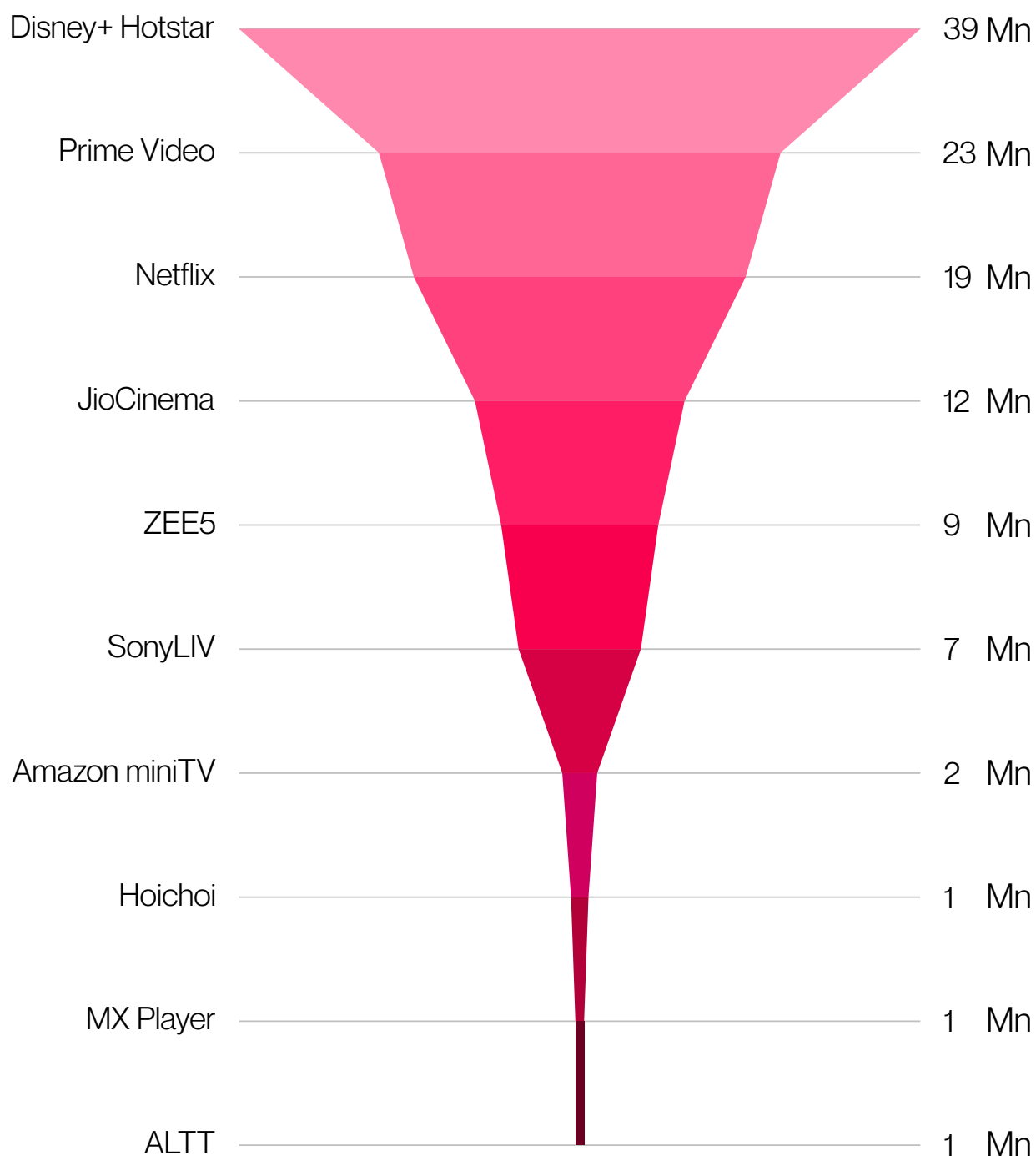
Source: Chrome DM SES, Mkt - All India, Dec'2023,

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.

Prime video unique viewers are inclusive of miniTV viewers

# Access modes Overlap (CTV + Mobile)










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

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

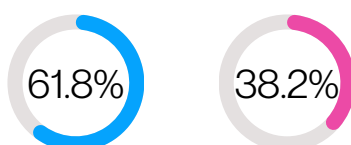
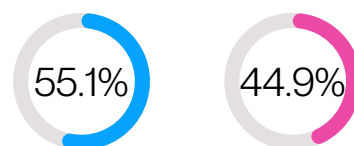
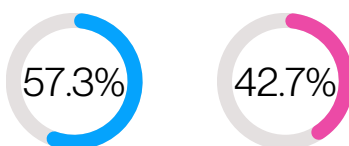
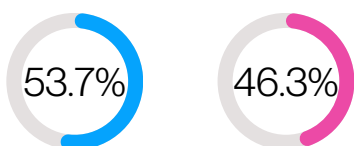
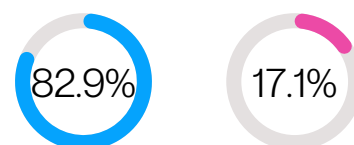
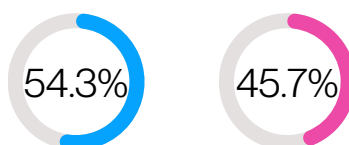
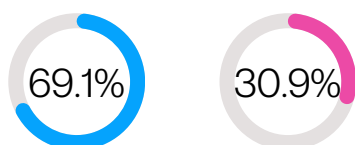
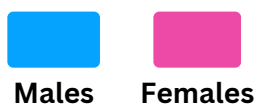
Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 min viewing across 24 hours.

Prime video unique viewers are inclusive of miniTV viewers

# 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

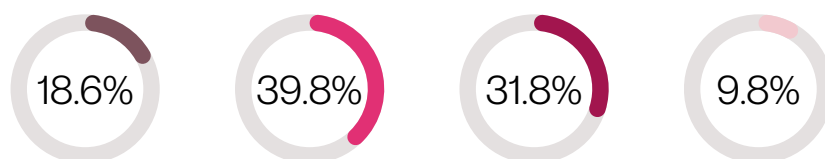
Jio Cinema - 125 mn, Disney+Hotstar - 135 mn, ZEE5 - 52 mn, Amazon (Prime+mini TV) - 51 mn, Sony LIV - 48 mn,

Netflix - 46 mn, MX PLayer - 41 mn

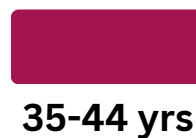
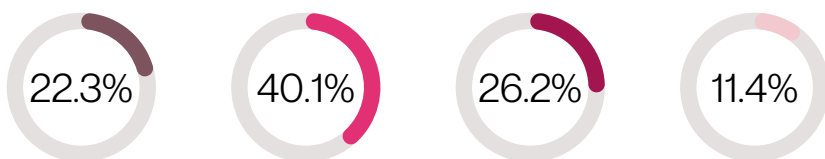
# Age Composition



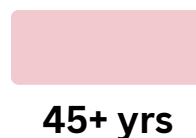
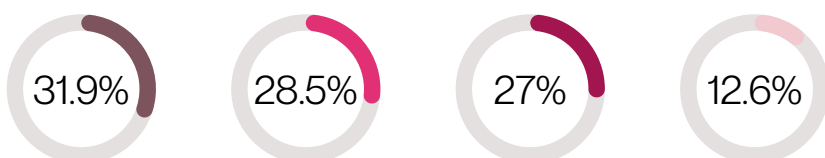
**JioCinema**



**Disney+ hotstar**



**prime video**



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

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

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

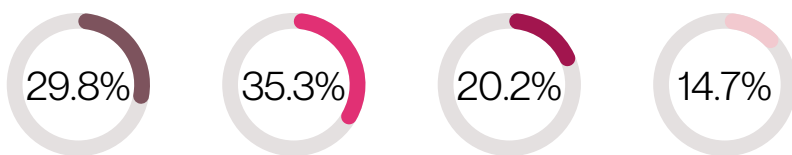
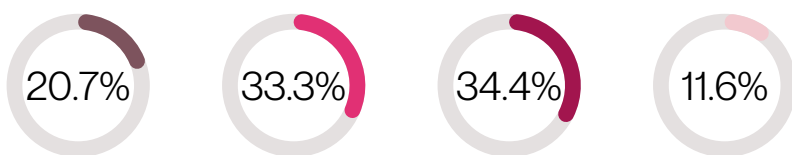
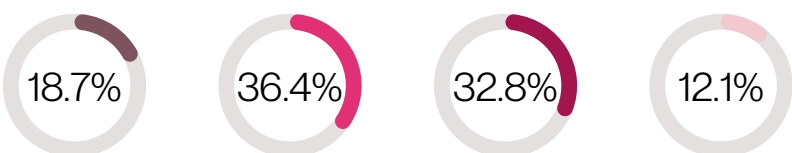
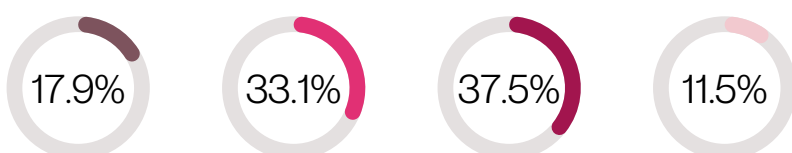
Netflix - 46 mn, MX Player - 41 mn



# Age Composition



## NETFLIX



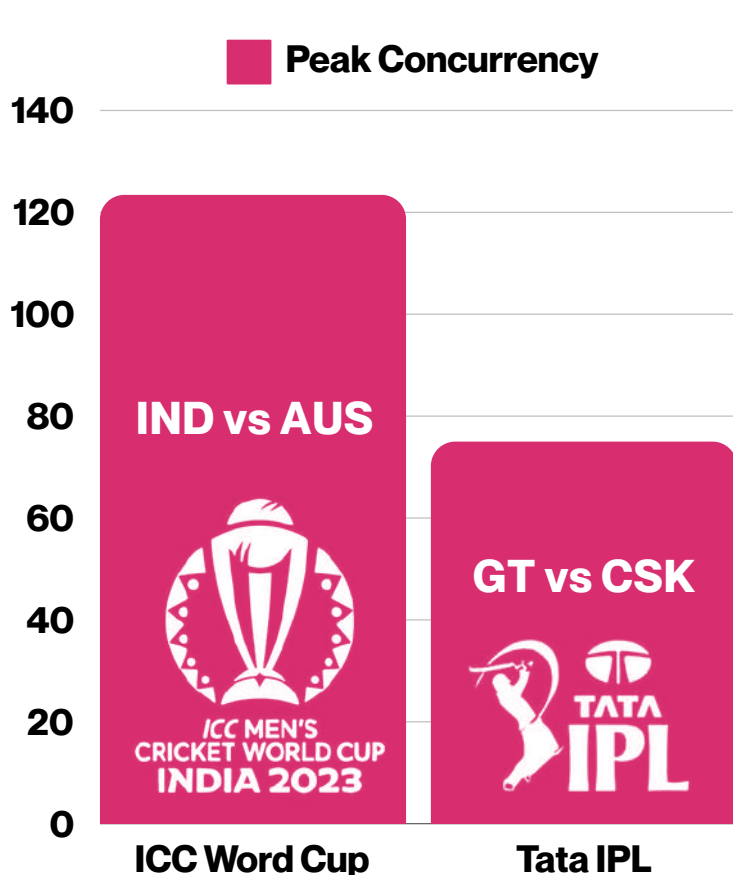
Source: Chrome DM SES, Mkt - All India, Dec'2023,

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

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Netflix - 46 mn, MX PLayer - 41 mn

# 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

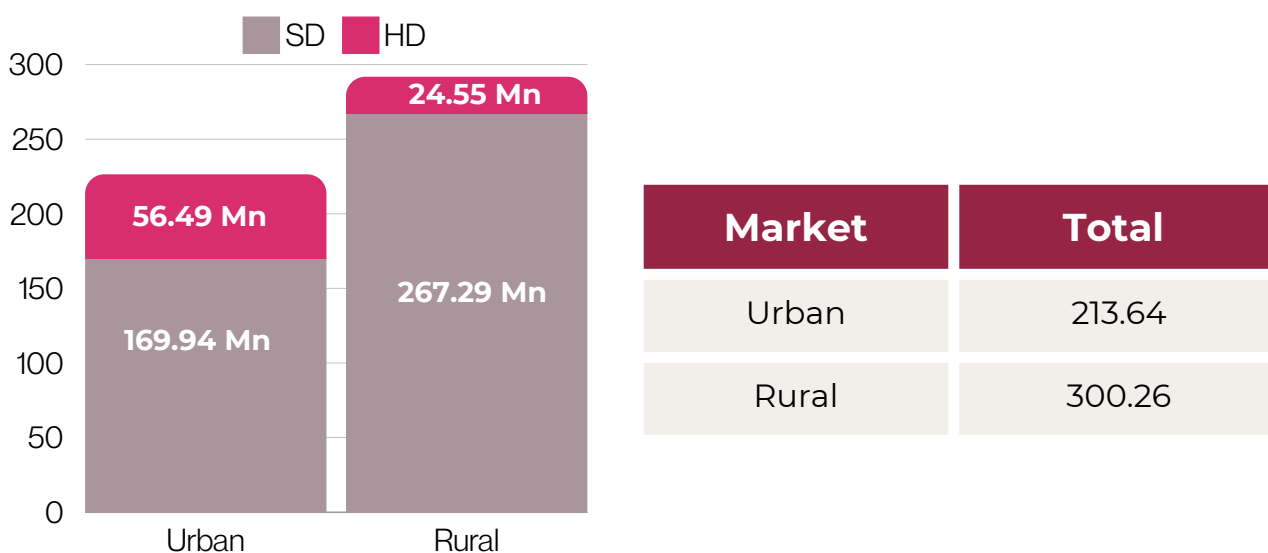
Source: Chrome DM SES, Mkt - All India, Dec'2023,

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

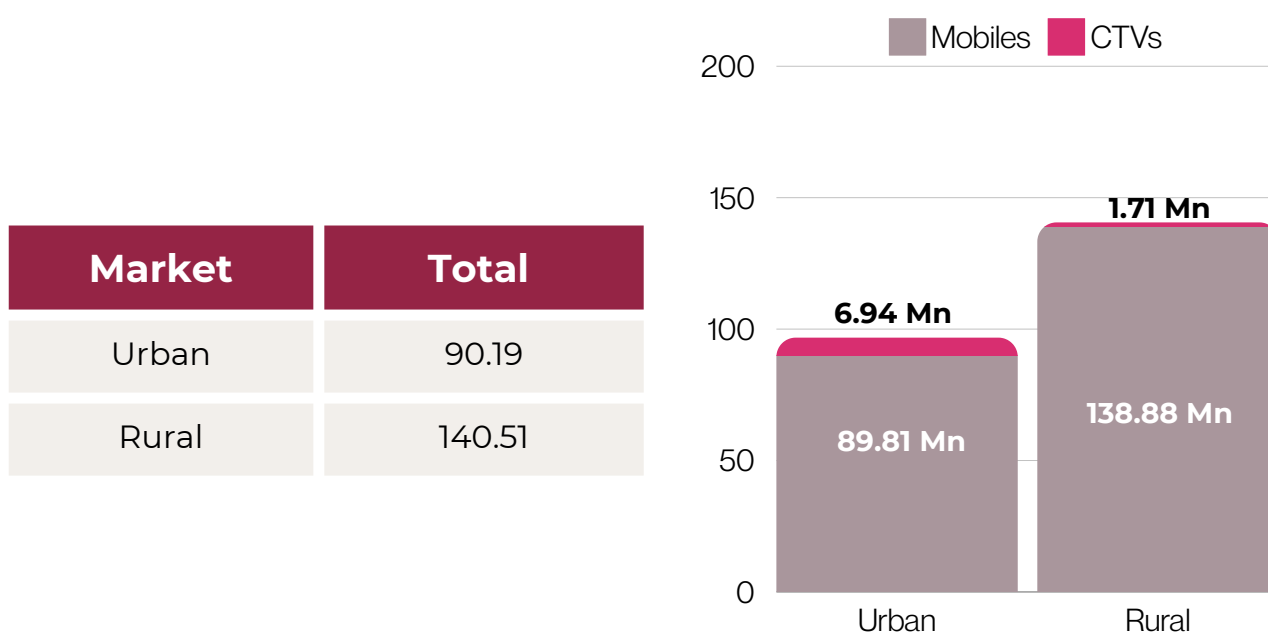
Reach: Shows/Web Series/Movies: Calculated on the basis of a minimum of 1 min viewing across 24 hours.

# ICC World Cup 2023

TV (Claimed Viewership) In Mn



Disney+ Hotstar (Viewership) In Mn



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

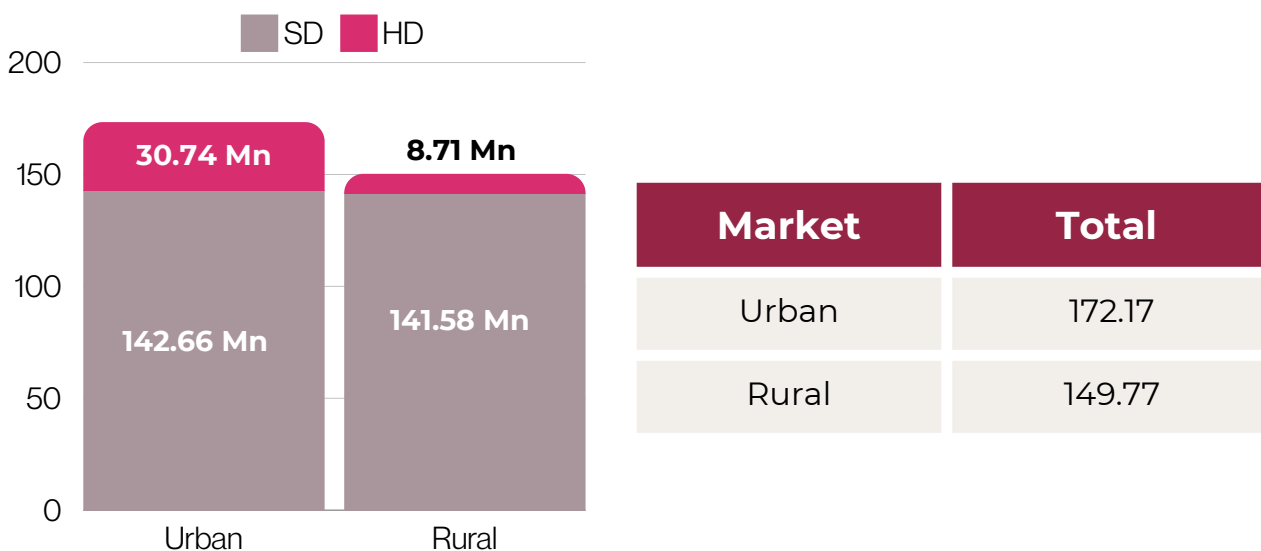
Source: Chrome DM SES, Mkt - All India, Dec'2023,

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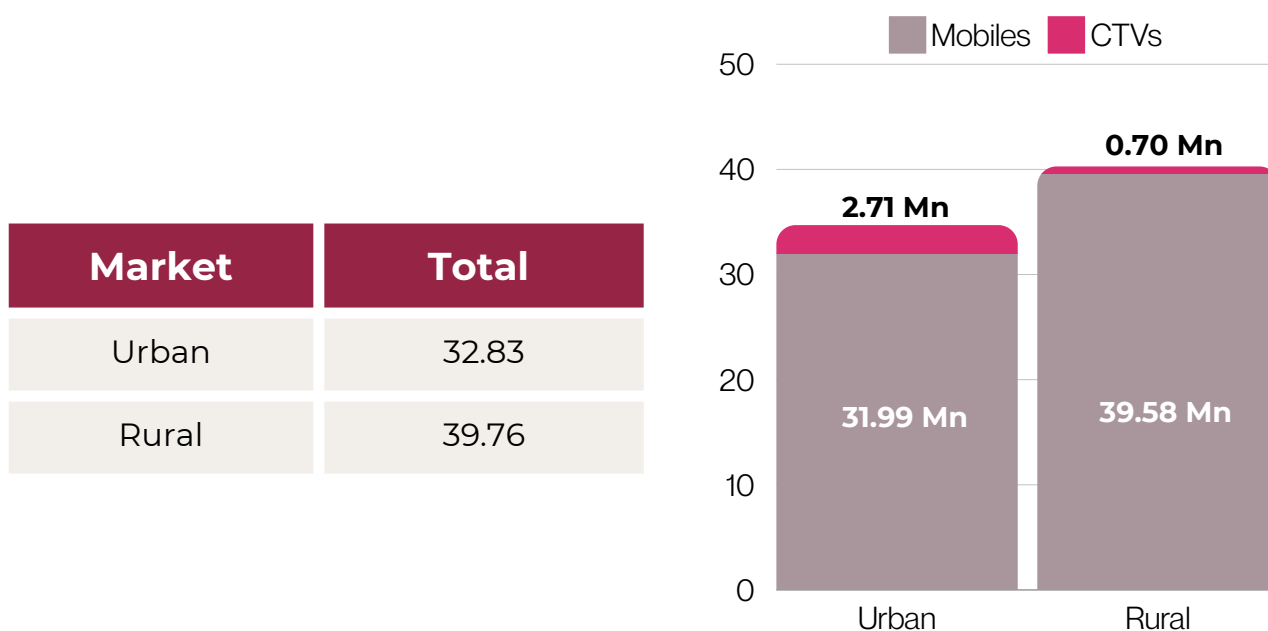
The totals across categories will not tally with the sum total of individual splits owing to overlaps within the same

# 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

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

# TATA IPL

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

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

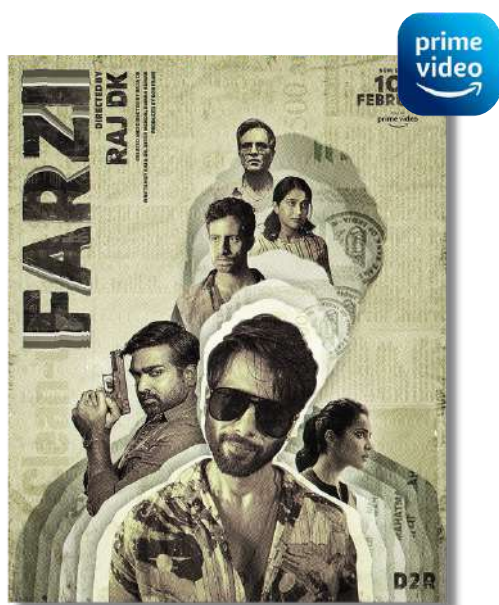
OTT = 504 million, 3,16,010 surveyed HHs

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

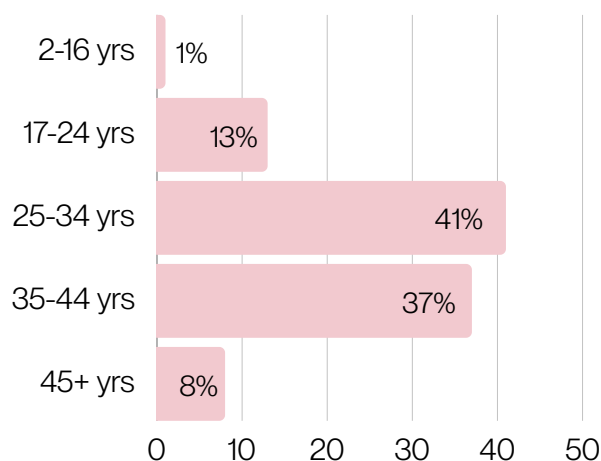
**22.50 Mn\***

Watched In Mn

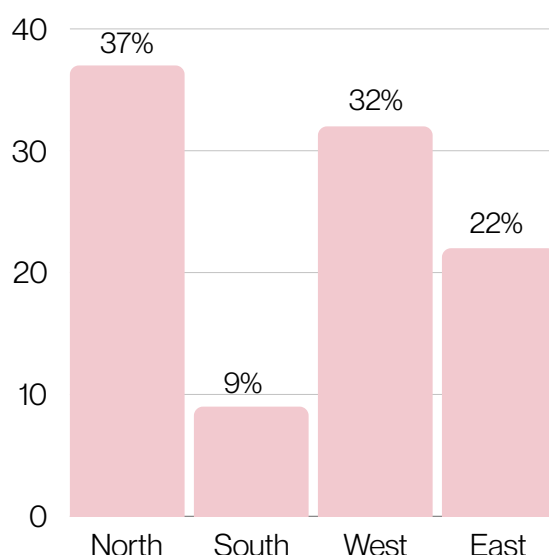
62%

38%

Males / Females



Age Group (in %)



Region (in %)

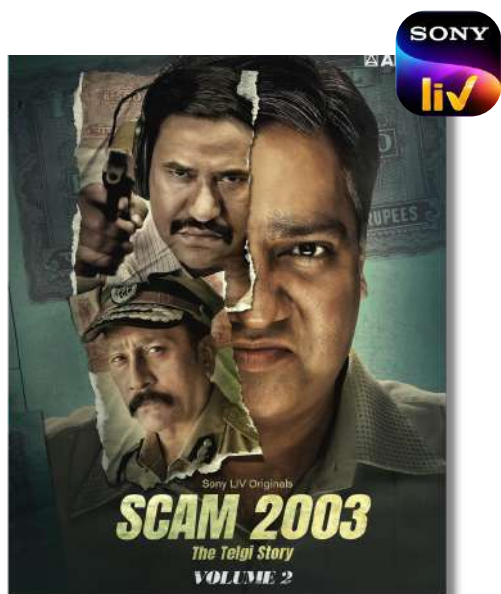
Source: Chrome OTT, Shows of Year 2023. NCCS A, All India, 2+

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

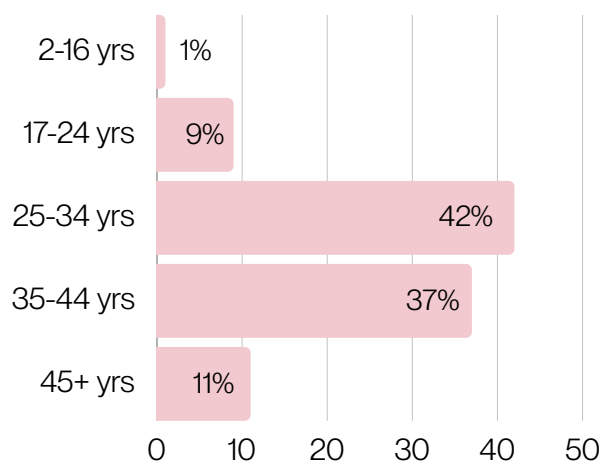
**13.35 Mn\***

Watched In Mn

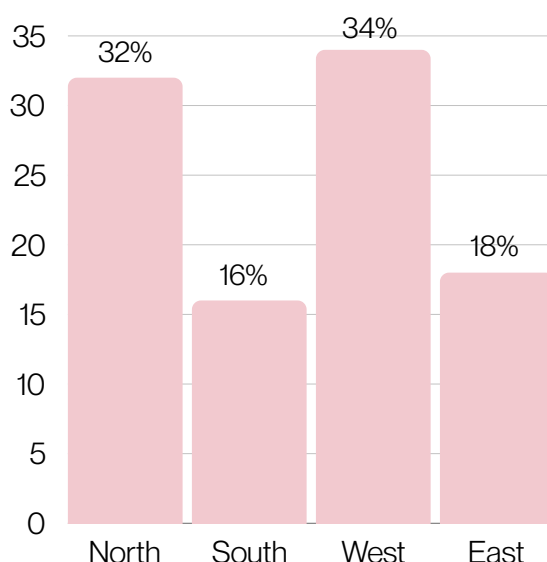
65%

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

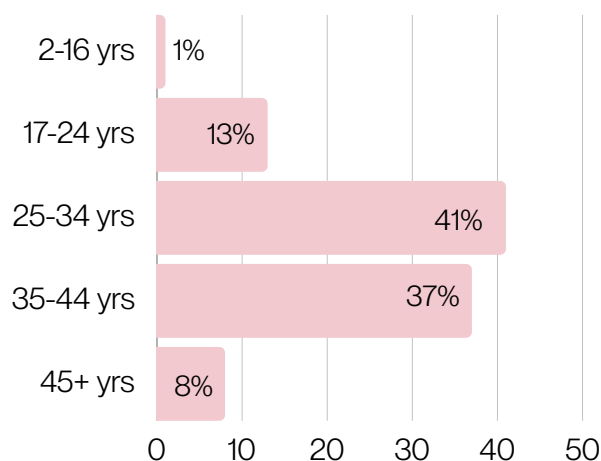
**12.17 Mn\***

Watched In Mn

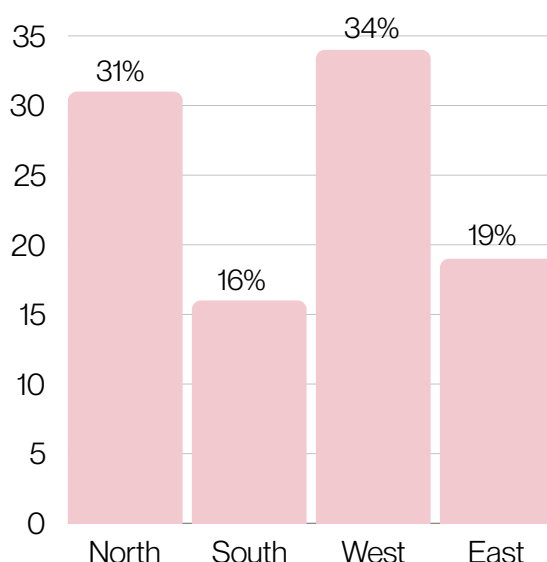
**55%**

**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.

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

# Top #4 SVOD Show



## Aakhri Sach

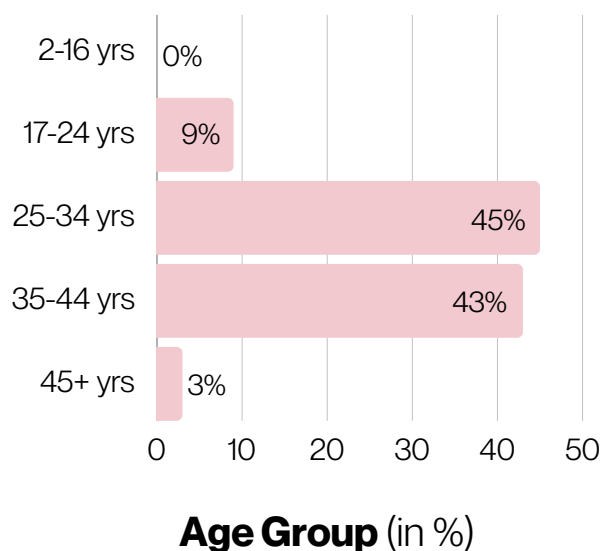
**12.16 Mn\***

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.

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

# Top #5 SVOD Show



## Permanent Roommates

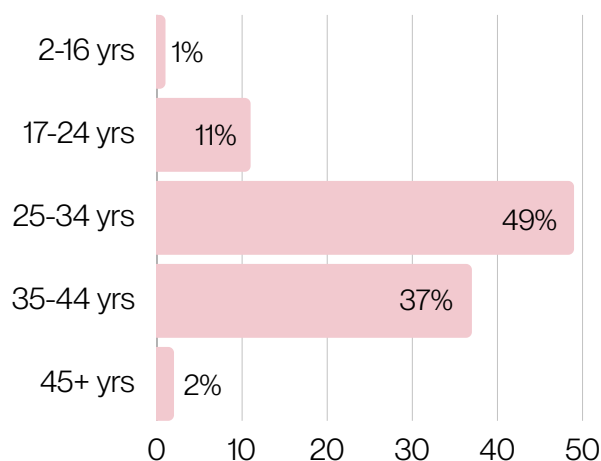
**8.97 Mn\***

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

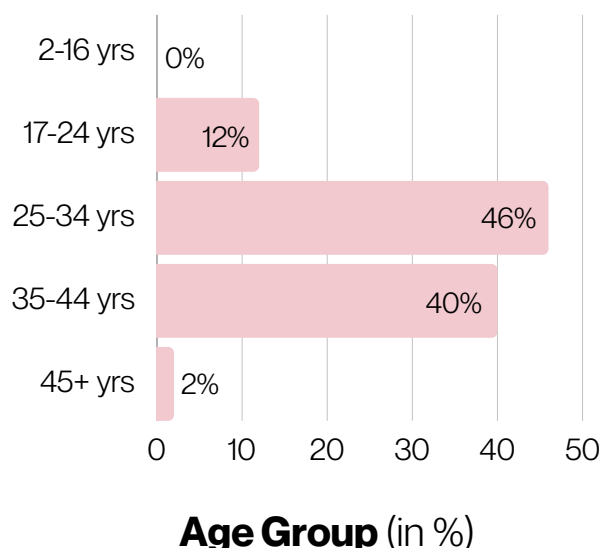
**7.80 Mn\***

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

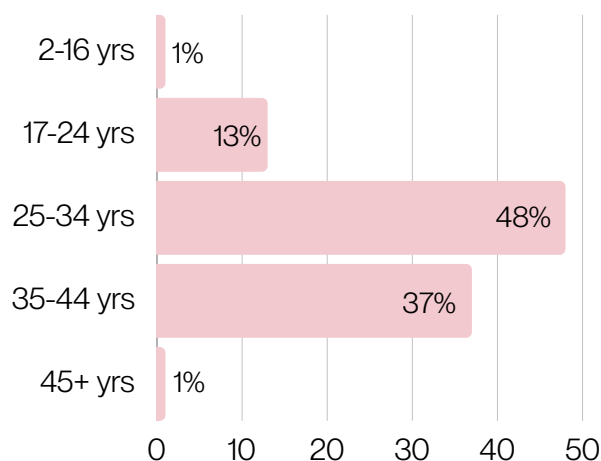
**6.76 Mn\***

Watched In Mn

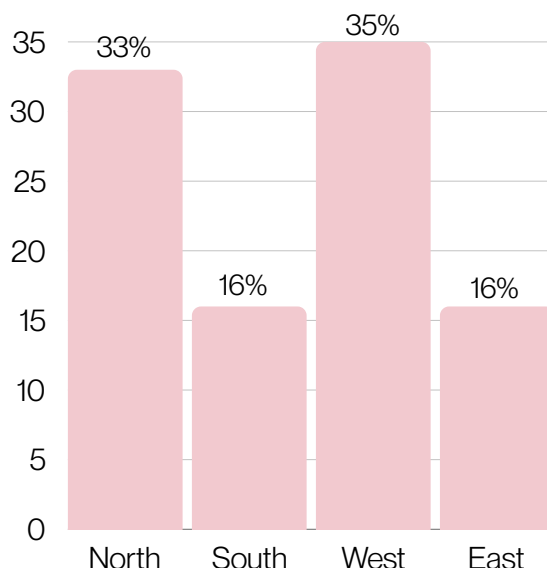
72%

28%

Males / Females



Age Group (in %)



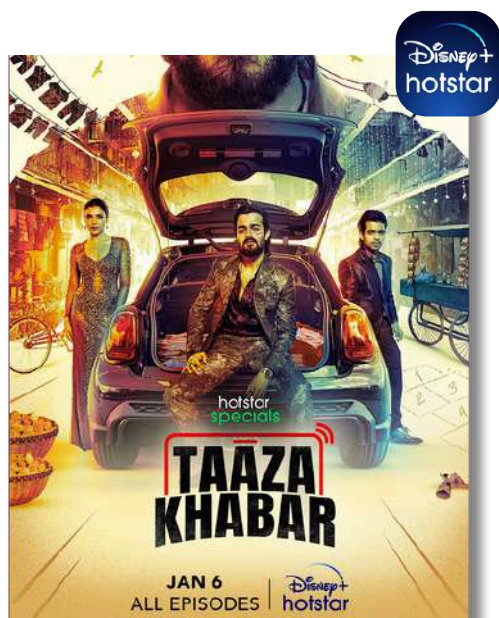
Region (in %)

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

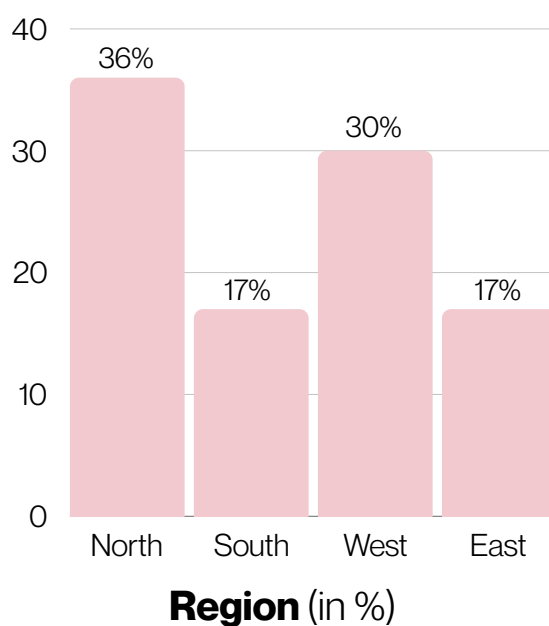
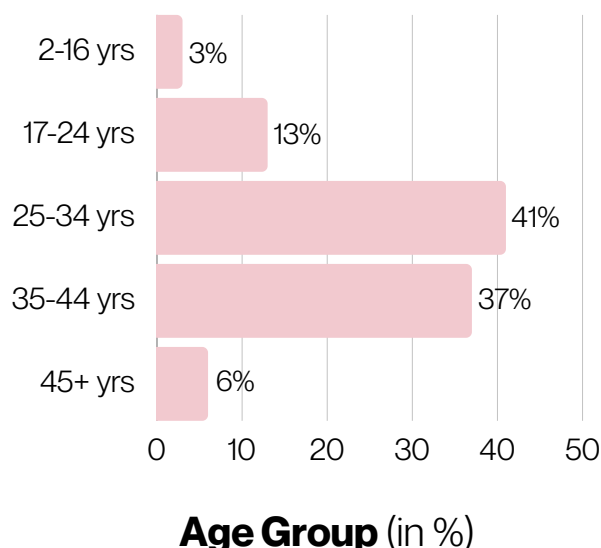
**5.99 Mn\***

Watched In Mn

**59%**

**41%**

Males / Females

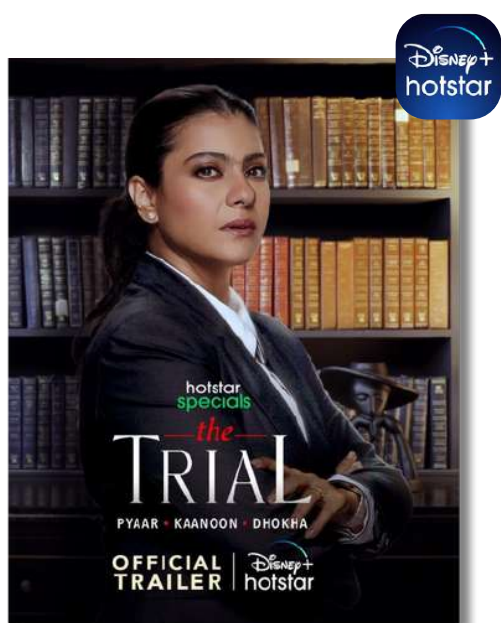


Source: Chrome OTT, Shows of Year 2023. NCCS A, All India, 2+

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

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

# Top #9 SVOD Show



## The Trial

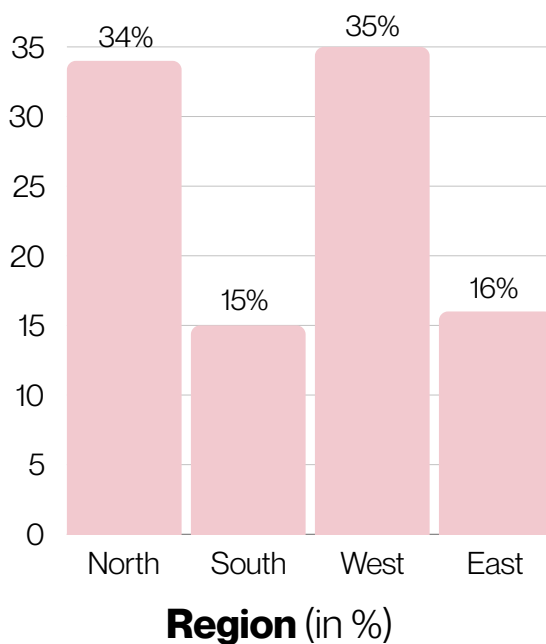
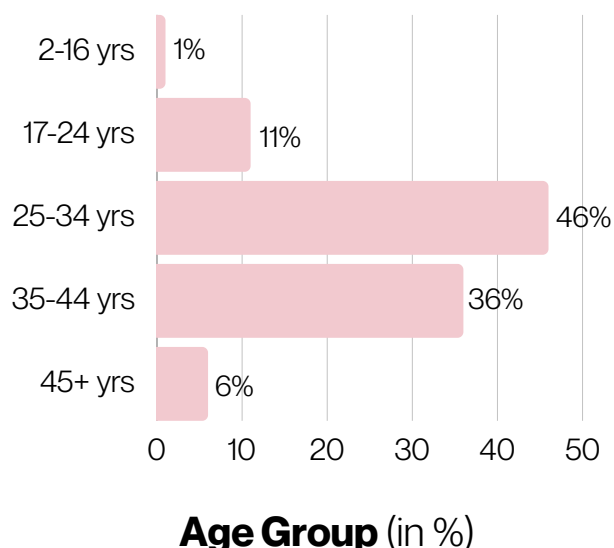
**5.96 Mn\***

Watched In Mn

**53%**

**47%**

Males / Females



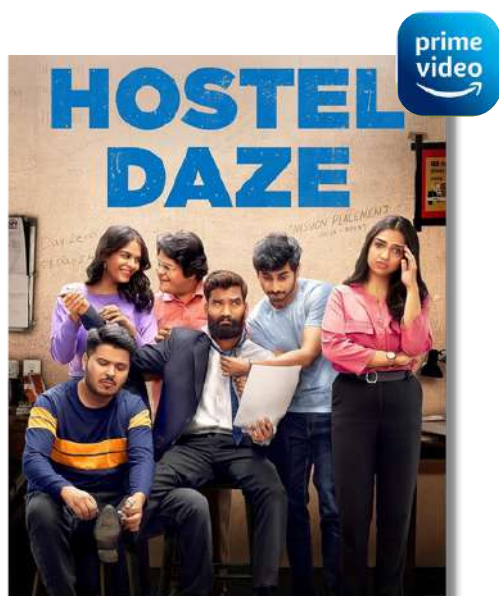
Source: Chrome OTT, Shows of Year 2023. NCCS A, All India, 2+

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

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



# Top #10 SVOD Show



## Hostel Daze

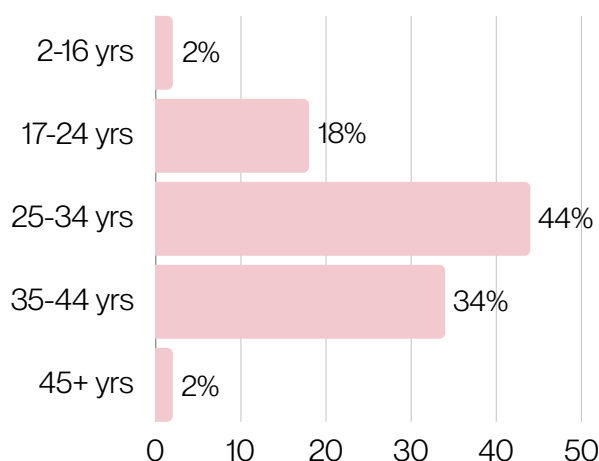
**5.89 Mn\***

Watched In Mn

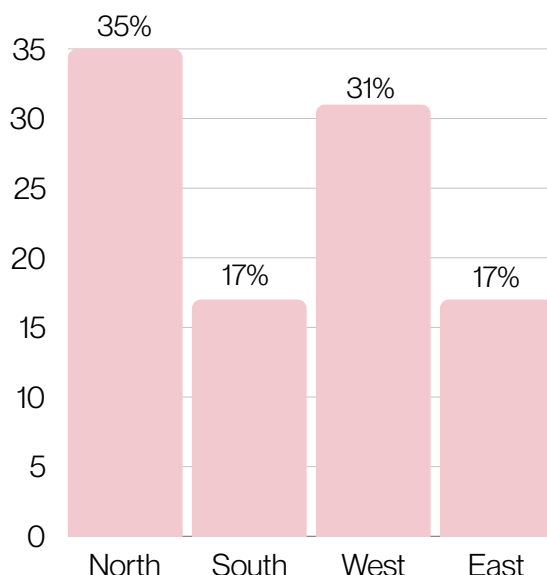
57%

43%

Males / Females



Age Group (in %)



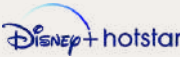


Region (in %)

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

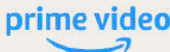

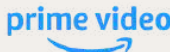
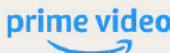
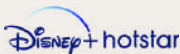
Rank	Movie	Platform	Total Subscribers	*Unique Viewers	Interactivity Score
1	Lust Stories 2	NETFLIX	6.5 Mn	17.72 Mn	35%
2	An Action Hero	NETFLIX	6.5 Mn	15.86 Mn	44%
3	Jaane Jaan	NETFLIX	6.5 Mn	15.72 Mn	61%
4	Chor Nikal Ke Bhaga	NETFLIX	6.5 Mn	14.74 Mn	67%
5	IB71		37 Mn	14.36 Mn	37%
6	Heart of Stone	NETFLIX	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	<b>NETFLIX</b>	6.5 Mn	19.8 Mn	51%
4	Jailer		24.5 Mn	18.09 Mn	47%
5	Lust Stories 2	<b>NETFLIX</b>	6.5 Mn	17.72 Mn	35%
6	Pathaan		24.5 Mn	17.07 Mn	59%
7	An Action Hero	<b>NETFLIX</b>	6.5 Mn	15.86 Mn	44%
8	Jaane Jaan	<b>NETFLIX</b>	6.5 Mn	15.72 Mn	61%
9	Avatar: The Way of Water		37 Mn	15.6 Mn	57%
10	Jawan	<b>NETFLIX</b>	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

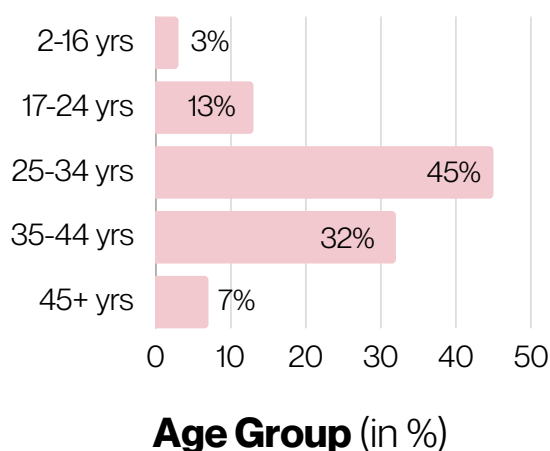
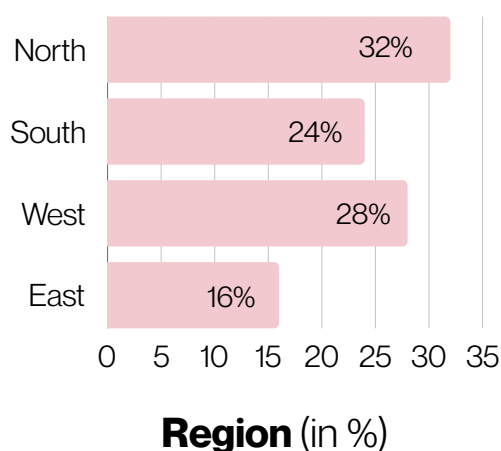
40.98 Mn\*

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

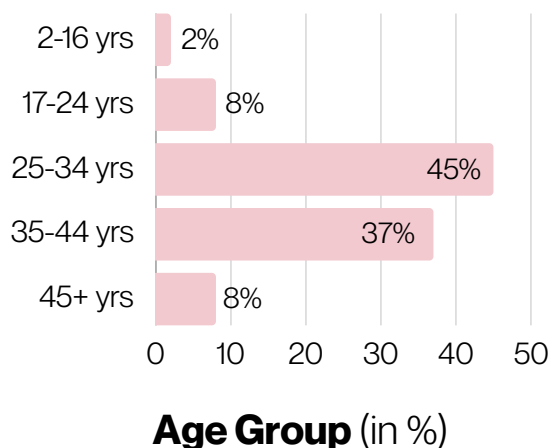
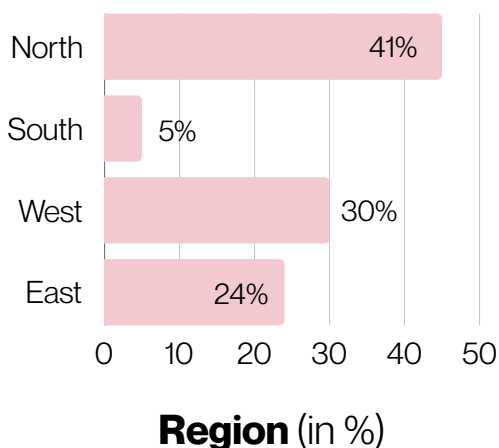
**30.65 Mn\***

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

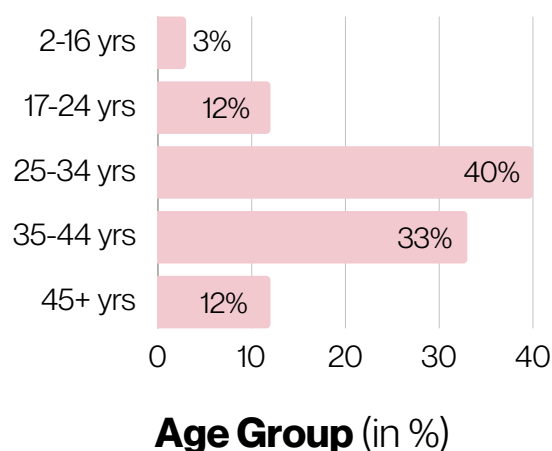
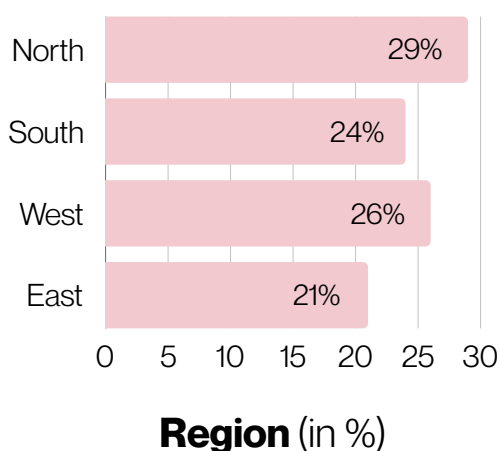
**25.7 Mn\***

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

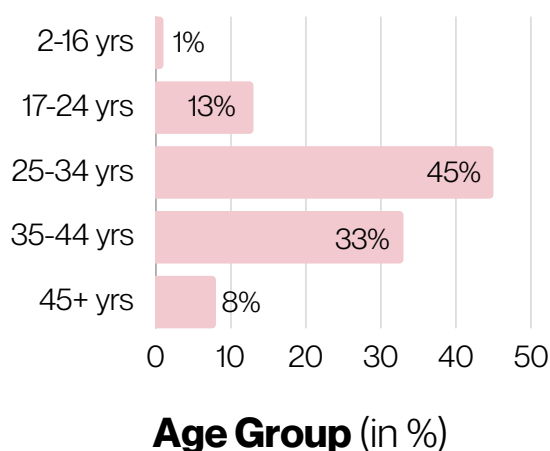
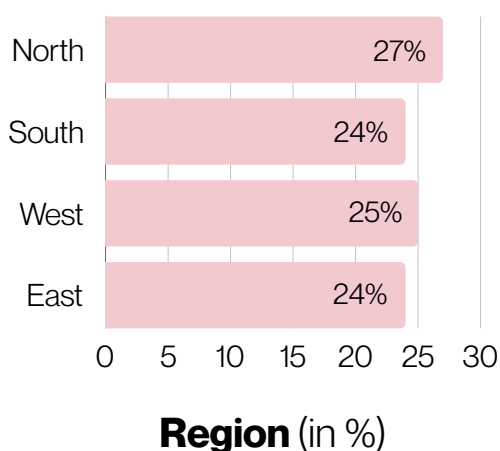
**23.33 Mn\***

Watched In Mn

49%

51%

Males / Females



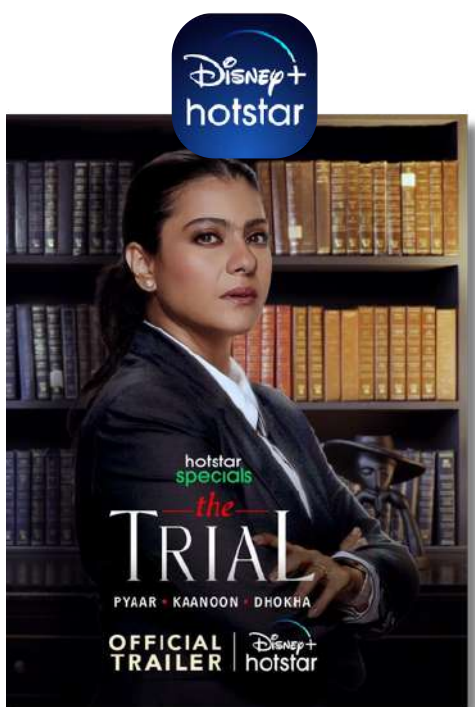
Source: Chrome OTT, Shows of Year 2023. All India, 2+

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

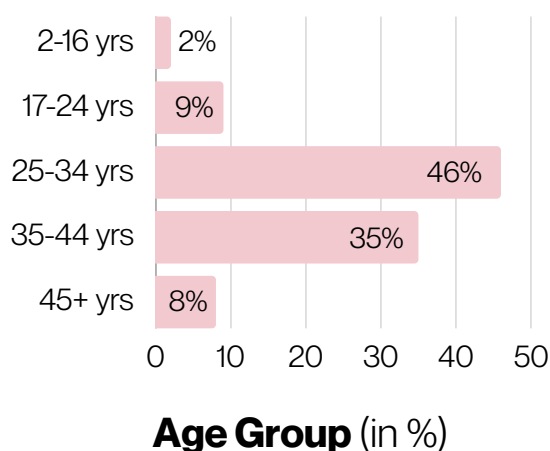
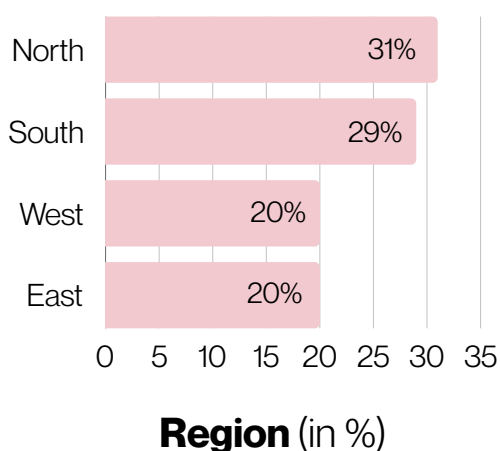
22.4 Mn\*

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)

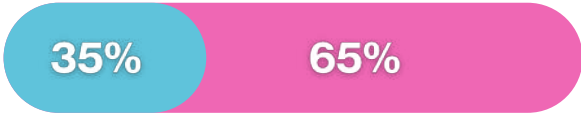
# Top #6 Female Protagonists



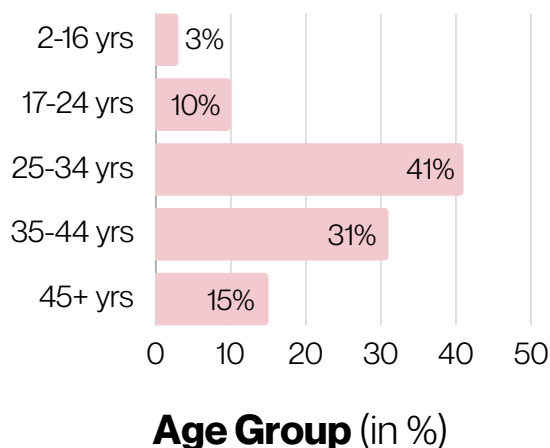
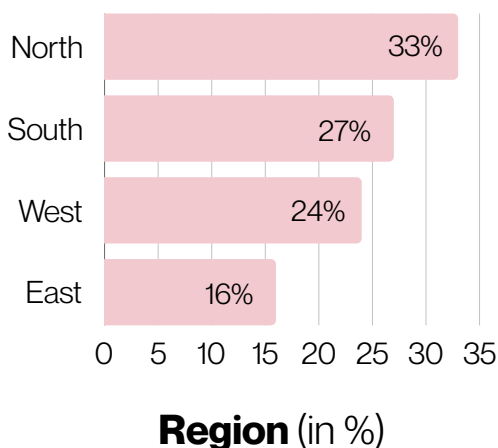
## City Of Dreams S3

**22.1 Mn\***

Watched In Mn



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

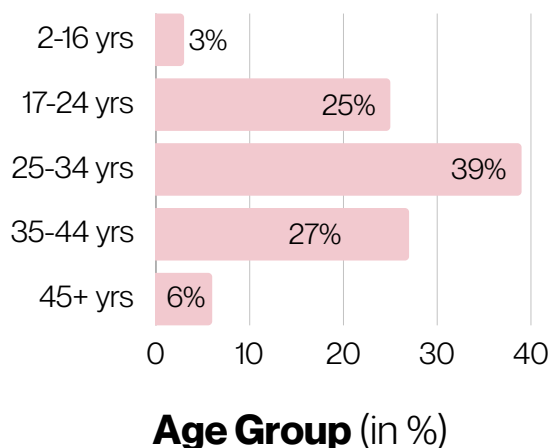
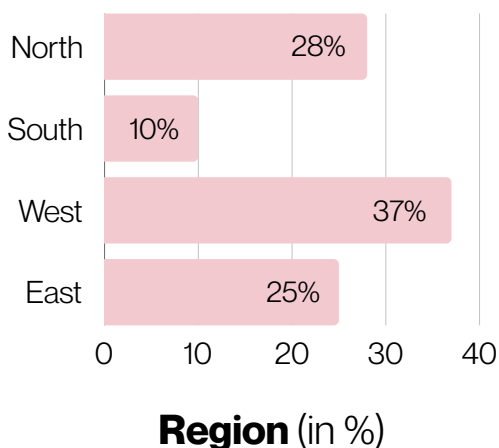
**20.95 Mn\***

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

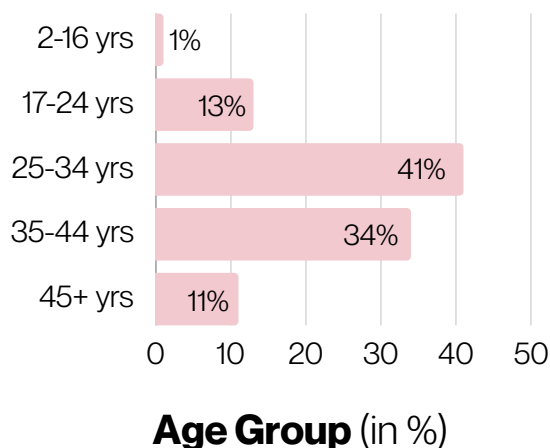
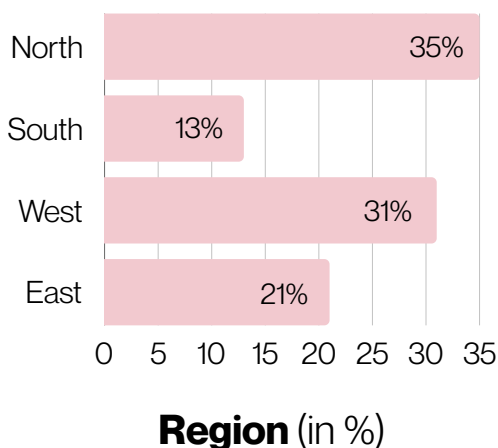
**18.73 Mn\***

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

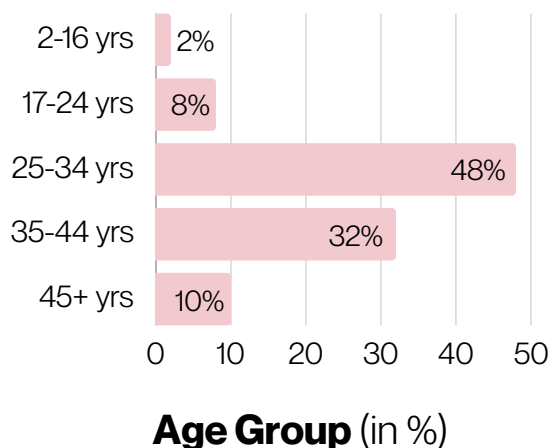
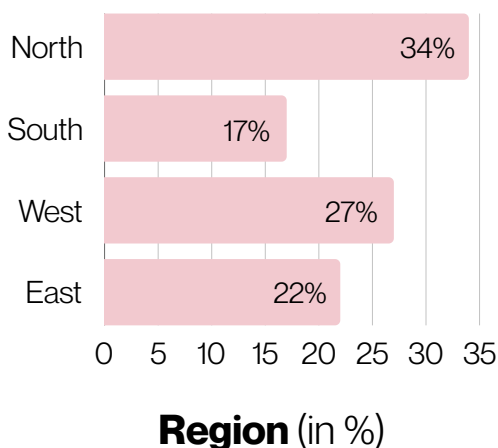
18.29 Mn\*

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.

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# Top #10 Female Protagonists



## Aarya S3

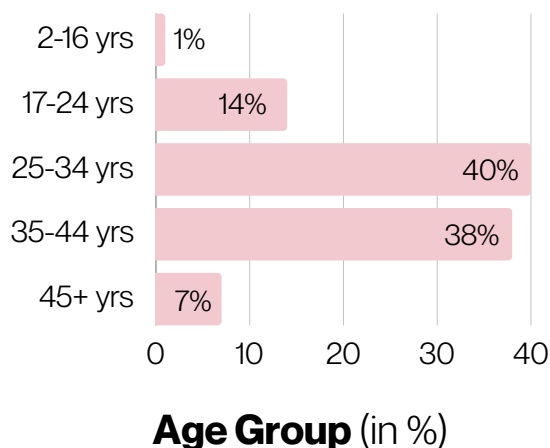
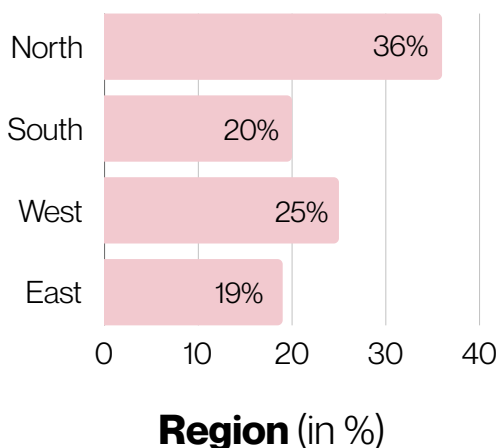
**18.03 Mn\***

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

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- **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

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- **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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