

A server room with blue lighting and colorful light trails. The room is filled with server racks, and the floor is covered in a pattern of blue and purple light trails. The walls are also covered in a pattern of blue and purple light trails. The ceiling is dark, and the overall atmosphere is futuristic and high-tech.

DIGITAL TRACK

CROSS MEDIA MEASUREMENT

CHROMEDM
BIG DATA & BEYOND

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1. OVERVIEW

A growing number of consumers have joined the ranks of 'cord-cutters' by switching their viewing habits online. This phenomenon of cord-cutting has thereby resulted in the migration of viewers from cable & satellite broadcast to streaming platforms, which has further driven the rising OTT consumption. As these streaming platforms evolve, it is essential to understand the incremental reach that can allow publishers/advertisers to seize and capture an appeal with a huge, engaging digital audience.

Coincidentally, India also has the largest population base of younger audiences from around the world. As a result, this mega market of primary internet consumers has driven the digital media consumption across the region. Rising internet penetration along with the provision of 3G and 4G services have bolstered the ever-growing consumption of smart devices and the fast reducing data cost.

Direct-to-Consumer (D2C) models are surging ahead by moving away from TV and other multi-level schemes to digital channels. With direct access to customers, these models can bypass traditional gatekeepers to sell, market and distribute their services. This allows for reduced cost in services along with an ease of convenience that offers a competitive edge over traditional channels which have middlemen placed between their services and their customers.

While broadcast TV remains extremely effective with a large audience at scale, stakeholders must change their marketing gears to accommodate the forthcoming digital renaissance. Incremental reach is not limited to differentiating between TV and online viewership, but instead establishes a distinctive audience that engages with OTT platforms in addition to the audience exposed to linear TV campaigns. To cite the 'News genre' as an example, the incremental reach across all platforms is as almost high as 60% of linear broadcast in certain cases. Incremental reach is therefore instrumental for advertisers and publishers to track and gauge the actual reach of content which is much higher than the conventionally reported linear broadcast. Moving forward, this cord-cutting behaviour paired with the subsequent migration of the young user base to online streaming platforms ensures a turn of transition from linear TV to OTT platforms.

2. Video Content Delivery

Broadly there are two forms of consumption:

- **Digital** across all forms, i.e., Connected TVs, Mobiles and Browsers
- **Linear** i.e., C&S

Digital content is essentially any content that is stored in the form of digital data. It can be viewed in the form of TV shows, music videos, movies and advertisements across different digital platforms. Over-the-top (OTT) media services, also known as Video-on-Demand (VOD) services, distribute digital content over smart devices through internet.

Linear Content is one where the content follows a predetermined schedule, and uses the medium of cable & satellite for broadcasters to stream their content 'over the air'. Linear TV employs traditional distribution tactics by identifying target demographics/ desirable neighbourhoods, thereby arming advertisers with the best mode of promotion for their ad-campaigns. For viewers, linear TV is an expensive solution (which includes the combined cost of C&S packages along with the procurement and maintenance of a traditional TV apparatus) compared to its digital counterpart.

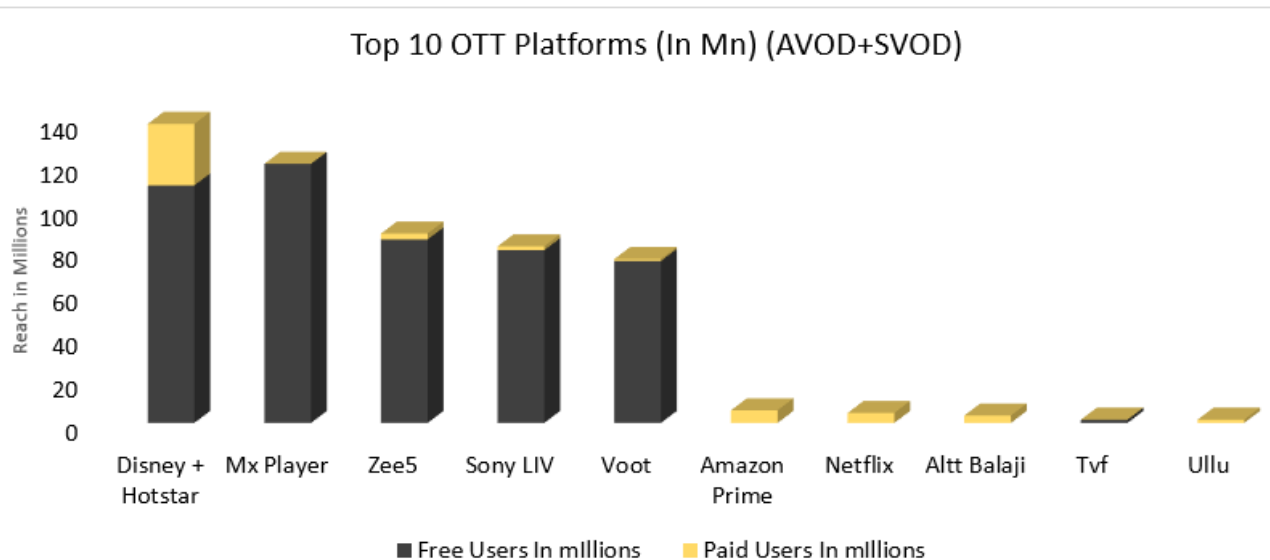
With the rising internet penetration, OTT services have gained a significant market cap owing to the rise of major players such as MX Player, Amazon Prime, Netflix, Disney+ Hotstar and so on. As of 2023, the expansion of 4G bundled with the ever-growing access to the internet services has thereby reduced the overall cost of digital services worldwide.

3. DIGITAL

Online video and audio streaming services, websites, social media, mobile apps, and other types of digital information can all be accessed, consumed, and interacted via digital media and technology. Due to the increased usage of digital devices and technological improvements, there is a growing tendency towards digital consumption, which has altered consumer behaviour and raised expectations for digital experiences. One can browse the internet to seek information, view movies, listen to music, and interact with others online.

• COTT (Penetration of Various Mediums)

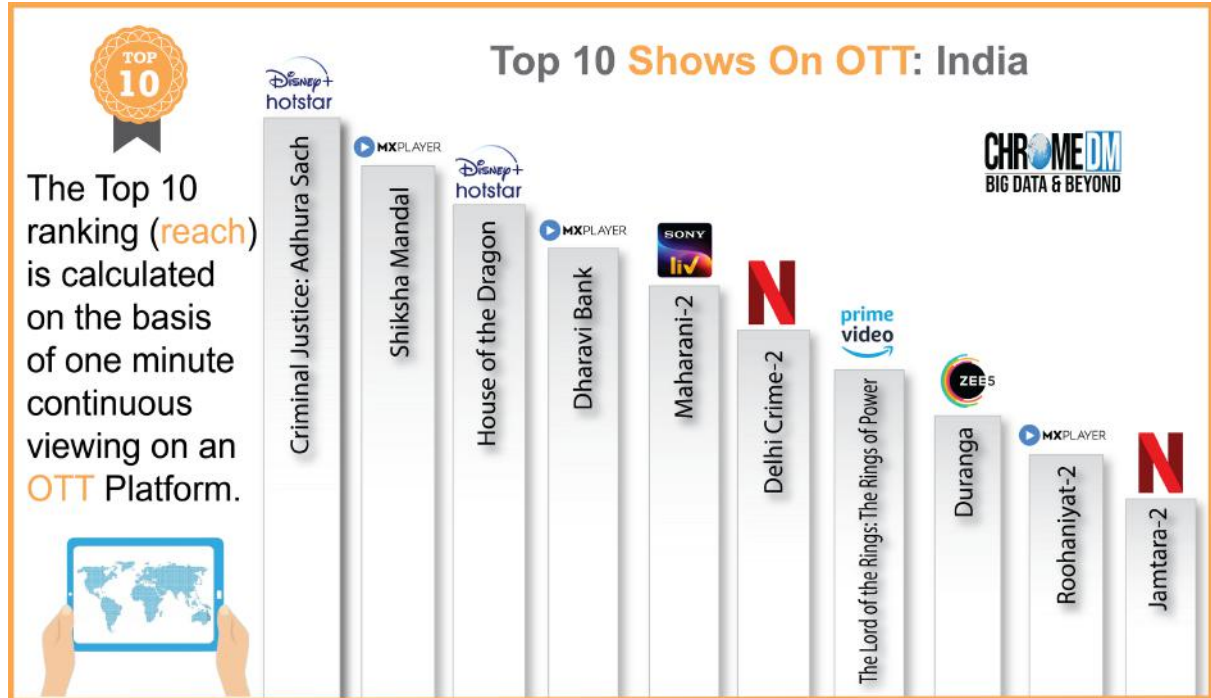
Disney+ Hotstar dominates the market by reaching over 138.5 million viewers, where AVOD content is made available to over 110 million viewers while SVOD content can be viewed by almost 28.5 million viewers



Source: COTT, Mkt- All India, Jan-Dec 2022, COTT Panel 81782; COTT representing 496 Million OTT users, and 836 Million Internet Users in India

• COTT (Top 10 Shows of 2022: AVOD+SVOD)

Criminal Justice: Adhura Sach tops the chart with 70.36 million unique viewers. Landing on second and third positions are **Shiksha Mandal** and **House of the Dragon** with 39.10 and 37.71 million unique viewers respectively.



Source: COTT, Mkt- All India, Jan-Dec 2022, COTT Panel 81782; COTT, representing 496 Million OTT users, and 836 Million Internet Users in India

Rank	Show	Platform	Reach In Mn	Production House
1	Criminal Justice: Adhura Sach	Disney + Hotstar	70.36	Applause Entertainment Ltd, BBC Studios
2	Shiksha Mandal	Mx Player	39.10	MX Player Originals
3	House of the Dragon	Disney + Hotstar	37.71	1:26 Pictures, Home Box Office (HBO)
4	Dharavi Bank	Mx Player	33.40	Mx Player, Zee Studios
5	Maharani S2	Sony Liv	32.65	Kangra Talkies, Sonyliv
6	Delhi Crime S2	Netflix	31.51	Film Karavan, Golden Karavan, Ivanhoe Pictures, Poor Man's Productions
7	The Lord of the Rings: The Rings of Power	Amazon Prime	31.20	Amazon Studios, Harper Collins Publishers, New Line Cinema
8	Duranga	Zee5	28.98	Rose Audio Visuals Pvt Ltd.
9	Roohaniyat S2	Mx Player	25.95	Endemol Shine India
10	Jamtara S2	Netflix	25.75	Tipping Point Films

Source: COTT, Mkt- All India, Jan to Dec 2022, COTT Panel 81782, representing 496 Million OTT users and 836 Million Internet Users in India.

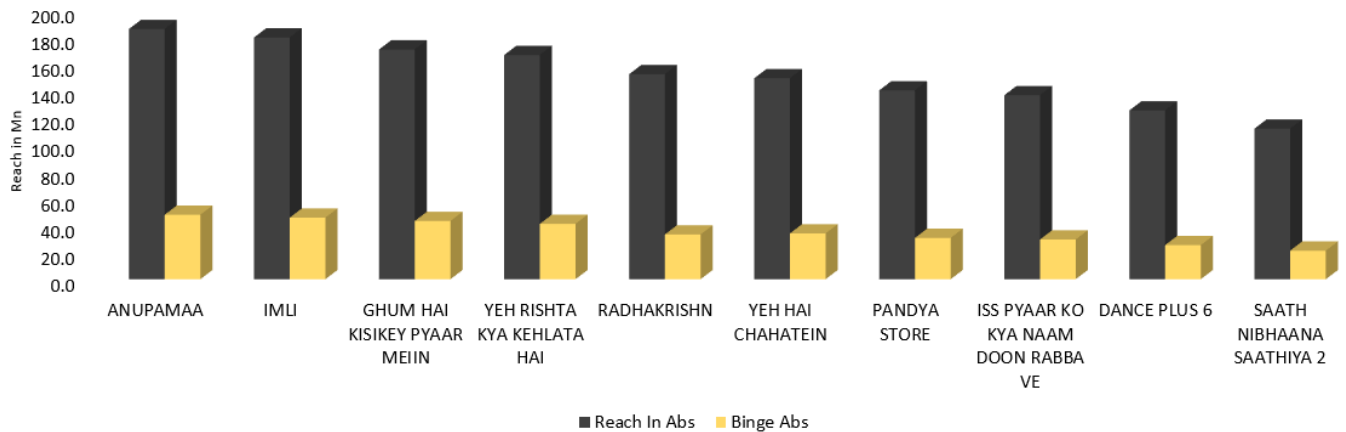
Reach:- The reach of shows/ web series/ movies is calculated on the basis of one minute continuous viewing.

Of these top 10 shows, 8 are home-grown and locally produced which is a huge feat for local production houses who have struggled to fare against international competitors just a few years back. **Applause Entertainment Ltd.** and **BBC Studios** were the top gainers from last year.

• COTT (Shows & Binged: AVOD)

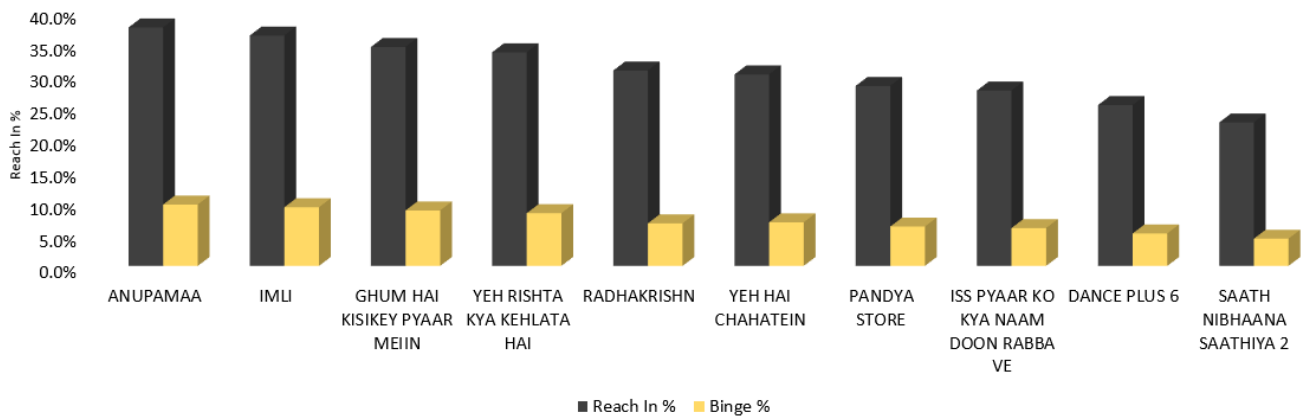
Anupama was the top show of year 2022 in the AVOD category. The show dominated the charts with 185.50 million unique viewers which translates to a reach of 37.40% of total OTT usage. The show was also binged by over 47.76 million viewers which again translates to a reach of 9.63% of total OTT usage.

Top 10 OTT Shows Reach (In Mn) AVOD



Source: COTT, Mkt- All India, Jan-Dec 2022, COTT Panel 81782; COTT, representing 496 Million OTT users, and 836 Million Internet Users in India

Top 10 OTT Shows (In %) AVOD

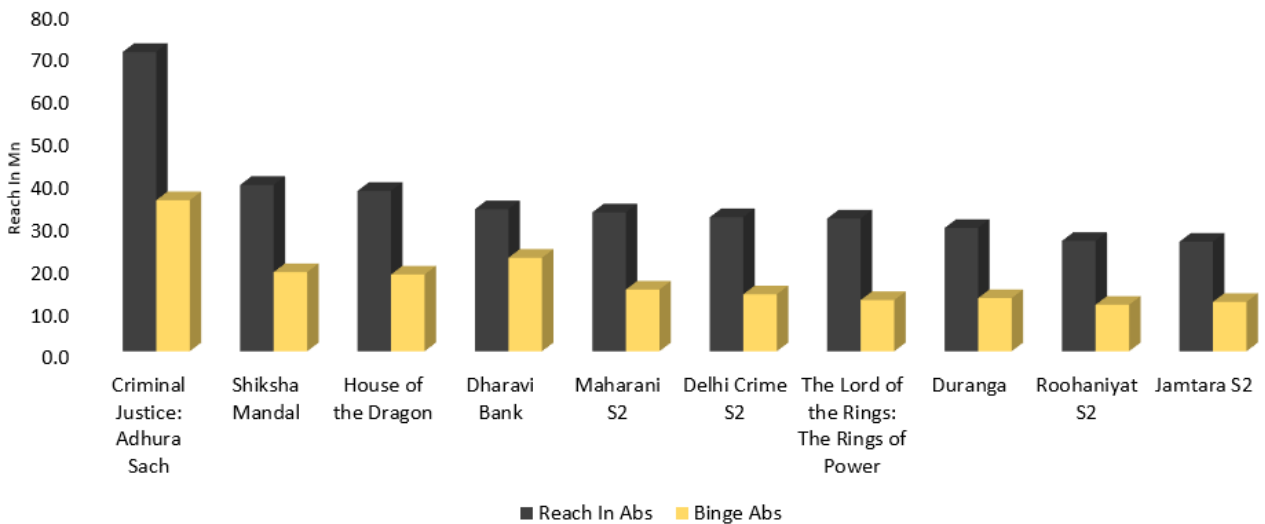


Source: COTT, Mkt- All India, Jan-Dec 2022, COTT Panel 81782; COTT, representing 496 Million OTT users and 836 Million Internet Users in India

• COTT (Shows & Binged: SVOD)

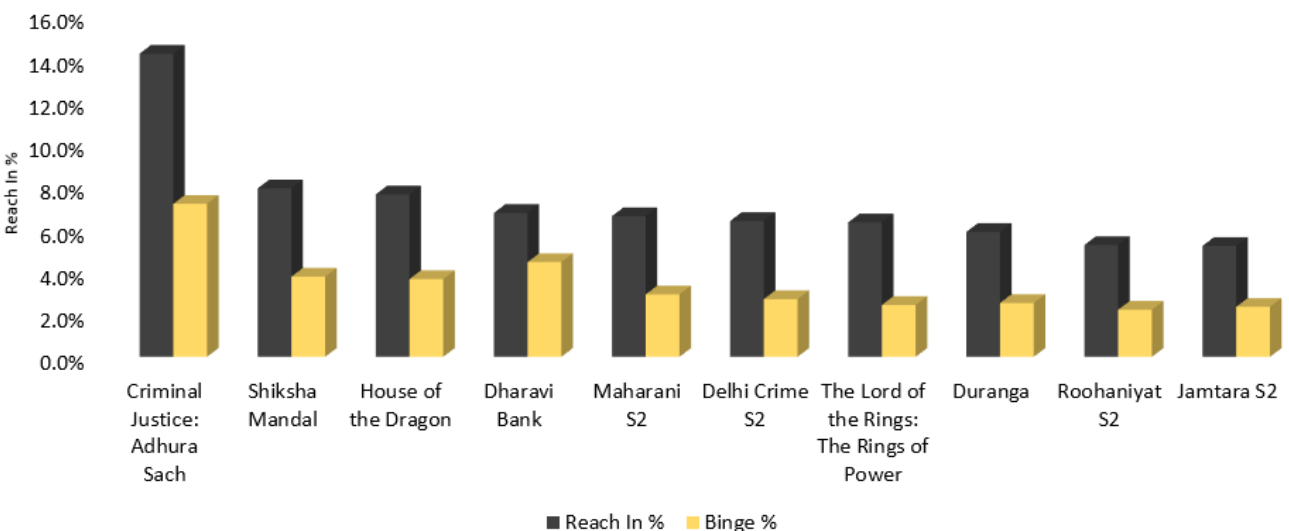
Criminal Justice : Adhura Sach was the top show of year 2022 in SVOD category. The show dominated the charts with 70.36 million unique viewers which translates to a reach of 14.19% of total OTT usage. The show was also binged by over 35.50 million viewers which again translates to a reach of 7.16% of total OTT usage.

Top 10 OTT Shows (In Mn) SVOD



Source: COTT, Mkt- All India, Jan-Dec 2022, COTT Panel 81782; COTT, representing 496 Million OTT users, and 836 Million Internet Users in India

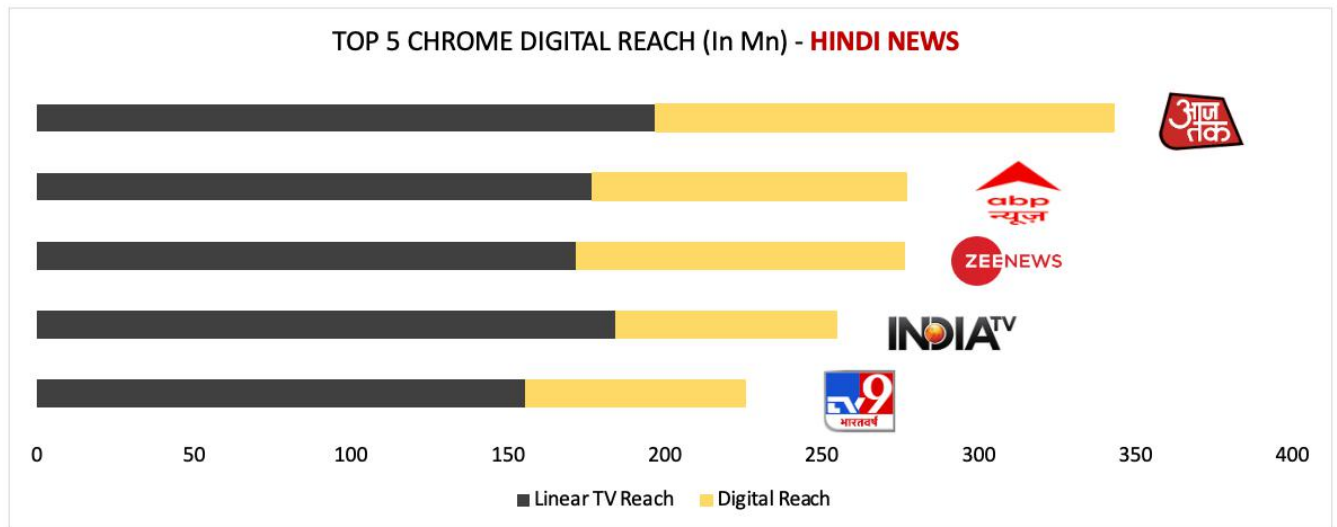
Top 10 OTT Shows (In %) SVOD



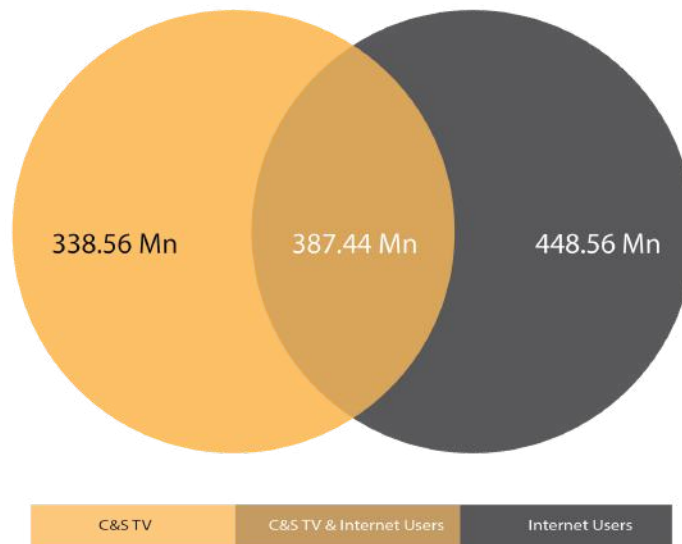
Source: COTT, Mkt- All India, Jan-Dec 2022, COTT Panel 81782; COTT, representing 496 Million OTT users, and 836 Million Internet Users in India

Live Content (News): Cable + Digital

The Leading 5 Hindi News Channels in India are Aaj Tak, ABP News, Zee News, India TV & TV 9 Bharat Varsh. AAJ TAK overall's reach with 343.07 million individuals translates to a reach of 29.21% across all end points, i.e., digital and linear.

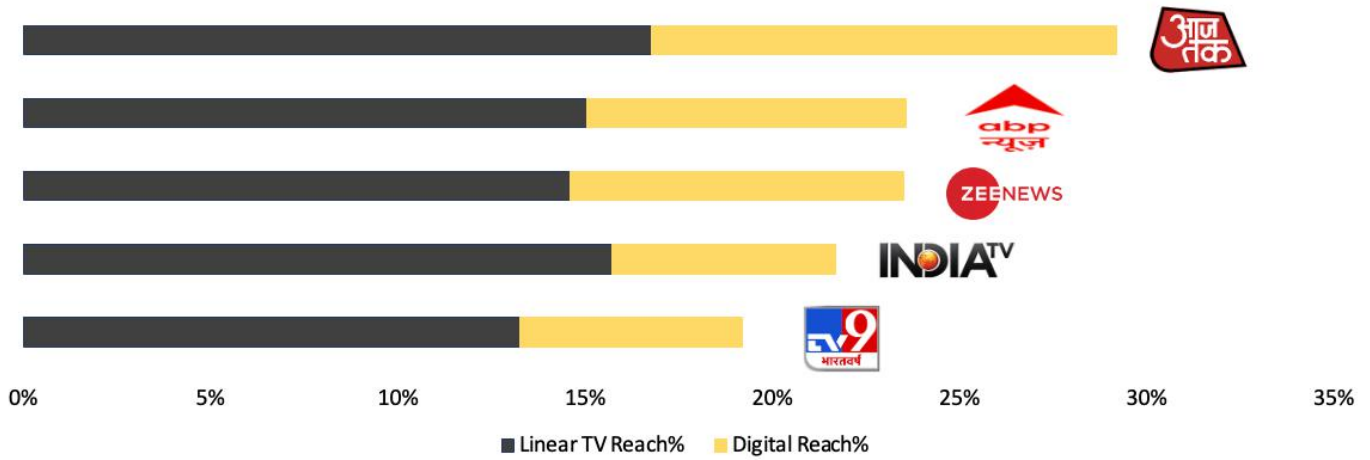


Source: Chrome Connect Linear TV Reach Dec' 22 and Digital Reach, Dec'22 All India Base Chrome DM Panel 82147 Representing 1174.54 Mn Internet/ C&S Individuals in India



Source: All India Base 82147 Chrome DM Panel Representing 1174.54 Mn internet/ C&S Individuals in India

TOP 5 CHROME DIGITAL REACH % - HINDI NEWS



Source: Chrome Connect Linear TV Reach Dec' 22 and Digital Reach, Dec'22 All India Base Chrome DM Panel 82147 Representing 1174.54 Mn Internet/ C&S Individuals in India

Looking specifically at Digital Reach, the top 5 channels are Aaj Tak, Zee News, ABP News, India TV & TV 9 Bharat Varsh. AAJ TAK's Digital reach Stands at 12.43% of the 1174.54 Million Internet/ C&S Individuals in India, with 145.95 million individuals accessing the content. YouTube dominates with in the digital medium with over 112.12 million viewers.

TOP 5 CHROME DIGITAL REACH (In Mn) - BY CATEGORY



Source: Chrome Digital Reach, Dec'22 All India Base Chrome DM Panel 82147 Representing 1174.54 Mn Internet/ C&S Individuals in India

4. Linear (C&S)

With 1456 channels beaming into Indian homes, there are two primary factors that impact consumption:

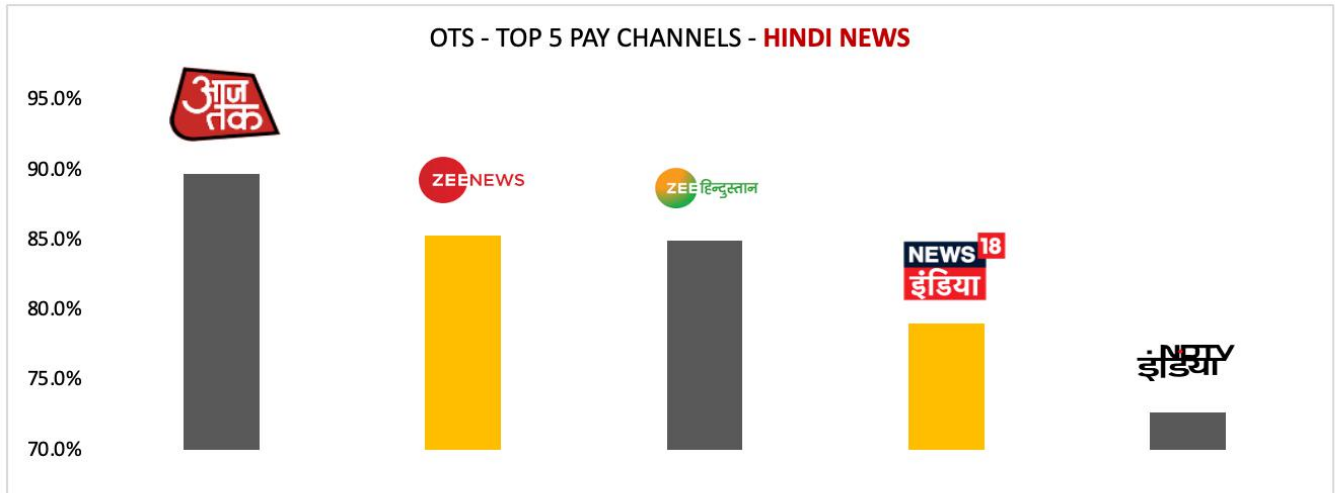
1. Content
2. Distribution

Most GEC consumption is appointment lead and driven by content – whereas for news, with over 340 channels, a primary differentiator being on air presentation – skews towards distribution. Sports falls exactly in between – differentiation of content and extremely strong on distribution. The ratings game is thus Darwinian in nature: the fittest survives while the weak perish. And to remain fit, one needs capital – for both generating *Good Content* and pushing aggressive *Distribution*.

OTS: Short for *Opportunity To See*, the OTS determines the amount of exposure or opportunities at which a particular audience can see a certain content. The numbers are generated from Chrome DM's OTS which takes into account the % age connectivity (availability) of a channel across TV households factoring the off-take of packages across all reported distribution platforms in India.

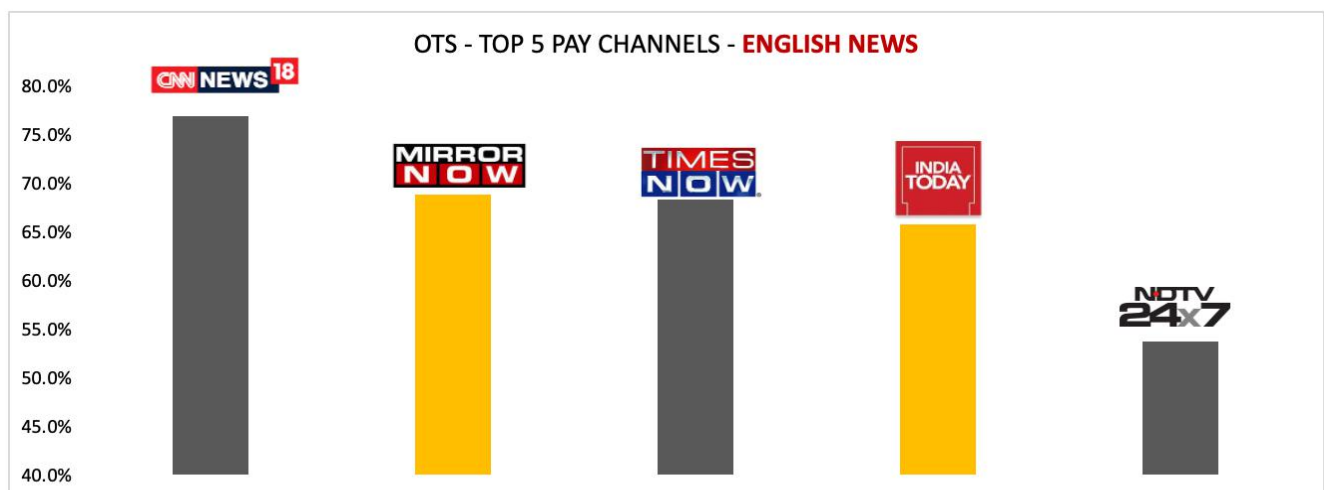
A. PAY OTS

Aaj Tak ranks first in the PAY OTS category across the Hindi News genre at 89.7% connectivity (availability) in TV households factoring the off-take of packages across all reported distribution platforms in urban HSM.



Source: Chrome Track 2.0, Wk-04'23, Mkt- All India Urban, 69.21 Mn C&S HHS

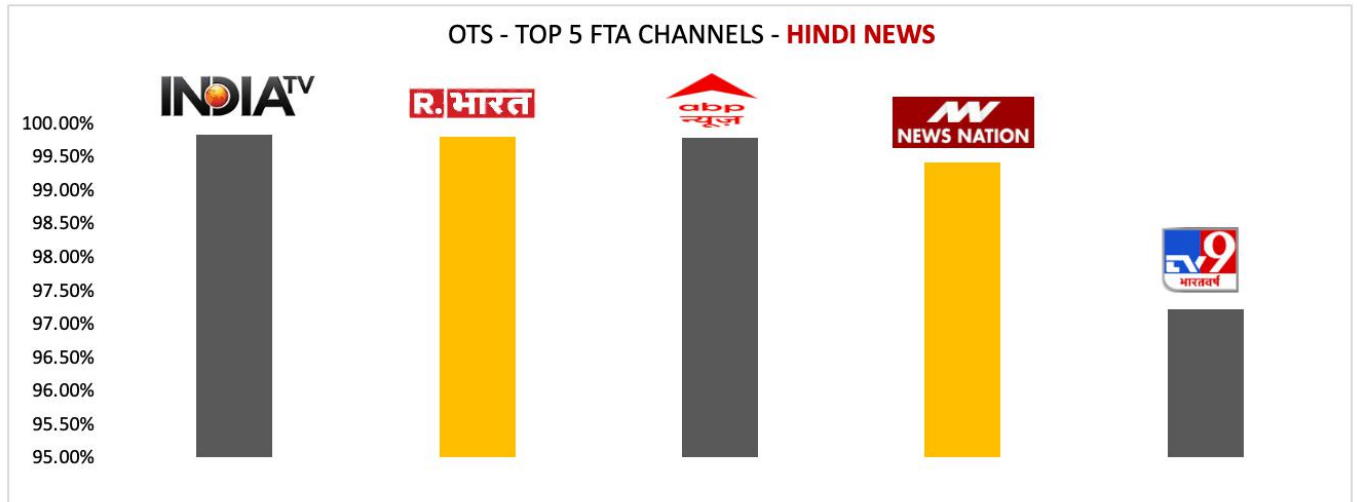
CNN News18 ranks first in the PAY OTS category across the English News genre at 78.0% connectivity (availability) in TV households factoring the off-take of packages across all reported distribution platforms in urban India



Source: Chrome Track 2.0, Wk-04'23, Mkt- All India Urban, 69.21 Mn C&S HHS

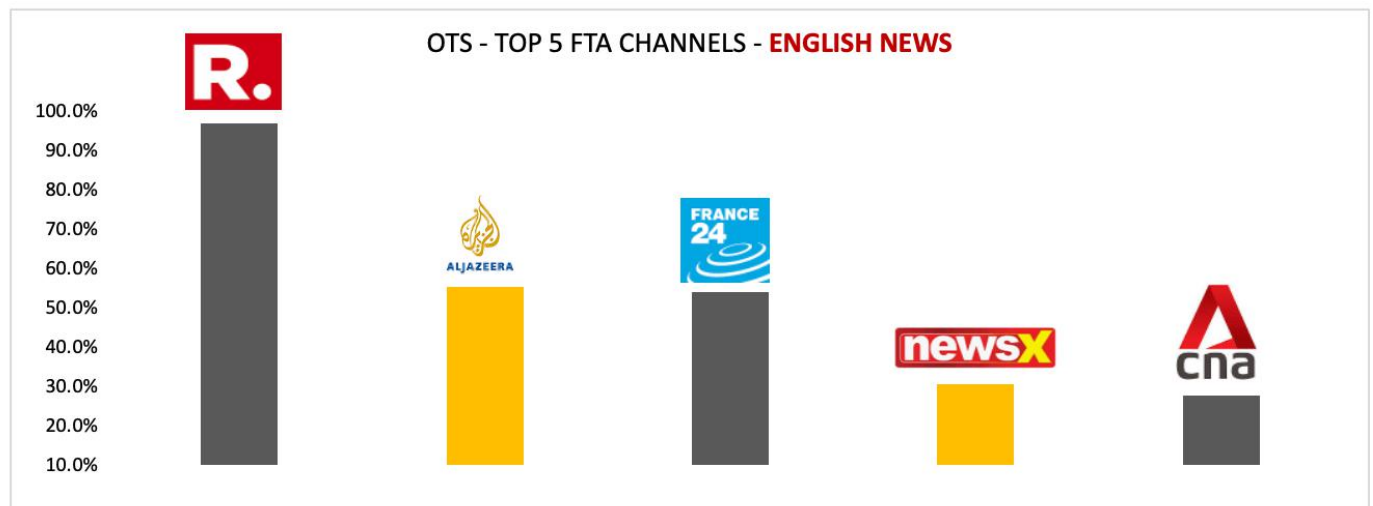
B. FTA OTS

India TV ranks first in the FTA OTS category across the Hindi News genre at 99.83% connectivity (availability) in TV households across all reported distribution platforms in urban HSM.



Source: Chrome Track 2.0, Wk-04'23, Mkt- All India Urban, 69.21 Mn C&S HHS

Republic TV ranks first in the FTA OTS category across the English News genre at 96.8% connectivity (availability) in TV households across all reported distribution platforms in urban India.



Source: Chrome Track 2.0, Wk-04'23, Mkt- All India Urban, 69.21 Mn C&S HHS

• Global Top 10 News Channels on YouTube

AAJ TAK dominates the list of 'YouTube top 10 Global News Channels' with over 55 million subscribers.



Source: YouTube, January 2023

5. CPM OR CPRPs



Digital Advertising has evolved over the last few years and conventionally through display ads – i.e., static images. However, with rising internet speeds and exponential drops in band width costs, these images over the last 2 years have rapidly graduated to audio visuals and long form video content.

The primary measure for displays ads has been CPM – Cost per Mile – the cost of 1000 impressions, each of which is tagged as a hit at a threshold of 1 second exposure for static ads and 3 seconds for videos. Television, on the other hand, has been operating on CPRPs.

Definitions & Calculations:

A. TRPs

What are TRPs? Simply put, ‘TRPs’ also known as Ratings, TVRs or time weighted ratings are a measuring tool to decipher what viewers are interested in watching. It is a metric used in the television industry to gauge how well-liked and popular particular TV shows or channels are. TRP is determined by counting the number of viewers of a specific TV show or channel at a given moment in time. TRP is a crucial indicator in the television industry since it may significantly affect the revenues and profits of broadcasters and advertisers and is used to assess the effectiveness of a particular TV channel or programme. Higher the ratings, more the viewers - which eventually means growing advertisers and lofty capital! TRPS thereby equals money, quite a lot of it! TRPs could be applied to programs, channels, time bands and most importantly Ads. Now, how do we calculate a TRP? Simply put, TRPs reflect - how much time was spent watching your programme vis-a-vis the total time that could have been spent watching your program, channel, time band or Ad. Let’s take an example - assume, there are 5 people in the universe, and we are evaluating a show with a 30 mins duration.

Person A - 15min,

B - 5min, C - 2 min, D & E did not watch.

Total Time Spent = 15 + 5 + 2+0+0 = 22 mins

Total Time that could have been Spent = 30 * 5 people = 150 mins

TRP = 22/ 150 = 0.14*100 = 14.67 %

However, in reality the numbers are much lower owing to multiple channels and proliferation of content.

B. CPRPs

CPRP is a short form for Cost Per Rating Point. It is a metric used in advertising to assess the profitability of a certain marketing initiative. The cost of an advertising campaign is divided by the number of rating points received to arrive at the CPRP. The audience measurement employed in media planning, known as "rating points," calculates how many people have watched or listened to a particular programme or advertisement. The rating points increase in value the higher the CPRP. By weighing the campaign's expense against the amount of exposure or reach it generates, CPRP assists advertisers in determining the efficacy of their advertising campaigns. Although it is frequently employed in television advertising, it can also be used in radio, print, and web media.

Firstly, how do we arrive at a CPRP – Cost PER rating point? As the term suggests it is total cost divided by total delivered GRPs which is Equivalent to Rate per Spot * Number of Spots / Total TRPs.

This is directly proportionate to the effective rate ER divided by the TRPs delivered. But then the threshold of TRPs on the ratings panel is a reach of 1 minute normalized to a 10 Second exposure which means an ad is then considered a 'hit' upon a continuous viewing of 10 seconds.

C. CPMs

Cost Per Mille, or CPM, stands for cost per thousand impressions. It's a metric used in advertising to calculate the price of showing an advertisement to 1,000 users or viewers. The number of times an advertisement has appeared on a website, an app, or another digital platform is referred to as "impressions." The cost of a CPM campaign is determined by dividing the campaign's overall cost by the quantity of delivered impressions, and then multiplying by 1,000.

Online advertising frequently uses CPM, especially in display and social media advertising, where impressions are the main statistic used to assess the effectiveness of an ad campaign. Understanding the cost of their campaigns and comparing it to those of other advertising channels is a useful indicator for advertisers. To assess the overall performance of an advertising campaign, CPM is frequently combined with other metrics like click-through rates, conversion rates, and return on investment.

D. Equating the two

On the digital side, the digital completion rate for a viewing of 30 seconds stands at 36% post a 3 second impression and at 89% completion rate for a continuous viewing of 10 seconds, post the same 3 seconds impression.

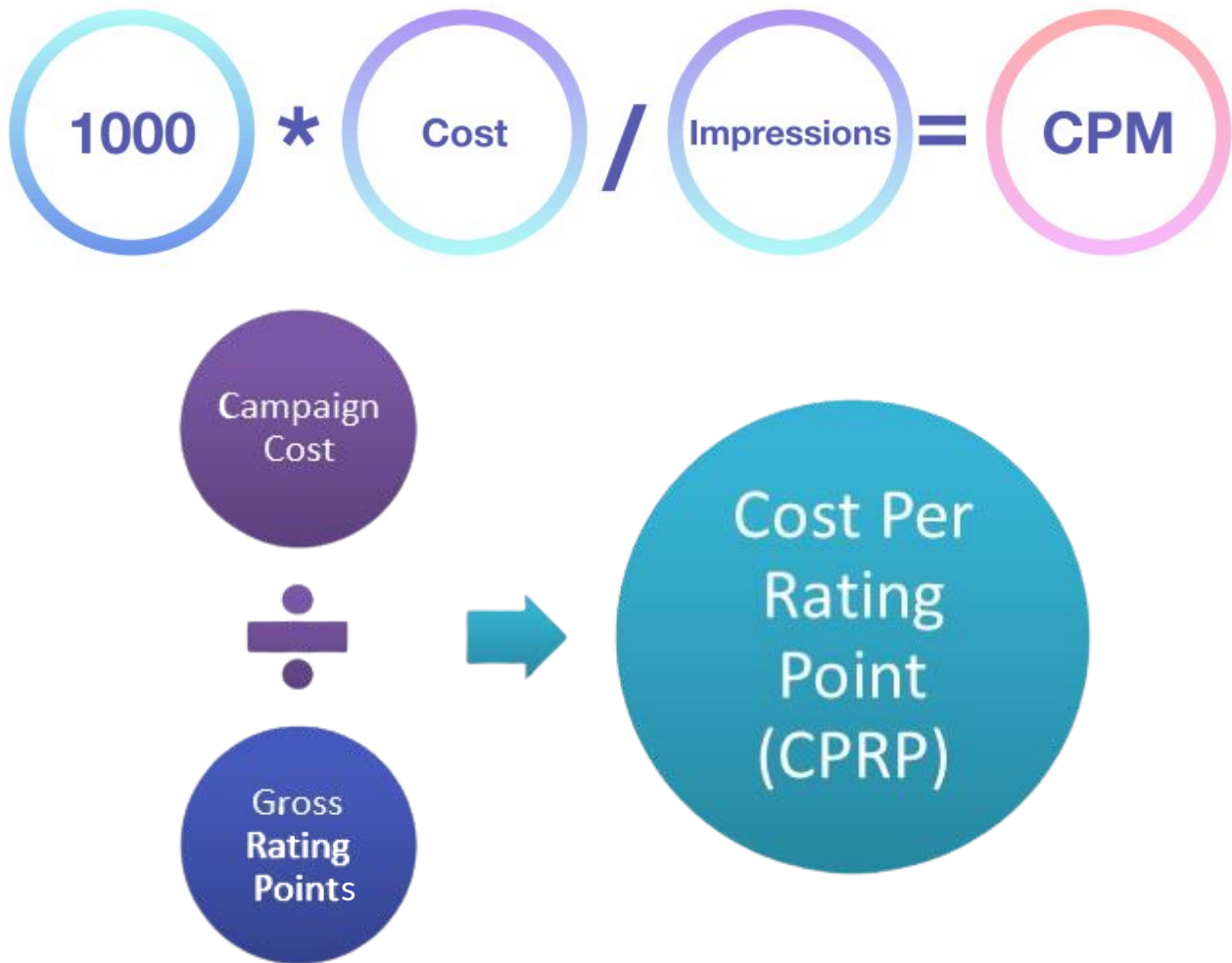
Simple math – a CPM of X for 3 seconds translates to a CPM of $X \cdot \frac{10}{3}$ for 10 seconds = 3.33 X. With 10% drop in audience retention @ 10 seconds this translates to $3.33 \cdot 89\% = 3$ X. Hence to equate a Video CPRP, tagged @10 seconds threshold to a Video CPM tagged @3 seconds, the conversion ratio/NORMALISING number is $\frac{10}{3} \cdot 89\% = 3$.

E. Business Impact

This directly means video advertising on digital mediums operating at a CPM of 200 will ideally be commanding a CPM of 600 if sold on (ERs) Effective Rates.

To illustrate - today a leading new broadcaster operating at a Top-line of INR 1200 Crores would have Approximately 1000 coming from linear broadcast and about 200 from Digital media – the equitable numbers stand at 1000 for linear and 600 for Digital i.e., a 1600 Cr top-line up from 1200 - thanks to the 3X CPRP over CPM multiple.

N.B. This is keeping the clutter factor constant for both the mediums, i.e. Linear and Digital.



6. Methodology

The data collection involves a hybrid process of assembling *online surveys* and tracking content by means of digital *finger-printing* technology.

- **Survey**

An in-house mobile application developed for online surveys which tracks the viewing trends across a sample size of 81,782 respondents (as of August 30, 2022). The surveys are then automated and later uploaded to the main server. The data is accessible to clients in the form of excel reports. The app is non-intrusive and does not alter the OTT consumption on a mobile device. The main purpose of the survey is to track and review the content consumption across various mediums, i.e., online, digital or linear.

Frequency: The data is captured every day with ~80% of the respondents participating on a daily basis.

- **Finger Printing**

This technology allows the identification of content based on their unique characteristics pertaining to its *audio* and *video*. This technology essentially analyses the content by generating a unique fingerprint or signature by way of recognizing and tracking it based on these unique characteristics or metadata.

This data is captured in real-time through the Chrome DM proprietary SDK-app. It is primarily used for content tracking and verifying the authenticity of digital data.

FAQs

Q. What is the function of this report?

A. *The report delivers the incremental reach which can be used to track and manage a unique set of audience that engages with Smart TVs and Smart phones in addition to the consumers reached through linear televisions. The cord-cutting phenomenon has accelerated the viewer migration from linear traditional viewing to OTT platforms, thus growing a large audience that cannot be reached by traditional broadcast. Incremental reach is therefore instrumental for advertisers and publishers to track and gauge the actual reach of content which is much higher than the conventionally reported linear broadcast.*

Q. What are the outputs in terms of data points?

A. *The data captured is on a minute-to-minute level, thereby facilitating the digital equivalent of cost per rating points (CPRPs).*

Q. On what basis are the respondents chosen for the fingerprinting SDK panel homes?

A. The respondents are required to meet the following criteria to install the Chrome proprietary fingerprinting SDK on their mobile devices:

- First, the respondent must belong from a TV household.
- Second, the respondent must be an OTT viewer.

Q. In what format are the files accessible to the clients?

A. The files are accessible in both excel/ pdf formats and a cloud based interactive interface. To access the file, a unique authorization code is provided to the clients.

Q. How is the market distributed across urban and rural India?

A. There are two categories within the market cluster: Metros and Non-Metros. Following is the break-down of Tier-1 through Tier 6 across Urban and Rural India:

Category			%
Urban	Metros	Tier-1	25.8%
	Non-Metros	Tier-2	21.3%
		Tier-3	18.7%
		Tier-4	14.3%
Rural	5000 - 9000	Tier-5	12.8%
	<5000	Tier-6	7.1%

Chrome Connect is a subscription-based service that reports the actual reach of content across all screens, linear and digital, by marrying viewership and potential exposure across all end points. This incremental reach helps publishers/advertisers track the reach of cross-media campaigns, and measure how each platform fares over and above the traditional cable and satellite broadcast. The incremental audience is the unique set of viewers that engage with Smart TVs (*YouTube, Android, Samsung In-built apps, browsers etc.*) and Smartphones (*YouTube, OTT, native apps, browsers etc.*) in addition to the audience reached through linear television campaigns. This report therefore helps track and manage potential audience by intelligently reaching households that are yet to be exposed and is optimized through de-duplicated audiences.

7. Technology

Chrome Connect measures content on Connected TVs, Mobile Devices & WebOS via live Fingerprinting.

A Live TV source is input into cloud servers, panel home respondents having a proprietary SDK mobile App installed in their mobile devices or connected TVs which captures real time data.

The content is pre-tagged on a cloud library on cloud servers and as soon as there is a content match, it gets captured and pushed to the cloud dashboard in real time.

Salient Features

- Android 8,9,10 & 11, Tizen & WebOS
- Almost Real-Time data (30 Second delay)
- Works with the Mic Off
- Hybrid Model (Audio fingerprinting/ Screen Grabs)

Tech Deployed

- Machine Learning (ML) & Artificial Intelligence (AI)
- Database: Big Data Analytics
- Frontend: Node JS & Java
- Data Size: in petabytes
- Backend Optimization: Low Server resource utilization
- Frontend Optimization: Minimal memory, processor & storage utilization on devices

Inputs from the mobile devices or connect TVs

- Geo Location
- Unique device ID
- Date/ Time Stamp
- Age
- Gender
- NCCS status

8. Chrome DM Infrastructure

1. All India Team Strength – 1,250+

- 650 Field Staff
- 450 Tele Callers
- 150 Managerial Staff

**This includes on roll employees, contractual staff & third-party outsourcing, as of August 2022.*

2. Coverage –

Urban 3,429 Class 1 and LC1 towns representing 92.3% population of urban India & 5,93,615 villages representing 100% of the rural population of India.

3. Universe –

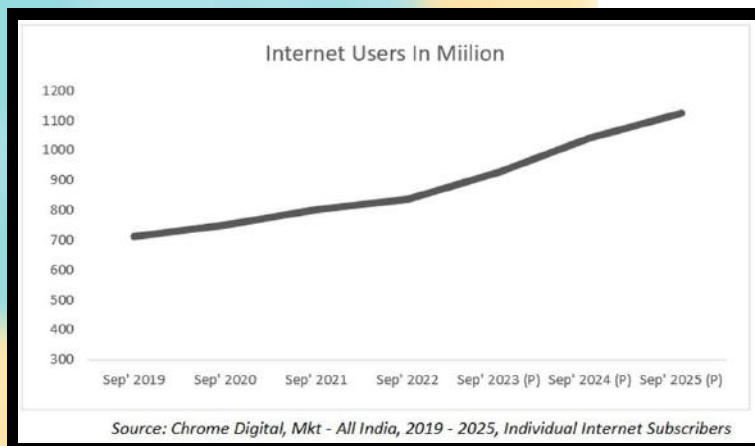
TV households: representing 219.6 MN households as of July 2022.

OTT base: COTT, representing 496 million OTT users.

9. The Digital explosion

Viewers have audaciously made their preferences known in the last couple of years, and they are seemingly not returning anytime soon. In the age of streaming era, audiences are starving for biting, bitter stuff that is willing to push beyond the boundaries set by the traditional viewing of sterilized content and filtered storylines.

This is a global phenomenon where viewers are supposedly 'cutting the cord' on their cable and satellite subscriptions in favor of digital streaming and online content. In India, where data is recovered at an astoundingly low price, the growing shift of viewing preference from cable and satellite broadcast to digital transmissions has been remarkably significant. However, linear content still retains the interest of the viewing class. Most leading publishers have their entire linear catalogue running on OTT as well, thereby expanding the reach and availability of the same content to a growing base of incremental audience. Besides that, News genre has also taken to live-streaming their pre-scheduled 'on-air' content online to their internet subscribers. In short, the content remains the same but the transmission has evolved from linear to digital.



Internet penetration increased exponentially to reach 836 million subscriptions as of September 2022. The numbers are projected to reach over 1100 million internet users by the end of year 2025. *Smartphone* users have reached 510 million and *Connected TVs* crossed the 18 million mark as of January 2023.

While movie theatres were still reeling from the devastating blowback from Covid restrictions and the subsequent economic lockdown, the entertainment industry had since retained some bragging rights by premiering consecutive hits on OTT platforms. With the rise of social media, consumers have taken to online platforms to share their viewing preferences while engaging in social commentary on their favourite TV shows. This practice has given rise to the phenomenon called 'Social Television'. Social media has revolutionized the viewing pattern for a whole new generation of viewers. With content being made available just a click away, it became a daily ritual for most who are likely to spend their hours browsing through internet besides working and sleeping. This changed the course for legacy media and studio houses that finally had to evolve its business practices to meet the standards of an evolving consumption trend. Streaming channels had reserved a strong currency in entertainment industry even before the pandemic had transformed our lives. The value of the same currency has just tripled in the last two years.

OTT platforms saw a rising demand for edgy stories laced with graphic depiction of violence and wry humor. As movie-makers and studio houses recognized a market for provocative and cut-throat content for whom the mainstream TV and silver screens spelled an age of doom and disillusion, the once-niche bracket was now too glaring to ignore. With the massive success of multiple shows that garnered over billion viewing hours, the OTT market is proving more competitive than traditional movie premieres and international film festivals for global screenings. If this trend holds, OTT might just be the new form of mainstream.

KEY DRIVERS:

- Ease of internet access due to rampant rise of digital globalization
- Accessibility to cheap data
- Increasing consumption of smartphones, smart TVs and other internet enabled devices
- Digital Initiative across rural regions helps an ever growing user base to access the multi-lingual / cross-cultural content through internet
- Growing popularity of Pan-Indian movies, thus allowing the content to travel and engage in multiple languages.

10. Conclusion

The market has once again shifted its gears! The coin has landed on 'digital', and it sure hopes to bring forth the long-promised online revolution.

The world is fast moving to digital and rightly so – no wires, no cables, no geographical boundaries and to a great extent no intermediaries. The transition from C&S to digital must be equitable. Revenues will sway towards digital, and to mark a reasonable transition for this Industry - **TV creatives on digital should be billed on ERs against CPMs.**

Digitisation in a true sense is democratization of content, and so should the transition. OTT platforms will retain a competitive edge as they continue to emerge as the preferred choice amongst the viewers and consumers in the coming years. While content is churned out every day, the OTT market allows it's audience to flush out their preferred choice and filter a genre within the comfort of their homes.

We respect the confidentiality and privacy of our clients, our people and others with whom we do business

