

FACTSHEET

Chrome Digital Track is a subscription-based service that reports the actual reach of content across new media (Smartphones, Smart TVs, Smart devices connected with screens i.e. Connected TVs etc.). This digital reach helps content publishers/advertisers track the reach of digital media campaigns (Live, VOD, or Shorts) and measure how each platform fares in the digital realm. Digital Reach refers to the total number of people who have consumed digital content, such as an advertisement, VOD, OTT content, or live TV during a given period. This metric is used to assess the overall effectiveness of a digital marketing campaign, as it provides insights into the number of digital audiences who have been exposed to a particular message, content, or brand. The threshold for reach calculation is a continuous viewing of 30 seconds as for the data reported in Chrome Digital Track.

The digital audience is the unique set of viewers that engage with Smart TVs (Cloud TV, Tizen, Vidaa, Roku, WebOS, Android, iOS & Linux, YouTube, etc.) and Smartphones (YouTube, OTT, native apps/ websites, etc.). This report therefore helps track and manage audiences consuming content beyond traditional Cable & Satellite universe.

Incremental Reach: Audiences that can be reached digitally through Live Streams or VOD content across Mobile phones, Connected TVs, or browsers.

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 March 2024.*

2. **Coverage** –

Urban 3,429 Class 1 and LC1 towns representing 92.3% population of urban India & 5,93,615 villages representing 91.7% of the rural population of India.

3. Universe –

TV households: representing 219.6 MN households as of March 2024.

OTT base: Chrome Digital Track, representing 504 million OTT users except YouTube.

Internet Base: representing 836 million internet users.

- All India Mobile SDKs – 82,147+ as on 30th March 2024
- Survey respondents – 3,60,000+ as on 30th March 2024

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 4G and 5G 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



Source: Chrome DM COTT Reach May'2023 All India Base Chrome DM Panel 82147
Representing 836 Mn Internet users Individuals in India

is much higher than the conventionally reported linear broadcast. Moving forward, this cord-cutting behavior 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.

Methodology

Chrome DM follows a hybrid approach (through App Usage + Quantitative surveys), and has created its proprietary SDK with finger printing which identifies the content on screens. Further to validate the authenticity of the respondents and data, Chrome DM conducts 10% online/web/telephonic surveys across all SDK connected panel homes.

Chrome Digital Track Report aims to report important metrics in the publisher's online presence and engagement across various digital platforms and devices. The Report would include social media, native websites, native apps, live streaming, connected TVs and other VOD platforms.

In addition, Chrome DM conducts monthly in-depth interviews to track and check the performance of the related content.

Mobile processor/ memory/ battery/ bandwidth consumption: the technology is optimized for the minimum processor, memory, battery & bandwidth consumption enabling the user to access other applications seamlessly depending on the hardware capability mapped to each unique mobile device type.

*The process has been tested over 6 months & is responding with optimal performance outputs.

Data capture frequency: A cron "daemon" is active on all devices which basically is a process that runs scripted jobs on a pre-determined schedule, capturing platform-level data via 1800 pings per day/ device.

Survey: An in-house mobile application developed for online surveys which track the viewing trends across a sample size of 82,147 respondents (as of March 31, 2024). The surveys are then automated and later uploaded to the main server. The data is accessible to clients in the form of excel, pdf & a user friendly dashboard. The app is non-intrusive and does not alter the OTT consumption on a mobile device or a connected TV (smart TVs + external devices). The main purpose of the survey is to track and review the content consumption across various mediums, i.e., online, or digital.

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

Finger Printing: This technology allows the identification of content based on its unique characteristics pertaining to its *audio* and *video*. This technology essentially analyses 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.

Confidentiality Note: Technology & Sample Homes

Confidentiality: The privacy and confidentiality of the sample homes and respondents are of utmost importance to us. All data is collected and handled with strict security measures.

At Chrome DM, we understand the paramount importance of maintaining the confidentiality and privacy of the technology and sample homes involved in our research initiatives. We want to assure you that we hold these principles in the highest regard and have implemented stringent measures to protect the sensitive information we gather. Here are some key points regarding technology and sample homes confidentiality that we strictly adhere to:

- **Data Security:** We have robust security protocols in place to safeguard all data collected through our technology. This includes the audio/video fingerprinting technology installed in mobile devices and connected televisions of sample homes. We utilize industry-leading encryption techniques and employ secure data storage practices to ensure the utmost protection of your information.
- **Anonymity:** We maintain the anonymity of the sample homes and respondents participating in our research. All collected data is aggregated and analyzed at a group level, without any

personal identification. Individual responses and viewing habits are never disclosed or linked to specific individuals.

- **Non-Disclosure Agreement:** Our sample homes and respondents are bound by strict non-disclosure agreements. They understand the importance of maintaining the confidentiality of their involvement in the research process and are prohibited from disclosing any information related to the research to third parties.
- **Internal Access Control:** Access to the collected data is limited to authorized personnel directly involved in the research project. We have strict internal access control policies and procedures in place to ensure that only authorized individuals can access and handle the data.
- **Compliance with Regulations:** We comply with all applicable data protection and privacy regulations. Our practices align with industry standards and guidelines to ensure the lawful and ethical handling of data.

Rest assured, Chrome DM takes confidentiality and privacy seriously. We are committed to maintaining the highest level of security and confidentiality throughout our research activities. Your trust and confidence in our services are of utmost importance to us.

Introducing our Elite Panel for News

Considering the prevalent issue of "dumbing down" of News in today's media landscape, we are thrilled to announce the establishment of our exclusive Elite Panel for News. This panel has been specifically designed to counter the dilution of news content and provide a platform for in-depth and insightful journalism.

At Chrome DM, we recognize the importance of quality news reporting and the need for accurate and comprehensive information dissemination. Our Elite Panel for News consists of a carefully selected group of respondents who are passionate about staying informed and engaged with current affairs.

Here is what sets our Elite Panel for News apart:

- **High Standards:** The members of our Elite Panel are individuals who value the integrity of news and prioritize the consumption of credible sources. They actively seek out well-researched and unbiased news content, ensuring a higher level of news literacy and critical thinking.

- **Intellectual Discourse:** Our Elite Panel encourages intellectual discourse and meaningful discussions around news topics. Through their participation, we aim to foster a community of informed individuals who contribute to the elevation of public discourse and the sharing of diverse perspectives.
- **Uncompromising Quality:** The Elite Panel for News actively supports the production of high-quality news content. By engaging with News stories, exclusive reports, and breaking news, they contribute to the preservation of journalism standards and help combat the sensationalism that often plagues the media landscape.
- **Feedback and Impact:** The insights and feedback provided by our Elite Panel play a vital role in shaping the news landscape. Their opinions and preferences help drive positive changes, encourage responsible reporting, and promote the importance of substantive news coverage.

We are proud to have established this Elite Panel for News to combat the challenges of "dumbing down" in news media. By prioritizing informed news consumption, we aim to contribute to a more knowledgeable society and encourage the pursuit of accurate and reliable information.

Parameters

VOD (Video on Demand): Platform provides content selection of user's interest from the content library. For Instance - YouTube, Zee5, SonyLIV, Disney+ Hotstar, etc.

External: Non-Smart TV connected with external OTT application supported devices. For instance - Amazon Fire Sticks, Set Top Boxes (Airtel Xstream, Jio, etc.), through Gaming Consoles.

OS (Operating System): Smart TVs with the pre-installed applications. For instance - Cloud TV, Tizen, Vidaa, Roku, WebOS, Android, iOS, and Linux.

Other VOD applications: 3rd Party Applications, applications other than the native application. For instance - Content of Zee5 also running on MX Player etc.

Native Apps/Websites: Platform owned mobile app store/websites. For instance - Aaj Tak Live, Zee5 Live, ABP Live, etc.

Live: Live streaming of data. For instance – most publishers have multiple live feeds

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 TV campaigns. **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 DM proprietary fingerprinting SDK in 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 excel, pdf & a user friendly dashboards. To access the file, a unique authorization code is provided to the clients. Dashboard: This facilitates comprehensive and real-time reports on News consumption with instant insights into the popularity of news stories, viewer engagement, and overall content consumption. Analytics include a dashboard that allow dissection of news consumption based on specific date and time bands. Identify peak viewing hours, trends, and patterns to optimize the content strategy.*

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

CATEGORY-WISE BREAKUP OF RESPONDENTS

CATEGORY	%age Breakup of Universe
GENDER	
Male	71.4%
Female	28.6%
ISEC	
ISEC A	8.0%
ISEC B	10.1%
ISEC C	17.5%
ISEC D	22.1%
ISEC E	42.3%

CATEGORY	%age Breakup of Universe
AGE	
15-24 years	16.7%
25-44 years	37.2%
44-59 years	27.6%
60+ Years	18.5%
DEVICE	
Pay TVs	62.6%
Connected TVs*	18.5%
Smartphones	97.4%
Desktops	1.1%

Management

Pankaj Krishna: Founder & CEO

With more than 23 years of experience in the media industry, Pankaj Krishna, an industry veteran, has held various roles. He completed his O levels from the University of London and finished an Executive Education Program from Harvard Business School. Although he began his entrepreneurial journey in 2008, Pankaj learned the intricacies of the media industry by working with some of the top brands in the business such as India Today, National Geographic, and Star India. He later became the Business Head of UTV India.

Pooja Shrivastava: Director & Product Head

Pooja Shrivastava is currently the head of digital business at Chrome DM and pursuing her doctoral degree from MICA, Ahmedabad, India on Digital Platforms and is a former visiting scholar at reputed St. John’s University, New York, USA. She has worked on several publications on over-the-top platforms, recommender systems, and digital measurement. Over the last 12 years she has been passionately working for research start-ups. As an Intrapreneur and technology innovation enthusiast she is skilled at forming strategies, analyzing operating environments & implementing corrective actions promptly. Her rich experience working for the Indian market (Urban and Rural) has always given her an edge to deliver outstanding results.

Disclaimer:

The data reports Incremental Digital Reach, achieved through Live Streams & VOD platforms and should not be construed as a postulate of any position a regulator may come to with respect to analysis contained therein.

Chrome DM shall not be held responsible or liable for any legal proceedings, disputes, or claims arising from the client's use of the data for advertising purposes. As of now, there is no specific regulation governing OTT data, and therefore, clients are advised to exercise caution and due diligence when utilizing the data for advertising campaigns or any other purposes.

Furthermore, if the data provided by Chrome DM is contested by any third party, the client agrees to indemnify and hold Chrome DM harmless from any legal action or dispute arising thereof.

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