



2019f

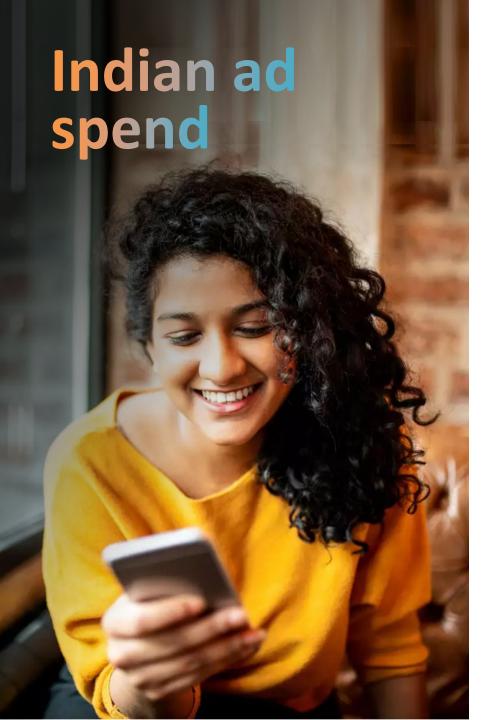
3.7%



2020f

5.1%





2019f

9.0%

2020f



10.7%



Indian ADEX estimated to grow at 10.7% in 2020. The fastest Growing major ad market in theworld

Ad spend (INR crores)					
Medium	2018	2019f	2020f		
TV	33,577	35,458	38,081		
Radio	2,709	2,824	2,986		
Print	18,383	18,164	18,140		
Outdoor + Cinema	4,008	4,293	4,632		
Internet	17,278	22,057	27,803		
All media	75,956	82,795	91,641		



India the 3rd highest contributor of incremental ADEX in 2020

Incremental ad spend rank			
Country	Rank		
USA	1		
UK	2		
India	3		
China	4		
Japan	5		

India is the 8th largest market in adspends groupm in 2020

Ad spend (USD billion)				
Country	2019f	2020f	YoY	Rank
United States	227	246	8%	1
China	89	90	1%	2
Japan	41	41	2%	3
United Kingdom	29	31	7%	4
Germany	21	21	1%	5
France	15	15	4%	6
Brazil	14	15	5%	7
India	12	13	11%	8
Canada	12	12	4%	9
Australia	11	12	2%	10

Digital ad spend growing, TV going steady, Print continues to be relevant & holding ground

Ad Spends (INR Crores)						
Medium	2018	2019f	2020f	2018 vs 17	2019f vs 18	2020f vs 19f
TV	33,577	35,458	38,081	20%	6%	7 %
Radio	2,709	2,824	2,986	5%	4%	6%
Print	18,383	18,164	18,140	1%	-1%	0%
Outdoor + Cinema	4,008	4,293	4,632	11%	7 %	8%
Internet	17,278	22,057	27,803	34%	28%	26%
All media	75,956	82,795	91,641	16%	9%	11%



Share of Adspend

	Share of Ad Spend			
Medium	2018	2019	2020f	
TV	44%	43%	42%	
Radio	4%	3%	3%	
Print	24%	22%	20%	
Outdoor + Cinema	5%	5%	5%	
Internet	23%	27%	30%	
All media	100%	100%	100%	

Key Highlights

- 1. In 2020, global adex estimated to grow at 5.1%, Indian adex estimated to grow at 10.7%.
- 2. 2020 Adex growth approx. 1.7x of estimated GDP growth
- 3. India 8th largest market globally in 2020, 3rd highest contributor to incremental ad spends, the fastest growing major ad market in the world.
- 4. Digital at 30% media mix. It is estimated to take 65% of incremental adex in 2020
- 5. Auto, e-commerce & mobile handsets to drive ad growth in 2020



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