

group^m

THIS YEAR,
NEXT YEAR



FEB
2020
INDIA

Global ad spend



2019f

3.7%



2020f

5.1%



Indian ad spend



2019f

9.0%



2020f

10.7%



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

Ad spend (INR crores)			
<i>Medium</i>	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 ad spends 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)						
<i>Medium</i>	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

<i>Medium</i>	Share of Ad Spend		
	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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