

group*m*

THIS YEAR, NEXT YEAR



GLOBAL AD SPEND

2018 est

4.3%



2019f

3.6%



INDIAN AD SPEND

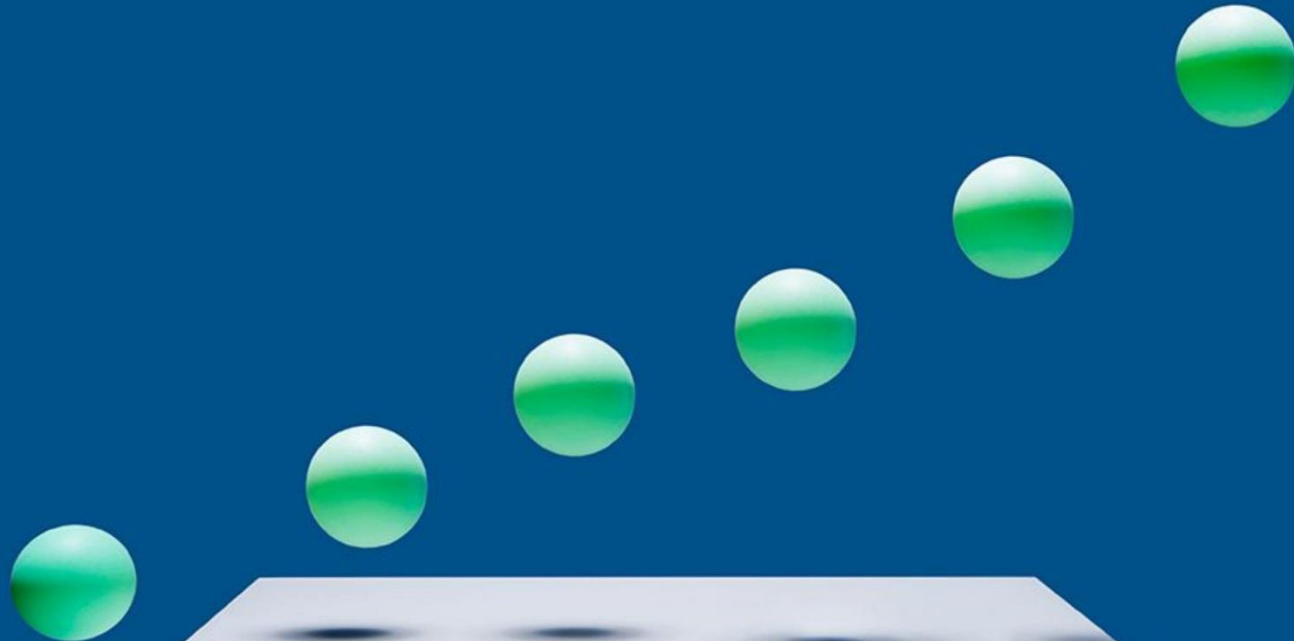
2018 est

15%



2019f

14%



Indian ADEX estimated to grow at 14% in 2019.
The fastest Growing Ad market in the world

Ad spend (INR crs)						
Medium	2014	2015	2016	2017	2018f	2019f
TV	19,411	23,022	25,350	27,961	33,577	38,612
Print	16,108	16,800	17,472	17,779	17,970	18,368
Digital	3,402	4,950	7,300	9,490	12,337	16,038
Outdoor	2,483	2,582	2,750	2,942	3,202	3,536
Radio	1,808	1,997	2,240	2,419	2,709	3,116
Cinema	340	408	560	672	806	1,008
All media	43,552	49,758	55,671	61,263	70,602	80,678

India the 3rd highest contributors of incremental ADEX in 2018

Ad spend (USD mn)				
Country	2018f	2019f	Incremental	Share of incremental
China	87,871	92,711	4,841	25%
USA	1,94,920	1,99,223	4,304	22%
India	9,515	10,872	1,358	7%
Japan	44,049	45,391	1,342	7%
UK	26,305	27,562	1,257	7%

India is the 10th largest market in ad spends

Country	Ad spend (USD mn)			
	2018f	2019f	YoY	Rank
USA	1,94,920	1,99,223	2%	1
China	87,871	92,711	6%	2
Japan	44,049	45,391	3%	3
UK	26,305	27,562	5%	4
Germany	20,343	20,524	1%	5
Brazil	18,593	19,076	3%	6
France	13,541	13,708	1%	7
Australia	11,713	12,232	4%	8
Canada	11,044	11,648	5%	9
India	9,515	10,872	14%	10

While digital is driving growth, TV continues to grow at a steady pace

	Ad spend (INR crs)										
Medium	2014	2015	2016	2017	2018f	2019f	2015 vs 14	2016 vs 15	2017 vs 16	2018f vs 17	2019f vs 18f
TV	19,411	23,022	25,350	27,961	33,577	38,612	19%	10%	10%	20%	15%
Print	16,108	16,800	17,472	17,779	17,970	18,368	4%	4%	2%	1%	2%
Digital	3,402	4,950	7,300	9,490	12,337	16,038	45%	47%	30%	30%	30%
Outdoor	2,483	2,582	2,750	2,942	3,202	3,536	4%	6%	7%	9%	10%
Radio	1,808	1,997	2,240	2,419	2,709	3,116	10%	12%	8%	12%	15%
Cinema	340	408	560	672	806	1,008	20%	37%	20%	20%	25%
All media	43,552	49,758	55,671	61,263	70,602	80,678	14%	12%	10%	15%	14%

Share of Adspend

	Share of ad spend					
Medium	2014	2015	2016	2017	2018f	2019f
TV	45%	46%	46%	46%	48%	48%
Print	37%	34%	31%	29%	25%	23%
Digital	8%	10%	13%	15%	17%	20%
Outdoor	6%	5%	5%	5%	5%	4%
Radio	4%	4%	4%	4%	4%	4%
Cinema	1%	1%	1%	1%	1%	1%
All media	100%	100%	100%	100%	100%	100%

Key Highlights

1. 2019, while global adex growing at 3.6%, Indian adex estimated to grow at a strong 14%.
2. Growing at a higher pace than last 4 years CAGR growth. Expected Growth across all media.
3. Adex growth approx. 2x of estimated GDP growth
4. Digital at 20% media mix. It takes 37% of incremental adex in 2019
5. India 10th largest market in ad spends, 3rd highest contributor to incremental ad spends, the fastest growing major ad market in the world.
6. FMCG, Auto, Digital Economy & Retail (Ecommerce, Tech/ Telco, Retails) drives 2/3rd of the Spends.

Exclusions and Disclaimers

Media ADEX reported excludes:

- Print - tender notices, appointments, classifieds/ matrimonial
- Radio - activation spends
- Digital - ad spends by SME segment
- Outdoor - wall painting

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