

## FICCI 2019

| Digital      | 2017  | 2018  | % Growth |
|--------------|-------|-------|----------|
| Advertising  | 114.9 | 154.4 | 34       |
| Subscription | 3.9   | 14.2  | 264      |
| TOTAL        | 118.8 | 168.6 | 42       |

Note: Figure in Billion.

| Mobile Phone             | 2017 | 2018 | % Growth |
|--------------------------|------|------|----------|
| RURAL                    | 499  | 526  | 5.41     |
| URBAN                    | 668  | 646  | -3.20    |
|                          | 1167 | 1172 | 0.43     |
| Note: Figure in Million. |      |      |          |

|                     | 2017 | 2018 | % Growth |
|---------------------|------|------|----------|
| Total Internet User | 446  | 570  | 28       |
| Narrow Band user    | 83   | 58   | -30      |
| Broadband user      | 363  | 512  | 41       |
| Urban Internet user | 314  | 373  | 19       |
| Rural Internet user | 132  | 197  | 49       |
| Figure in Million   |      |      |          |

|                       | % of Most Popular Activiti's |
|-----------------------|------------------------------|
| Entertainment         | 30                           |
| Visit Social Site     | 21                           |
| Watch Videos          | 16                           |
| Use Search Engine     | 15                           |
| Look for Product Info | 4                            |
| Play Games            | 4                            |

| TOP VIDEO APPS(Entertainment) |              |                           |
|-------------------------------|--------------|---------------------------|
| Rank                          | By Downloads | By MAU                    |
| 1                             | Hotstar      | Hotstar                   |
| 2                             | Jio          | Jio                       |
| 3                             | Airtel TV    | Amazon Prime Video        |
| 4                             | Sony LIV     | Google play Movies and TV |
| 5                             | ZEE5         | AirtelTV                  |

| Category wise content consumption | %     |
|-----------------------------------|-------|
| Entertainment                     | 27.38 |
| Sports                            | 18.64 |
| Lifestyle                         | 13.83 |
| Society                           | 10.15 |
| Politics                          | 5.12  |
| offbeat                           | 4.12  |
| Humour                            | 3.23  |
| Tech                              | 2.52  |
| Education                         | 1.73  |
| Economics                         | 1.62  |

| Rank | Most Active Social Media Platform in WORLD |
|------|--|
| 1    | Youtube                                    |
| 2    | Facebook                                   |
| 3    | Whatsapp                                   |
| 4    | Instagram                                  |
| 5    | FB Messenger                               |

|                    | Digital AD Revenue |            |
|--------------------|--------------------|------------|
|                    | 2017               | 2018       |
| Video              | 38                 | 50         |
| Search             | 36                 | 51         |
| Display            | 34                 | 46         |
| Classifieds        | 7                  | 8          |
| <b>INR Billion</b> | <b>115</b>         | <b>155</b> |

| Rank | Top 5 Total Digital Ad Insertion as Web ( India) |
|------|--|
| 1    | Youtube  |
| 2    | Times of India                                   |
| 3    | Mapofindia.com                                   |
| 4    | Rediff.com                                       |
| 5    | firstpost.com                                    |

| Rank | Top 5 Largest Ad Category in INDIA | % Share |
|------|------------------------------------|---------|
| 1    | Services                           | 51      |
| 2    | Banking/Finance/Investment         | 8       |
| 3    | Education                          | 5       |
| 4    | Auto                               | 5       |
| 5    | F&B                                | 4       |
|      |                                    |         |

| Categories        | % Spends on Digital Advertising by Category |
|-------------------|---|
| BFSI              | 38  |
| Consumer Durables | 36  |
| E-Commerce        | 34  |
| Telecom           | 31  |
| M&E               | 18  |
| Retail            | 18  |
| FMCG              | 16  |
| Auto              | 15  |
| Others            | 1   |

| Sectors           | By Value Ad Spend on Digital in % |
|-------------------|-----------------------------------|
| FMCG              | 28                                |
| Ecommerce         | 17                                |
| Consumer durables | 12                                |
| BFSI              | 12                                |
| Telecom           | 10                                |
| Auto              | 8                                 |
| Retail            | 6                                 |
| M&E               | 5                                 |
| Others            | 2                                 |

| Subscription Revenue | 2017 | 2018 | % Growth |
|----------------------|------|------|----------|
| Video                | 3.4  | 13.4 | 294      |
| Audio                | 0.5  | 0.8  | 60       |
|                      | 3.9  | 14.2 | 264      |

INR Billion

## FICCI 2019

1. Digital media grew by 42% to reach INR 169 Billion in 2018
2. Digital Ad spends grew by 34% to reach INR 154 Billion in 2018.
3. Digital subscription grew 262% to reach INR 14 billion.
4. Broadband Subscribers increased to 41% from 363 million to 512 million.
5. Total Internet user 570 Million out of which 373 in Urban(65%) and 197 in Rural(35%).
6. Rural Internet grew by 49% to reach 197 Million.
7. Smartphone users reached to 340 Million, smartphone penetration is 36% in India.
8. Average India data consumption is doubled from 4 GB in 2017 to 8 GB per month in 2018.
9. Smart/Connected TV'S crossed 10 million. Indian's spend 30% of their phone time on M&E.
10. 325 Million people viewed videos online in 2018.
11. 245 Million people viewed news online in 2018.
12. Digital Ad spends grew by 34% to reach 154 Billion in 2018.
13. Four categories now spend 30% of their ad spends in Digital ;BFSI,FMCG,Telecom and ecommerce.
14. There are around 3 Lacs SME using digital media for advertising.
15. Paid video subscriber grew from 7 Million 2017 to 12-15 million in 2018
16. However , the percentage of paid subscribers to total consumers is less than 5% and 1% for video and audio respectively.
17. Over 60% of video viewership volume generated by telecos and amount spend them by acquiring these content is INR 3.5-4 Billion.
18. Digital will overtake film in 2019 and print by 2021 to reach INR 354 Billion in 2021.
19. Number of mobile connection in India is 1171 Million, number of unique subscribers are 650-700 Million.
20. Tele density in India is 91%.
21. 4 billion Internet user in world ,one out of 8 user is in Indian world.
22. India come to 2nd after china in terms of adoption of M&E Services.
23. Indians downloaded 17 Billion apps in 2018 and average smartphone has 69 apps installed.

24. Indians Spend 8.5 Hours per week on online video which is far higher than the world avg which 6.5 Hours per week.
25. Google claims 97% content consumed on their platform is in local language , same on OTT who claimed 90% content consumed in local language.
26. 226 Million Indians are on Social media ( 17% Social media penetration) in 2018 .
27. 54% of Ad insertion and value is on Desktop and 46% on Mobile.
28. Audio Streaming user grow 50% to reach 150 Million in India.