Indian internet population is 205 million, as of 2013. Third largest internet population after China and the United States, projected to be the second largest by 2015, with 330-370 million users.

2011: China 480, USA 245, India 120
2015: China 583, USA 279, India 330-370

Source: Comscore 2013, Internet World Stats 2010, IAMAI 2013
## Ad Revenues in India, by Media, 2011-2016

<table>
<thead>
<tr>
<th></th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>CAGR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print</td>
<td>139</td>
<td>154</td>
<td>172</td>
<td>193</td>
<td>215</td>
<td>241</td>
<td>11.5%</td>
</tr>
<tr>
<td>TV</td>
<td>116</td>
<td>130</td>
<td>148</td>
<td>170</td>
<td>197</td>
<td>230</td>
<td>14.7%</td>
</tr>
<tr>
<td>Out-of-home</td>
<td>18</td>
<td>20</td>
<td>22</td>
<td>24</td>
<td>26</td>
<td>29</td>
<td>10.0%</td>
</tr>
<tr>
<td>Digital*</td>
<td>15</td>
<td>20</td>
<td>26</td>
<td>34</td>
<td>44</td>
<td>57</td>
<td>29.9%</td>
</tr>
<tr>
<td>Radio</td>
<td>12</td>
<td>13</td>
<td>16</td>
<td>20</td>
<td>24</td>
<td>30</td>
<td>20.7%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>300</strong></td>
<td><strong>337</strong></td>
<td><strong>384</strong></td>
<td><strong>440</strong></td>
<td><strong>506</strong></td>
<td><strong>586</strong></td>
<td><strong>14.3%</strong></td>
</tr>
</tbody>
</table>

**Digital Ad Growth**

Indian Digital Sector is on the rise, with 31% growth as opposed to other media.

With a total spend of 1,969 Cr in the Services Sectors, Telecom & auto are the Top spending categories at 1,159 Cr.
**Digital Spend in Various Categories**

**Total Online Ad Spend (FY 2011-2012)**
INR 1,750 Cr

**Total Online Ad Spend (FY 2012-2013)**
INR 2,260 Cr

Indian online advertising market is projected to reach 2,938 Cr by March 2014.

Source: IAMAI and IMRB Report 2013
THAT'S ALMOST 10% OF THE ENTIRE INDIAN ADVERTISING BUDGET
INDIA IS NOW THE FOURTH LARGEST AUDIENCE OF SEARCHERS IN THE WORLD AFTER CHINA, US AND JAPAN

UNIQUE SEARCHERS IN INDIA GREW BY 28%

3900+ Advertisers ran online ad campaigns in September 2013

395 Average no of display ads an Indian is exposed to

Source: India’s Online Display Ad Campaign, Comscore, 2013
TOP DISPLAY AD ADVERTISERS

Source: India’s Online Display Ad Campaign Report Comscore, 2013
INTERNET USER DISTRIBUTION

137m URBAN

68m RURAL

58% Y-O-Y GROWTH OF RURAL INTERNET USERS

TOP CITIES
MUMBAI (12m) / DEHLI (8.7m) / HYDERABAD (7.1m)

Source: IAMAI 2013
Indian Express Nov, 2013
Indian Online Population grows steadily
73.9 Million Indians Surfed the Web via a Home or Work Computer

Growth Over 1 Year

Total Unique Visitors (000)


+31%

Comscore 2013
75% of India’s online population is under the age of 35 yrs.

Drivers of Web Behavior

Online activity time spend
services (23%) / Social Networking (25%) / Entertainment (11%)
retail (3%) / News+Information (3%) / All Other (35%)

Source: Comscore 2013
86% Indian web users visit a social networking site.

Drivers of web behaviour:

- 33 million Twitter users
- 90 million Facebook users
- 18 million LinkedIn users

217 minutes spent on average.
DRIVERS OF WEB BEHAVIOUR

27% INCREASE IN THE INDIAN ONLINE VIDEO AUDIENCE OVER A YEAR

31.5 MILLION USERS WATCHED VIDEOS ON GOOGLE SITES (YOUTUBE)

217 MINUTES ARE SPENT ON FACEBOOK BY AN AVERAGE USER

28% INCREASE IN FACEBOOK VISITORS IN THE LAST 12 MONTHS

Source: Comscore 2013
18,55,000
130% increase in user base since March 2012

15,14,000
589% increase in user base since March 2012

22,00,000
58% increase in user base in last 6 months

140-150 Million (Globally)

Mountain Dew, Virgin Mobile and MTV India have already used Vine for promotions

Source: Exchange4media report 2014
81% of India’s population uses Mobile Phone

10% use Smartphone

9% use Multimedia Phone

3% use Tablets

Source: Nielsen 2013
MOBILE INTERNET USERS IN INDIA

TOTAL 110 MILLION USERS

85 million URBAN
25 million RURAL

9/10 MOBILE INTERNET USERS ARE MEN

HOWEVER, 900Mn MOBILE PHONE USERS
Almost Half of Mobile Users are Younger than 25

Source: IAMAI – IMRB Report 2012
Nielsen Report 2013
MOBILE INTERNET CONSUMPTION BEHAVIOUR

57% Indian smartphone owners are most likely to view downloaded video clips

Smartphone owners in India are the least likely to be annoyed with mobile ads.

25 million Mobile Internet users in India

40% Access via Community service Centers & cyber cafes Mobile

32% Access Internet only via Mobile

WHAT ARE THEY DOING ON MOBILE?

- Text Messaging 45%
- Social networking 26%
- Web Browsing 15%
- Applications 13%

Source: Nielsen Report 2013
TABLET SALES - UNITS IN INDIA

0.36 MILLION → 1.9 MILLION
427% INCREASE

PREFERRED ACTIVITIES
SOCIAL NETWORKING / ENTERTAINMENT
CHATTING + MESSAGING / E-MAIL

51% SPEND MORE THAN 2 HOURS A DAY

Source: IAMAI report 2013
MAIT 2013
CMR (India Tablets Consumer Usage and Adoption Trends 2013)
MARKETERS AND MEDIA SELLERS RATE INTEGRATED MULTI-SCREEN CAMPAIGNS AS VERY IMPORTANT

MARKETERS EXPECT MULTI SCREEN CAMPAIGNS TO BE VERY IMPORTANT

EXPECTED MULTI SCREEN MEDIA SPEND BY 2016

Source: Nielsen 2013
HIGHLIGHTS - WHAT WE NOTICED IN 2013

- Indian digital sector is on the rise with 31% CAGR growth as opposed to other media
- Indian Online Advertising Market is projected to reach INR 2,938 Cr by March 2014
- India is the fourth largest audience of searchers in the world as unique searchers grew by 28%
- At 200+ million Internet users, India’s rural Internet users shows 58% Y-o-Y growth
- 86% Indian internet users visit social networking sites
- 81% of India’s population use Mobile Phones of which 110 million mobile phone owners are Internet users with 9/10 mobile internet users being men.
- 427% increase in tablet sales in India with 51% users spending more than 2 hours a day on tablet
- Marketers expect a 50% multi screen media spend by 2016
CREDITS – TEAM BEHIND

ARNAB MITRA
MANAGING DIRECTOR - LIQVD ASIA
DIRECTOR - DMTI

SUDIPTI SINGH
HUMAN EXPERIENCE STRATEGIST
LIQVD ASIA

YOGESH DWIVEDI
RESEARCH EXECUTIVE
LIQVD ASIA

ALL STATS ARE HAND-PICKED FROM VARIOUS SOURCES AND
THE REAL SCENE OF INDIA ON INTERNET FOR THE CONCLUDING
THANK YOU