

**#MEDIASMART**  
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Presents

# INDIA SAYS YES TO CONNECTED TV!

**INDIA CTV REPORT 2022**



Primary Data Research Partner



# Foreword

The festivities are back with a bang and with movement restrictions of the last two years eased out, people are looking forward to celebrating together with families. Festive season and Connected TV (CTV) present interesting opportunities for brands to maximize engagement. As more eyeballs turn to CTV, it translates into an effective advertising channel.

CTV, which was until recently seen as an alternative to linear TV, has now emerged from the shadows and cemented its place as a device of choice for Indian audiences to consume content. In 2021, the mediasmart team set out to map the CTV viewership in India through a first-party survey in partnership with VTION and found that despite being a fairly new choice of entertainment for many families, more and more Indians across the country were accessing and consuming content on CTV.

This year, we follow the trail of CTV viewership further into the country with our CTV 2.0 Report that digs deeper into consumption habits across metros and non-metros in India. We evaluate and analyze the interactions with content formats on CTV as well as the impact of CTV advertising on purchase decisions.





# FROM CABLE TV TO CTV – BRINGING FAMILIES BACK TO THE LIVING ROOMS

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**MEDIASMART**  
Integrating Consumer Journeys  
Across Screens  
Unified Programmatic Platform

# Evolution of Content Consumption

When Cable/Terrestrial Television began public programming in India families and neighborhoods came together to watch television. Broadcast television viewing was almost a community activity in the India of late 80s and early 90s when only a few households had their own television sets.

From an era of 10 people in a family being huddled over a tiny television set, content consumption moved to small screen when people took to mobile phones for solo viewing. The Jio Effect in 2016 hooked India to data. The average data usage shot up from 700 MB per month to 11GB. For the first time, individual content consumption was possible with affordable data and smartphones. Content consumption became increasingly individual and personalized.

Then, as Smart TVs started to become more accessible at better prices, the internet-based content consumption picked up on it, leading to a growth in CTV as an entertainment source. Today, the CTV phenomenon has heralded a new era, as families emerged from their mobiles and tablets to re-enter their living rooms and enjoy watching content together on the big screen. Thus, shifting away from solo viewing. From sharing passwords for OTT content, to battling it out on their favorite games, CTV took the center stage and the pandemic only accelerated this consumption further.



## Broadcast Era



## Mobile Streaming Era

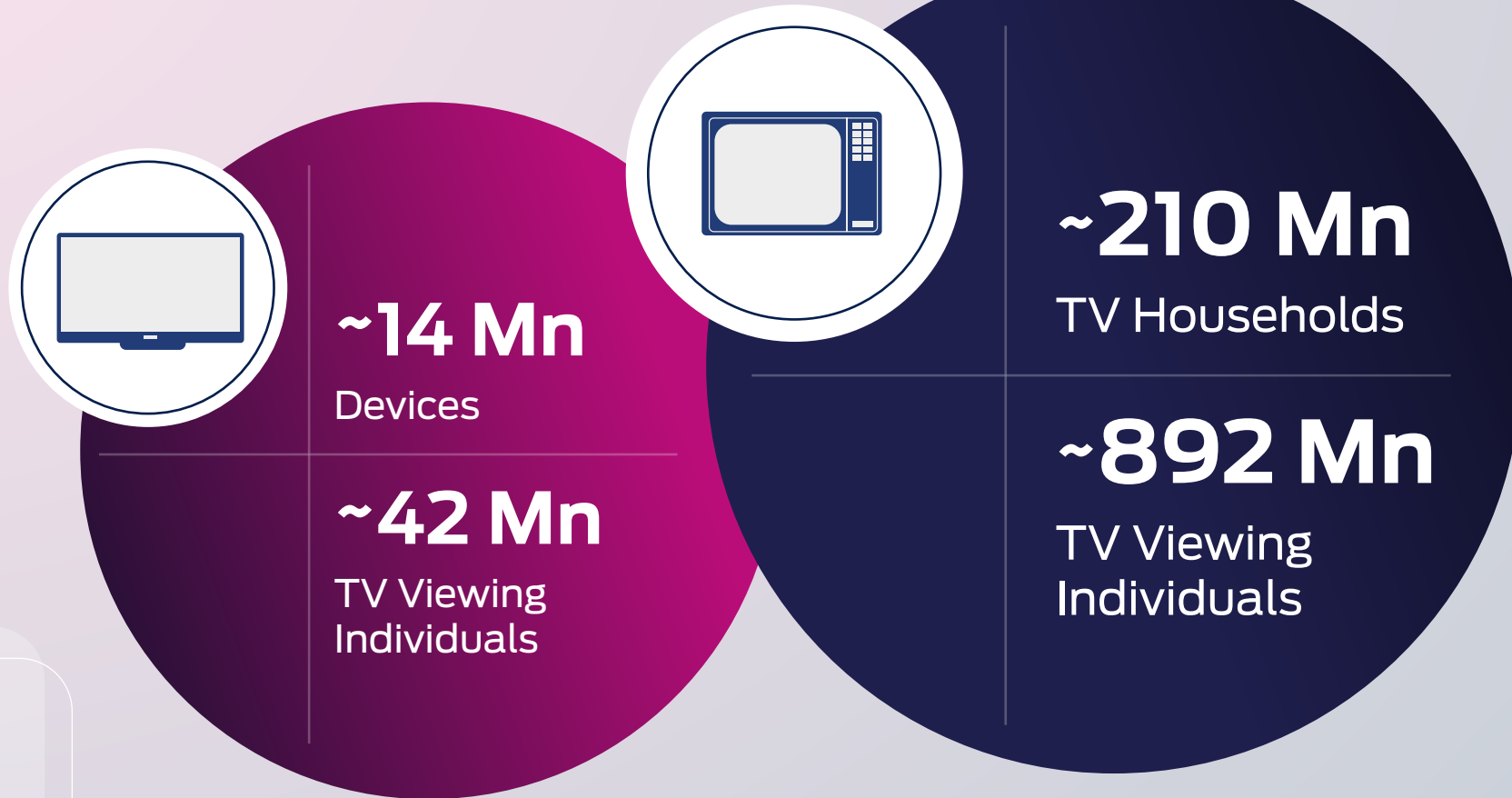


## Connected TV Era



# CTV & Linear TV

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Before we go into exploring the consumption trends, let's rewind a bit to understand the current landscape of content consumption on TV and what factors have aided the growth of CTV

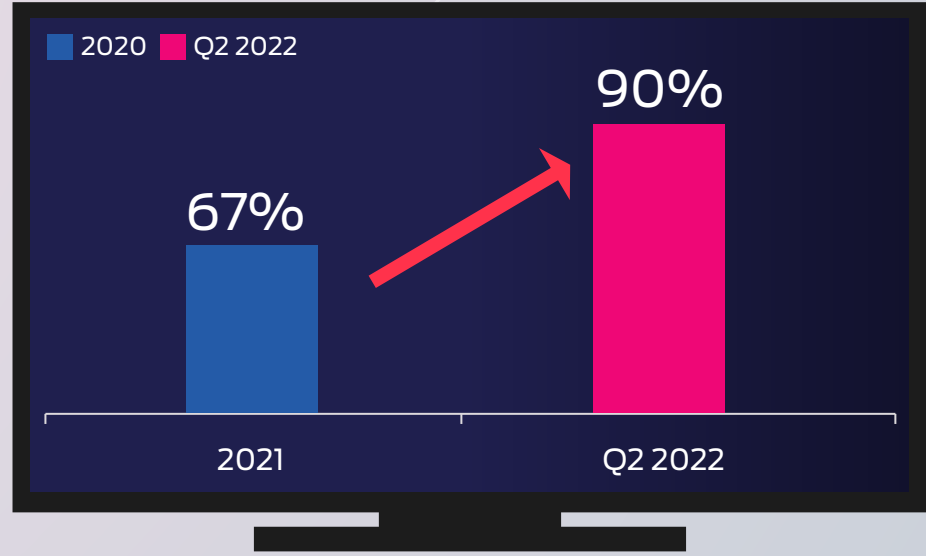
Source- BARC & mediasmart estimates

# India's CTV Growth



9 out of 10 TVs sold in Q2 2022 were Smart TVs

India's Smart TV market grew 74% YoY in Q2 2022



% Share of Smart TVs in overall TV Shipments (India)

## Key Growth Drivers



Growth of Smart TVs



Fast Broadband Speeds & 5G



Accessible Devices



Content at affordable price points / AVOD

# Expert Speak



The entire landscape in India has seen a dramatic shift over the last few years. Viewership habits have changed substantially, with the proliferation of content across platforms and the ways in which one can access the content on TV. With a surge in the growth of Smart TVs in India and many data points suggesting that 89% of all TVs sold today are Smart TV, Connected TV will continue to grow and become mainstream. India is a young market with tremendous potential for CTV adoption and Connected TV offers opportunities for engaging storytelling and targeting opportunities associated with digital advertising. It also offers great opportunities for advertisers where they can get strong consumer insights on viewing habits and also target specific cohorts to drive the brand message effectively and efficiently. Brands advertise where the consumers are and we can safely say that consumers are shifting to Connected TV and this will become in a very short span of time an important & indispensable medium to reach out to your consumers.



**Gopa Menon**

Head of Digital, South Asia

MINDSHARE



With Smart TVs getting affordable, CTV is taking over the traditional TV as the preferred device. The shift gradually came in with the pandemic, bringing a change in the content consumption patterns and OTTs gaining a larger share of the time spent. The good thing about CTV advertising is unlike traditional TV buys advertiser gets an option to choose their potential audience. Hence, a complete shift from spot buys to audience buying on a large screen is now possible with digital targeting capabilities and can be bought and served programmatically. Although we are at a very nascent stage, I strongly believe India will be one of the fastest-growing markets for CTVs and the fast growth in supply will make advertising affordable and give rise to new innovative ad formats for advertisers.



**Shibu Shivanandan**

Founder & MD

PivotRoots

# CTV IS THE NEW WAY TO WATCH TV!

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## CTV Survey 2021 Recap User Behavior & Trends



**78%**  
had a Smart TV  
out of which  
**93%**  
used the internet  
to consume  
content



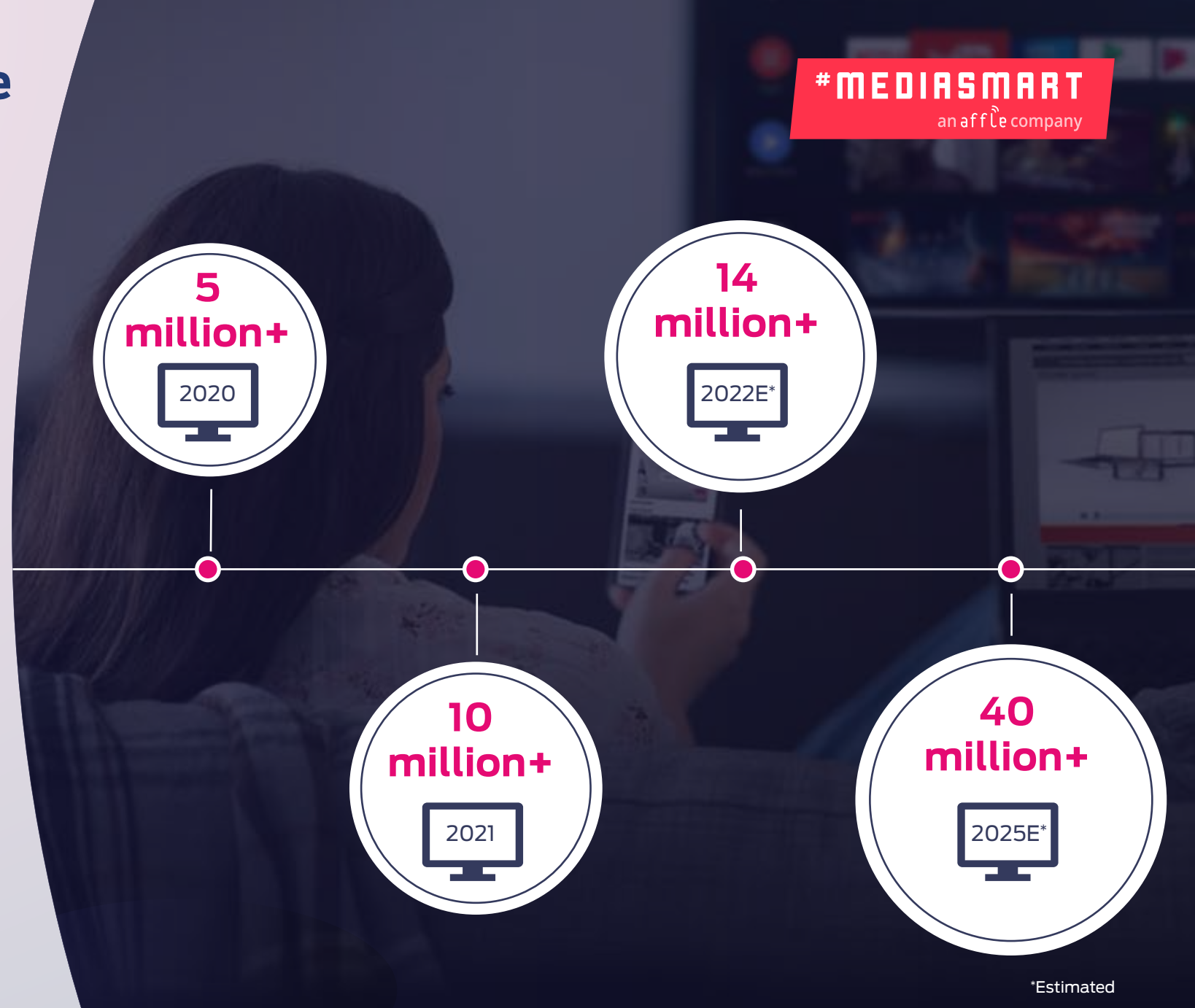
**69%**  
spend  
**1-4**  
hours/day  
watching  
CTV



**66%**  
have a subscription  
for more than  
**1**  
OTT app

# The Evolving Landscape of CTV

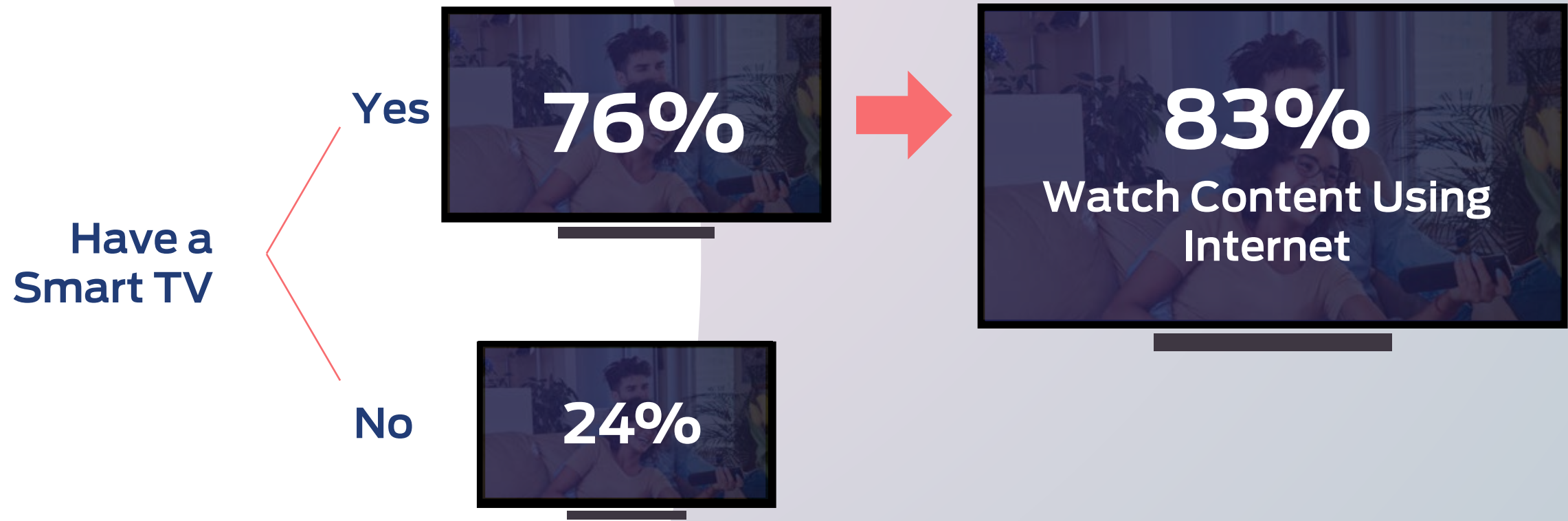
When we released our India CTV Report in 2021, CTV viewing in India was still at a nascent stage. According to industry estimates, CTV subscriptions stood at merely 5 million subscribers in 2020, but quickly doubled to 10 million in 2021. By 2025, this figure is expected to become 4x.



Source: EY-FICCI 2021 & 2022 report

\*Estimated

# Smart TV Owners are CTV Viewers



Base of respondents: 2592 from 16 states, 1L+ towns, NCCS A & B

Primary Data Research Partner



# Expert Speak



We have come a long way from last year, when the ecosystem in India was taking the first steps towards understanding and exploring the CTV opportunity, to now when top clients are insisting on the inclusion/ better understanding of CTV in their media plans. What's heartening to see is the speed at which CTV is becoming the device of choice at home for users and how ad dollars are following the eyeballs. This edition of mediasmart's report will help advertisers understand the nuances of the medium better along with the changing consumer behavior and also instill confidence regarding CTV's role as an impactful advertising medium. It's an evolving medium for advertisers & Madison's focus continues to be the pioneer in educating, evangelizing, and consistently building innovating tech to provide the best solutions for our partners.



Our partnership with mediasmart in 2021 was the first-of-its kind research on CTV viewers in India and their habits, sliced-and-diced by various demographics and came at a time when there was little industry knowledge about this category. This year, as we go deeper and wider into the country, the newer learnings from our CTV 2.0 report will further give an impetus to the growing appetite and enthusiasm for CTV among consumers and advertisers. The behavioural characteristics and consumption patterns that emerge will shape the way content is delivered and consumed, as well as how the various players in the ecosystem interact with one another to give a push for CTV's growth in the country.



**Vishal Chinchakar**

CEO

MADISON  
DIGITAL



**Shailesh Varudkar**

Chief Business Officer

VTION

# Demographic Spread of Respondents

We wanted to understand the penetration of CTV among the Indian cities and towns, as well as how CTV has come of age among the Indian users.

A nationwide survey was conducted by VTION between August-September 2022, with respondents across metros and non-metros, signaling deeper inroads for CTV usage across the country.

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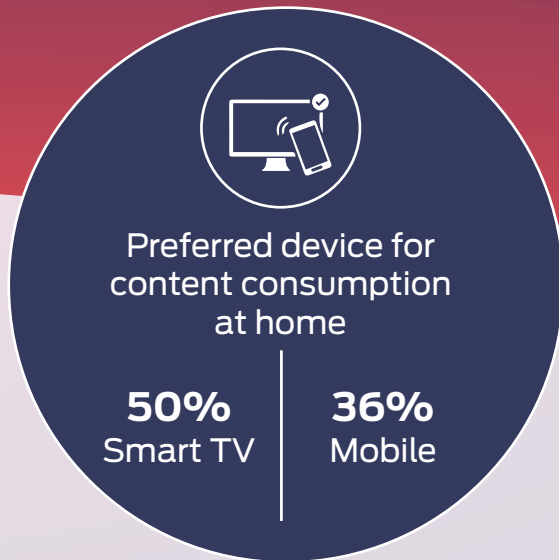
Base of respondents: 2592

# Accessing and Consuming Content on CTV

Smart TVs are emerging as the preferred device for content consumption when users are at home, with more than 50% claiming they prefer to watch content at home on their Smart TVs over mobile or tablets.

The Smart TV user is an evolved user with a knowledge of direct usage of CTV and all its features. A majority of the respondents claim to access internet-based content via the app store on the Smart TVs to access and download apps.

## Accessing CTV content



60%  
Via Smart Stores or  
Pre-Installed Apps



26%  
Via Dongle



14%  
Via Gaming Consoles or  
Internet Set-Top Boxes

### PRO TIP FOR BRANDS

Advertising on CTV can help you reach users in the comfort of their homes in the most impactful way

# When it Comes to Content Experiences on Smart TV, Size Matters!

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Bigger Smart TV screens translate into how central they are becoming to the lives of the average user. With the growth of streaming services, high-quality content is becoming more accessible and Smart TVs – with their bigger screens – offer more engaging content experiences.

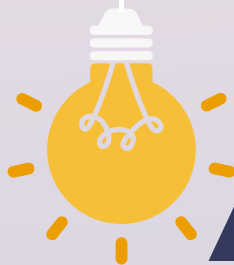
Many users also consume content on the Smart TV together in the living room and invest in bigger screens for shared viewing. This can be seen by the fact that 83% of users own Smart TVs bigger than 32 inches.



own Smart TVs between  
40-54 inches

## PRO TIP FOR BRANDS

Take advantage of the bigger screens for enhanced storytelling with the power of programmatic to reach and engage with your target audiences



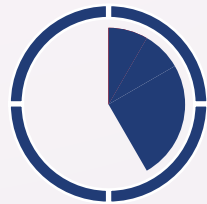
# CTV Viewing Becomes a Part of the Daily Routine

The average time spent on CTV viewing in 2022 continues to rise, reaching nearly 4 hours vs 3.5 hours in 2021. 72% of respondents above 35 years of age consume CTV content after 6 p.m, indicating that CTV is a preferred source of entertainment for people to wind down after work.

## Time spent per day watching CTV content

**4 Hours**

Average time spent watching CTV content



**32%**

Spent 2-4 hours



**40%**

Spent more than 4 hours

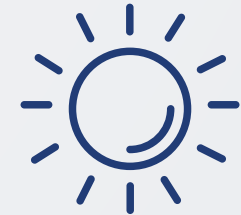


## Preferred time to watch



**61%**

Watch 6 pm or later



**28%**

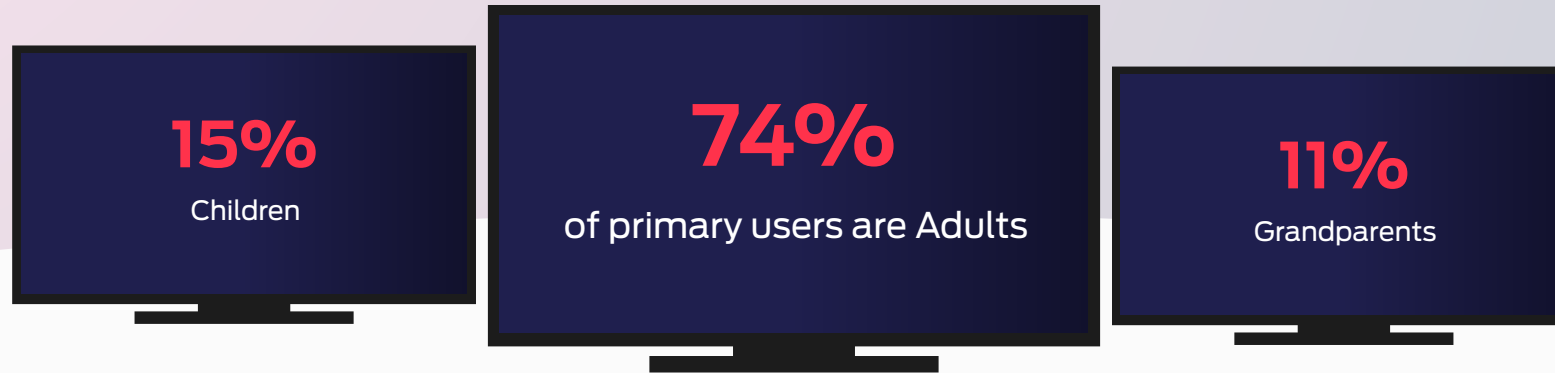
Watch between noon to 4 pm





# CTV Viewership Trends

CTV is bringing families together, with as many as 84% households having more than 1 person watching CTV. 64% respondents claimed to prefer watching CTV together with their families. In many households, CTV consumption is driven by adults, including grandparents.

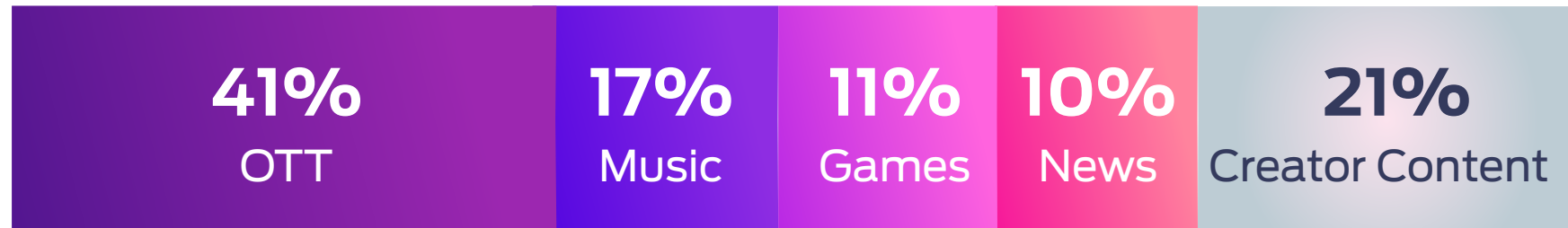


## PRO TIP FOR BRANDS

Household Sync Technology makes ads more engaging by syncing CTV ad campaigns with ads on other connected devices in the same household

# CTV Content Consumption Trends

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**2x**  
**users**

Claimed that they are more likely to watch OTT content as compared to Creator Content on CTV

Base for Profile; Those who view Internet Based TV: 1619

Primary Data Research Partner

VTION

## PRO TIP FOR BRANDS

Users prefer quality on-demand content on CTV vs Creator Content, making it a platform for advertising to evolved users

# CTV Viewers Have a Wide Range of Options

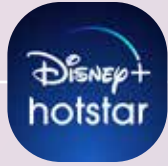
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**INR 499**  
per month  
**INR 5988**  
yearly  
**2 devices**



**INR 125**  
per month  
**INR 1499**  
yearly  
**3 devices**



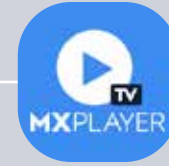
**INR 75**  
per month  
**INR 899**  
yearly  
**2 devices**



**INR 83**  
per month  
**INR 999**  
yearly  
**2 devices**



**INR 83**  
per month  
**INR 999**  
yearly  
**3 devices**



**INR 75**  
per month  
**INR 899**  
yearly  
**3 devices**



**INR 83**  
per month  
**INR 999**  
yearly  
**4 devices**



**INR 25**  
per month  
**INR 300**  
yearly  
**5 devices**



**INR 125**  
per month  
**INR 1499**  
yearly  
**5 devices**



**INR 83**  
per month  
**INR 999**  
yearly  
**4 devices**



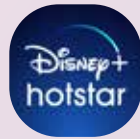
**INR 125**  
per month  
**INR 1499**  
yearly  
**4 devices**



**INR 83**  
per month  
**INR 999**  
yearly  
**8 devices**

Note- Publicly available data analyzed

# CTV Users are Spread Across Multiple OTTs



PURE SVOD

HYBRID MODELS



Claimed app usage on CTV



of CTV devices generate active requests from 4+ OTTs

\*mediasmart estimates

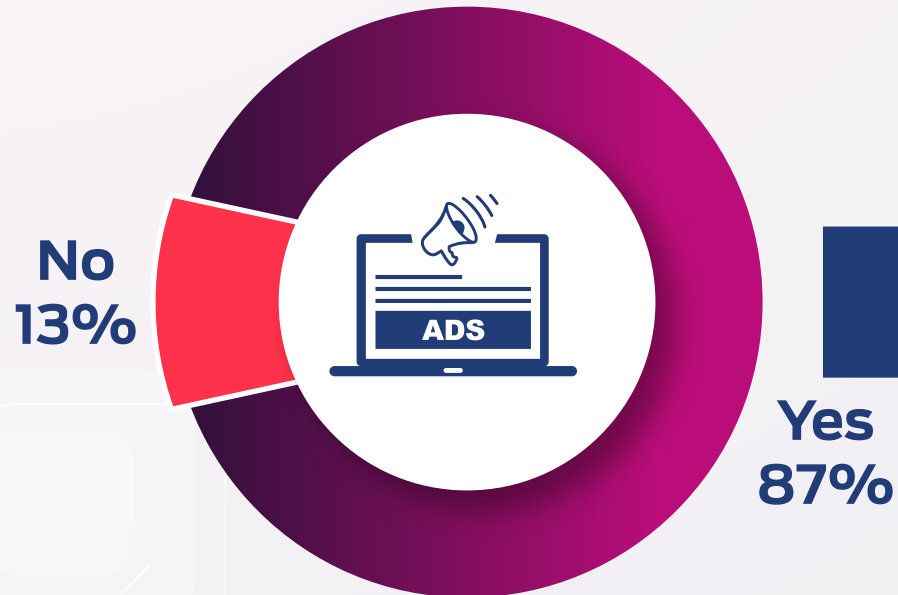
Base for Profile; Those who view Internet Based TV: 1619

# Impact of CTV Advertising

**9 in 10** viewers of CTV recall being exposed to ads. 81% of those exposed to ads claim that ads influenced them.



## Exposed to Ads



Yes  
87%

## Ad Influence



Yes  
81%

No  
19%

# Influence of CTV Ads

## How ads influence?

Help me know more about products/services

41%

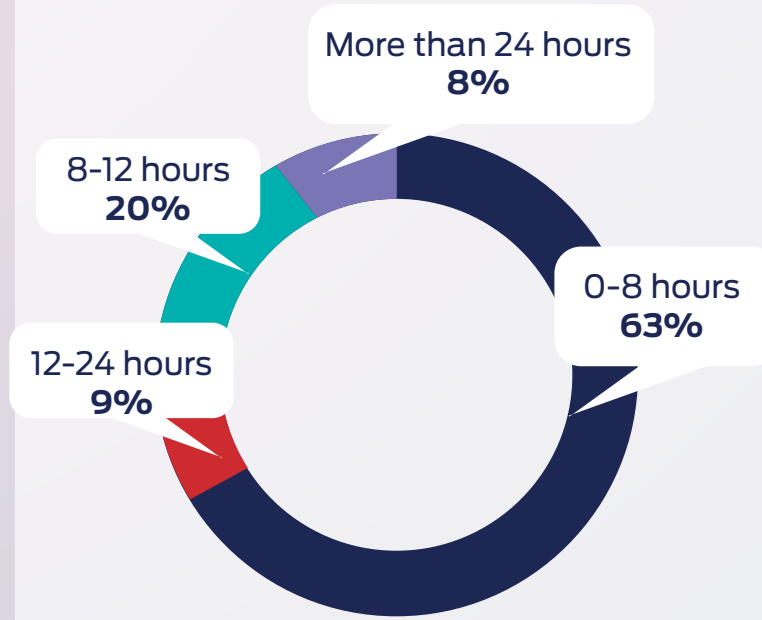
Make me curious to further explore online

38%

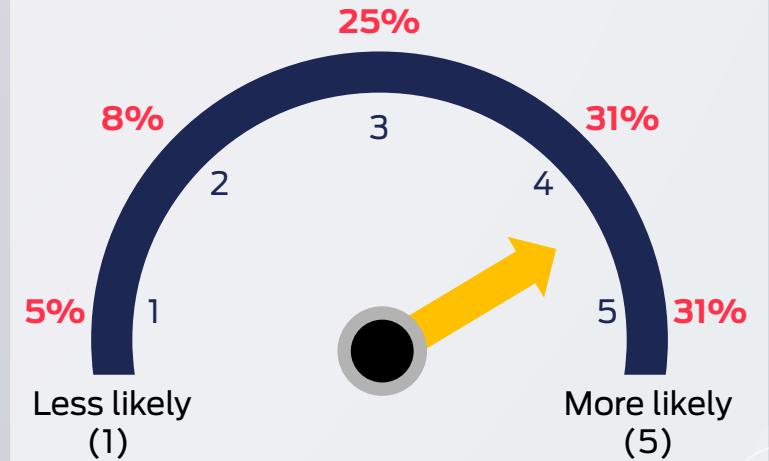
Make me curious to further research offline (visit store)

21%

## How long it stays on top of the mind?

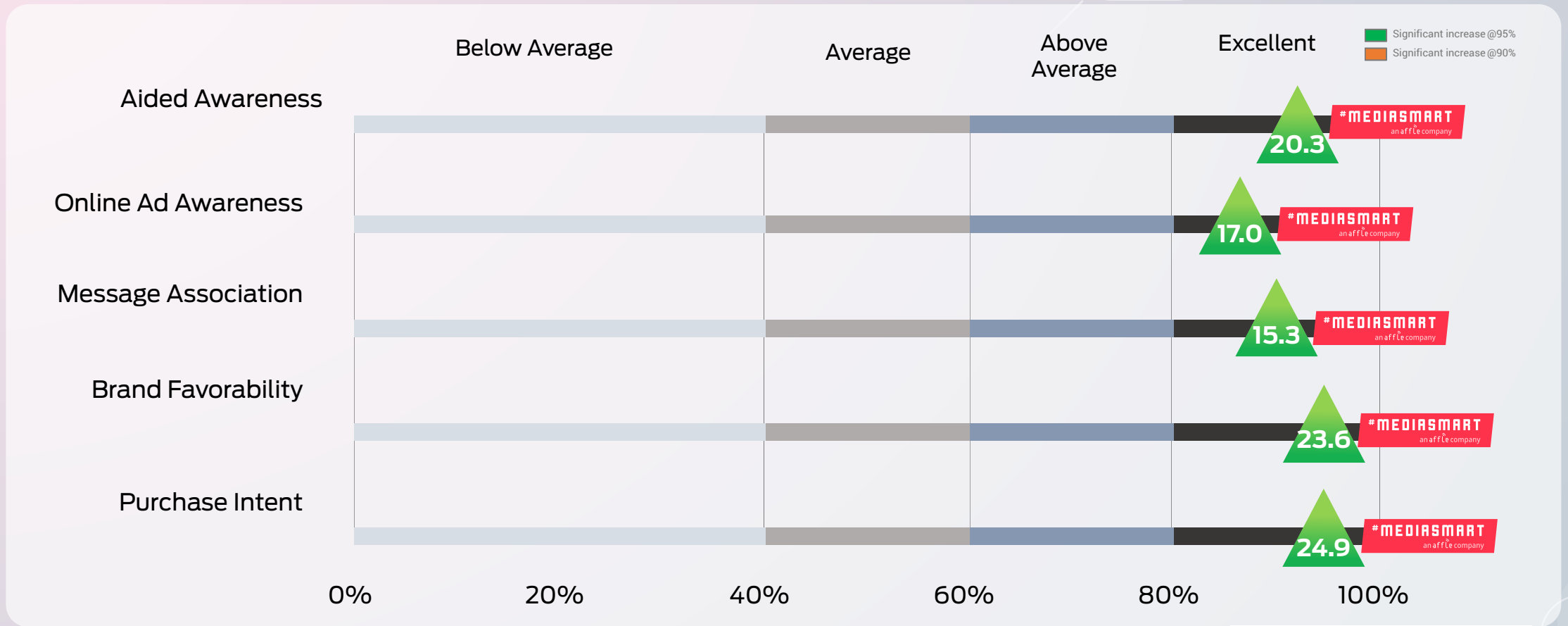


## How likely are you to buy the product after seeing ad on CTV & Mobile?



# CTV Ads are Impactful

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## PRO TIP FOR BRANDS

BRAND LIFT STUDY- TOP FOOD DELIVERY APP  
Source: Kantar MarketNorms: | India – Overall, N = 367 campaigns

KANTAR BRAND LIFT INDEX  
Campaign executed on Mediasmart in July 2021

Own the journey from discovery to purchase by connecting the disconnected worlds of mobile and TV

# Expert Speak

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US's streaming viewership surpassed that of Cable TV for the first time in July 2022. In India too, CTV is becoming the device of choice at home for users, this is evident in the rapid growth of these audiences. These audiences are cord-cutters and cannot be reached through traditional linear TV, hence CTV becomes an indispensable part of the media plan, which can be seen in the growth in the number of advertisers using CTV. I also believe that CTV has the potential to truly democratize TV advertising by allowing even low-budget advertisers to connect with audiences on TV. This edition of mediasmart's report will help advertisers understand the nuances of the medium better along with the changing consumer behavior and also instill confidence regarding CTV's role as an impactful advertising medium through measurable technologies like mediasmart's CTV Household Sync.



CTV's impact was already being felt in India two years ago, and it is exciting to see the further inroads that this impactful new medium has made both in the minds of the consumers as well as for advertisers. Cutting-edge technologies around CTV Household Sync make it possible for advertisers to engage more users by syncing CTV ad campaigns with ads on other connected devices around. With the growth of CTV and the technologies that enable CTV advertising, we are hopeful that more brands will be able to include this in their marketing budgets to increase brand awareness and impact.



**Amardeep Singh**

CEO



**Noelia Amoedo**

Founder & CEO

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# THE CTV OPPORTUNITY: KEY TAKEAWAYS

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# Key Takeaways

CTV reach has penetrated to non-metro users too and is driven by middle-class consumption

Viewers switch between OTT apps depending on the content they seek, the interest at the point of time (for e.g. cricket season), as well as who they watch it with

CTV viewing is not just a solo viewing experience - **84% households** have more than 1 people watching CTV

CTV ads are impactful- **9 in 10** viewers of CTV recall being exposed to ads & **81%** of those exposed to ads claim that ads influenced them

Purchase intent for users improve if they are nudged on their connected mobile devices within **24 hours**



# Expert Speak

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Connected TV in India has seen a high volume of adoption, with double-digit growth in overall awareness. Market intelligence reveals that the market size of the OTT video streaming industry in India is projected to cross \$5 billion by 2023 and India is at the threshold of becoming one of the top global markets.

We are seeing a huge demand from advertisers who want to reach out to this pool of active CTV users impactfully. The brand lift study conducted by Havas on CTV's impact showed great insights into how the CTV ecosystem creates meaningful exposures to reach the target audience. The platforms and the formats have opened up a vast opportunity for us in terms of innovation, strategy, and creating best practices for CTV advertisers.



**Mohit Joshi**

CEO

HAVAS



Our report this year goes deeper into the reach and impact of CTV and it is interesting to see how far CTV has grown into the metros and non-metros. It's a stark revelation to see CTV's growth into a family viewing phenomenon that is bringing people back to their living rooms. The audience for CTV is fairly well spread across the diversity of content offered by multiple OTTs, and now beginning to explore newer genres like Games, Live News as other top choices.

This consumption shift has also led to significant growth in co-viewing which is not restricted to a certain demographic or geographic segment either. This holds huge potential for advertisers who can leverage emerging technologies like mediasmart's CTV Household Sync to connect the worlds of TV & mobile and drive impact.



**Nikhil Kumar**

Vice President, IN & SEA

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# How to Effectively Integrate CTV Advertising in Your Marketing Mix

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Increase brand impact by syncing ads on CTV with ads on other devices in the household



Target apps and streaming video on Smart TVs, Devices, or Gaming Consoles



Take advantage of combining CTV Household Sync Ads based on the audiences' demographic, interest or location – and either 1st- or 3rd-party data



Measure both online conversions and incremental footfall and optimize results



Quantify your TV ads with more than 25 dedicated KPIs in real-time

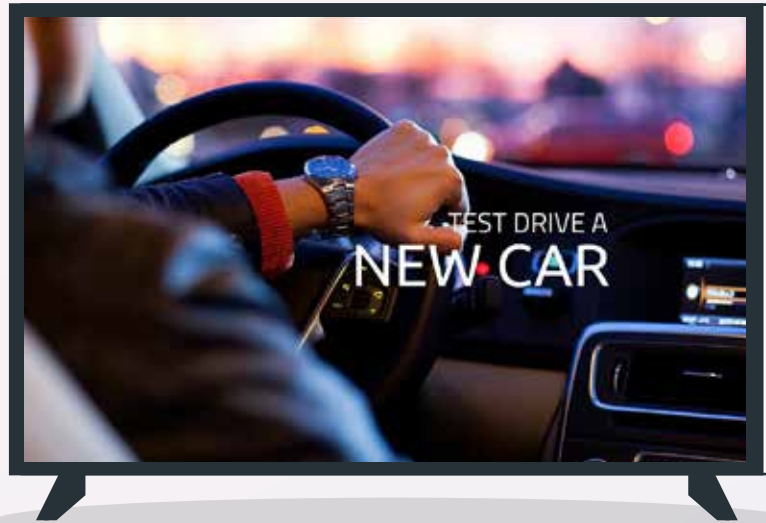


Acquire and retain your CTV app users

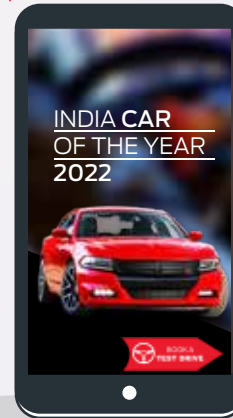
# Connecting the Disconnected Worlds of TV & Mobile

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Ad Shown on CTV



Ad Shown on  
Connected Mobile  
Devices within the  
Same Household



Ads can be synced from 30s, 5 min, 1h, 24h to 10 days after showing the TV ad to have a better recall for the brand

## How Does Household Sync Work?

With mediasmart, syncing a CTV campaign with other devices in the same household requires minimum effort. Advertisers can automatically select the needed targeting options as well as create a dedicated cross-device strategy. Household Sync on mediasmart uses fresh data for each campaign and is based on IP addresses, which undergo several layers of validation. Among other things, the validation process includes an in-house algorithm to maximize data accuracy and compliance with privacy regulations.

# How Leading Brands Use mediasmart's CTV Solutions for Brand Impact

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## Campaign Objective & Strategy

Lotus Herbals wanted to promote its range of sunscreens through an impactful campaign. mediasmart's CTV Household Sync technology played a pivotal role as part of a cross-screen engagement strategy for Lotus Herbals and reaffirmed the brand's market standing as a leading player in the sunscreen category.

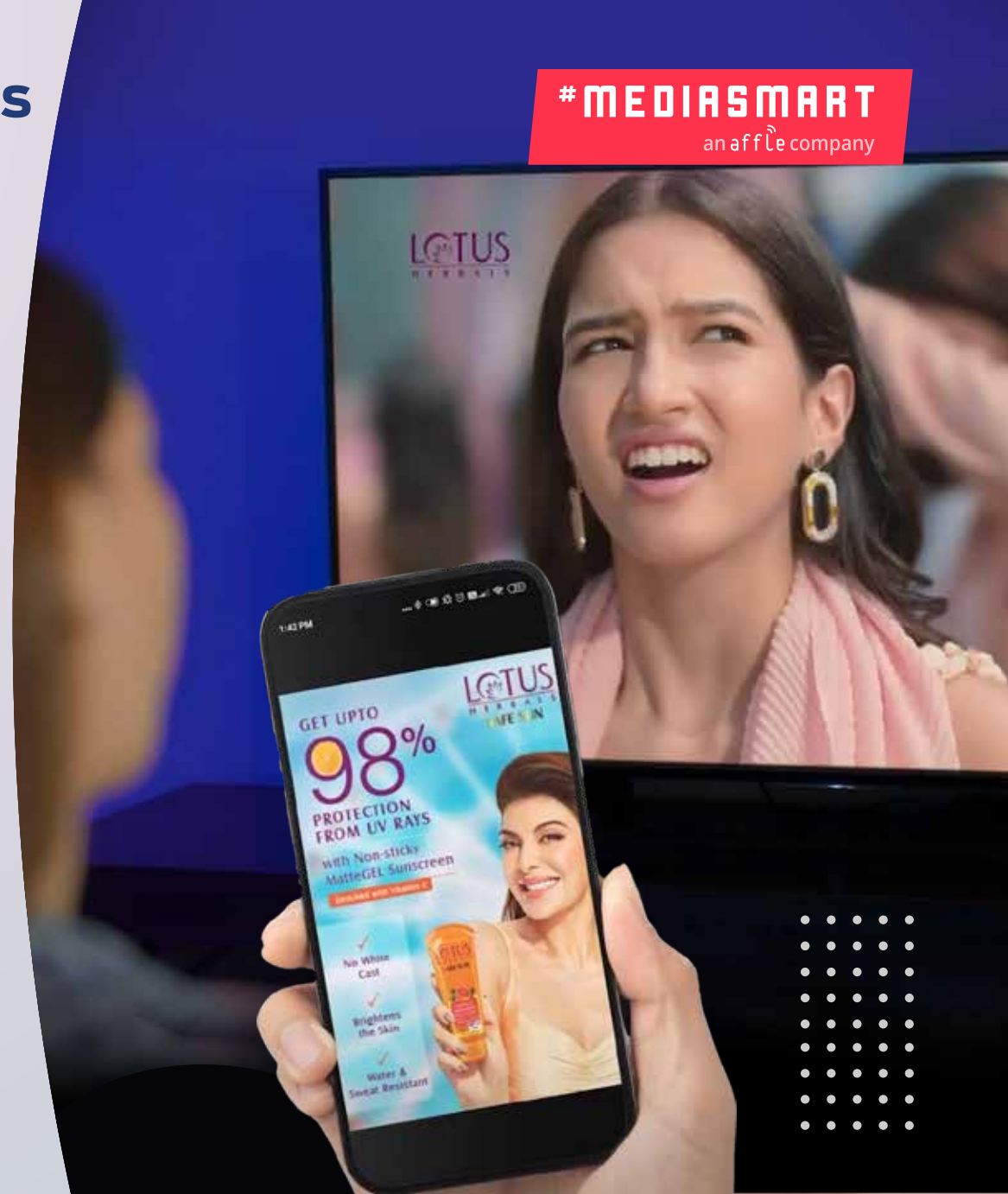
## Results

✓ Enabled cross-screen audience engagement

✓ Impactful Brand storytelling on the large screen with high VTRs

✓ Engagement on the synced mobile campaign with high CTRs

✓ Delivered a growth in online sales





# How Leading Brands Use mediasmart's CTV Solutions for Brand Impact



## Campaign Objective & Strategy

Discovery+ leveraged mediasmart's CTV Household Sync solution to strengthen brand awareness & reach audiences via multiple connected devices, thereby driving new age media usage innovation & consumer engagement.

## Results:

- ✓ Enabled impactful brand storytelling & awareness on the large screen with high VTRs
- ✓ Drove impactful engagement on mobile with high CTRs
- ✓ Drove a significant increase in app store rankings for the brand
- ✓ Delivered a lift in organic brand searches

# WHY BUY CTV ADVERTISING WITH MEDIASMART

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Find highly engaged users



High-quality ad units



Real-time buying and metrics



Household Sync with audiences



Better CPMs and reduced ad spend wastage



Better attribution, tracking and frequency capping



Borderless reach across global markets





# MEDIASMART

mediasmart, an Affle company, is a unified programmatic platform which provides advertisers, trading desks and agencies ways to integrate consumer journeys across screens.

Unique strengths such as omni-channel audience management & incremental measurement together with measurable and high impact CTV advertising (through its proprietary Household Sync technology), make mediasmart the platform of choice for marketers looking for an intuitive and powerful programmatic solution, whether they choose to use mediasmart's console or build their own solutions on top of its open APIs.

Proximity Marketing  
with Incrementality  
Measurement

Connected TV with  
Household Sync

Omnichannel  
Audiences

Programmatic  
Brand Marketing

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GET IN TOUCH



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