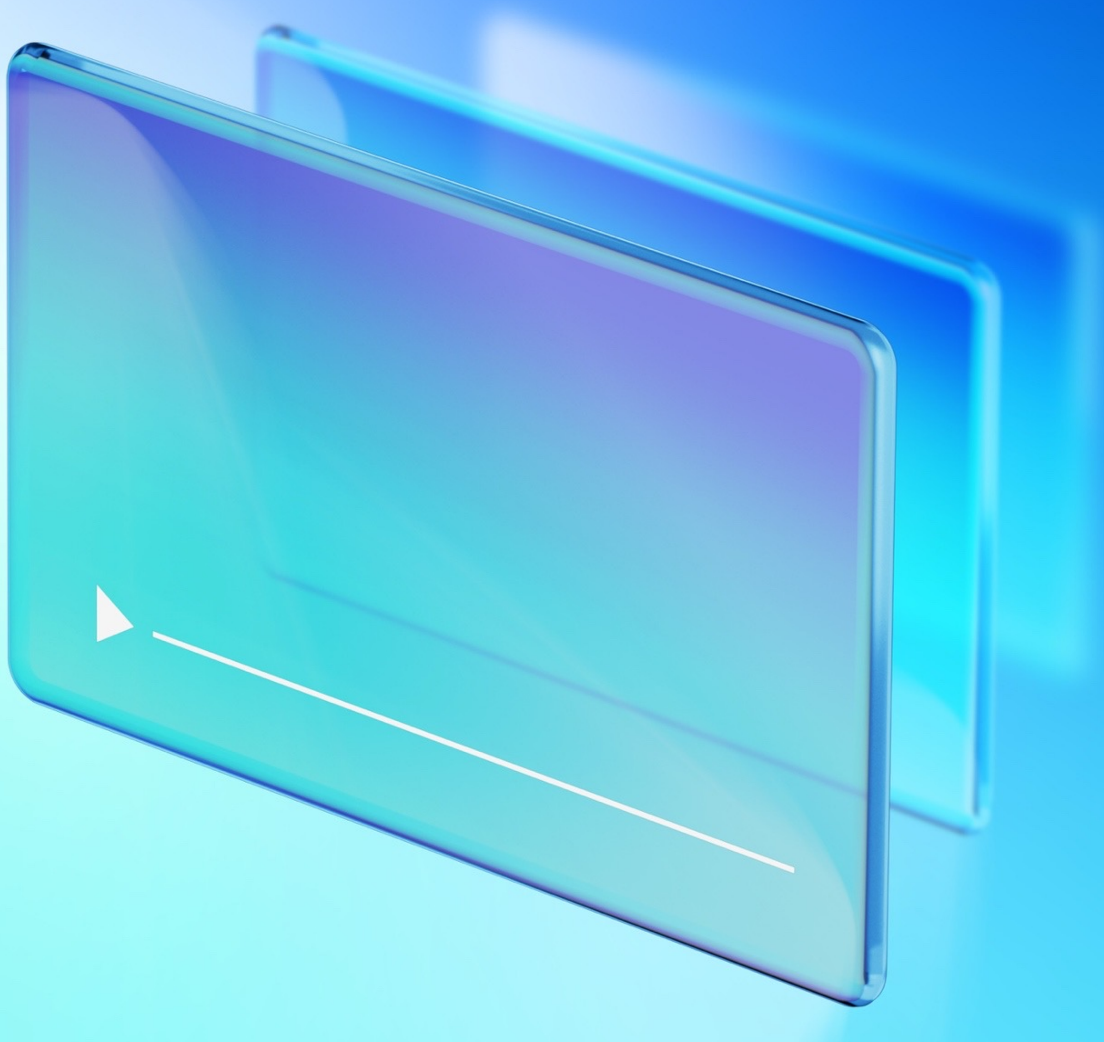
WPP Media · theTradeDesk

The Connected TV Era: India's New Prime Time

How CTV is reshaping big screen behaviour, advertising, and impact.



The Changing Landscape of Indian Television
— Third Edition, 2026

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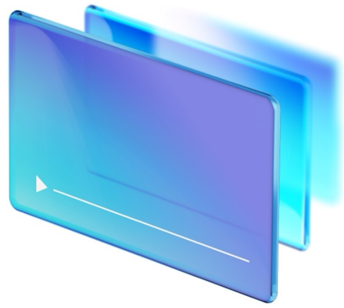


LEADERSHIP PERSPECTIVE

Audience growth momentum in CTV:
A catalyst for marketing solutions

It is where audiences come together, where stories create shared experiences, and where brands have built some of their strongest connections with consumers.

But the television landscape is changing. The big screen is no longer defined by a single mode of viewing. Audiences are moving seamlessly between traditional television, streaming and Connected TV, creating a more fragmented but increasingly addressable viewing ecosystem.

For advertisers, this evolution presents a significant opportunity. CTV is not replacing television; it is expanding what television can deliver. By bringing together the scale and storytelling power of TV with the precision, measurability and flexibility of digital, CTV is making the big screen more relevant to how consumers watch, discover, and engage today.

Understanding this shift requires looking beyond individual platforms or formats. It requires a holistic view of who is watching, what they are watching, where they are watching, and how those behaviours are evolving across India.

This report brings together these perspectives to provide a clearer view of India's CTV audience and the forces shaping its growth. It explores changing viewing behaviours, emerging audiences and opportunities for brands to rethink how they plan for the big screen.

The future of television is not about choosing between TV and CTV. It is about understanding how they work together to create more connected, effective and future-ready media strategies.

Prasanth Kumar
CEO, South Asia
WPP Media

If you'd like to discuss this report, or dive even deeper into India's CTV behaviours, please reach out to our team via **communications.india@wppmedia.com**

LEADERSHIP PERSPECTIVE

India's big-screen inflection moment

Every so often a market reaches the point where the audience has clearly moved, but the industry has not yet caught up. India's connected television screen is at that inflection point today.

I have spent much of this past year in conversations with marketers, agencies, and publishers across the country, and the same question keeps surfacing in different words. The shift is real. What do we do about it?

Across some of the world's largest markets, CTV has followed a remarkably consistent trajectory. Audiences move first, often faster than the industry plans for. Infrastructure follows. Investment comes later, sometimes too late for brands to shape the market. India stands in that window now, and these moments do not stay open for long.

For advertisers, the question is no longer whether CTV belongs in the media plan, but what role it should play. Making that decision requires a clear, objective view of the market and that is what gives this study its weight.

Developed jointly by The Trade Desk and WPP Media with Ormax Media, the study offers an independent, market-wide perspective of India's CTV landscape. That perspective reflects how we operate at The Trade Desk: on the side of the buyer and across the breadth of the open internet. It helps marketers see CTV not as a stand-alone channel, but as an addressable, measurable part of the wider media plan.

My conviction is straightforward. The audience has arrived. The means to act on it is here. The next step is to plan for CTV with the clarity and intent it now deserves.

I hope this report gives you that.

Tejinder Gill
Managing Director
The Trade Desk India

If you'd like to discuss this report, or dive even deeper into India's CTV behaviours, please reach out to our team via thetradedesk.com

About this report

This research is a joint initiative by WPP Media and The Trade Desk, executed by Ormax Media. The report combines a dedicated study of 3,000 Connected TV viewers in urban India (May-June 2026) with the Ormax OTT Audience Report 2026, sampling 12,000-plus across urban and rural India.

This report is based on survey responses from a sample of participants and does not represent a census of the entire population.

A note on the numbers in this report: Audience and time figures describe CTV viewing on the television set. Where a comparison to mobile or linear is drawn, it is stated. The research did not separately isolate every subcomponent of viewing; figures that the study did not break down are not split here, and any such cut is flagged for confirmation.

Research methodology

CTV Universe Sizing

Based on the Ormax OTT Audience Report 2026, India's largest syndicated research on the OTT category, with an annual sample size of 12,000-plus across urban and rural India. Additionally, household sizing was modelled by WPP Media.

CTV Audience Profiling

A dedicated audience profiling study conducted among 3,000 CTV viewers in urban India in May–June 2026.

New to CTV?

Our glossary (page 28) will help clarify industry terms.

EXECUTIVE SUMMARY

India's big-screen reset

India's living room has not changed. Families still gather around their big screen in the evening. What has changed is how and what Indian families consume on their TV, and, in turn, the ways advertisers can now communicate to them.

Connected TV in India already reaches 207 million viewers across an estimated 62 million to 65 million households, with 3X growth since 2022. This is no longer a metro or premium-only story. Rural CTV audiences have doubled in 12 months.

In 2026, more than two-thirds of the urban NCCS A households are CTV homes, hence, the growth now comes from NCCS B or below. At 47% in metros, there is still headroom for CTV to expand further, while scale is expected to come from non-metros and rural.

For CMOs, that combination matters. CTV now offers national scale without sacrificing access to high-value audiences. It is no longer an incremental digital channel, but a core part of how television reach is built in India.

CTV retains the qualities that have always made television powerful: a large screen, long-form content, shared viewing, and concentrated prime-time attention. But it adds audience choice, addressability, and the ability to measure what happens after exposure.

The big screen still commands its prime-time power. Between 8 p.m. and 10 p.m. on weekdays, 78% of CTV viewers are active, choosing to watch web series, cricket, or films.

That choice is translating into response. Across all CTV viewers, 83% seek more information after seeing an ad. Among premium CTV viewers that rises to 89%. This engagement changes the role CTV can play in your media plan. For the right audiences, it can move consumers from awareness to consideration and action.

CTV is now an essential consideration. This report is designed to help you make confident CTV planning decisions. You'll learn how India's CTV audience watches, who they watch with, and what they do after seeing an ad.

3 CTV insights every CMO should know

CTV has evolved from emerging to essential. As the category matures, the planning conversation has shifted from "Should we be on CTV?" to "How do we plan this properly?". These three findings offer a clear starting point.

1

83% of CTV viewers take action after seeing an ad, making them one of the most responsive audiences on any screen

Across all CTV viewers, 83% seek more information after seeing an ad, rising to 89% among premium CTV viewers. CTV provides a high-attention environment where advertising can drive meaningful action.

CTV's ability to serve addressable ads helps close one of television's longest-standing measurement gaps. Marketers can move beyond proxy metrics and connect ad exposure to outcomes such as brand lift, online engagement, store visits, and retail sales — enabling in-flight optimisation, providing clearer visibility into campaign performance and business impact.

2

One CTV impression reaches 2.5 people, creating a household reach multiplier

Over 80% of CTV viewing is shared. While the average household has 3.3 members, a single ad impression reaches approximately 2.5 people.

This co-viewing behaviour creates a significant planning advantage — but only when marketers can understand which devices and viewing signals belong to the same household. A robust identity graph powers household-level addressability, enabling more effective frequency control across connected devices and reducing unnecessary ad repetition.

3

Gen Z CTV viewers consume content primarily across two screens, spending close to 3.1 hours a day on CTV

CTV is increasingly becoming an active screen for Gen Zcontent consumption. They spend over 3 hours a day on CTV, watching a range of programs from web series to sports and films.

As a lean-back environment where viewers are deeply engaged with content, CTV can become the foundation of a connected omnichannel strategy — building attention on the biggest screen before reinforcing those messages consistently across the consumer journey.

The question is no longer whether to invest in CTV, but how to plan, how much to invest, and how to define clear media objectives.

INDIA'S CTV ECOSYSTEM

The new TV opportunity

As one of India's mainstream media channels, it's essential to understand the CTV ecosystem: how the audience connects, where viewers live, and what kind of homes have connected big screens.

India is now estimated to have 62 million to 65 million CTV households with 207 million viewers, experiencing 3X growth since 2022. New audience acquisition is a major driver and so is deeper engagement among existing viewers. 67% of CTV's audience are either new to CTV or spend more time on it now than a year ago.

62M-65M
CTV households

207M
CTV viewers

3X
growth since 2022

2.9 hours
daily watch time

Beyond the city

The CTV map has been redrawn in just one year. Small towns and rural areas are growing fastest, and non-metro India now makes up the majority of the audience. CTV is no longer a big city medium. For advertisers, emerging-market planning is now the core of the opportunity.

While UP-UTT, Maharashtra, PHCHPJK, Karnataka, AP/Telangana remained the biggest CTV markets, Bihar-Jharkhand, Rajasthan, Kerala, and parts of northeast witnessed more than average growth in the last year.

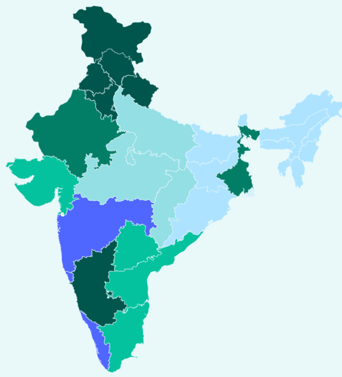
CTV growth across markets

+21%
Metro

+46%
Mini-metros

+55%
Small towns

+110%
Rural



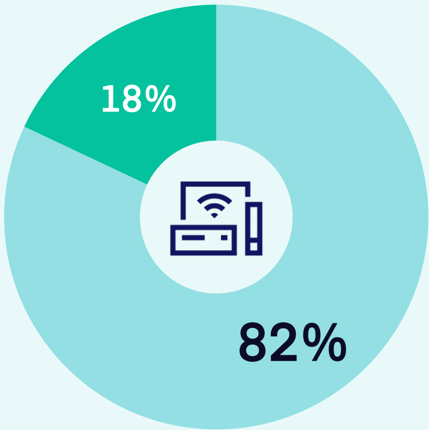
Advertisers' takeaway

Rural TV audiences doubled in a year — the next 100M viewers are unlikely to be from metros.

Smart TVs are the default device

82% of CTV users access streaming content through apps built into their smart TV. The television itself has become the primary streaming interface, making the OEM ecosystem (Samsung, LG, Xiaomi, Sony, TCL) an increasingly important advertising distribution layer.

How India accesses the big screen



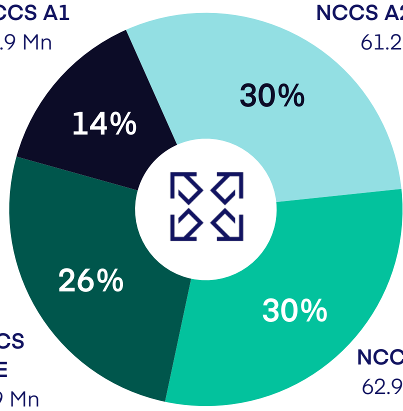
The premium concentration

CTV is where the country's premium audiences gather. 44% of India's CTV universe is from NCCS A, proving its relevance for brands looking to connect with affluent consumers. India's premium CTV audiences spend close to three hours a day on CTV.

Premium audiences are not just more valuable per impression; they are present on the big screen for longer.

Mass reach meets premium core

CTV universe by NCCS
Universe size (Mn) & Contribution %



44% NCCS A
56% NCCS B or below

Advertisers' takeaway

CTV now offers not just access to high-value audiences but also national scale.

4 kinds of CTV homes

Not all homes are alike, and the difference that matters most to a planner is the relationship with linear.

One out of three CTV homes are cord-cutters or never connected to linear TV and 68% continuing to maintain a linear connection.

Within the CTV universe, linear TV remains relevant among CTV households. Over a quarter of the universe is now cord-cutters, indicating a shift towards CTV-led viewing.

Household type		What it means for planning
41%	**Regular linear** Reachable, actively watching	Cord-switching is real, hence plan for TV+ CTV.
27%	**Light linear** Difficult to reach	CTV should carry the primary weight, not a top-up share.
27%	**Cord-cutters** Unreachable at any weight	CTV is the only way in, full stop.
5%	**Never connected** Unreachable, no connection to lose	CTV is the only way in; this household never had another option.

Advertisers' takeaway

1. **Buy the platform layer**
   With 82% entering through built-in apps, the smart-TV operating system is a genuine, ownable ad surface.
2. **Redraw the footprint**
   Extend CTV plans into small towns and rural India, where the growth and the incremental reach now sit.
3. **Segment by linear relationship**
   Plan for Total TV, using CTV to reach the light viewers and cord-cutter households that linear alone can no longer deliver.

Linear TV remains relevant as cord-cutting grows

For the past three years, there has been a steady stream of cord-cutters upgrading their television experience. Almost a third of CTV households have disconnected their cable or DTH connection entirely.

The common assumption is that cord-cutting is a premium, tech-forward behaviour. Our research shows the trend running the other way — cord-cutting climbs as media affluence declines. This shows tight household budgets play a role in cord-cutting, suggesting a shift from complimentary viewing to OTT-first consumption in less affluent homes.

The cord-cutting timeline
When did cord-cutters disconnect their LTV connections?

Less than 6 months ago	6-12 months ago	1-2 years ago	2+ years ago
11%	**24%**	**32%**	**33%**

HOW INDIA WATCHES THE BIG SCREEN

India's CTV viewing behaviour

The scale and profile of the CTV ecosystem establishes the size of the prize for advertisers. Viewing behaviour is the key to winning. On almost every count, the big screen is experienced nothing like the phone it is so often planned alongside.

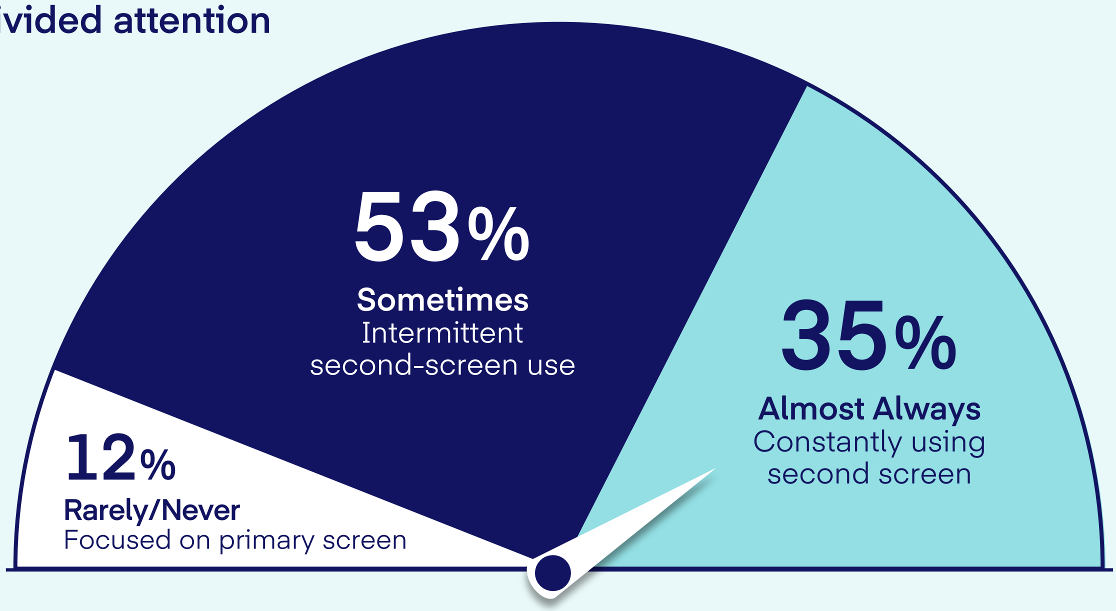
CTV viewing is one of the most intentional 3 hours of screen time in the Indian day. When the big screen is on, it holds the room.

While CTV remains the primary viewing destination, a second device (typically a smartphone) plays an important role.

Second-screen usage is common among CTV viewers, 88% of viewers engage with a second screen while watching. This is an ideal opportunity for advertisers to explore full-funnel activations and drive meaningful outcomes.

CTV's second-screen behaviour is an ideal opportunity for advertisers to explore full-funnel activations.

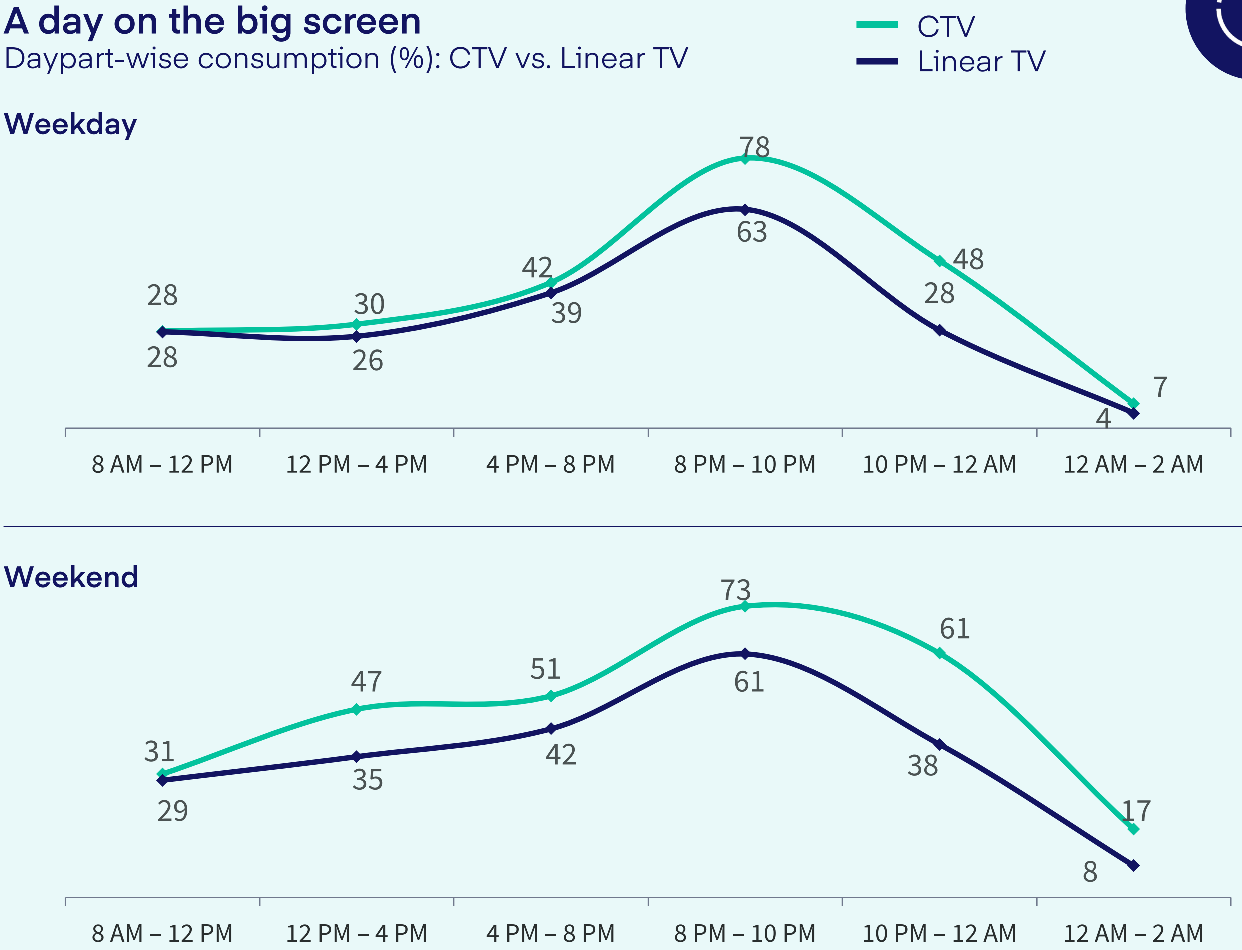
Undivided attention



Prime time is expanding across screens

A day on the big screen

Daypart-wise consumption (%): CTV vs. Linear TV



Weekday 8 PM – 10 PM: CTV 78% vs linear 63%
Weekend 8 PM – 10 PM : CTV 73% vs linear 61%

Families still gather in the evening, but in an estimated 62 million to 65 million homes across India, prime-time attention now sits on a connected screen. At the critical 8 p.m.-10 p.m. weekday slot, 78% of CTV viewers are active on the big screen. Among them, a majority also engage with linear TV, showing strong overlap between the two rather than a shift entirely away from one to the other.

Beyond prime time, CTV offers advertisers opportunities to connect with engaged audiences in late-night and weekend windows — these are high-attention, low-clutter windows ripe for the picking. On weekends, among the CTV audience, the late-night slot of 10 p.m. to midnight, sees a dominant 61% CTV viewership.

Advertisers' takeaway CTV viewership mirrors linear TV time bands.

Reach, recalculated

Co-viewing and family time

CTV is largely a shared, household activity, rather than a solo scroll. More than 80% of CTV viewers watch with family or friends. The entire family gathers for sports, millennial couples nestle on the lounge to binge-watch web series, and Gen Z siblings put their phones down to watch the latest films.

This is among the most consequential findings in the study, and it deserves to be understood in full because it changes the arithmetic of reach. The consequence runs through every stage of a plan.

Let's start with reach: 3.3 people live in the average CTV home and while not everyone watches every session, a single impression reaches about 2.5 members of the household. This shows planners utilising impression counts built for personal screens understate CTV's true delivery.

On the big screen, one impression is not one viewer. It is 2.5.

Reach, frequency, and measurement all have to be rethought around the household.

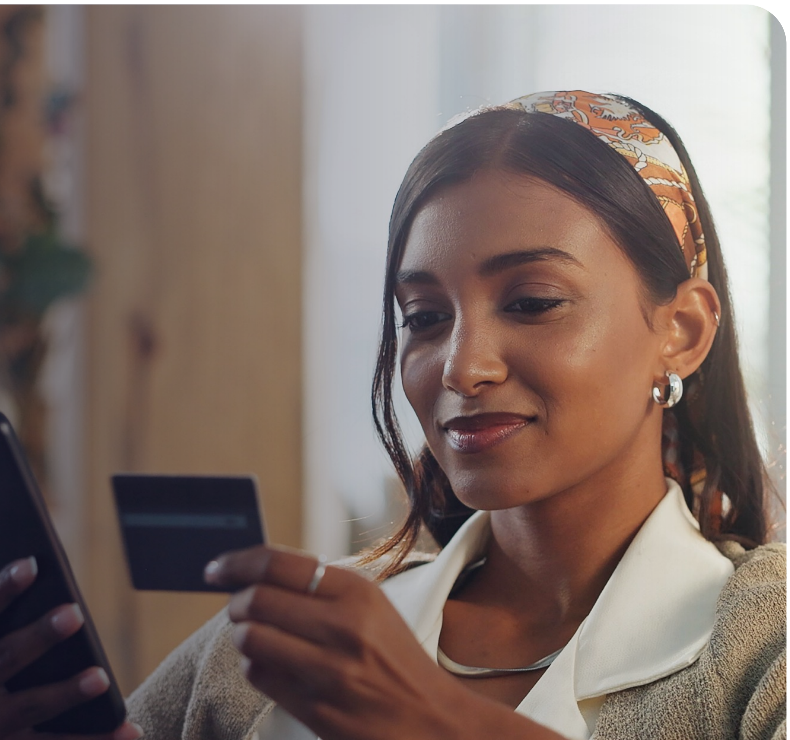
On frequency, an ad served once to a household is often seen by several people at once, which changes how CTV impressions should be counted. And on measurement and attribution, household-level exposure means the individual-cookie logic of digital misreads what actually happens in the room.

Viewing accompaniment

		Smartphone	CTV
Solo	Alone	72%	19%
Group/Family	Spouse/Partner	11%	25%
	Sibling	6%	17%
	Parents/Elders	5%	17%
	Entire family	4%	21%

One impression,
2.5 viewers

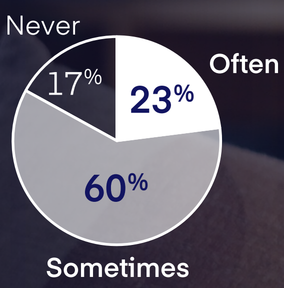
CTV advertising drives action



Post-ad behaviour of India's CTV viewers

83%

search for more information after seeing a CTV ad



This goes up among the affluent NCCS A audiences to 89%. This strong post-view action demonstrates the platform's ability to convert exposure into intent.

Advertisers' takeaway

Ensure web and AI search is ready to satiate the viewer's curiosity.

> The consumer truth is simple; the old TV has become smart, and linear and CTV consumption now happen in the same household, often on the same screen. True unified measurement, and the ability to communicate seamlessly across devices, is where the real value for advertisers and marketers will come from. What we need from platforms is accountability: cross-screen frequency management and unified measurement that lets me see TV and CTV in one view, not two dashboards telling two different stories.

Sajit Gopal
Head of Media
Domino's India (Jubilant Foodworks)

What India watches

What wins the big screen

69% Web series	**64%** Cricket	**63%** Theatrical films
59% Direct-to-OTT films	**51%** Music/Songs	**47%** Reality shows
47% GEC fiction series	**47%** News	**36%** Comedy & joke videos
34% Non-cricket sports	**30%** Cartoons	**23%** Knowledge videos

CTV audiences turn towards the big screen when they decide to watch a film, series, sport, or a favourite reality show. Short video and utility viewing remain on the handset in a more disrupted experience.

In India's living rooms, live sports and premium story-telling are the preferred CTV programs – web series lead at 69%, followed by cricket at 64%, then theatrical films at 63%. These are immersive, long-form, made-for-the-big-screen formats.

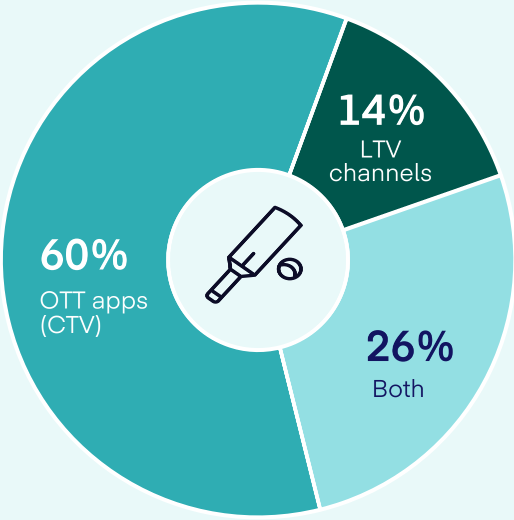
The chosen format sets the room — co-viewing audiences shift between different content formats. Cricket and sports gather the whole family, while web series and films draw smaller, absorbed household audiences seeking uninterrupted, intentional viewing time.

CTV dominates sports and GEC

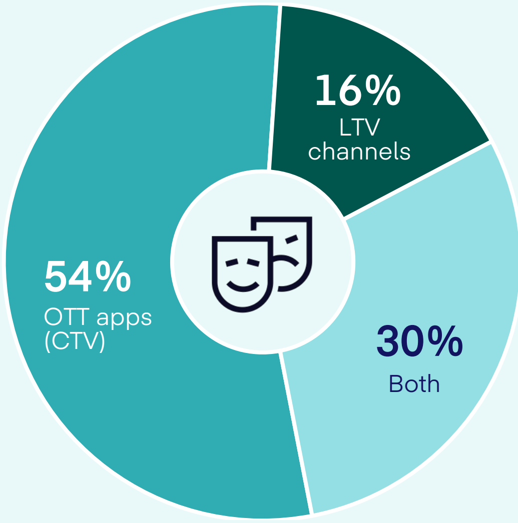
Sports and GEC viewing on CTV

% Preference (Base LTV Audience)

Sports viewing on TV:
Platform preference



GEC viewing on TV:
Platform preference



Sports are often a shared, event-driven viewing experience that deliver great opportunities for advertisers. The big screen's high-attention environments, like cricket, continue to capture the attention of families.

It's no surprise our nation's favourite pastime, cricket, draws 64% of the CTV audience with 84% co-viewing and 45% watching with the entire family.

CTV is now the preferred channel for live sports and GEC.

> As connected TV democratises, richness of audience profiling will unlock the greatest value for brands. Being able to target across gender, age, geography, affluence, and buying behaviour combined with real-time understanding of co-viewing are the measures will be critical to optimise for reach and minimise impression wastage.
>
> **Nithya Ravi**
> Head, Global Media
> Godrej Consumer Products

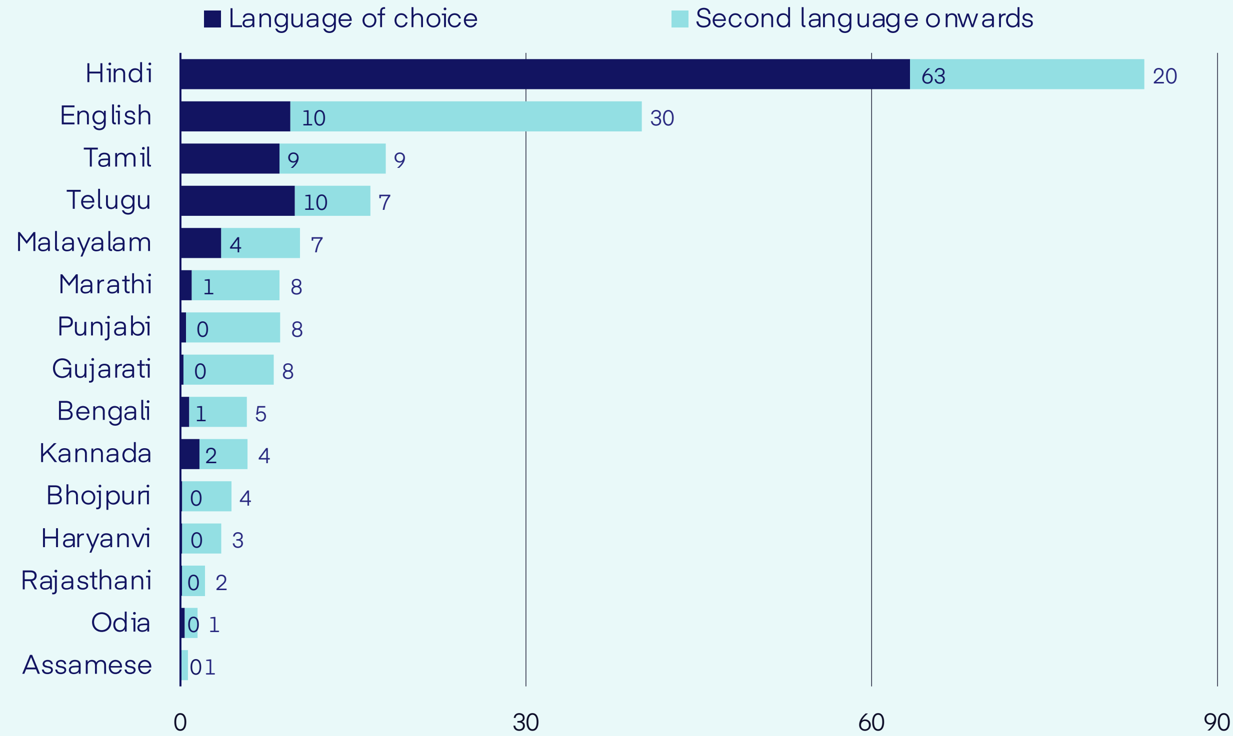
Language is no barrier

The widespread use of subtitles and dubbing is expanding content discovery well beyond native-language viewing.

Hindi is the language of choice for 63% of CTV viewers, with 40% watching in English.

Language preference is no longer a barrier for content consumption, with multilingual viewing becoming the norm. This widens addressable reach for domestic and international content.

Language of choice



CTV is no longer a test-and-learn line item. It's the strategic backbone of modern video planning. The conversation has matured beyond impressions towards incremental reach, brand lift, and SOV against targeted cohorts as currencies. Brands are leveraging it across the funnel — from high-impact tentpole launches and hyperlocal activation to extending reach on smaller screens for conversion. The next frontier is unified cross-screen measurement that connects CTV exposure to tangible business outcomes.

Chirag Sharma
Lead, Digital Marketing, Prime Video
India & SEA Markets

FAST is TV's next big growth story

Free ad-supported television channels, or FAST, offer a combination of linear and on-demand programming.

These channels are built directly into the smart TV's operating system and require no subscription.

One-third of CTV viewers are already aware of FAST, with 1 in 5 watching close to 50 minutes a day.

FAST adoption skews distinctly urban, with **Delhi, Mumbai, AP-Telangana, and Tamil Nadu** showing the highest concentration of FAST viewers. This audience gravitates towards traditional content categories, with news, movies, and entertainment (reality shows and serials) dominating viewing.

These programs echo the types of content available on traditional TV, suggesting the familiar user experience of FAST channels helps viewers feel comfortable. The FAST audience tends to linger on CTV, they have an average viewing time of 3.4 hours a day, compared to 2.9 across all CTV audiences.

We expect to see viewership grow as more households explore FAST. For now, it's the single largest untapped ad-funded inventory in Indian CTV, and it's ready for advertisers to reap.

Advertisers' takeaway

1. **Count reach at the household, not the impression**

   Apply the co-viewing multiplier or CTV will look smaller than it delivers.

2. **Plan dayparts beyond 8 p.m.–10 p.m.**

   Late-night and weekend windows on CTV are high-attention and under-bought.

Who is watching: Audience segments

VALUE SEGMENTS	LIFE STAGE			VIEWING BEHAVIOUR
				
Premium audiences act on CTV ads	**Gen Z** consumes content across two screens	**Millennials** are the dependable spine of CTV	**Mothers** bring others to the big screen	**Cord-cutters** and light linear viewers

CTV now reaches a significant number of living rooms across India, but its real power is precision. It provides advertisers with the ability to reach a particular household audience.

This section groups the highest-value audiences three ways — by value, by life stage, and by viewing behaviour. It's important to note, when planning, household audience targeting can go beyond the demographics listed in this section, ensuring your budget works hard to deliver results.

One behaviour shared across all segments is the propensity for digital commerce and another is the rise of cord-cutting.

The top three reasons for cord-cutting are a preference for OTT on CTV, flexibility, and better content quality on OTT.

Online shopping among CTV viewers

86%

shopped online in the last month with **fashion (65%) and beauty (54%)** being top shopped categories

66%

order food delivery, groceries, and essentials via apps

40%

CTV users have a credit card

VALUE SEGMENTS

Premium audiences act on CTV ads

Who they are:
The most affluent CTV homes, premium audiences, and the upper tiers. They are the Top 15% of urban CTV audiences, based on their spending propensity on a wide array of premium products, memberships & services.

What sets them apart:
Ad responsiveness rises in premium audiences with 89% engaging with brands after seeing an ad. They also watch around 3 hours of CTV a day.

Why advertisers should care:
They disprove the assumption that premium audiences avoid advertising, and they over-index on the categories you pay most for: finance, travel, home, quick commerce.

How to reach them:
Reach premium audiences at scale by prioritising CTV and be present across search and AI tools where their post-ad journey now leads.

Advertisers' takeaway

Almost 9 out of 10 premium CTV viewers engage with brands after seeing an ad.

COHORT SNAPSHOT
Premium

21M
urban CTV audiences

AD RESPONSE

89% seek more information about a product after seeing a CTV ad, at least sometimes

TRAVEL

55% travel internationally

80% travel domestic via air

48% have airport lounge access

LIFESTYLE

72% own a credit card

45% have a fitness/gym membership

95% have at least 1 car

LIFE STAGE

Gen Z CTV viewers consume content across two screens

CTV is increasingly becoming an active screen for Gen Z content consumption. They spend over 3 hours a day on CTV, watching a range of programs from web series to sports and films.

Who they are:
The youngest CTV viewers, aged 15 to 29, digital-native and often assumed to have abandoned television.

What sets them apart:
They out-watch every other generation on the big screen and watch with others. The majority of their CTV time is shared, mostly with siblings or parents.

Why advertisers should care:
Gen Z is reachable on the big screen at scale and in a shared context that personal devices cannot match. They are still growing as a CTV audience.

How to reach them:
Reach Gen Z through the household, not just the handset. Align to the genres they gravitate to rather than buying them as isolated individuals.

Advertisers' takeaway

For advertisers targeting Gen Zers, CTV offers a high-attention big-screen window that social cannot match on duration or co-viewing.

COHORT SNAPSHOT
Gen Z

49%
of the audience

3.1h time spent on CTV

46% have increased usage on CTV in the last 12 months

TV HABITS

68% prefer watching OTT apps on smart TV

62% prefer flexibility offered by OTT apps (watch anytime, pause, rewind, binge, etc.)

CTV HABITS

23% watch alone

77% watch with friends or family

TOP 3 CTV FORMATS

64% Web series

64% Cricket

60% Theatrical films

LIFE STAGE

Millennials are the dependable spine of CTV

Who they are:
The working-age core of the CTV audience, comfortable across streaming services and long-form content.

What sets them apart:
The most committed long-form viewers, among the most ad-responsive, and the most likely to have increased their CTV use in the past year. They watch on the best home connectivity, often as couples.

Why advertisers should care:
They are the dependable spine of a CTV plan — broad, engaged, high-intent reach that builds a relationship.

How to reach them:
Use millennials as the reliable base of a CTV buy and lean into long-form environments where their attention is deepest.

Advertisers' takeaway

Millennial viewers are ripe for brand connections via CTV — they watch long-form content, on the best connectivity, alongside the other household decision-maker.

COHORT SNAPSHOT
Millennials

38%
of the audience

2.8h time spent on CTV

56% have increased usage on CTV in the last 12 months

TV HABITS

77% prefer watching OTT apps on smart TV

67% prefer flexibility offered by OTT apps (watch anytime, pause, rewind, binge, etc.)

CTV HABITS

15% watch alone

85% watch with friends or family

TOP 3 CTV FORMATS

74% Web series

67% Theatrical films

64% Cricket

LIFE STAGE

Mothers bring others to the big screen

Who they are:
A key decision-maker in the household, often watching family and general-entertainment content.

What sets them apart:
Among the highest co-viewing of any audience: nearly 9 in 10 of their sessions are shared, clustered on the content that gathers the whole family.

Why advertisers should care:
This is the rare moment when the decision-maker and the family she buys for are in front of one screen at once, an environment few media can offer.

How to reach them:
Place brand messaging in family and general-entertainment content to reach the decision-maker and the household together. Then, sequence CTV with the channels.

COHORT SNAPSHOT

Mothers

20%
of the audience

2.9h time spent on CTV

54% have increased usage on CTV in the last 12 months

TV HABITS

78% prefer watching OTT apps on smart TV

65% prefer flexibility offered by OTT apps (watch anytime, pause, rewind, binge, etc.)

CTV HABITS

11% watch alone

89% watch with friends or family

TOP 3 CTV FORMATS

74% Web series

68% Theatrical films

63% Direct-to-OTT films

Advertisers' takeaway

Deliver brand messaging to mothers while they co-view with loved ones. Reach them via long-form, family, and general entertainment programs.

VIEWING BEHAVIOUR

Cord-cutters & light linear viewers

Who they are:
Households that have cancelled linear entirely (27%) or keep it but rarely watch (27%).

What sets them apart:
Together, they are the majority of CTV homes. Cord-cutters left recently and in numbers, and cutting rises as budgets tighten, so the behaviour is spreading down the affluence scale.

Why advertisers should care:
These households are unreachable, or barely reachable, on linear at any weight. They are the clearest proof as to why CTV is now a reach necessity.

How to reach them:
Shift the reach budget that linear can no longer deliver into CTV and use CTV to rebuild the frequency these homes have quietly removed from the linear plan.

Advertisers' takeaway

1. **Match the audience to the shift**
   Life-stage cohorts reward content alignment; value segments reward premium CTV concentration; behaviour segments reward moving linear reach into CTV.

2. **Reach decision-makers in context**
   Mothers and premium audiences deliver the buyer and the household in one shared, receptive setting.

Connected TV is emerging as a powerful bridge between television's immersive storytelling and digital media's audience precision. For two-wheeler brands, it builds high impact awareness while reaching distinct cohorts across markets. As the ecosystem matures, unified cross-screen measurement and stronger linkages between incremental reach and brand lift will make CTV integral to brand building and product launch planning.

Aashish Midha
Head of Marketing, India Business
Hero MotoCorp

BIG-SCREEN PLANNING ESSENTIALS

What this means for planning today

With the landscape of CTV changing significantly, we cannot go with a one-size-fits-all planning approach for CTV.

1 Urban audience planning

47% of urban TV households are CTV households, compared to 31% at all India level. Also, 68% of CTV households still consume linear TV.

Planning implication
CTV has to complement linear TV and become like another TV channel. For brands, it is important to look at Total TV reach which is a combination of LTV and CTV.

2 NCCS A/Premium audiences

More than half of NCCS A households are now CTV homes, and in these homes only 40% watch linear TV regularly.

Planning implication
CTV plan to become the base plan with specific shows on linear TV for incremental reach. Use affluence signals such as NCCS, device type (premium CTV brands), premium auto owners, credit card users, and international travel.

3 Cord-cutters or light linear TV viewers

32% of CTV audiences are cord-cutters or cord-nevers.

Planning implications
Design plans purely based on CTV with reach and frequency sufficiency as these audiences cannot be reached via linear TV.

4 Hyperlocal targeting

CTV campaign targeting can be done at various geo cuts including at pin code level.

Planning implications
1. Target specific towns/cities where new stores are to be launched.
2. Go granular using pin-code level targeting to build awareness and use catchment area promotions to drive footfalls/store visits.
3. Optimize inventory - increase media pressure in locations with higher stock inventory and activate localised discounts, bundles, limited period offers etc.

A perspective from WPP Media

India's CTV story will move from scale to intelligence. AI-led, interactive and shoppable formats will make CTV a full-funnel medium, connecting big-screen storytelling to search, enquiries, add to cart/store visits and purchases.

Targeting will evolve to cover not just geography and affluence, but privacy-safe signals such as household life stage, language, content preferences, and shopping behaviour—helping brands target relevant homes.

Household IDs will change how TV is planned. By connecting exposure across linear TV, CTV, and other screens to the same anonymous household, brands can measure reach, manage frequency, reduce repetition, find new homes and sequence communication from awareness to action.

Measurement—an area where the industry is seeking a common solution is also evolving. The industry is moving towards platform-agnostic, cross-screen frameworks that count genuine exposure and provide a consistent view of reach, frequency and outcomes. Together, these developments can give CTV broadcast-scale impact with clearer business accountability. This is the next phase of a market, at its inflection point.

Rajiv Rajagopal,
SVP, Head Advanced TV,
WPP Media

CTV has moved well beyond being an experimental extension of television; it is becoming a meaningful part of the consideration journey for brands. For a new-age mobility brand like VIDA, the ability to combine the immersive storytelling of the big screen with the precision of digital is particularly valuable. It allows us to communicate a new category, build familiarity and reach relevant audiences in a more contextual way

Kausalya Nandakumar
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Glossary

AVOD (Ad-supported video on demand)	Streaming video services that do not require subscription and are funded by advertising.
Cord-cutters	Households that have cancelled their cable or DTH connections for linear TV access.
Connected TV (CTV)	Connected TV, often referred to as simply CTV, is television programming that is consumed on a television set and delivered through the internet. Ads can be served before content or during traditional commercial breaks.
FAST (Free ad-supported television)	Streaming services that are free to the consumer and ad supported. FAST platforms offer a combination of linear and on-demand programming.
GEC	General Entertainment Channel
Linear TV	Linear TV is viewed via a cable, satellite, or traditional TV antenna.
NCCS	New Consumer Classification System. Used to classify Indian consumers by a range of criteria including income, education, and more.
OTT (Over-the-top television)	OTT is a broader term used to describe digital video streamed on any device — desktop, mobile, and, yes, a television set. CTV is a subset of OTT.
Premium CTV viewers	The top 15% of urban CTV audiences are classified as premium, based on their spending propensity on a wide array of products and services.
SVOD (Subscription video on demand)	Streaming services that require a monthly subscription to view their content.

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