

# WHO'S WATCHING? CTV Audience Personas in India



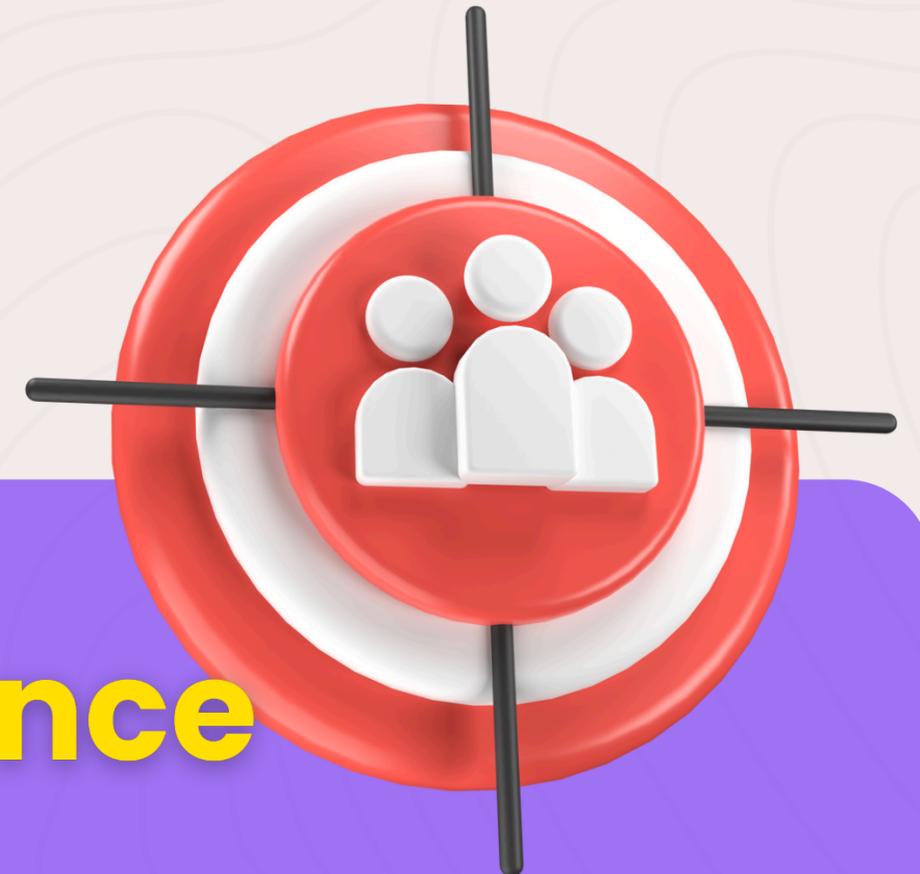
Discover the real people behind India's  
Connected TV boom

**Presented by: The Media Ant**

# Why Should Marketers Care About CTV Audiences?

**CTV households**  
**80M+** = **Viewers**  
**200–250M**

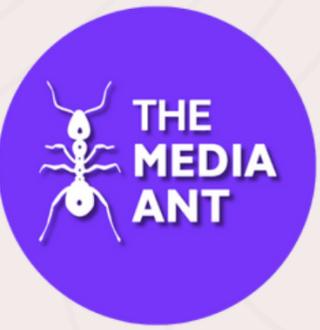
- India's TV habits are shifting from passive to personalized
- Understanding who is watching helps tailor campaigns for better ROI



**CTV isn't just reach—it's relevance**

# CTV IN INDIA

## -The Big Picture



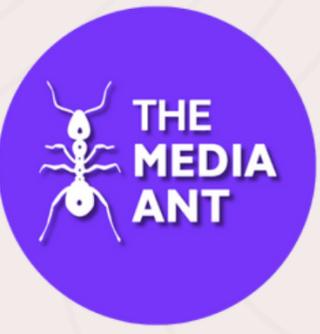
METRIC	VALUE	SOURCE
CTV Households (2025)	80 Million+	EY-FICCI 2024
CTV Viewers (Estimated)	200–250 Million	Techarc, MPA
Growth Rate	25–30% YoY since 2021	BCG
Projected by 2027	130–150 Million HHs	ICRA, BCG
Urban Share	60%	BCG
Tier 2/3 Growth	2x Urban Growth	EY, MPA
Top States	MH, TN, WB, KA, GJ, NCR	MiQ, The Media Ant
NCCS A/B Viewership Share	60%	EY, BCG

# THE OPPORTUNITY

## CTV = Premium, Intent-Driven Audiences

- Nearly half of premium TV households now watch on CTV.
- Skews toward affluent, digitally active users.
- Ideal for performance-led branding.





# PERSONA 1

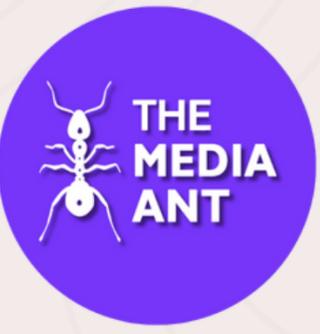
## Urban Power Watchers

- Where: **Metros**
- Size: **60M**
- Income: **₹12–30L/year**
- Devices: **Smart TVs, Fire TV, Chromecast**
- Platforms: **YouTube CTV, Hotstar, Netflix**
- Behavior: **Affluent, device-hopping, ad-engaged**
- Ad Strategy: **Mastheads, cross-device retargeting**
- Ideal Brands: **Samsung, L'Oréal, CRED**

SMART TV  

 YouTube  

SAMSUNG L'ORÉAL  CRED

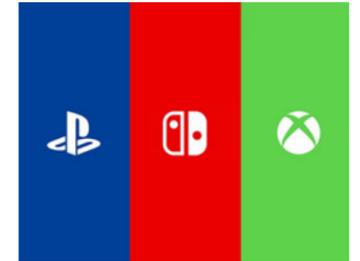


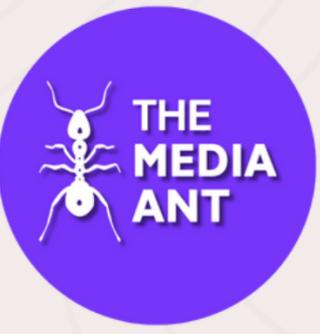
# PERSONA 2

## Gen Z & Young Influencers

- Where: **Urban & college towns**
- Size: **40M**
- Devices: **Gaming consoles, Smart TVs**
- Platforms: **YouTube Shorts, Twitch, Prime**
- Behavior: **Gaming, QR usage, pop culture fans**
- Ad Strategy: **QR ads, influencer tie-ins**
- Ideal Brands: **Oreo, boAt, Dream11**

SMART TV





# PERSONA 3

## Family-Led Bharat Viewers

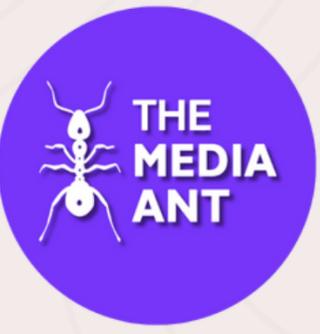
- Where: **Tier 2/3 towns**
- Size: **80M**
- Income: **₹4–10L/year**
- Devices: **Budget Smart TVs, Jio STB**
- Platforms: **JioCinema, Zee5, YouTube Regional**
- Behavior: **Co-viewing, cricket & drama fans**
- Ad Strategy: **Vernacular, long-format AVOD**
- Ideal Brands: **LIC, Patanjali, Dabur**

SMART TV



PATANJALI





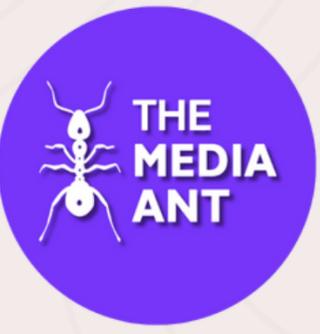
# PERSONA 4

## Premium Streamers

- Where: **Top metros**
- Size: **20M**
- Income: **₹25L+**
- Devices: **High-end Smart TVs**
- Platforms: **Netflix, Prime, Hotstar**
- Behavior: **Subscription-first, brand-sensitive**
- Ad Strategy: **Branded content, pause ads**
- Ideal Brands: **Audi, Zomato Gold, Urban Company**

SMART TV

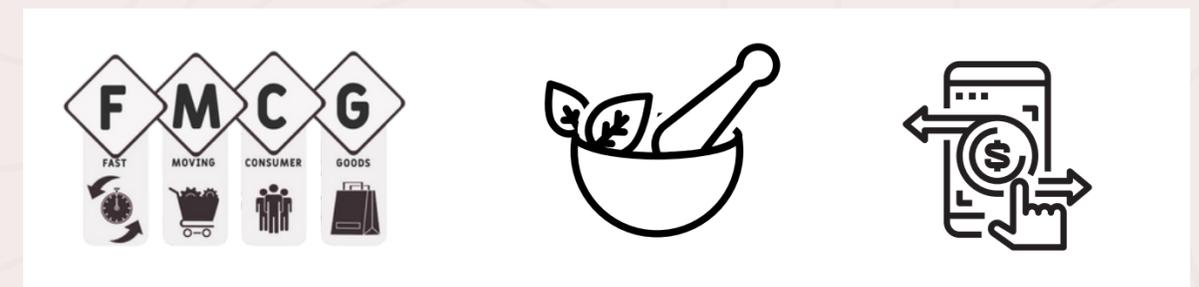


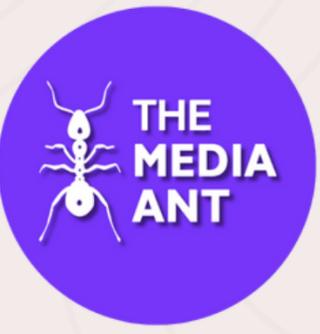


# PERSONA 5

## Regional Language Loyalists Streamers

- Where: **TN, AP, WB, UP, Bihar, Gujarat**
- Size: **30M**
- Income: **₹3–8L/year**
- Platforms: **Samsung TV+, YouTube Regional**
- Behavior: **Free-first, local cinema, devotional**
- Ad Strategy: **Zip-code targeting, ACR-based delivery**
- Ideal Brands: **FMCG, Ayurvedic, Local Fintech**



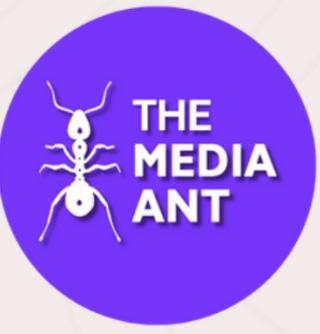


# PERSONA 6

## Senior SmartViewers

- Where: **Urban middle class**
- Size: **15M**
- Income: **₹2–6L/year (pensioners)**
- Platforms: **Devotional YouTube, FAST channels**
- Behavior: **High attention, news & mythology fans**
- Ad Strategy: **Large-font visuals, voice-first storytelling**
- Ideal Brands: **Health insurance, Ayurveda, Legacy brands**

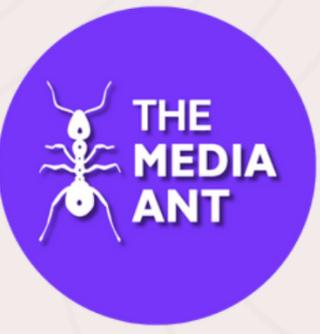




# WHY THIS MATTERS

## Smart Planning Begins with Smart Personas

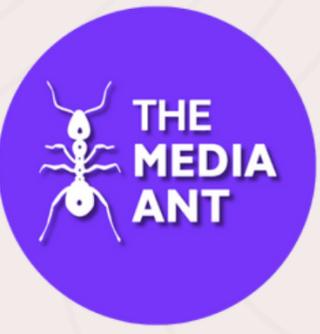
- **No more guessing:** These audience cohorts help you plan CTV media with confidence
- **Use them to:**
  - Select the **right platform**
  - Choose **formats** based on behavior
  - Allocate budget by geography & screen habits



# START YOUR CAMPAIGN WITH CONFIDENCE

## The Media Ant: Your Partner in CTV Planning

- Access real CTV media costs & inventories
- Use our planning tool to match audience to formats
- End-to-end campaign execution with proof of delivery
-  Visit [www.TheMediaAnt.com](https://www.TheMediaAnt.com)



# Disclaimer

**The audience personas are derived from:**

- EY-FICCI M&E 2024
- Techarc 2024
- BCG India TV Report
- MPA India Video Report
- Internal Media Ant insights

**Note: These personas serve as directional planning tools, not fixed classifications.**



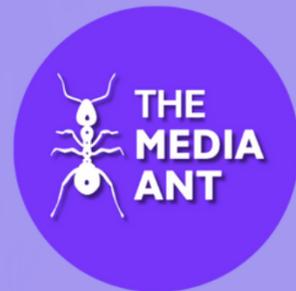
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[ad@themediaant.com](mailto:ad@themediaant.com)



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