

REWINDING Y 2022 FOR ADVERTISING IN **GEC** GENRE



SOURCE: AdEx India, A Division of TAM Media Research

Highlights : GEC

01

29% rise in Y 2022 compared to Y 2018. When compared to Y 2021, the growth is 2% in Y 2022;

02

Food & Beverages sector topped with 28% share of GEC genre's Ad Volumes; 'Durables' entered the Top 10 list of Y 2022.

03

Toilet Soaps category topped in Y 2022 with 6% share of Ad Volumes; Biscuits and Aerated Soft Drinks were the new entrants among the Top 10.

04

Mosquito Repellents saw highest increase in Ad secondages (2.5 times), followed by Biscuits during Y 2022 compared to Y 2021.

05

HUL was the top advertiser in Y 2022; Coca-Cola India and Procter & Gamble Home Products were the new entrants among the Top 10 in Y 2022.

06

800+ exclusive advertisers in GEC genre; Ullu Digital was the top exclusive^ advertiser in GEC genre followed by Mangalam Matrimony.com

07

Dettol Antiseptic Liquid was the top brand followed by Harpic Power Plus 10x Max Clean; 5600+ brands advertised on GEC genre.

08

Prime Time, the most preferred time-band on GEC channel genre among other time-bands.

09

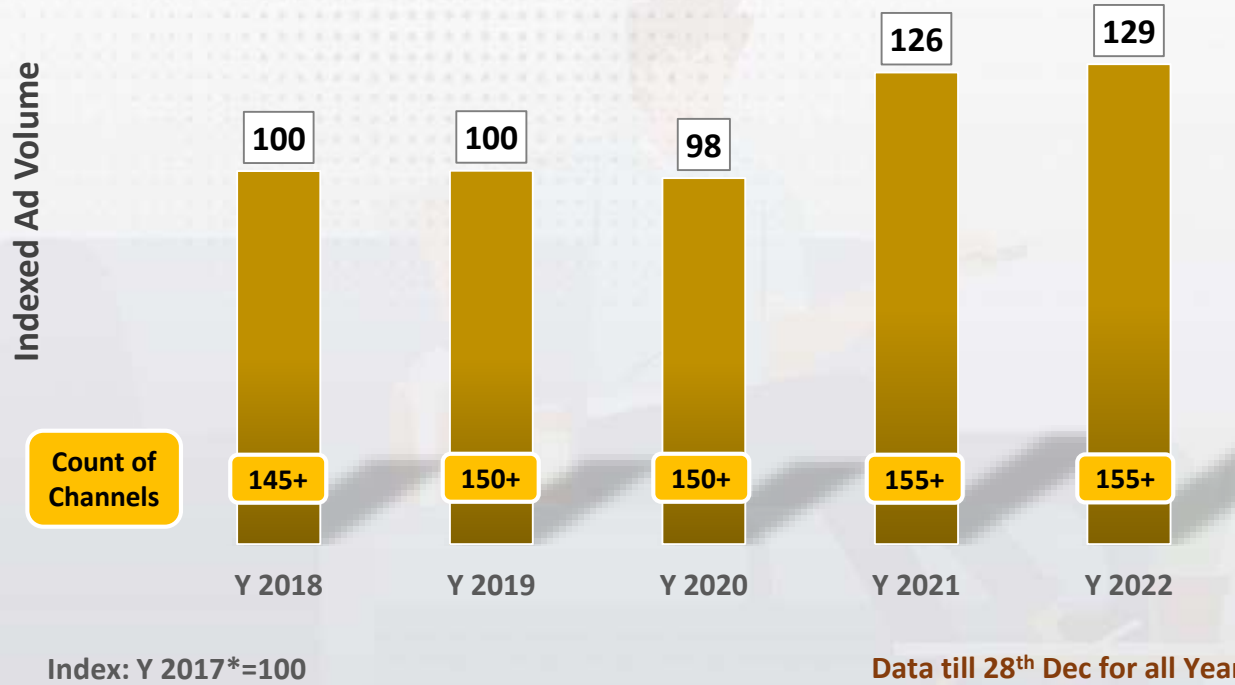
Ad Commercials of 20-40 seconds were most preferred for advertising on GEC channels in Y 2022.

10

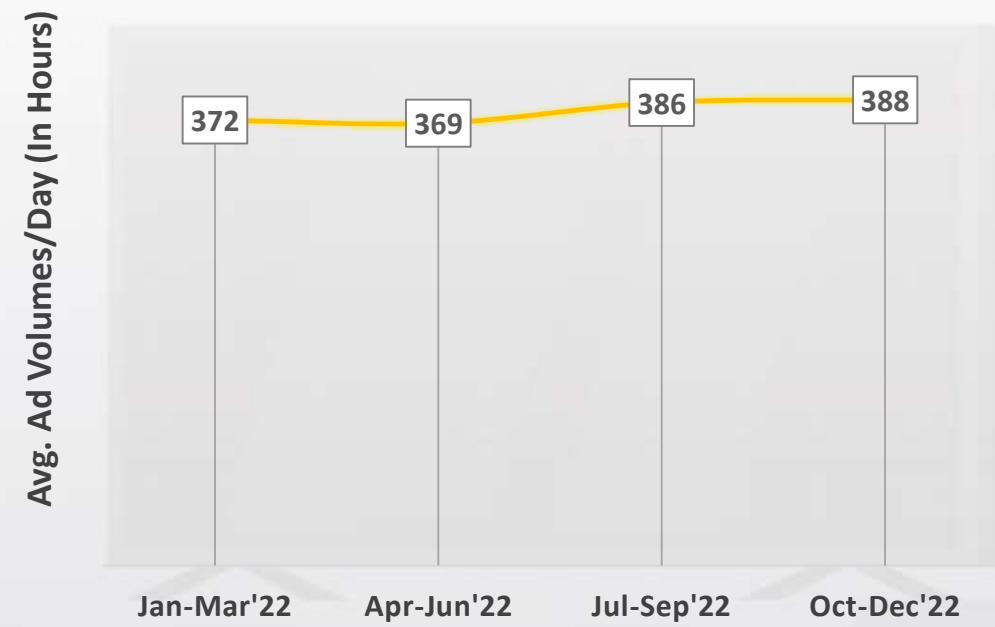
Share for <20 sec GEC ads rose by 5% in Y 2022 over Y 2021.

Trends in Ad Volumes of GEC Genre: 29% rise in Y 2022 compared to Y 2018

Indexed Growth in GEC : Y 2019-22 over Y 2018

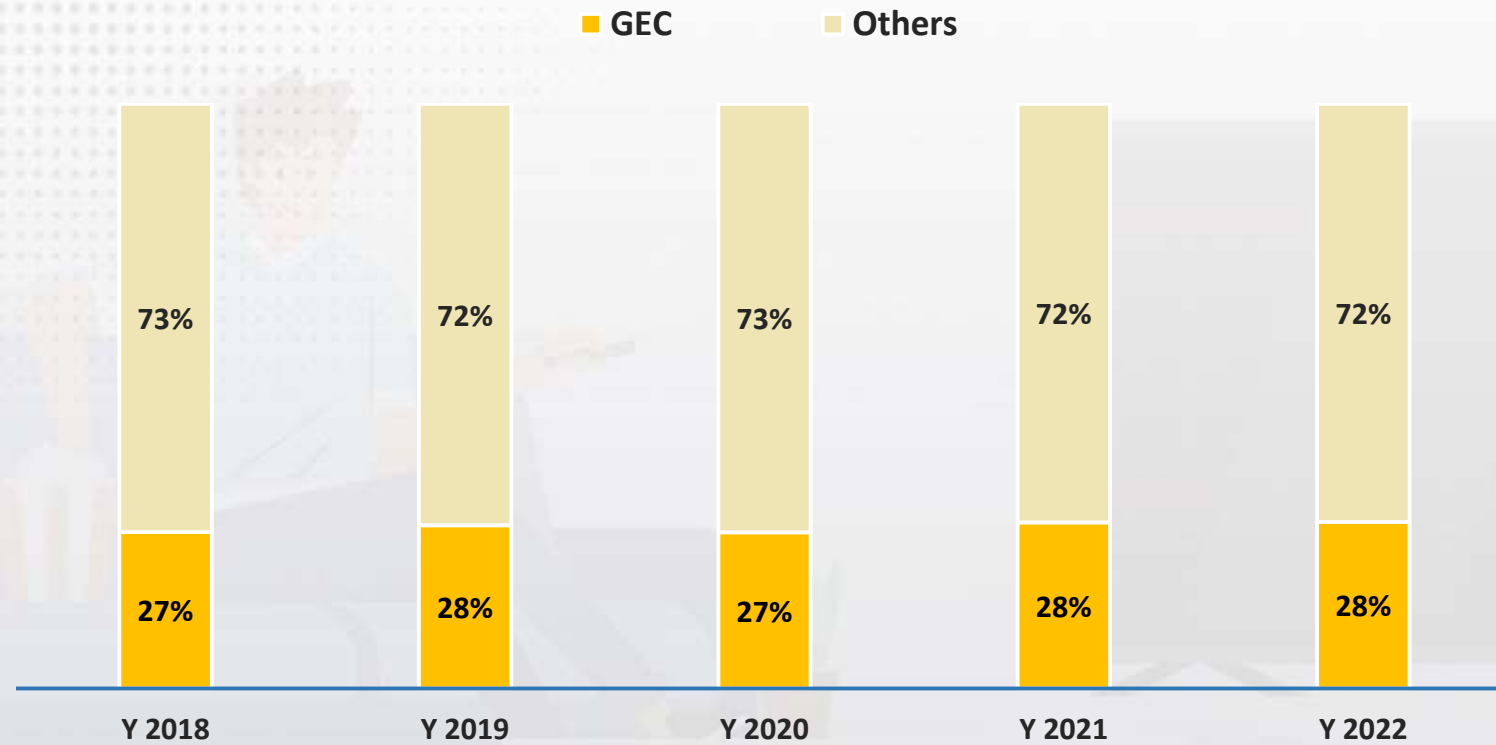


Quarterly Trends in GEC : Y 2022



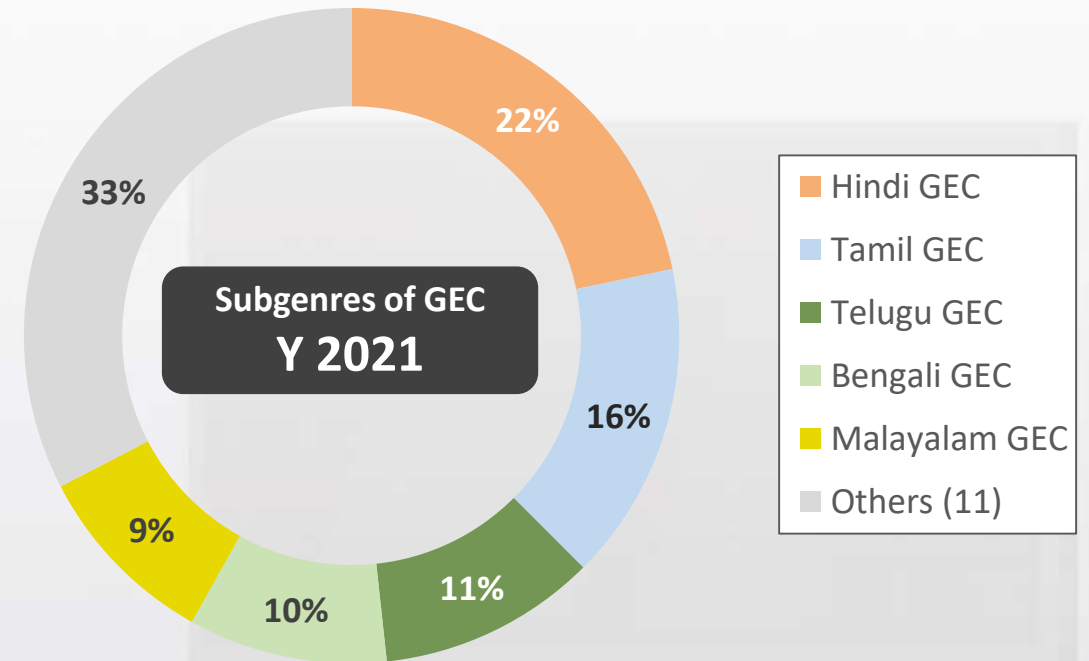
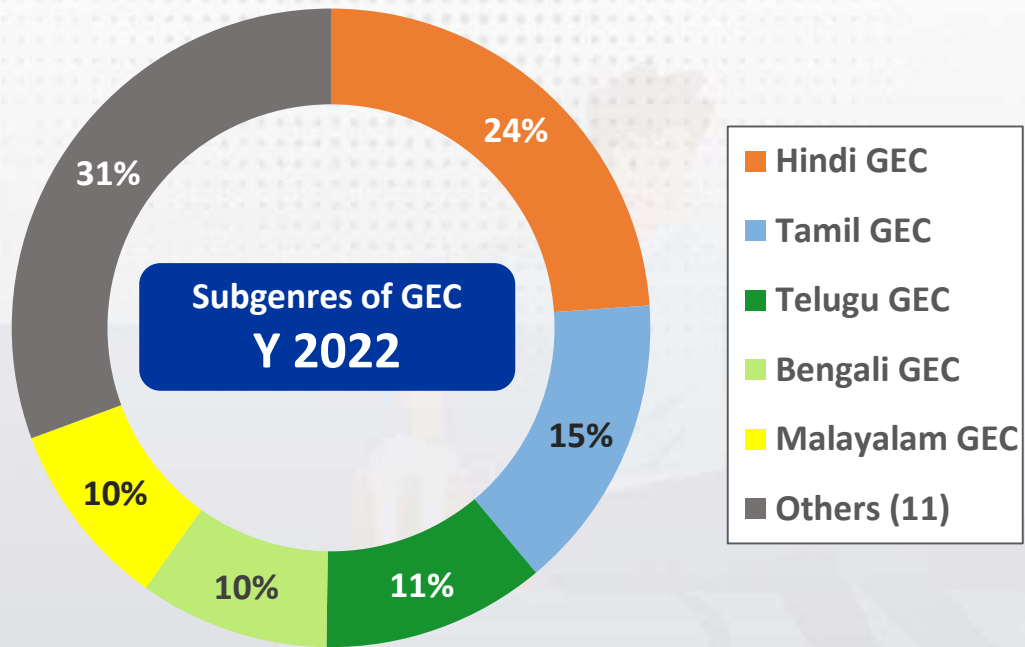
- Compared to Y 2021, 2% growth in Y 2022 for GEC advertising.
- Y 2022 had the highest ad volumes since Y 2018.
- Third and fourth quarters of Year 2022 saw more ad volumes than the first and second.

GEC share in TV Advertising: Stable GEC share in Y 2022 over Y 2021



- Y 2022 saw highest **GEC** share (**28.5%**) of overall TV Ad Volumes since Y 2018.

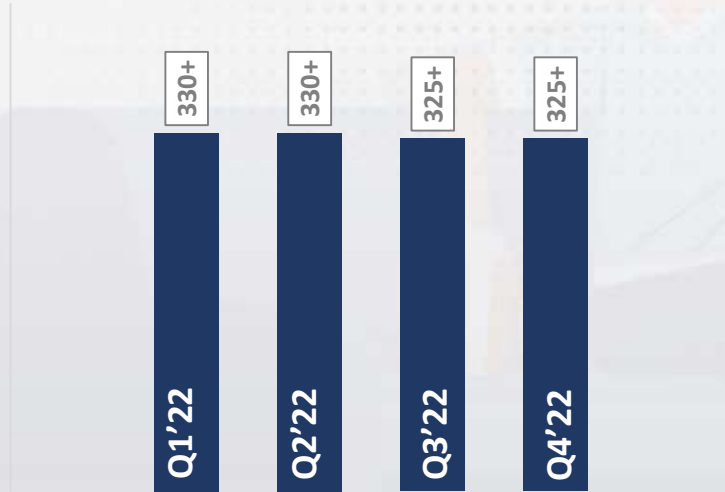
Top 5 Subgenres of GEC: No change in Top 5 subgenres compared to Y 2021



- During both Y 2022-21, **Hindi GEC** topped with more than **20%** share of **GEC channel genre's** Ad Volumes.
- Top 5 subgenres accounted around **69%** share of Ad Volumes during Y 2022.

Tally of Categories, Advertisers and Brands in GEC Genre – Quarter wise

Count of Categories



Count of Advertisers



Count of Brands



- Count of Categories and Advertisers on GEC genre dropped in Q3-Q4'22 over Q2'22 whereas count of Brands peaked in Q3'22.

Leading Sectors: 'Durables' entered the Top 10 list of Y 2022

Rank	Top 10 Sectors – Y 2022	% Share	Rank in Y 2021
1	Food & Beverages	28%	1
2	Personal Care/Personal Hygiene	20%	2
3	Household Products	9%	5
4	Services	8%	3
5	Personal Healthcare	8%	6
6	Hair Care	8%	4
7	Laundry	6%	7
8	Building, Industrial & Land Materials/Equipments	2%	8
9	Personal Accessories	1%	10
10	Durables	1%	11
	<i>Others</i>	8%	

- **Food & Beverages** sector topped with **28%** share of **GEC** genre's Ad Volumes followed by **Personal Care/Personal Hygiene** with **20%** share.
- Sectors at Rank 3, 5 and 9 observed positive rank shift in Y 2022 compared to Y 2021.

Leading Categories : Toilet Soaps (6%) led the GEC genre in Y 2022

Rank	Top 10 Categories in Y 2022 (Total 398)	% Share	Rank in Y 2021
1	Toilet Soaps	6%	2
2	Milk Beverages	5%	1
3	Toilet/Floor Cleaners	4%	6
4	Washing Powders/Liquids	4%	4
5	Shampoos	4%	3
6	Tooth Pastes	4%	5
7	Chocolates	3%	9
8	Tea	3%	8
9	Biscuits	3%	11
10	Aerated Soft Drink	2%	13
Next 40 Categories		42%	

- **Biscuits** and **Aerated Soft Drinks** were the new entrants among the Top 10 categories.
- **Toilet Soaps**, **Toilet/Floor Cleaners** and **Chocolates** saw positive rank shift.
- Top 10 categories added **37%** share of **GEC** genre's Ad Volumes.

Top Growing Categories in GEC : 180+ Categories registered Positive Growth

Rank	Top Growing Categories (Y2022 vs. Y2021) (based on highest increase in Ad Volumes)	Growth
1	Mosquito Repellents	2.5 Times
2	Biscuits	45%
3	Aerated Soft Drink	48%
4	Antiseptic Creams/Liquids	90%
5	Non Aerated Soft Drink	2.1 Times
6	Ecom-Wallets	2.5 Times
7	Hair Dyes	39%
8	Air Fresheners	2.8 Times
9	Toilet Soaps	6%
10	Chocolates	12%

- **Mosquito Repellents** saw highest increase in Ad secondages, followed by **Biscuits** during Y 2022 compared to Y 2021.
- **4** out of top 10 growing categories belonged to **F&B** sector.

Leading Advertisers: FMCG Players reign the Top 10 list

Top GEC Advertisers (Y 2022) [Total 2.8 K+]		Rank (Y 2021)
1.	Hindustan Unilever	1
2.	Reckitt Benckiser India	2
3.	Brooke Bond Lipton India	3
4.	Godrej Consumer Products	8
5.	Cadburys India	5
6.	Ponds India	4
7.	Coca Cola India	18
8.	ITC	6
9.	Procter & Gamble	7
10.	Procter & Gamble Home Products	15

Top 10 Advertisers contributed 53% share of GEC genre's Ad Volumes

- **HUL, Reckitt Benckiser and Brooke Bond Lipton India** remained at Top 3 positions during both Y 2021-22.
- **Coca-Cola India and Procter & Gamble Home Products** were the new entrants among the Top 10 in Y 2022.
- **Godrej Consumer Products** saw positive rank shift.
- Top 100 advertisers accounted for **86%** share of overall **GEC** genre advertising.

Exclusive^ Advertisers in GEC- Y 2022 : 800+ exclusive advertisers in GEC genre

Rank	Top Exclusive^ Advertisers (GEC) [Total 800+]
1	Ullu Digital
2	Mangalam Matrimony.com
3	Timelesstoday
4	Makkal Tholai Thodarpu Kuzhumam
5	Amrita Enterprises
6	Raja Siddha Hospital
7	Virtual Bharat
8	Royal Enterprises
9	Wyndham Hotels And Resorts
10	Telecart.com

^ Present in GEC genre but not in Other genres

- **Ullu Digital** was the top exclusive^ advertiser in **GEC** genre followed by **Mangalam Matrimony.com**.

Leading Exclusive^ Advertisers Y 2022 : 1.2K+ exclusive Advertisers

Rank	Top Exclusive Advertisers (Y 2022) [Total 1.2K+]
1	Super Market Grocery Supplies
2	Life Insurance Council
3	Ullu Digital
4	St Botanica Beauty
5	Prag Film And Television Institute
6	Alphavector India
7	Waycool Foods & Products
8	Sahyadri Bio Labs
9	Lakshya Indian Institute of Commerce
10	Cashgrail

^ Present in Y 2022 but not in Y 2021 in GEC genre

- Super Market Grocery Supplies was the top exclusive^ advertiser during Y 2022 compared to Y 2021.

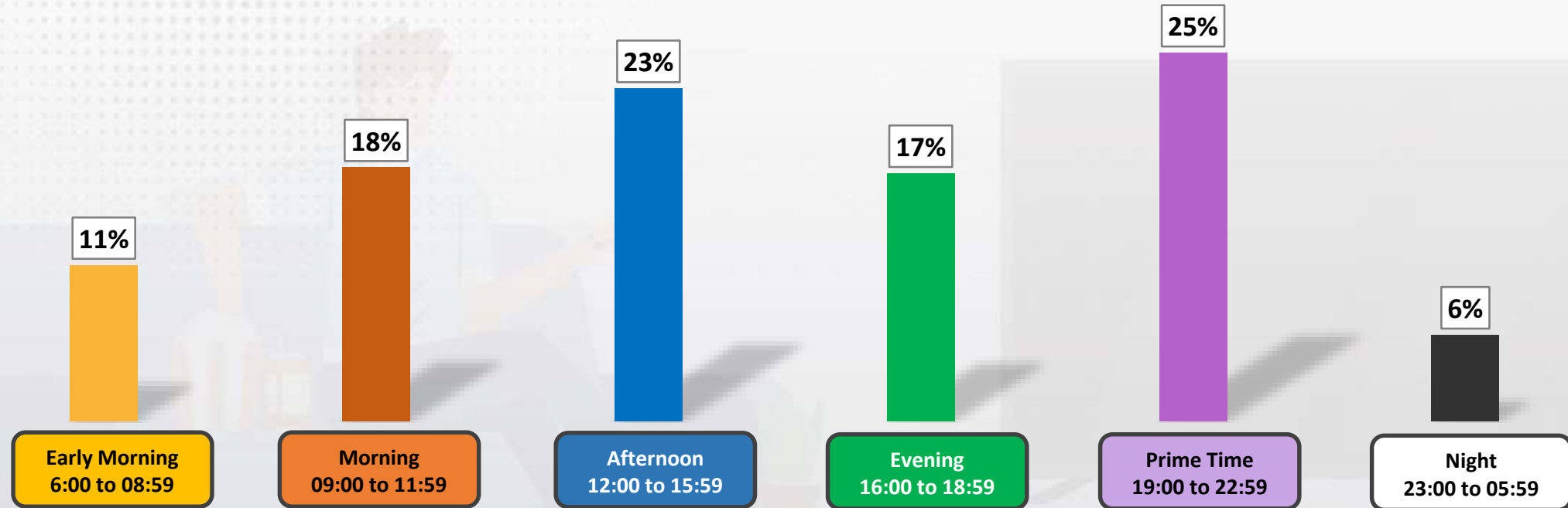
Leading Brands in Y 2022: 5600+ brands advertised on GEC genre

Rank	Top Brands (Y2022) [Total 5.6K+]
1	Dettol Antiseptic Liquid
2	Harpic Power Plus 10x Max Clean
3	Lizol All In 1
4	Dettol Toilet Soaps
5	Horlicks
6	Close Up Ever Fresh
7	Clinic Plus Shampoo
8	Glow & Lovely Advanced Multivitamin
9	Surf Excel Easy Wash
10	Harpic Bathroom Cleaner

Top 10 Brands contributed
11% share of **GEC Ad Volumes**

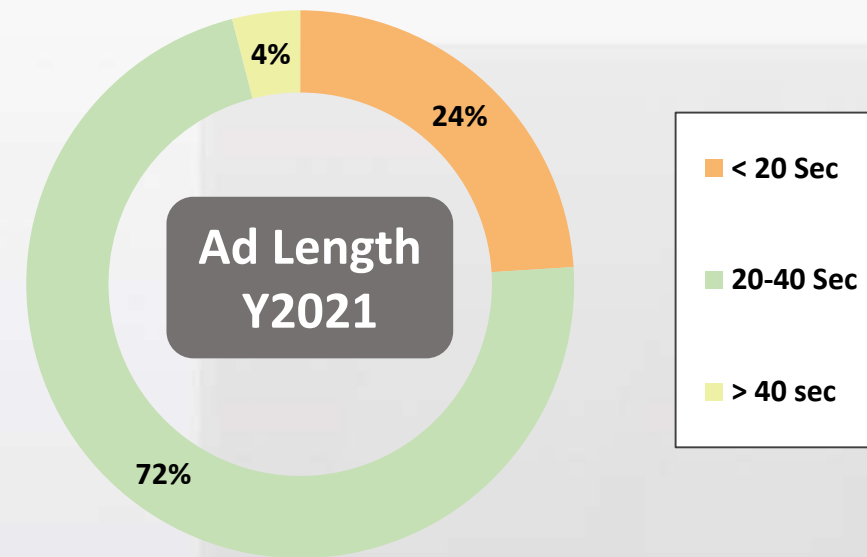
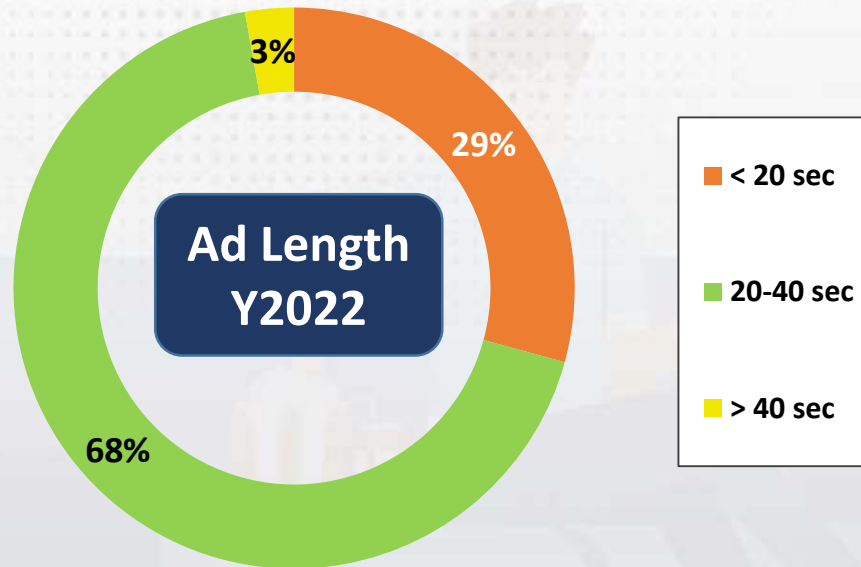
- **Dettol Antiseptic Liquid** was the top brand followed by **Harpic Power Plus 10x Max Clean**.
- **Top 4** brands were from **Reckitt Benckiser (India)**.

Advertising share by Time Bands in GEC Genre



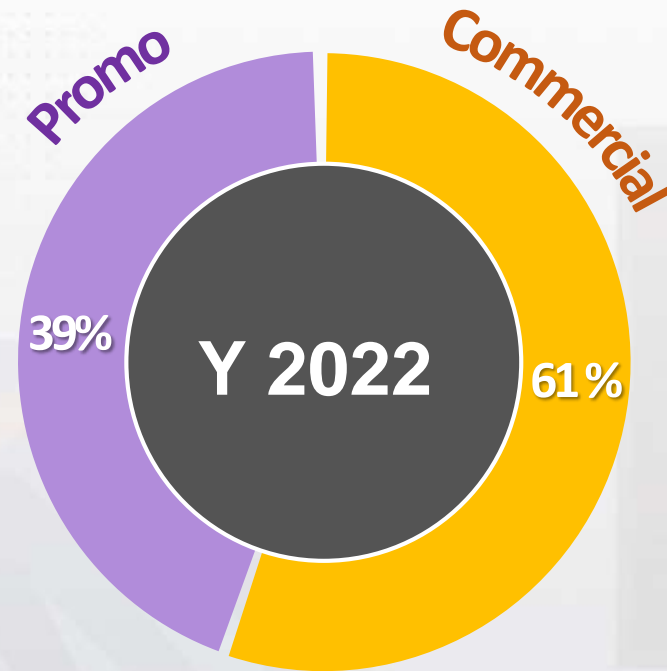
- **Prime Time** was the most preferred time-band on **GEC** genre followed by **Afternoon** and **Morning** time-bands.
- **Prime Time, Afternoon & Morning** time bands together added more than **60%** share of ad volumes.

Ad Size in the GEC Genre : Y 2022 and Y 2021



- Share for <20 sec GEC ads rose by 5% in Y 2022 over Y 2021.
- Ad Commercials of 20-40 seconds were most preferred for advertising on GEC channels during both the years. However, their share decreased by 4% in Y 2022 over Y 2021.

Promotion vs. Commercial Ads in GEC Genre



- **Commercial** advertising added **61%** share of Ad Volumes whereas **Promos** had **39%** share in Y 2022 on GEC genre.

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