

# + REWINDING Y 2022 FOR ADVERTISING IN MOVIE GENRE



SOURCE: ADEX INDIA - A DIVISION OF TAM MEDIA RESEARCH

# Highlights

01

In Y 2022, 22% indexed growth observed on Movie genre compared to Y 2019 and 13% growth compared to Y 2020

02

HUL, Reckitt Benckiser, Cadbury India, and Ponds India all kept their rankings in both 2021 and 2022.

03

Hindi movies dominated the Ad Volumes for the Movie genre in both of the years 2022–2021 with a share of more than 40%.

04

The count of advertisers and brands in the movie genre descended in Q4'22 compared to other 3 quarters of Y 2022.

05

The Top 7 sectors retained their ranks in Y 2021-22 with F&B and Personal Care/Personal Hygiene sector contributing 45% share of Ad Volumes in Movie Genre.

06

Toilet Soaps category led the Movie genre with 6% share of ad volumes in Y 2022.

07

3 out of Top 10 growing categories belonged to F&B sector.

08

480+ advertisers & 1.4K+ brands exclusively advertised during Y 2022 compared to Y 2021.

09

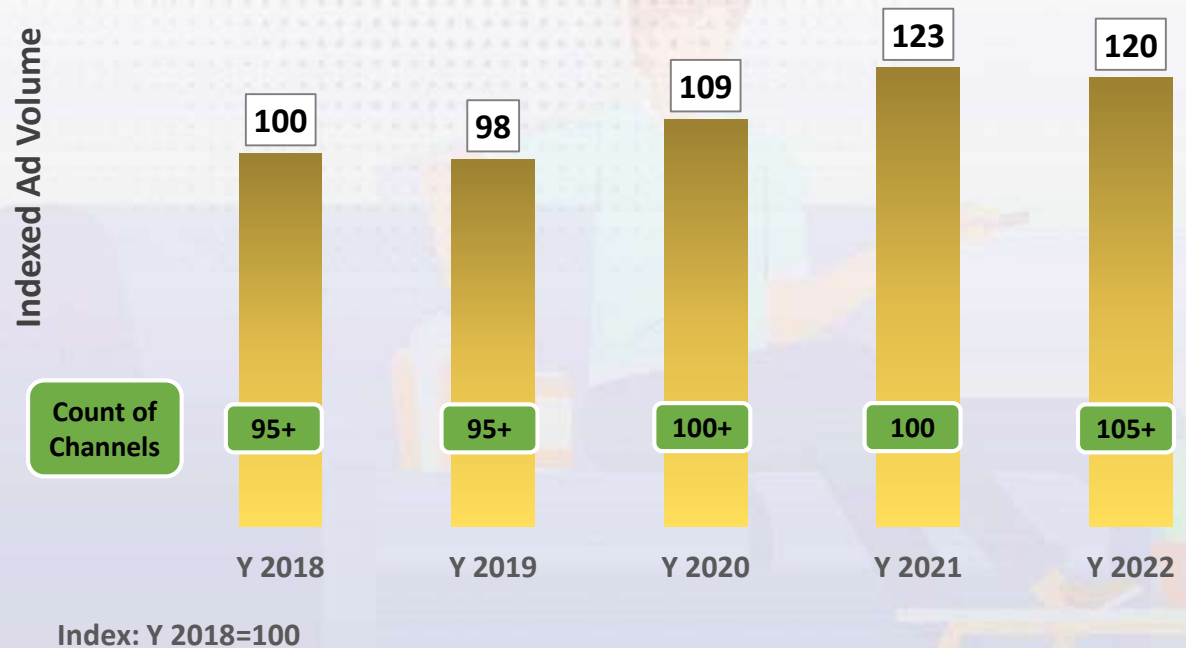
Regional and National Movie channels had 55% and 45% share of Ad Volumes respectively in Movies genre during Y 2022.

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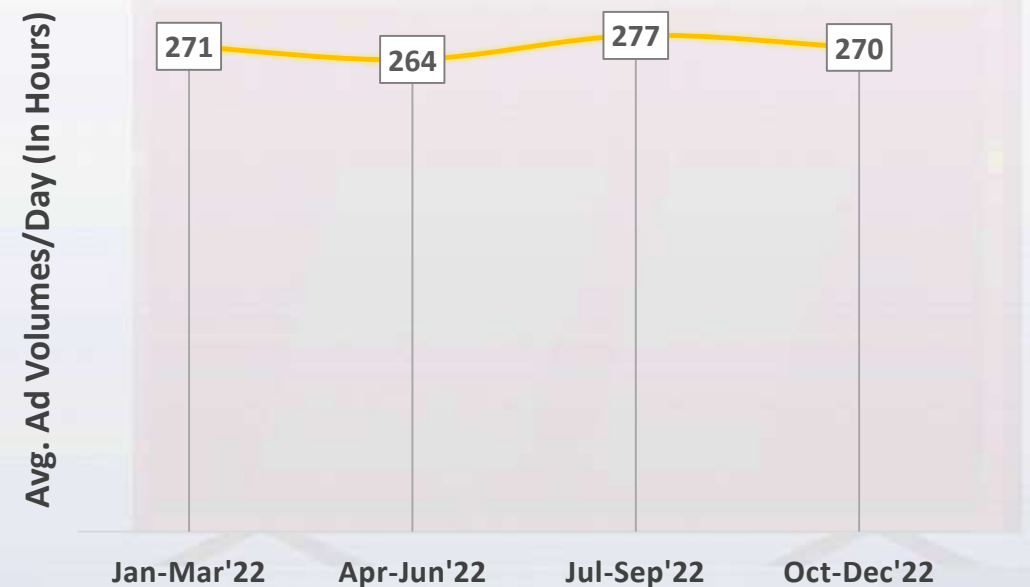
In Y 2022 & 2021, 20-40 sec ads in Movie genre had more than half of pie the ad volumes share.

# Trends in Ad Volumes of Movie Genre: 20% rise in Y 2022 as compared to Y 2018

### Indexed Growth in Movies : Y 2019-22 over Y 2018



### Quarterly Trends in Movies : Y 2022



- In Y 2021, **23%** indexed growth observed in **Movie** genre as compared to Y 2018 and **13%** growth as compared to Y 2020.
- Highest Ad Volumes observed in **Jul-Sep'22** among all the quarters of Y 2022.
- Jul-Sep'22 registered a rise of **5%** in ad volumes in **Movie** Genre as compared to Apr-Jun'22.

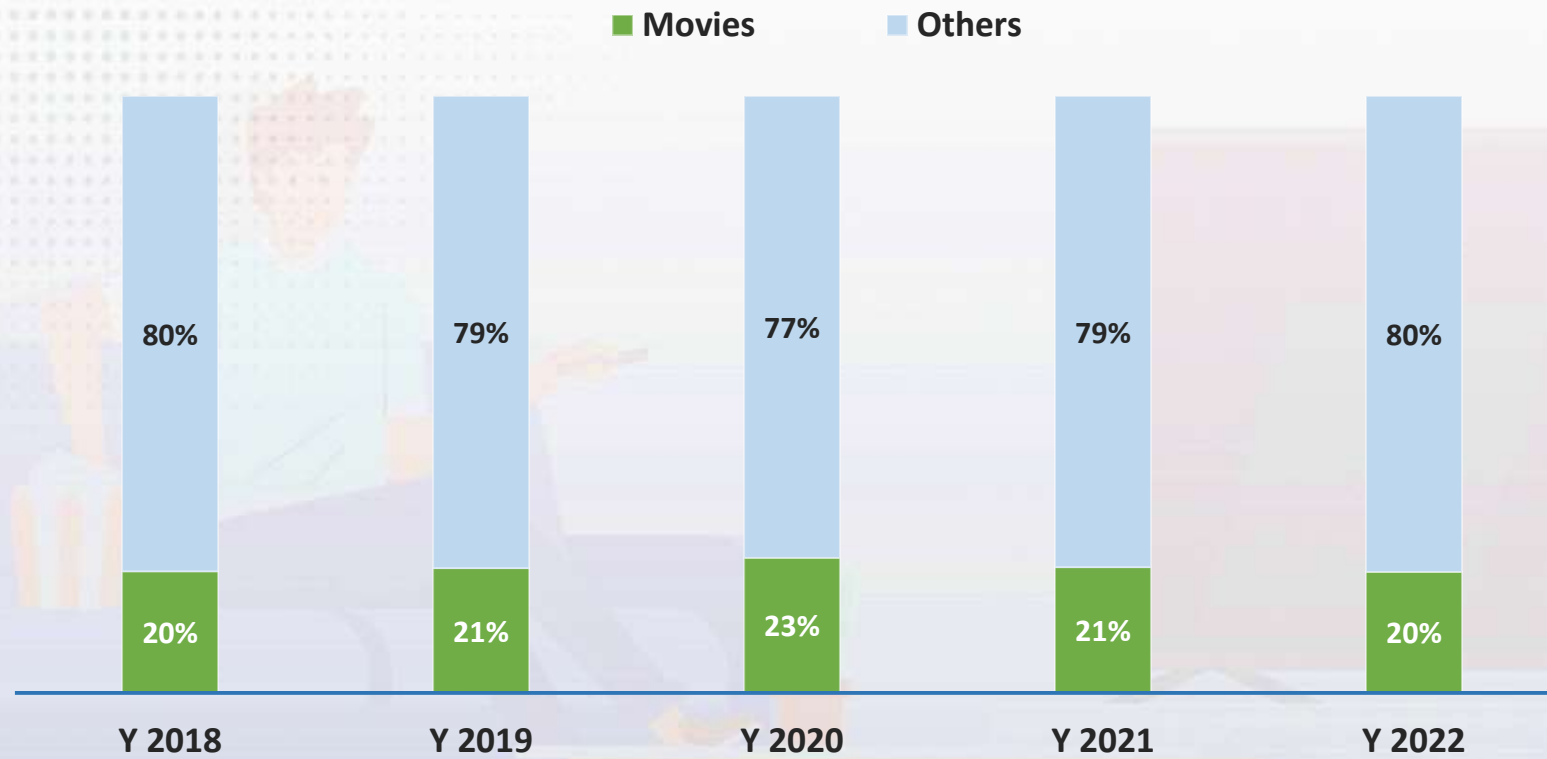
# Monthly Share of Avg. Ad Volumes/Day: Y 2022



- Feb'22 registered lowest share of Ad Volumes in Movie genre i.e. 7.73 %.
- Oct'22 registered highest Ad Volumes in Movie genre.

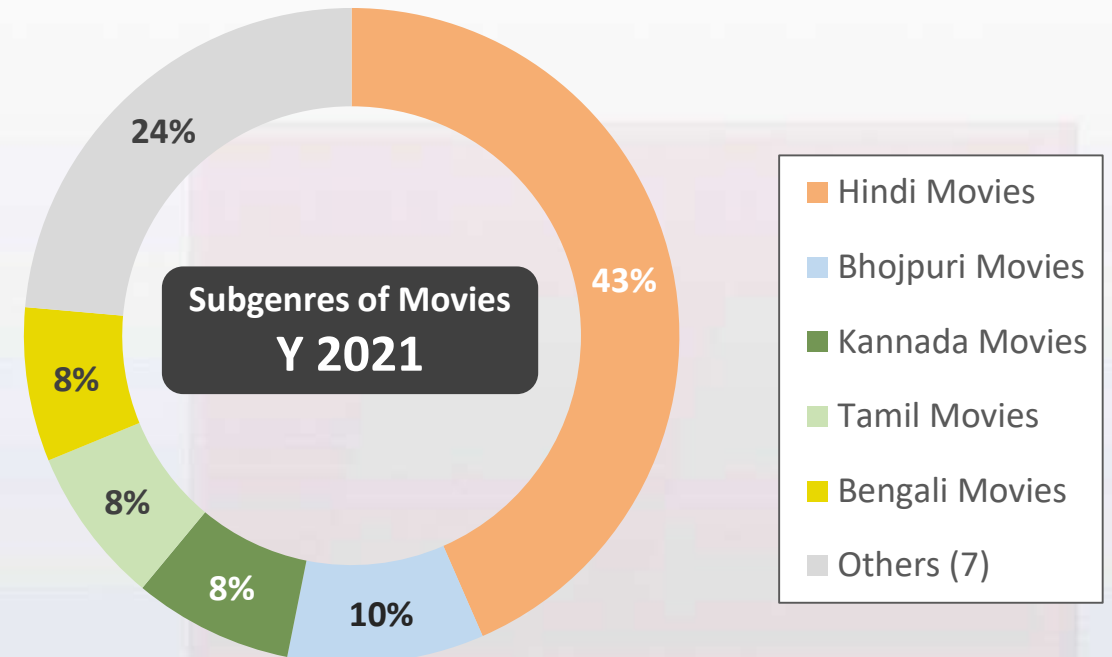
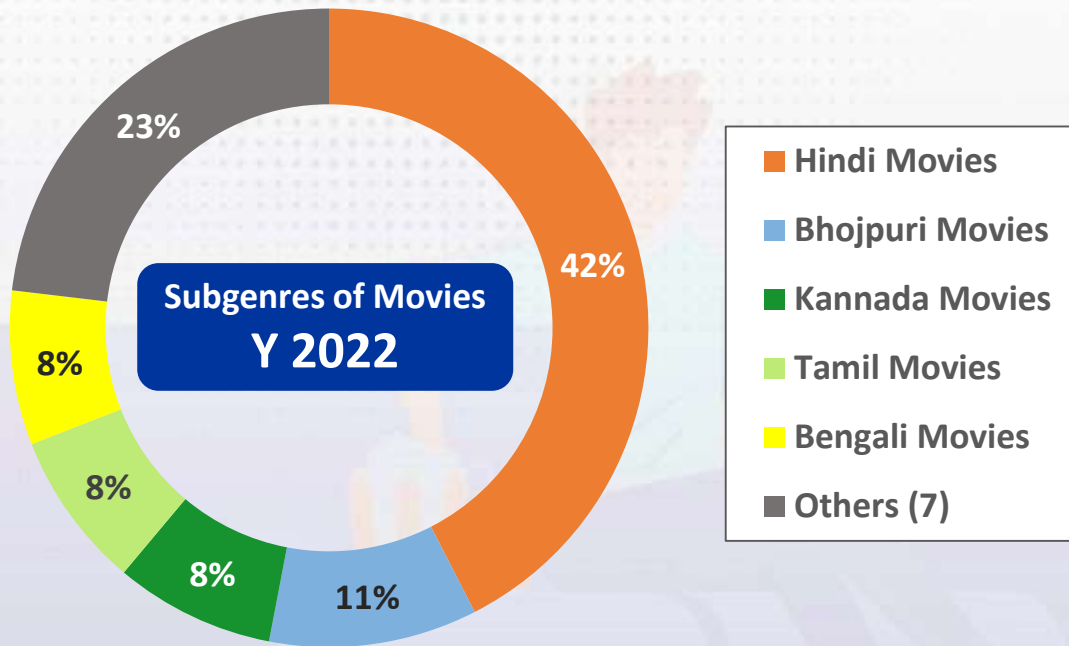


# Share of the Movie Genre in overall TV Advertising: Y 2018-22



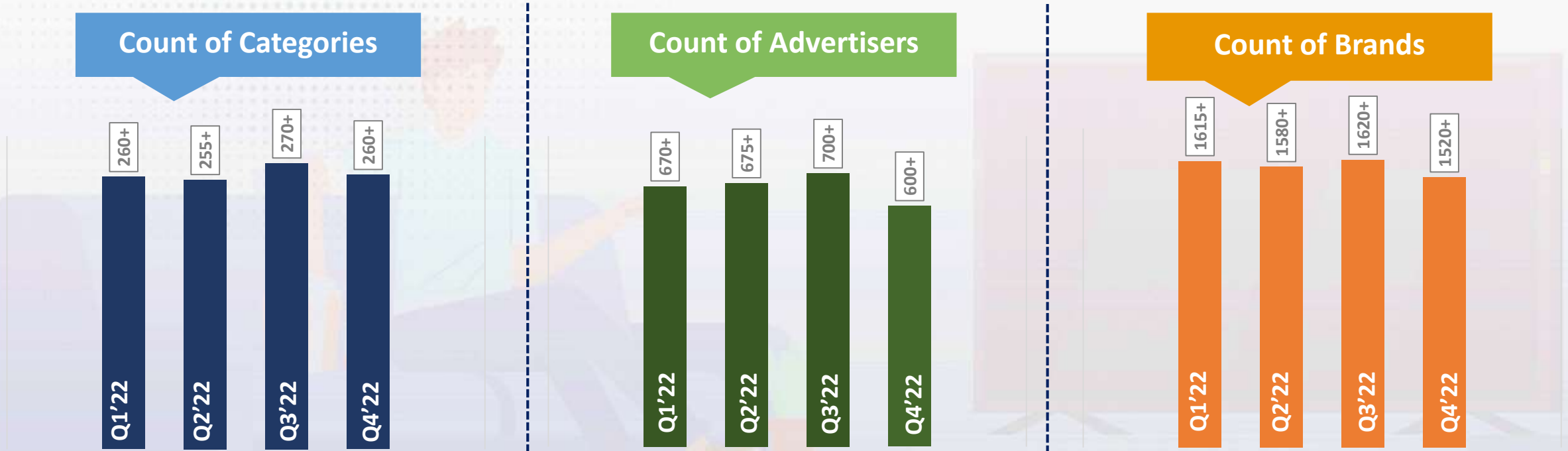
- Y 2020 has the highest share of Ad Volumes i.e. 23% as there was no new content being created during Covid-19.
- The ratio of ad volume share for Movie genre among all the other genre in Y 2022 was similar to Y 2018.

## Top 5 Sub-genres of Movies Genre



- Hindi movies dominated the ad volumes in 2022 and 2021 with a share of more than 40%.
- All the Top 5 subgenres retained their respective ranks in Y 2022 over Y 2021.

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



- The count of advertisers and brands in the movie genre descended in Q4'22 compared to other quarters of Y 2022.

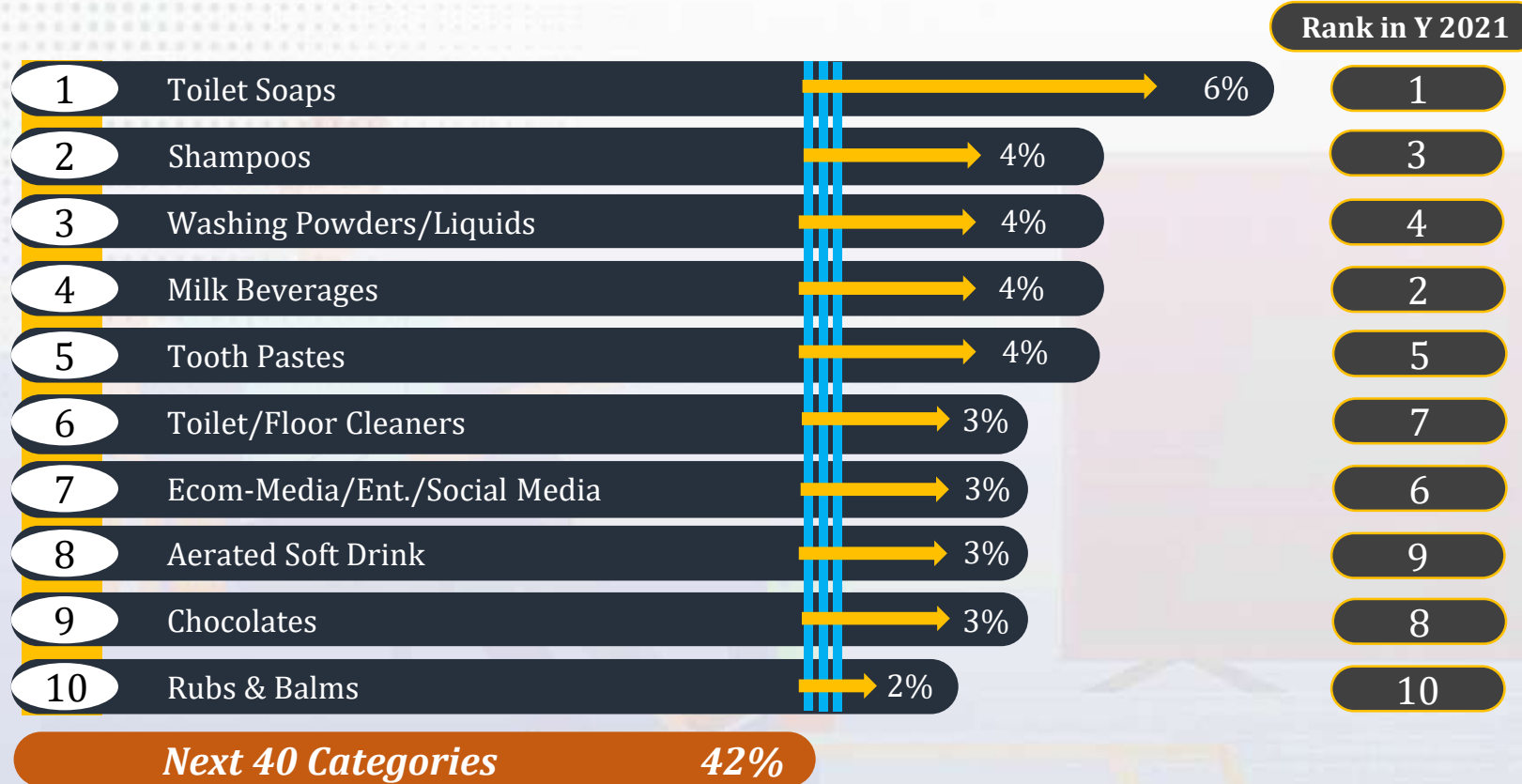
# Leading Sectors: 'Food & Beverages' topped with 24% share of Movie Genre's ad volumes

Rank	Top Sectors – Y 2022	% Share	Rank in Y 2021
1	Food & Beverages	24%	1
2	Personal Care/Personal Hygiene	21%	2
3	Services	11%	3
4	Personal Healthcare	9%	4
5	Hair Care	7%	5
6	Household Products	7%	6
7	Laundry	5%	7
8	Building, Industrial & Land Materials/Equipments	2%	9
9	Auto	2%	8
10	Personal Accessories	2%	10
	<i>Others</i>	9%	

- The top 7 sectors retained their positions for the years 2022 and 2021, with the **F&B** and **Personal Care/Personal Hygiene** sectors accounting for **45%** of the ad volumes for **Movies** by genre.



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



- Top 10 categories added **36%** share of **Movies** genre's Ad Volumes.
- **Toilet Soaps** retained their 1<sup>st</sup> rank in Y 2022.

# Top Growing Categories : 130+ Categories registered Positive Growth on Movie genre

Rank	Top Growing Categories (Y2022 vs. Y2021) (based on highest increase in Ad Volumes)	Growth
1	Mosquito Repellents	126%
2	Ecom-Wallets	122%
3	Antiseptic Creams/Liquids	62%
4	Aerated Soft Drink	25%
5	Non Aerated Soft Drink	103%
6	Face Wash	25%
7	Footwear	157%
8	Biscuits	15%
9	Hospitals/Clinics-Infertility	255%
10	Air Fresheners	281%

- During Y 2022, **Mosquito Repellents** saw the highest increase in Ad secondages as compared to Y 2021, followed by **Ecom-Wallets**.
- In terms of growth % among Top 10 categories, **Air Fresheners** topped with highest growth of **2.8 Times**.
- **3** categories out of top 10 growing categories belonged to **F&B** sector.

## Leading Advertisers: FMCG Players reign the Top 10 list

Top Advertisers (Y 2022) [Total 1.2K+]	Rank (Y 2021)
Hindustan Unilever	1
Reckitt Benckiser (India)	2
Cadburys India	3
Godrej Consumer Products	7
Brooke Bond Lipton India	4
Ponds India	6
Coca Cola India	15
Procter & Gamble	5
ITC	8
Colgate Palmolive India	9

Top 10 Advertisers contributed **47%** share of **Movies** genre's Ad Volumes

- Throughout the years 2021 and 2022, **HUL, Reckitt Benckiser, Cadbury India, and Pond India** held the top spots in the **Movie** genre.
- **Coca Cola India** observed highest positive rank shift in Y 2022 as compared to Y 2021.
- Top 100 advertisers accounted for **85%** share of overall **Movie** genre advertising.

# Exclusive^ Advertisers in the Movies Genre: Y 2022

Rank	Top Exclusive^ Advertisers (Y2022) [Total 40+]
1	Advanced Hair Restoration India
2	TCN Enterprises
3	Al Amani TVR Group
4	Begalileo.Com
5	Idealz Enterprises Llc
6	Idragon
7	Bora Housing
8	Real Value Housing
9	Annapoorna Trading Co (Hooghly)
10	Cherry Chariot Bakery & Confectionery

^ Present in Movies genre but not in Other genres

- 40+ advertisers advertised exclusively in **Movie** genre during Y 2022.
- **Advanced Hair Restoration India** was the top exclusive^ advertiser in **Movie** genre.

# Leading Brands in Y 2022: Dettol Toilets Soaps topped among the 3050+ brands advertising in Movie genre

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

Top 10 Brands contributed **10%** share of **Movies** Ad Volumes

- Out of the Top 10 brands, 5 belonged to **HUL** and 4 belonged to **Reckitt**.
- 4 brands entered in Top 10 list during Y 2022 as compared to Y 2021.



# Leading Exclusive^ Advertisers and Brands: Y 2022

Rank	Top Exclusive Advertisers (Y 2022) [Total 480+]
1	Cashgrail
2	Life Insurance Council
3	Aditya Birla Nuvo
4	St Botanica Beauty
5	Indian Oil Corporation
6	Bayer Cropscience India
7	Super Market Grocery Supplies
8	Uber India Systems
9	Extramarks Education
10	Wakefit Innovations

Rank	Top Exclusive Brands (Y 2022) [Total 1.4K+]
1	Veet Pure
2	Ponds Bright Beauty Serum Cream
3	Colgate Vedshakti
4	Suzuki Avenis
5	Thums Up Charged
6	Coca Cola Zero
7	Vicks Tulsi Cough Drops
8	Dettol Powder To Liquid Handwash
9	Ghadi Det Cake
10	Dr. Joints Pain Relief Oil

^ Present in Y 2022 but not in Y 2021

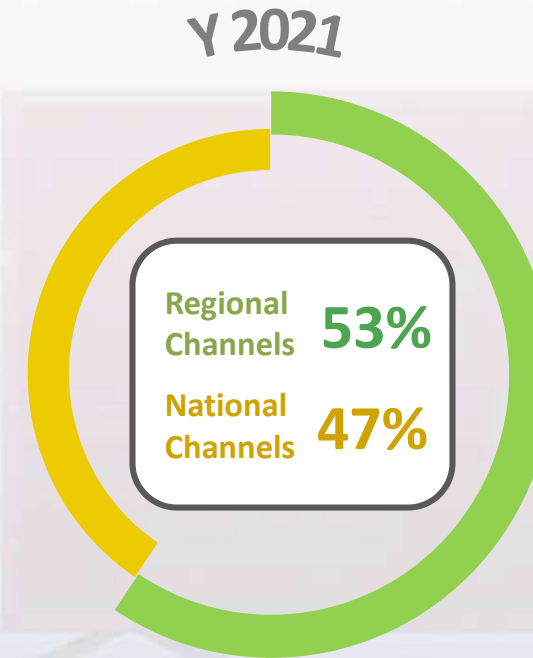
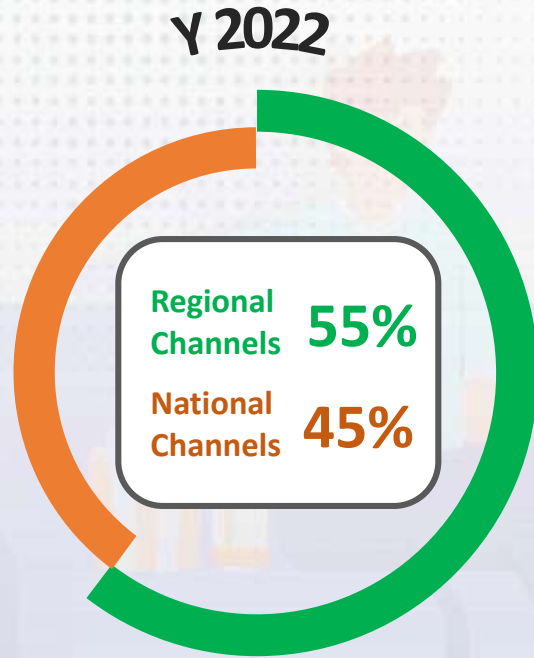
- 480+ advertisers & 1.4K+ brands exclusively advertised in movie genre during Y 2022 as compared to Y 2021.
- **Cashgrail** and **Veet Pure** were the top exclusive^ advertisers and brands respectively during Y 2022 as compared to Y 2021.

- **Regional Channels had more than 50% share of Ad Volumes**

National TV Advertisements means airing or telecasting of an advertisement on National television channel – that are visible nationwide and are broadcasted in national or international languages like Hindi or English.

On the other hand, Regional channel target viewers from particular regions such as Bihar, Karnataka, Tamil Nadu etc. The channels are telecasted in the local spoken language depending on the region such as Bhojpuri, Kannada, Tamil etc.

# National & Regional Channels: Regional Movie Channels had more than 50% share of Ad Volumes



- Regional and National **Movie** channels had nearly equal share of Ad Volumes in both the years.

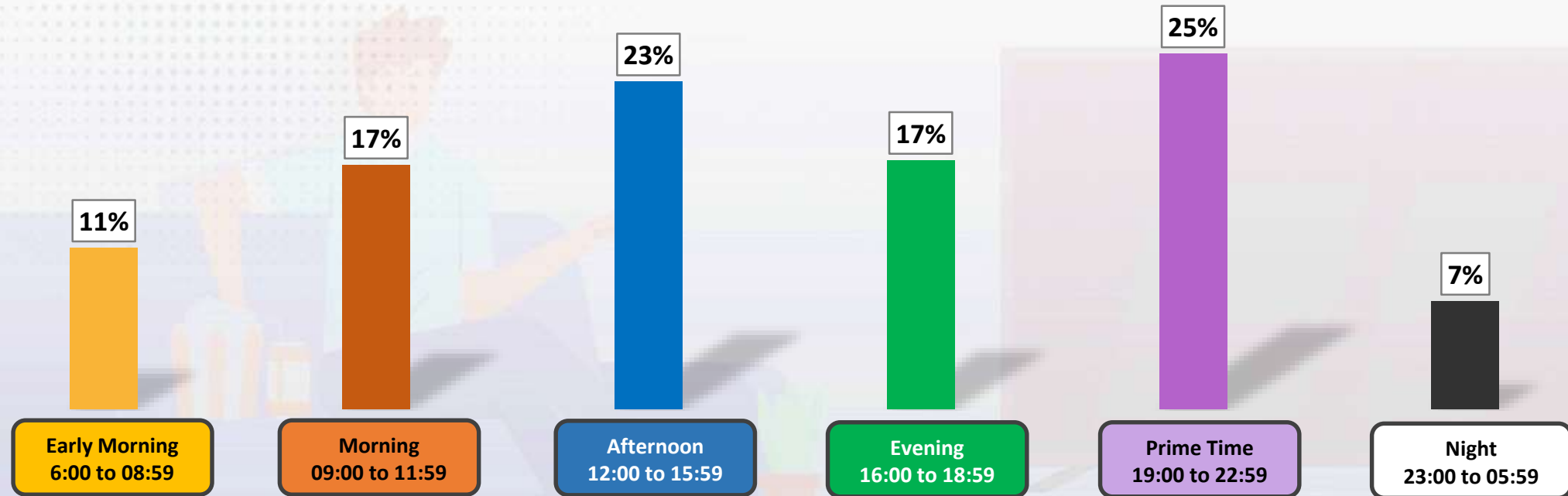
## 95+ Exclusive Advertisers on National & 685+ on Regional channels in Movie genre during Y 2022

Rank	Exclusive Advertisers (National Channels)	[Total 95+]
1	Hewlett Packard India	
2	St Botanica Beauty	
3	Bennett University	
4	Diamond Producers Association Esv (Belgium)	
5	PEP Technologies	

Rank	Exclusive Advertisers (Regional Channels)	[Total 685+]
1	Kaleesuwari Refinery	
2	Prabas Vcare Health Clinic	
3	Kolors Slimming & Beauty	
4	Aachi Masala Foods	
5	Hatsun Agro Product	

- **Hewlett Packard India** and **Kaleesuwari Refinery** were leading Exclusive advertisers on National and Regional **Movie** channels respectively during Y 2022.

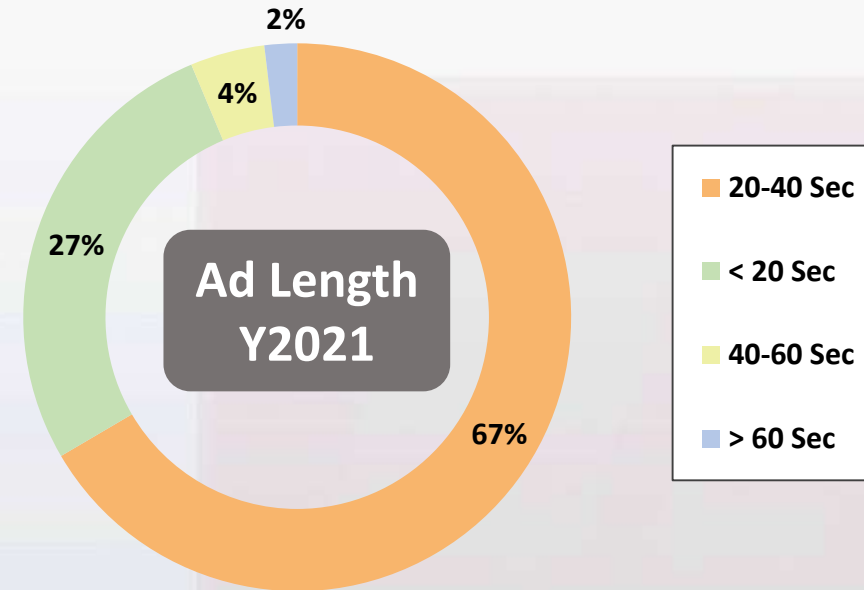
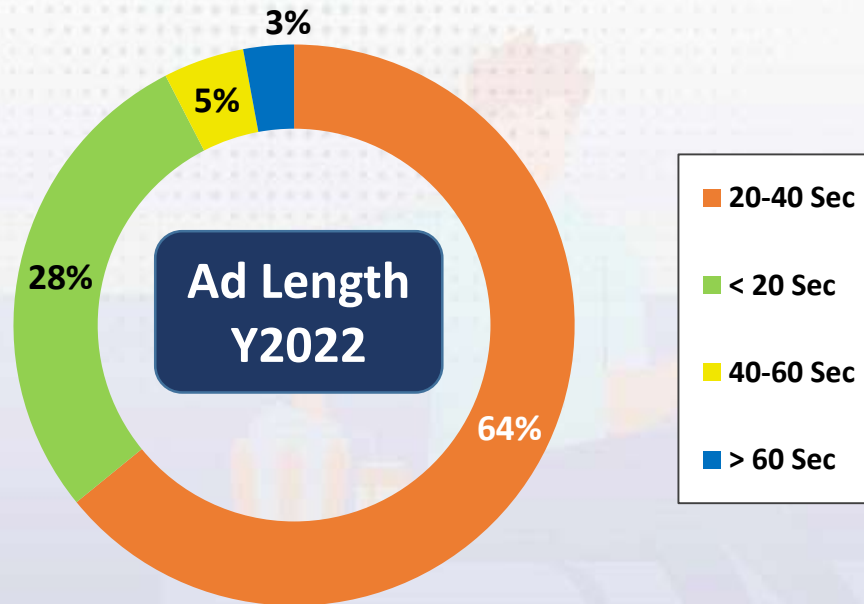
# Advertising share by Time Bands in Movie Genre



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

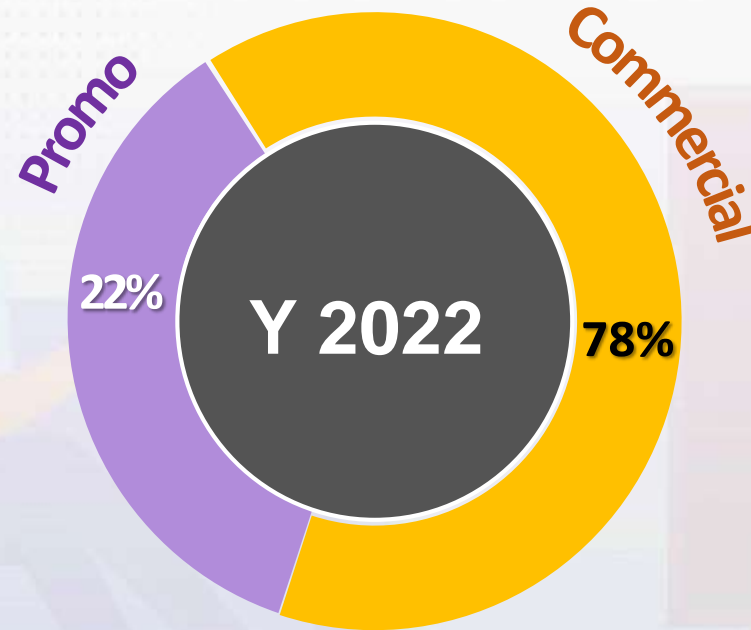


## Ad Size in Movie Genre : Y 2021\* and Y 2020\*



- In Y 2022 & 2021, **20-40 sec** ads in **Movie** genre had **more than half of pie** the ad volumes share.
- Ad Commercials of **20-40 seconds** were most preferred for advertising on **Movie** channels during both the years.

# Promotion vs. Commercial Ads in Movies Genre



- **Commercial** advertising added **78%** share of Ad Volumes whereas **Promos** had **22%** share in Y 2022 in Movie genre.

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