



# Rewinding Y 2022 for Advertising in **AUTO SECTOR**

Media: TV, Print, Radio & Digital; Period: Y 2022



## Highlights – Part 1

Period : Y 2022

### Television

1.

Fourth Quarter witnessed 5% Ad Volume growth compare to 3rd Quarter of Y 2022.  
Ad Volumes of Auto sector on Television soared by 8% in Y 2021 over Y 2020

2.

**Cars** alone contributed **43%** to the ad volume share of **Auto Sector**.  
**NEWS** Channel Genre topped preference list of **Auto Sector** during Y 2022 with **56%**.

### Print

3.

Ad Space in Print witnessed double digit growth during festive period.  
Compare to 1<sup>st</sup> Quarter of Y 2022, Q4 witnessed 49% ad space growth.

4.

Among 4 zones, North topped for Auto advertising with 34% share in Print during Y 2022.  
61% of the total ad space utilized by 'Auto' sector's advertisers for different types of Sales Promotions in Print media.



## Highlights – Part 2

Period : **Y 2022**

### Radio

**5.** Ad volumes for Auto Sector grew by **37%** in Y 2022 over Y 2020 and by **24%** compared to Y 2021.  
Ad share for Cars and Ret Cars ruled with **73%** of the total Ad Volume.

**6.** **Maharashtra** was the top state with **17%** share of Ad Volumes followed by **Gujarat** with **16%** share.  
Advertising for Auto Sector was preferred in **Evening** and **Morning** time-band on Radio.

### Digital

**7.** Ad Insertions of Auto sector on Digital soared **2.3 times** in Y 2022 over Y 2020 and by **1.3 times** over Y 2021.  
**Tata Motors** and **Ather Energy** were the two advertisers during Y 2022.

**8.** Top 10 Advertisers accounted **44%** share of Ad Insertions in Y 2022 with **Tata Motors** leading the list.  
**Ad Network** topped with more than 50% share of transaction method for Auto sector in Y 2022.

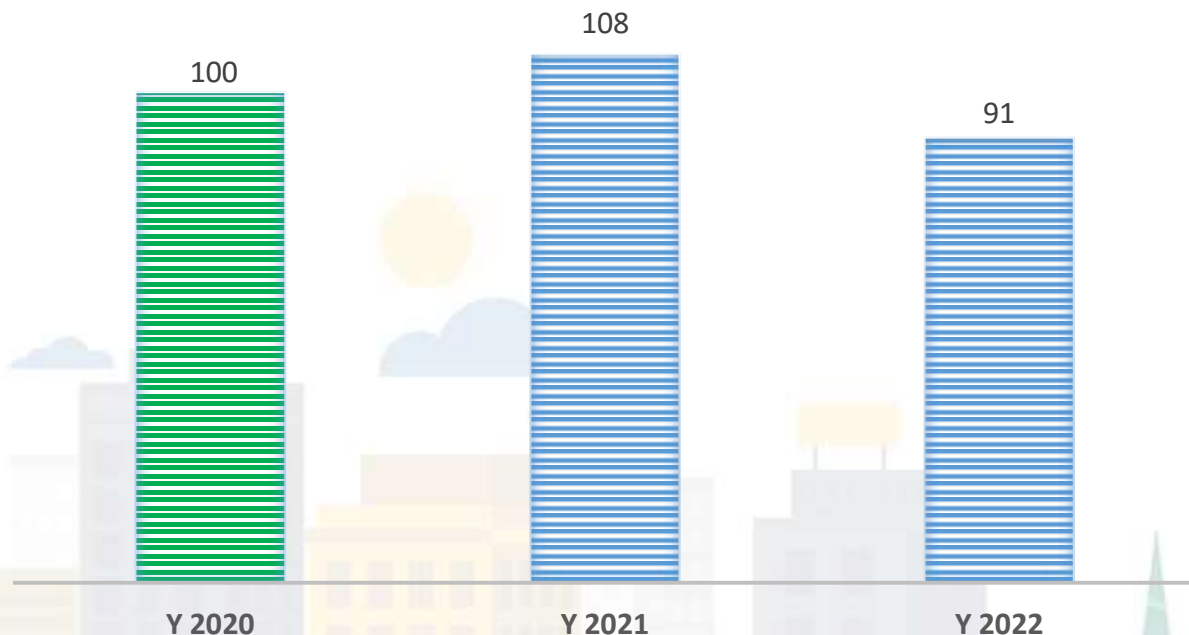


# TV



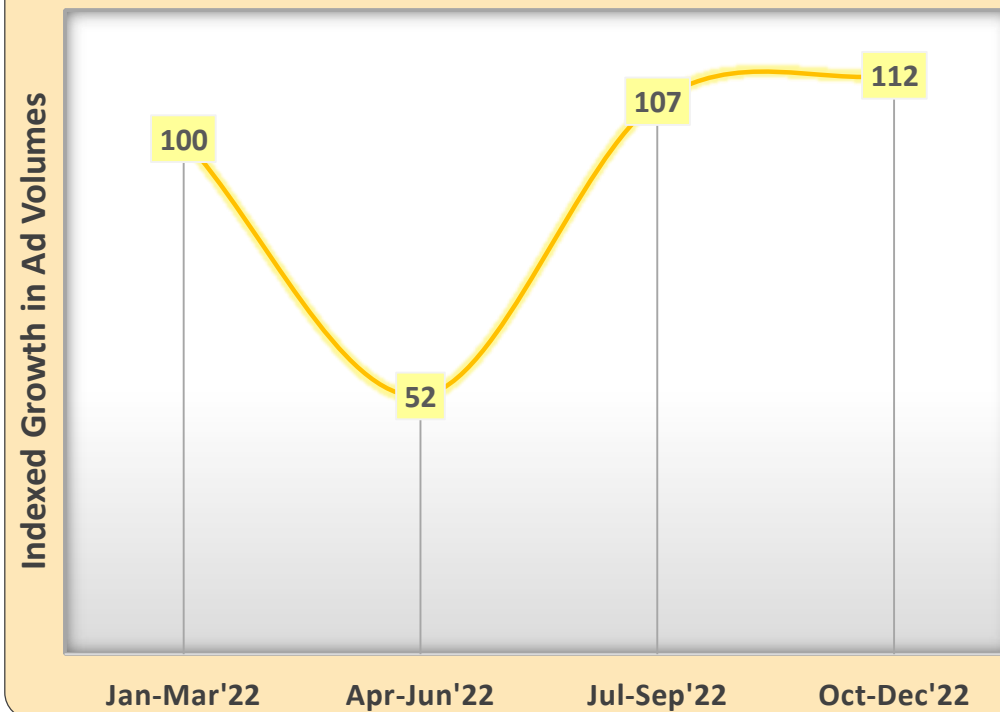
# Ad Volumes for Auto sector on TV

## INDEXED AD VOLUME GROWTH



Index: Y 2020=100

## Quarterly Trends : Y 2022

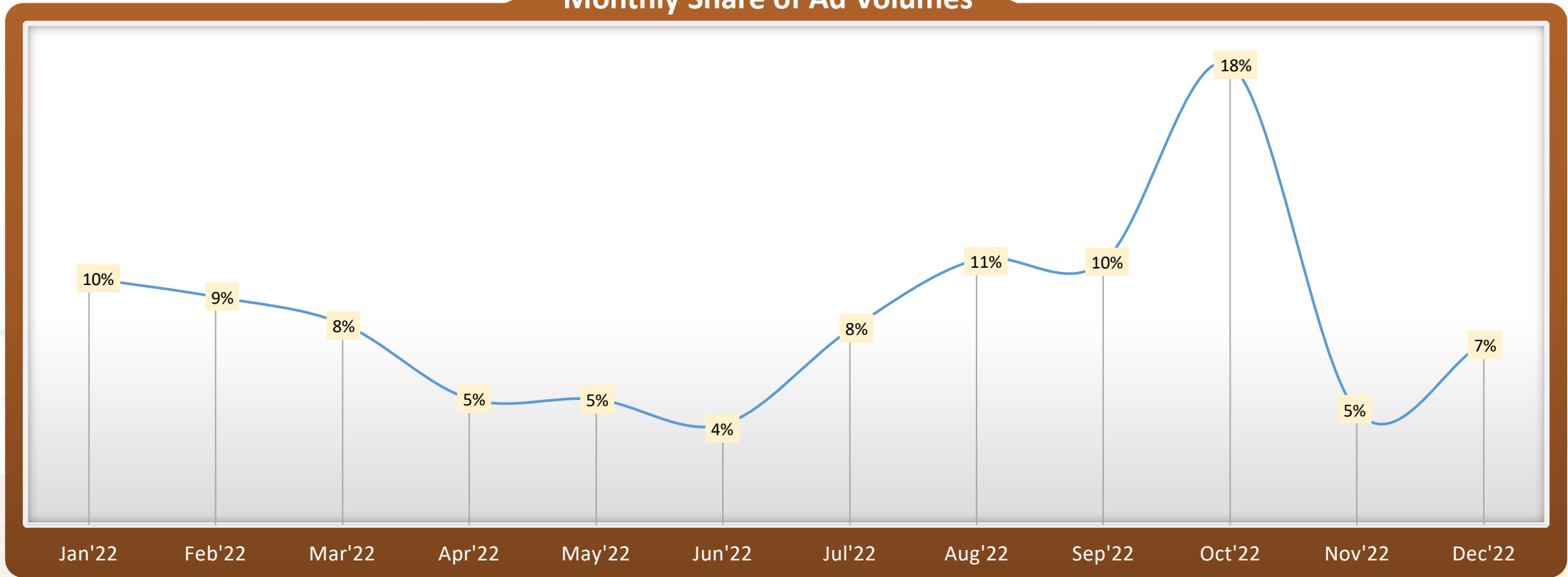


- Compared to 3<sup>rd</sup> Quarter of Y 2022, Q4 witnessed **5%** Ad Volume growth in Auto sector on TV.
- Ad Volumes of **Auto sector** grew by **8%** on Television in Y 2021 over Y 2020.
- In Q2, Ad Volumes observed **52%** drop, post that there was significant growth in **Q3 & Q4**.



# Monthly Ad Volume Trend of Auto sector on TV

## Monthly Share of Ad Volumes



- Auto sector had consistent ad volumes from July to October, wherein, October had the highest share of Ad Volume.
- During April to June, Auto sector had the lowest shares.

# Top 10 Categories and Advertisers of Auto for TV

Top 10 Categories	% Share
Cars	44%
Two Wheelers	40%
Commercial Vehicles	5%
Tyres	4%
Tractors	2%
Corporate-Auto	2%
Other Auto Product & Service	1%
Ret Cars	1%
Ret Automobiles Range	1%
Auto Spares	1%

Top 10 Advertisers	% Share
TVS Motor Company	12%
Maruti Suzuki India	11%
Suzuki Motorcycle India	8%
Hyundai Motor India	6%
Tata Motors	6%
Hero Motocorp	6%
Renault India	4%
Kia Motors Corporation	4%
Okaya EV	4%
Skoda Auto	3%

- **Cars** categories alone contributed **44%** to the total ad volume share of **Auto sector** followed by **Two wheelers** with **40%**.
- Ad Volumes of the Commercial Vehicles category grew by **5.4 times** in Y 2022 as compared to Y 2021, whereas, the shares of Cars and Two Wheelers, the top two categories, declined by **25%** and **13% respectively**.
- Top 10 Advertisers accounted more than 65% share of ad volumes in Y 2022 with **TVS Motor Company** topping the list.

## Top 10 Brands from Auto sector on TV

Top 10 Brands	% Share
Suzuki Avenis	6%
Kia Carens	3%
Renault Kiger	2%
TVS Jupiter	2%
TVS Apache RTR 4V Series	2%
TVS XL 100	2%
Okaya Faast-F4	2%
Honda Activa	1%
Renault Triber Dual Tone	1%
TVS Jupiter 125	1%

- Among the Top 10 brands from Auto Sector, **Suzuki Avenis** was on Top followed by Kia Carens.
- Top 10 brands of Y 2021 constitute of 4 brands from **TVS Motors** and 2 from **Renault India**.
- Top 10 Brands accounted **28%** share of ad volumes in Y 2022 with 7 **Two Wheelers** brands and 3 **Car** brands.



## Top Channel Genres preferred by advertisers of **Auto sector** on TV

Channel Genres	% Share
News	56%
Movies	18%
GEC	10%
Music	5%
Sports	5%
Others (6)	4%

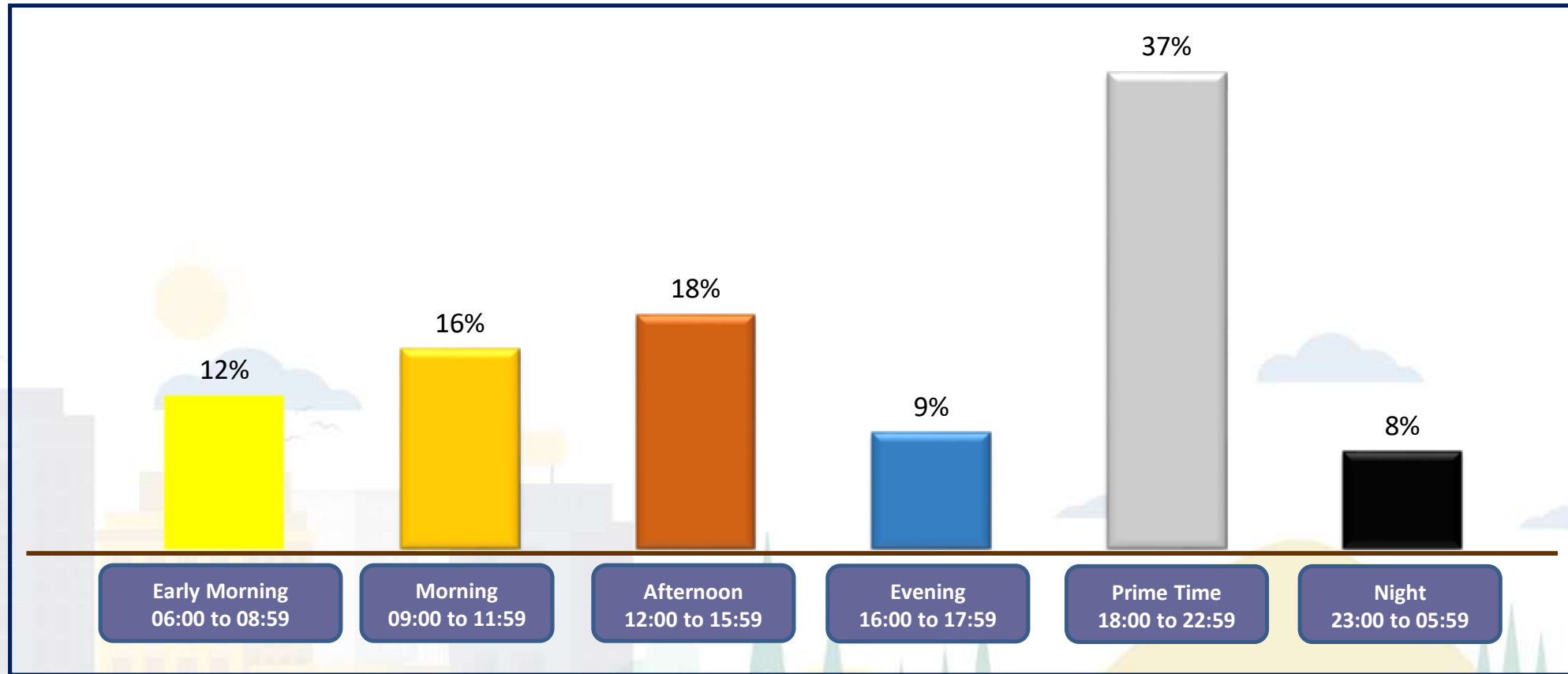
- Top 2 channel genres on TV together accounted nearly 75% of ad volumes share for **Auto sector** during Y 2022.
- **NEWS** Channel Genre topped preference list of **Auto Sector** during Y 2022 with more than 56% share.

## Top 10 Program Genres preferred by advertisers of **Auto sector** on TV

Program Genres	% Share
News Bulletin	41%
Feature Films	19%
Interviews/Portraits/Discussion	4%
Film Songs	3%
Drama/soap	3%
Reviews/reports	3%
Business Program	2%
Music Shows/Songs	1%
Religious/devotional/astrology	1%
Cricket	1%

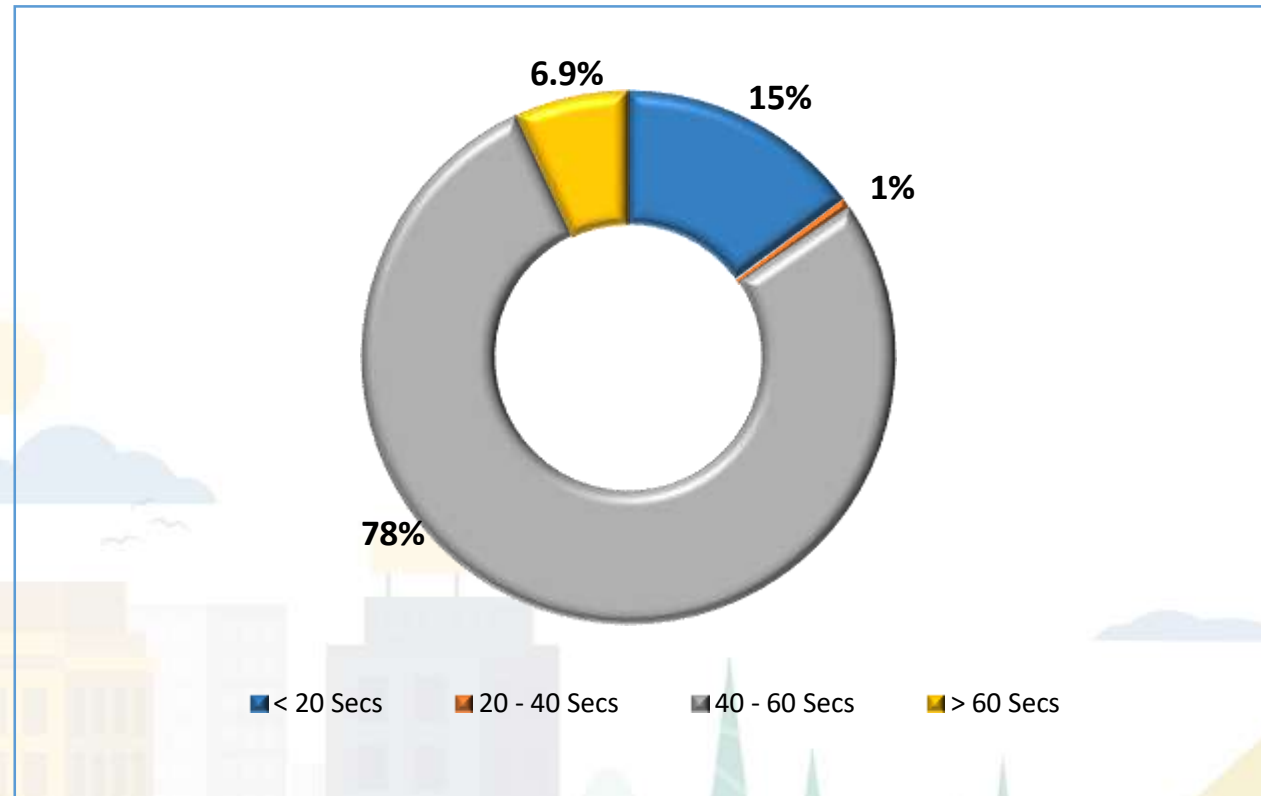
- **News Bulletin genre** most preferred for promoting **Auto** brands on Television.
- Top 2 program genres i.e. **News Bulletin** and **Feature Films** together added 60% to the total Ad Volume share of **Auto sector** on TV.

# Time band analysis for **Auto** advertising on TV



- **Prime Time** was the most preferred time-band on TV followed by Afternoon and Morning time-bands.
- **Prime time & Afternoon** time bands together accounted for **55%** share of Ad Volumes.

# Preference of ad size by advertisers of **Auto** on TV



- Advertisers of **Auto sector** preferred 40-60 secs ad size on TV.
- 40-60 seconds and <20 seconds ads together covered 92% shares in Y 2022.

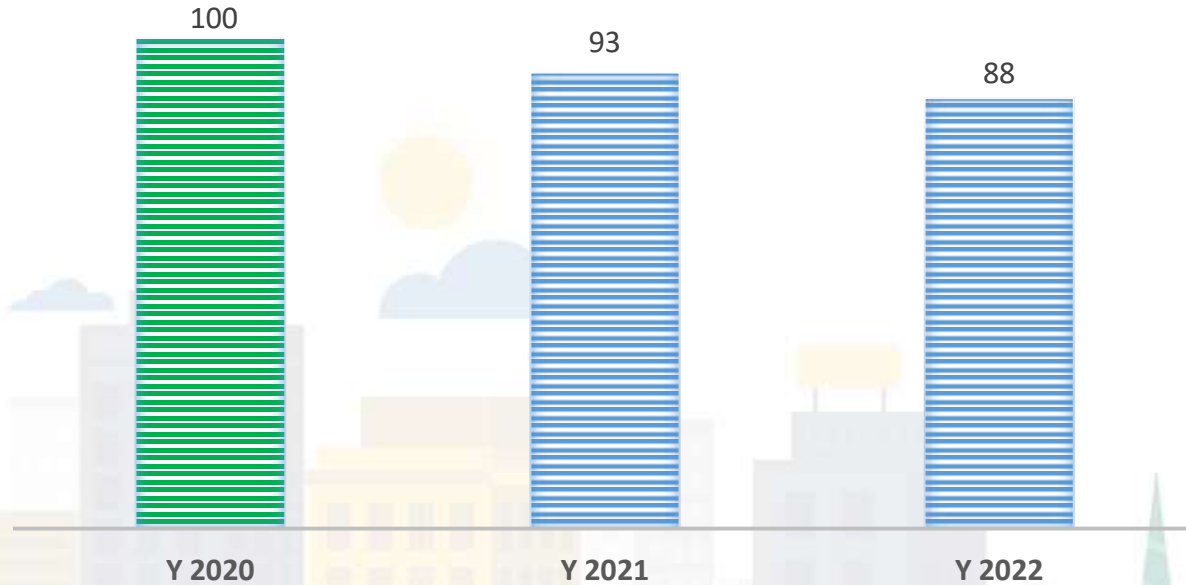
# Print





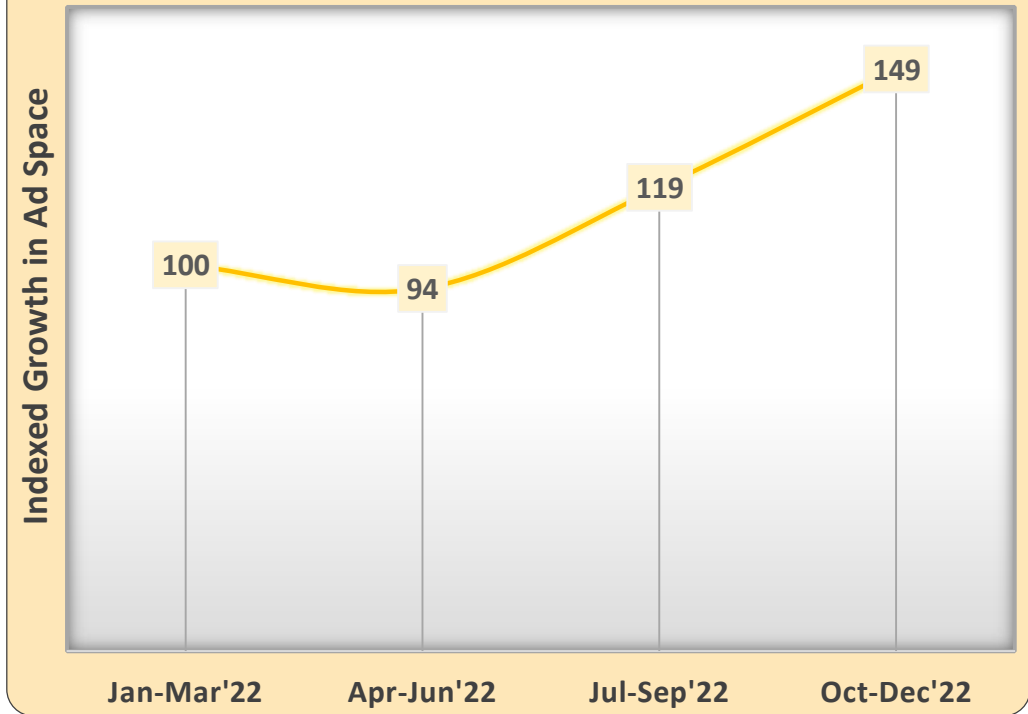
# Ad Space for Auto sector in Print

## INDEXED GROWTH-AD SPACE



Index: Y 2020=100

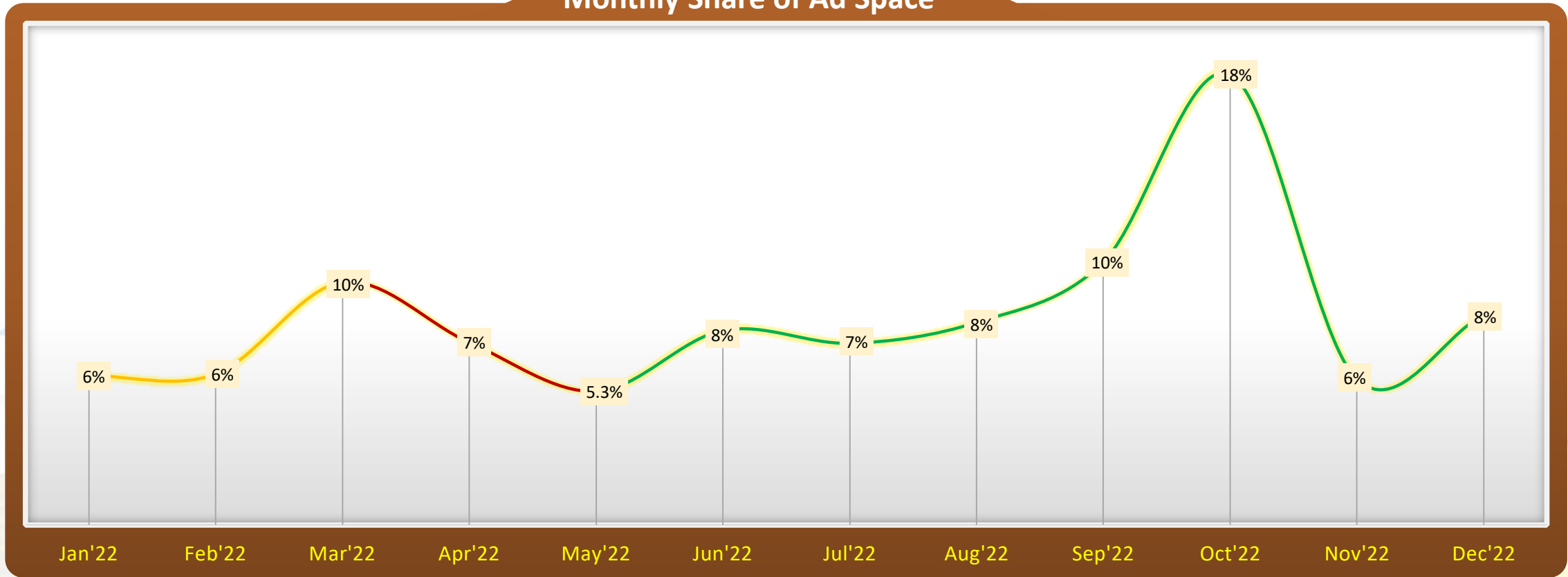
## Quarterly Trends : Y 2022



- Compare to 1<sup>st</sup> Quarter of Y 2022, Q4 witnessed 49% Ad volume growth.
- Usage of Ad Space by **Auto sector** in Print declined by 7% in Y 2021 over Y 2020 and by 6% in Y 2022 over Y 2021.
- Like Television medium, Print medium too observed the lowest Ad space usage in 2<sup>nd</sup> quarter.

# Monthly Ad Space Trend of Auto sector in Print

### Monthly Share of Ad Space



- The lowest share of Ad Volume was in May'22.
- Ad Space in Print witnessed growth in Oct'22 i.e. festive period.

# Top 10 Categories and Advertisers of Auto Sector for Print

Top 10 Categories	% Share
Cars	45%
Two Wheelers	39%
Ret Cars	3%
Commercial Vehicles	2%
Tractors	2%
Ret Two Wheelers	2%
Corporate-Auto	1%
Tyres	1%
Ret Commercial Vehicles	0.5%
Automotive Fuel	0.3%

Top 10 Advertisers	% Share
Maruti Suzuki India	23%
Hero Motocorp	15%
Honda Motorcycle & Scooter India	11%
Skoda Auto	4%
TVS Motor Company	3%
Bajaj Auto	3%
Tata Motors	3%
Kia Motors Corporation	3%
Hyundai Motor India	2%
Mahindra & Mahindra	2%

- Top 2 categories in Print Media from Auto sector, **Cars & Two Wheelers** together accounted nearly 84% of the total Ad Space of the **sector**.
- Top 5 Advertisers accounted for 58% share of Ad Space in Y 2022 with **Maruti Suzuki India & Hero Motocorp** leading the list with 23% and 15% share respectively.

## Top 10 Brands from Auto sector in Print

Top 10 Brands	% Share
Maruti Car Range	6%
Honda Activa	4%
Honda Shine	4%
Hero Two Wheelers (Hero Corp)	3%
Maruti Suzuki Baleno	2%
Hero Motorcycles	2%
Maruti Suzuki Ignis	2%
TVS Two Wheelers Range	1%
Kia Carens	1%
Hero HF Deluxe	1%

- Top 10 Brands accounted nearly 30% share of ad space in Y 2022 with **Maruti Car Range** leading the list.
- Within these, 6 brands each were from **Two-Wheeler** and 4 from **Car's** category in Y 2022.

# Newspaper: Publication Language and Genre for Auto sector in Print

Publication Language	% Share
Hindi	43%
English	17%
Marathi	9%
Telugu	6%
Tamil	5%
Others (8)	16%

Focus on Advertising on General Interest Newspapers by advertisers

Publication Genre	% Share
General Interest	97.8%
Business/Finance/Economy	1.8%

- 43% of the total ad space utilized by Auto Sector advertisers was in Hindi Publications.
- Top 5 Publication Languages accounted for 83% share of Auto sector's Ad space.
- General Interest publication genre added 97.8% share of Auto sector's Ad Volume.



# Zone wise Advertising share of Auto sector in Print

Zone	% Share
North Zone	34%
South Zone	27%
West Zone	24%
East Zone	13%

Top 2 Cities - North Zone
New Delhi
Lucknow

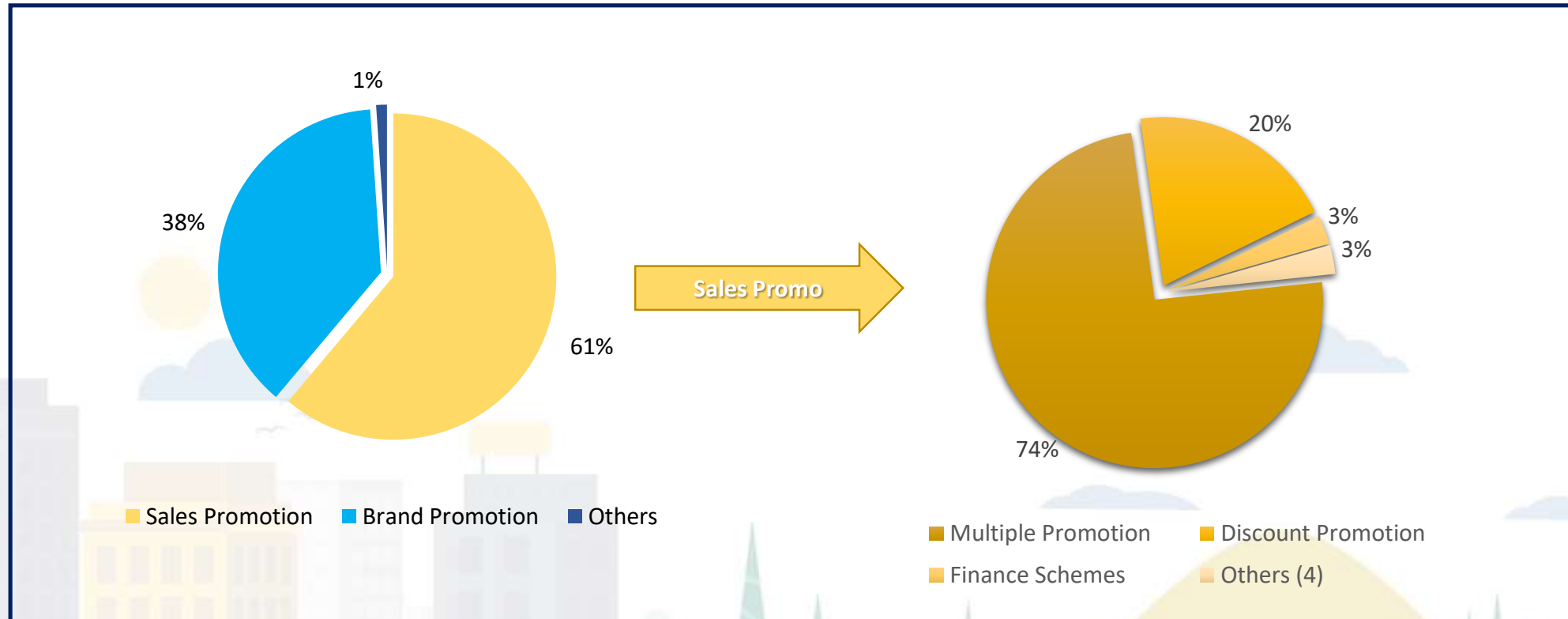
Top 2 Cities - South Zone
Bangalore
Chennai

Top 2 Cities - West Zone
Mumbai
Nagpur

Top 2 Cities - East Zone
Kolkata
Raipur

- Among 4 zones, North ranked 1<sup>st</sup> position for Auto advertising with 34% share of sector in Print during Y 2022.
- On overall India level, New Delhi & Mumbai were top 2 cities with max. Auto sector ads in Print medium.

# Advertising Promotions of Auto sector in Print



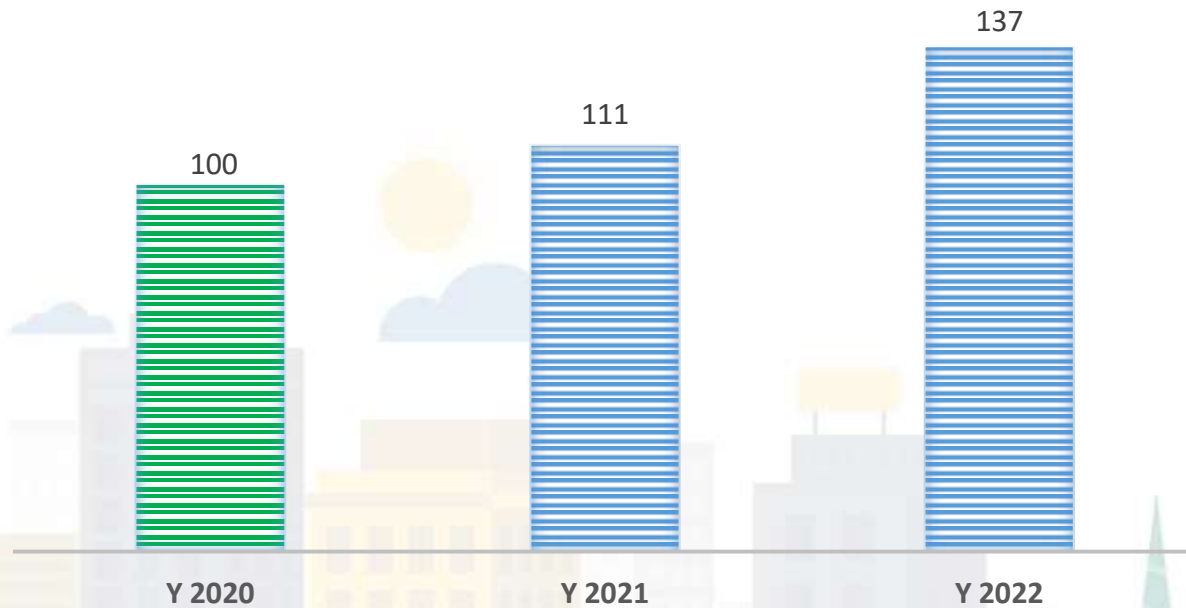
- 61% of the total ad space utilized by 'Auto' sector's advertisers for different types of Sales Promotions in Print media.
- Among Sales Promotions, Multiple Promotion occupied 74% share of the pie followed by Discount Promotion with 20% share in Y 2022.

# Radio



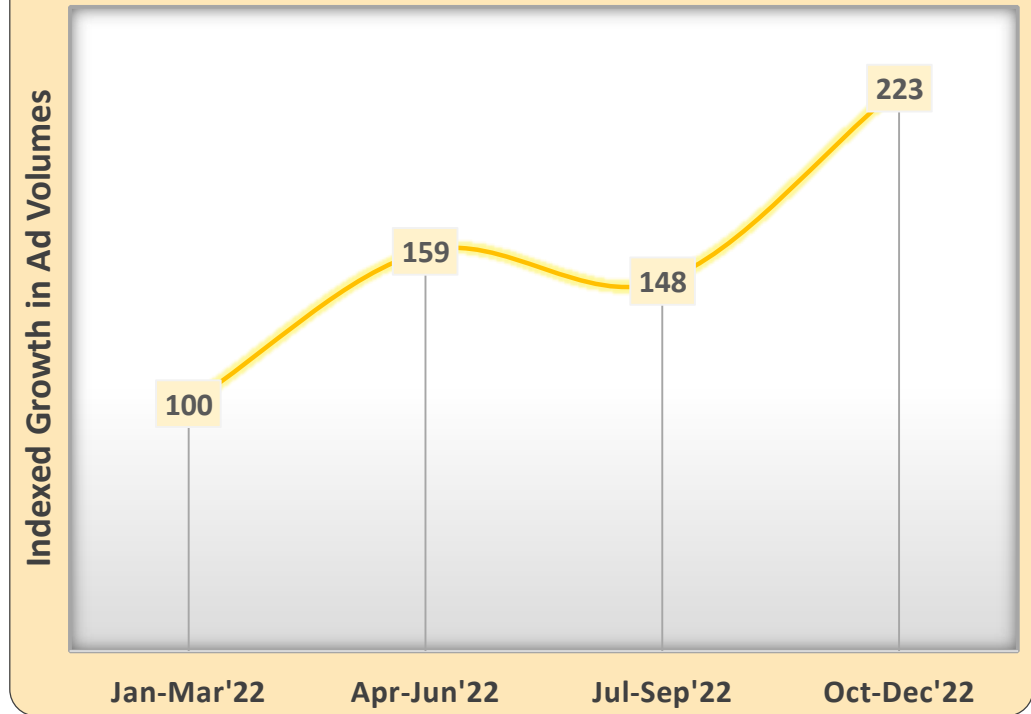
# Ad Volumes for Auto sector on Radio

## INDEXED AD VOLUME GROWTH



Index: Y 2020=100

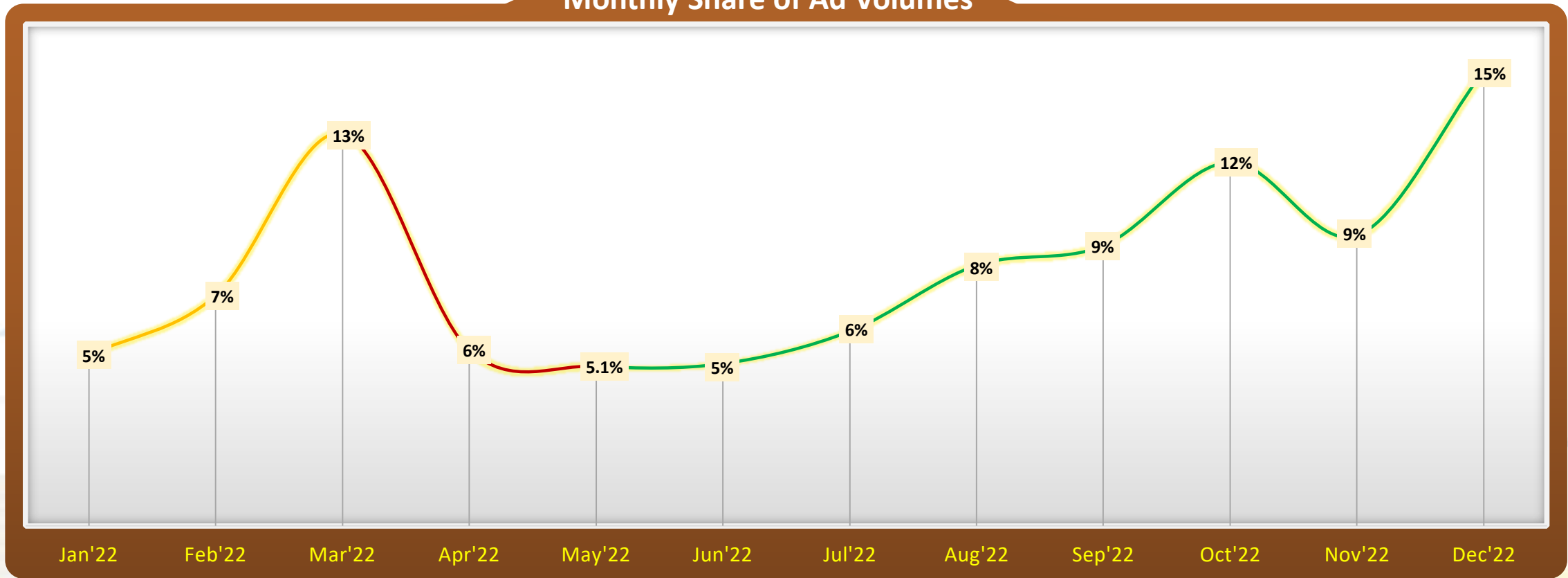
## Quarterly Trends : Y 2022



- Ad volumes for Auto Sector grew by **37%** in Y 2022 over Y 2020 and by **24%** compared to Y 2021.
- Fourth quarter witnessed 123% ad volume growth for **Auto sector** on Radio compared to 1<sup>st</sup> quarter of Y 2022.

# Monthly Ad Volume Trend of Auto sector on Radio

## Monthly Share of Ad Volumes



- Lowest Ad Volumes observed in Apr'22 and May'22.
- Festive period boosted Ad Volumes for Auto sector during Aug'22-Dec'22.



# Top 10 Categories and Advertisers of Auto for Radio

Top 10 Categories	% Share
Cars	57%
Ret Cars	15%
Auto-two Wheelers	12%
Ret Auto-two Wheelers	5%
Corporate-Auto	2%
Auto-commercial Vehicles	1%
Products & Services-Auto	1%
Tyres	1%
Auto Spares	0.6%
Automotive Fuel	0.6%

Top 10 Advertisers	% Share
Maruti Suzuki India	25%
Tata Motors Ltd	7%
Hyundai Motor India Ltd	7%
Honda Cars India Ltd	4%
Honda Motorcycle & Scooter I Ltd	3%
Nissan Motor Co Ltd	3%
Kia Motors Corporation	2%
Honda Bigwing	2%
Mahindra & Mahindra	2%
Skoda Auto	2%

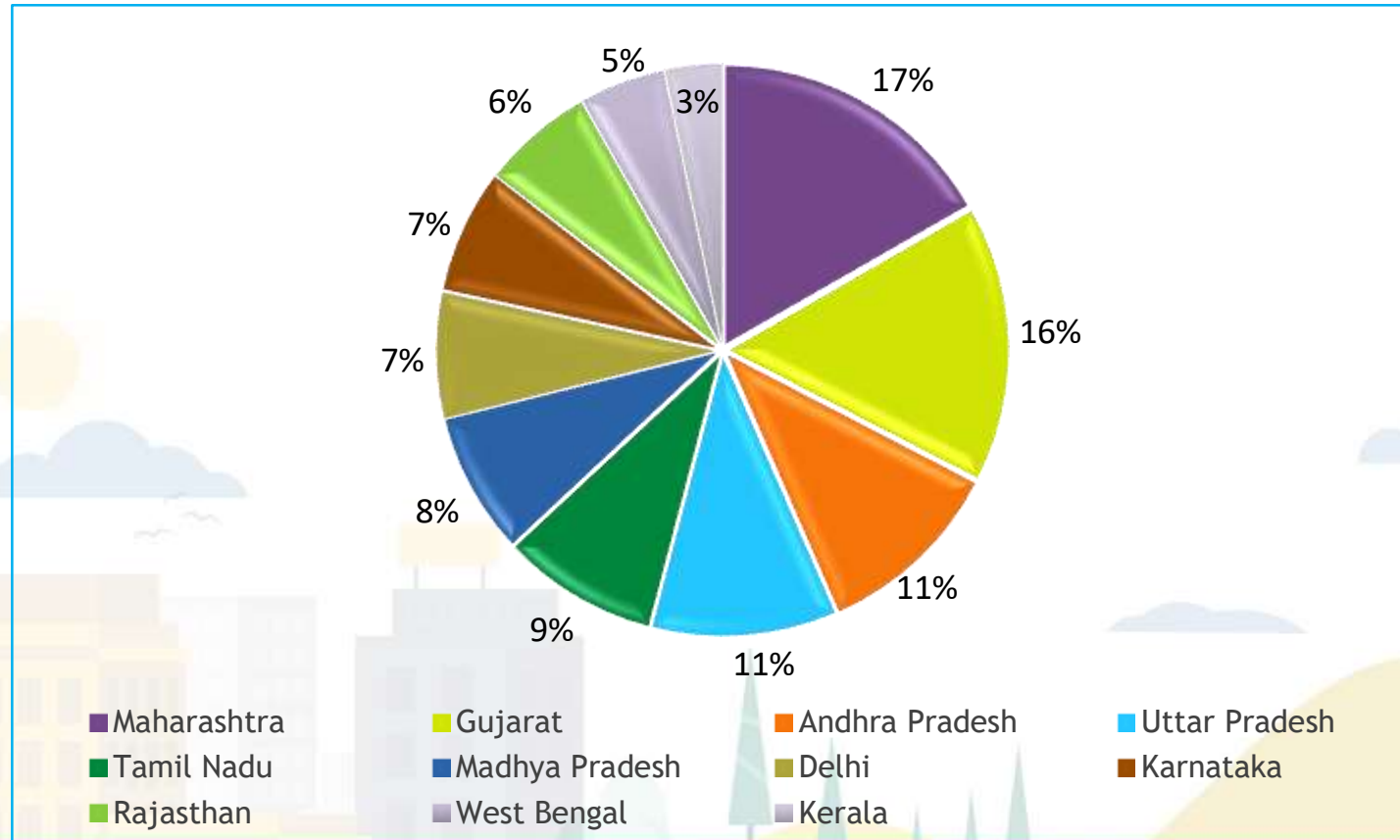
- On Radio, ads for **Cars & Ret Cars** ruled with **73%** of the total ad volume share of **Auto sector**.
- Top 5 Advertisers accounted for 52% share of ad volume in Y 2022 with **Maruti Suzuki India** leading the list.

# Top 10 Brands from Auto sector on Radio

Top 10 Brands	% Share
Maruti Suzuki Arena	6%
Maruti Suzuki True Value	4%
Nissan Magnite	2%
Kia Carens	2%
Maruti Suzuki Baleno	2%
Maruti Suzuki Wagonr	2%
Tata Motors	2%
Honda Shine	2%
Hyundai Alcazar	1%
Honda City	1%

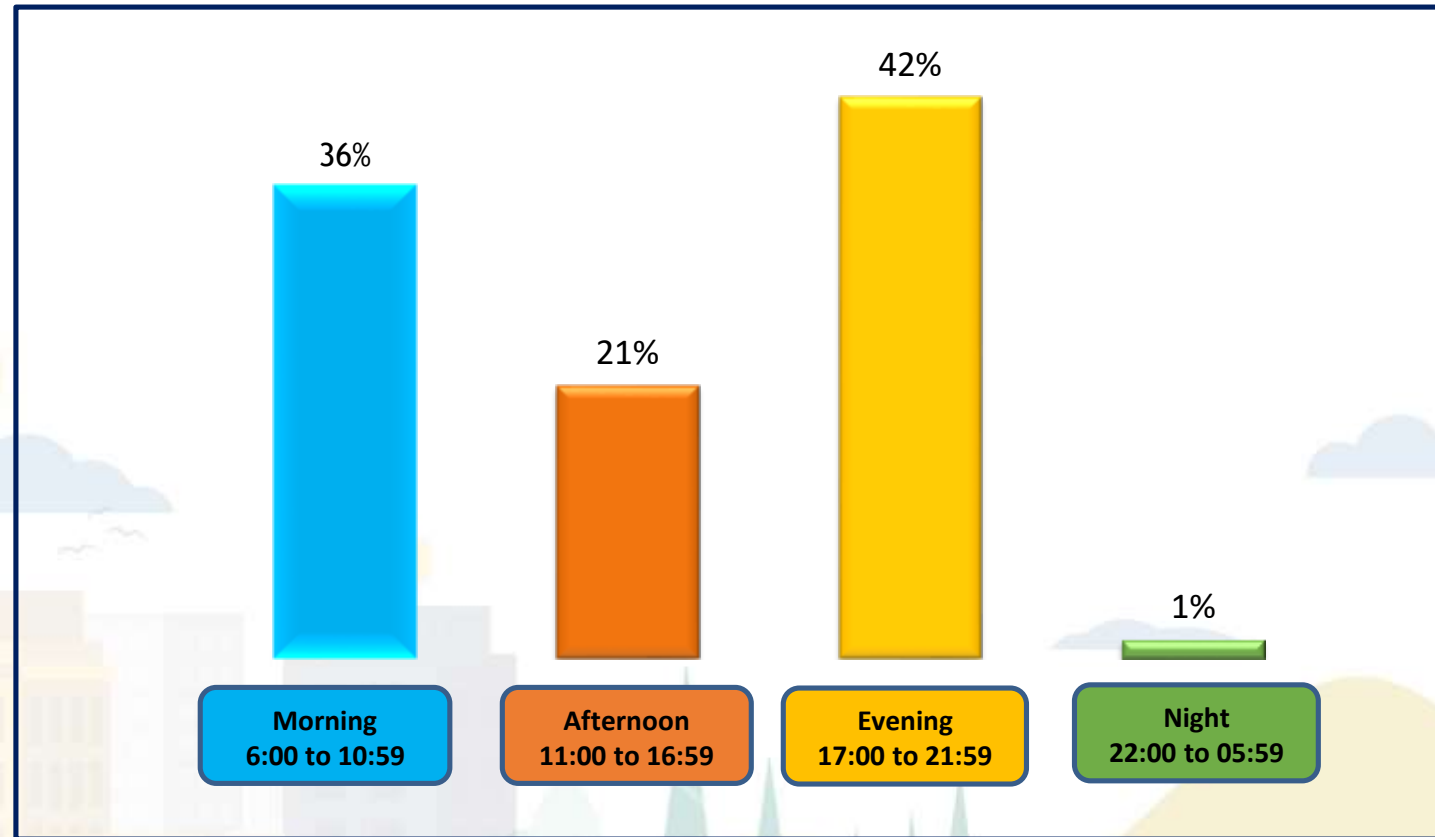
- Among the Top 10 **Auto** brands, 4 brands belonged to **Maruti Suzuki India** and 2 to Hyundai Motor.
- Top 10 Brands accounted 29% share of Ad Volumes in Y 2022 with **Maruti Suzuki Arena** leading the Brand's list.
- 9 out of Top 10 brands on Radio belonged to Car's category.

# State-wise share of Auto advertising on Radio



- The Top 5 states accounted for 63% share of Ad Volumes for the **Auto sector**.
- **Maharashtra** topped the states with **17%** share of Ad Volumes followed by **Gujarat** with **16%** share.
- **Andhra Pradesh, Uttar Pradesh & Tamil Nadu's** ad share increased by **2.5 times**.

# Time band analysis for **Auto** advertising on Radio



- Advertising for **Auto sector** was preferred in Evening and Morning time-band on Radio.
- 42% share of the **Auto** Ad Insertions were in Evening time-bands followed by 36% in Morning during Y 2022.

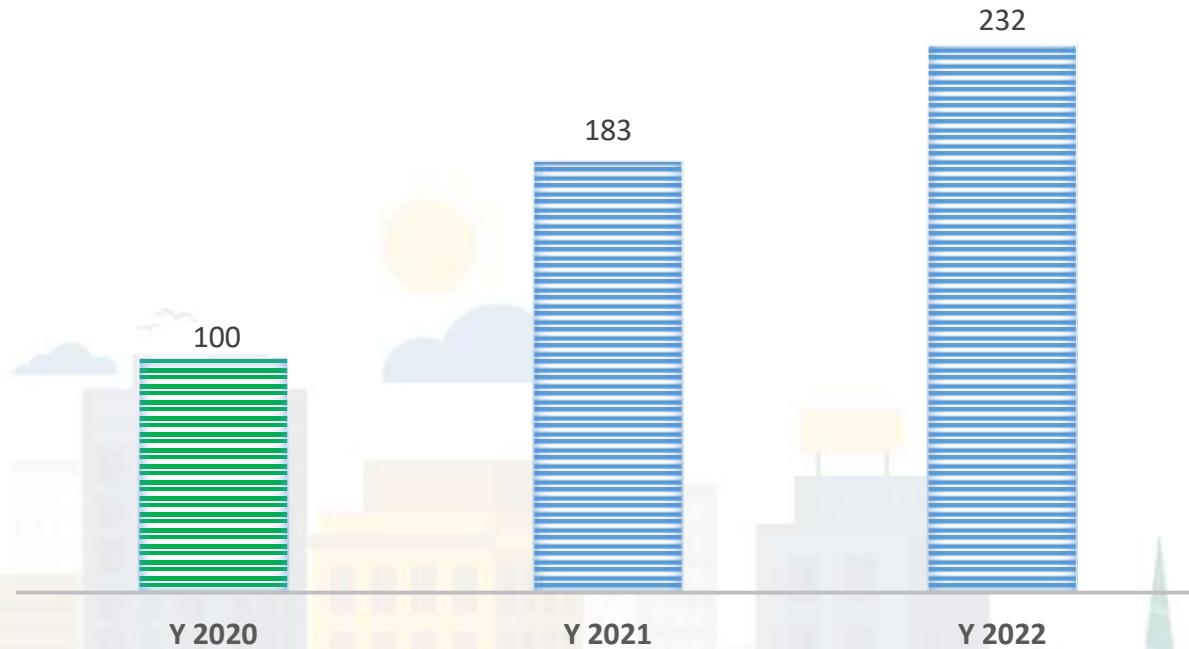
# Digital





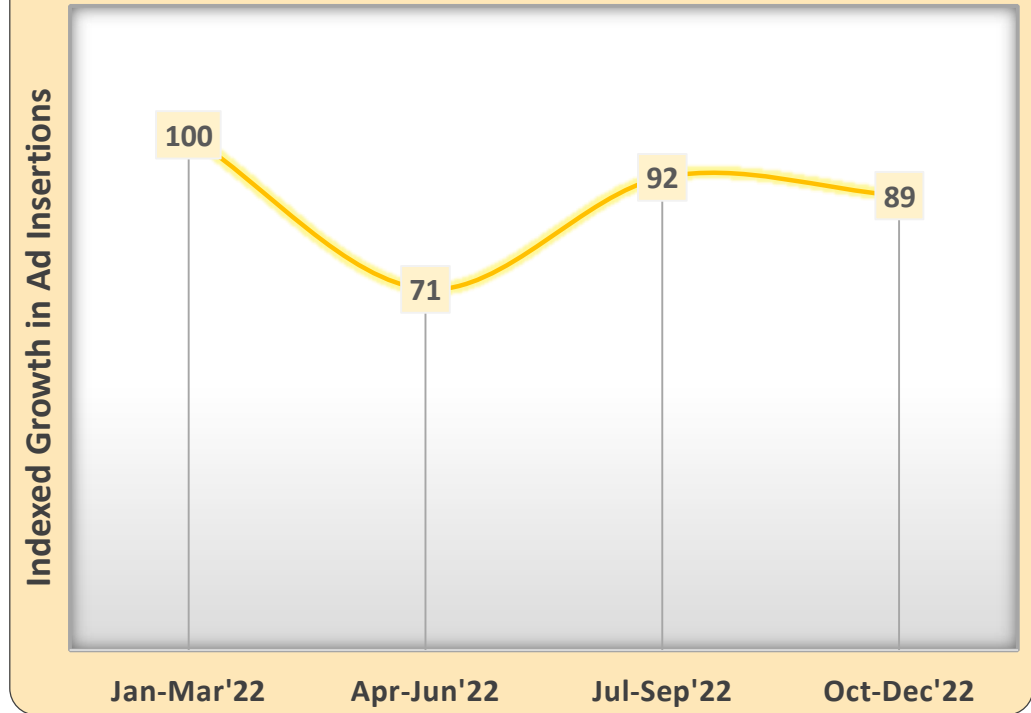
# Ad Insertions for Auto sector on Digital

## INDEXED AD INSERTION GROWTH



Index: Y 2020=100

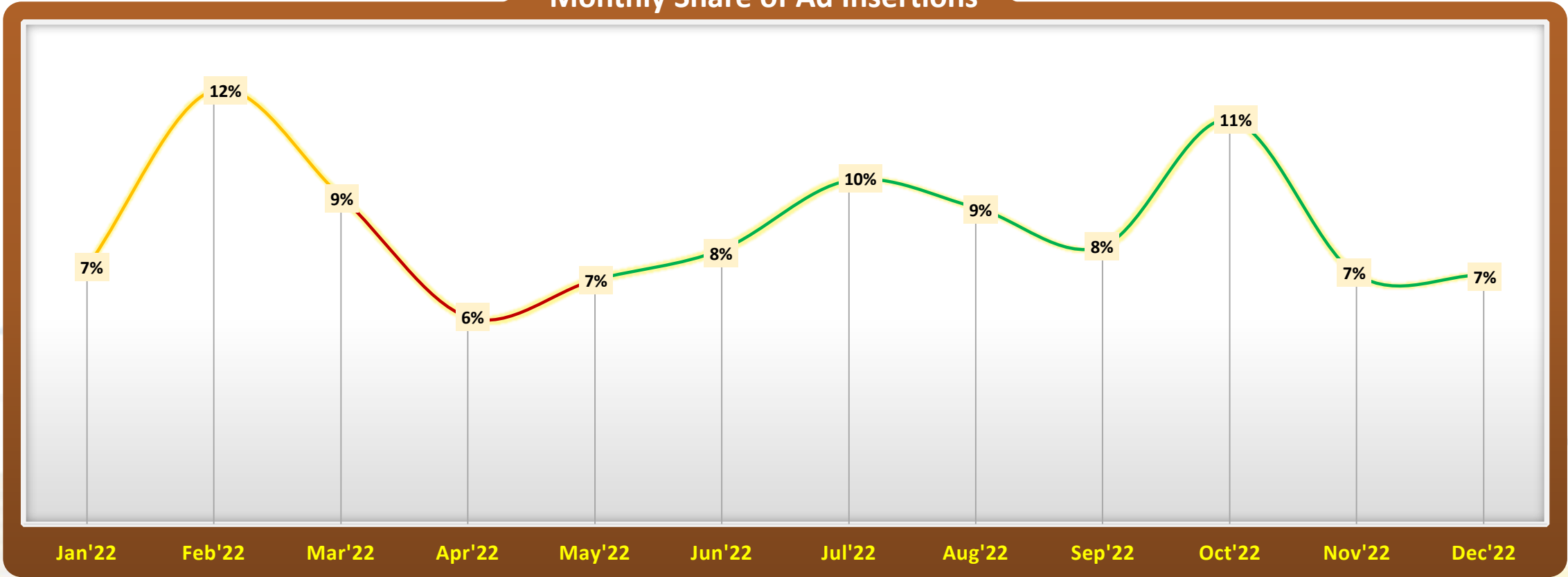
## Quarterly Trends : Y 2021



- Ad Insertions of Auto sector on Digital soared **2.3 times** in Y 2022 over Y 2020 and by **1.3 times** over Y 2021.
- The lowest Ad insertions was observed in Q2 with 29% of Y 2022.

# Monthly Ad Insertion Trend of Auto sector on Digital

Monthly Share of Ad Insertions



■ Highest percent observed in Feb'22 with 12% of total Digital ad insertion shares followed by Oct'22 (festive period).

# Top 10 Categories and Advertisers of Auto Sector for Digital

Top 10 Categories	% Share
Cars	39%
Two Wheelers	20%
Ret Auto-cars	12%
Corporate-Auto	10%
Tyres	6%
Other Products & Services	3%
Commercial Vehicles	3%
Automotive Batteries	1%
Automotive Fuel	0.6%
Ret Two Wheelers	0.5%

Top 10 Advertisers	% Share
Tata Motors	6%
Ather Energy	5%
Maruti Suzuki India	5%
Nissan Motor Co	4%
Yokohama India	4%
TVS Motor Company	4%
Toyota Kirloskar Motor	3%
Hero Motocorp	3%
Renault India	3%
Mahindra & Mahindra	3%

- On Digital Medium, category '**Cars**' topped **Auto** sector with nearly 40% of the ad insertions followed by category '**Two Wheelers**' with 20%.
- Top 10 Advertisers accounted **44%** share of Ad Insertions in Y 2022 with **Tata Motors** leading the list.

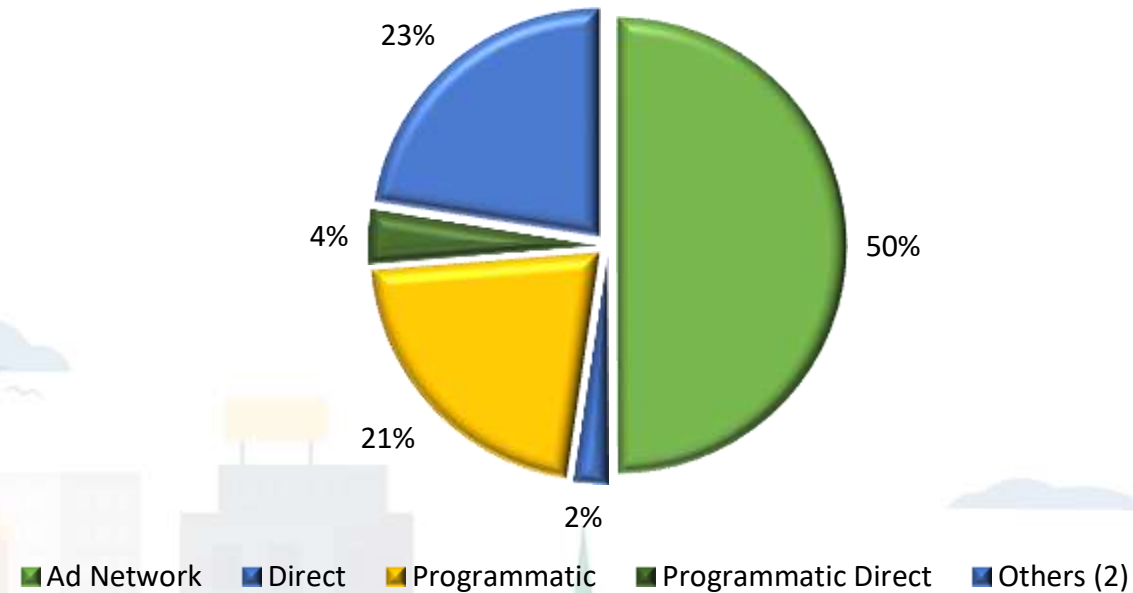
# Top 10 Brands from Auto sector on Digital

Top 10 Brands	% Share
Yokohama	4%
Nissan Magnite	3%
Tata Motors	3%
Ather 450x Gen 3	2%
Ather Energy	2%
Ret Hyundai Car (Modi)	2%
Mahindra First Choice	2%
Volvo Cars	2%
Renault Kiger	1%
Ampere Magnus Pro	1%

- Top 10 Brands accounted 26% share of Ad Insertion in Y 2022 with **Yokohama** leading the list with 4% of the total ad insertions of Auto sector on Digital Medium.
- Among the Top 10 brands, 5 brands belonged to category 'Cars'.

# Transaction Methods of Digital Advertising in Auto sector

Ad Network was the top transaction method for **Digital** advertising



- **Ad Network** topped with 50% share of transaction method for Digital advertising of **Auto sector** in Y 2022.
- **Programmatic** transaction method ranked at 2<sup>nd</sup> position for **Auto** Ad Insertions on Digital.



## DISCLAIMER

TAM has made every effort to ensure that the information in this report is appropriate/correct, however TAM does not assume and hereby expressly disclaim any and all liability to any party for any loss, damage, or disruption caused by errors or omissions, whether such errors or omissions result from negligence, accident, or any other cause. The content of the report is only for information and awareness purposes only and not intended to substitute any professional advice regarding its usages. Before any reference or use of this report in manner kindly connect with TAM Media Research Pvt. Ltd. All rights including copyright reserved with TAM Media Research Pvt. Ltd.



**Website Link:** [www.tamindia.com](http://www.tamindia.com)



**For any queries write to:**

[taminsights@tamindia.com](mailto:taminsights@tamindia.com)