

Quarterly Report (Jul-Sept'23)

ADVERTISING ON **GEC GENRE**



Advertising Overview on Television (News Genre)

A **Television** advertisement (also called a **television commercial**, **commercial**, **ad TV** advert or simply an advert) is a span of **television** programming produced and paid for by an organization. It conveys a message, aimed to market a product or service.

TAM AdEx monitors more than 600+ TV Channels

This section mainly focuses on understanding the GEC advertising trends in comparison to the past 3 Half Yearly Period Jan-Jun, Top Spenders (Categories , Advertisers & Brands) and Channel Genres.

Highlights JUL-SEPT'23: **GEC GENRE**

01

Ad volumes in **GEC Genre** witnessed consistent **growth of 4%** during Apr-Jun'23 and Jul-Sept'23 over Jan-Mar'23.

02

'**Food & Beverages**' sector retained its **1st** position with **28%** share of ad volumes in Jul-Sept'23 over Apr-Jun'23.

03

'**Mosquito Repellent**' was the only new entrant in the top 10 category list in Jul-Sept'23 over Apr-Jun'23.

04

'**Hindustan Unilever**' retained its **1st** position throughout the first three quarters of Y 2023.

05

Out of the top 10 brands, **6** of them belonged to **Hindustan Unilever** during Jul-Sept'23.

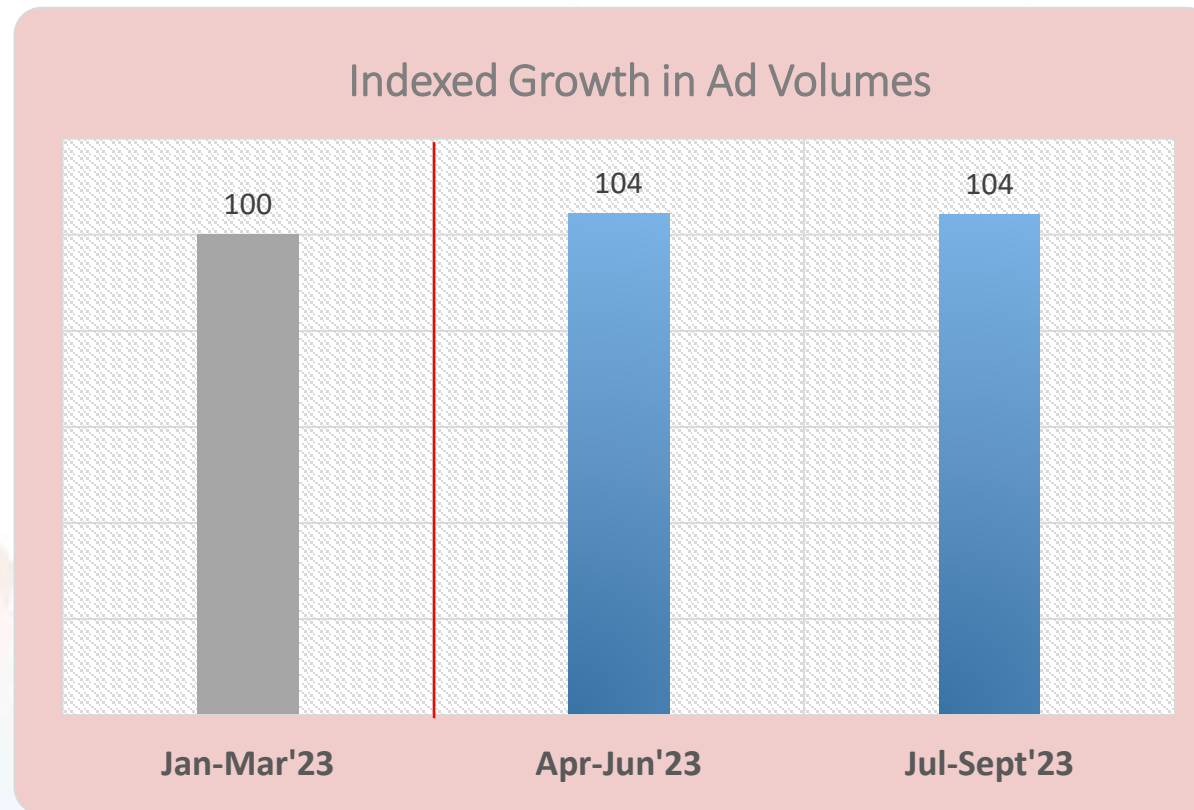
06

'**Ecom-Online Shopping**' category saw highest increase in Ad secondages with growth of **83%**. **145+** categories registered Positive growth.

07

During Jan-Jun'23, '**Hindi GEC**' was the leading Subgenre for advertising with **24%** share of ad volumes.

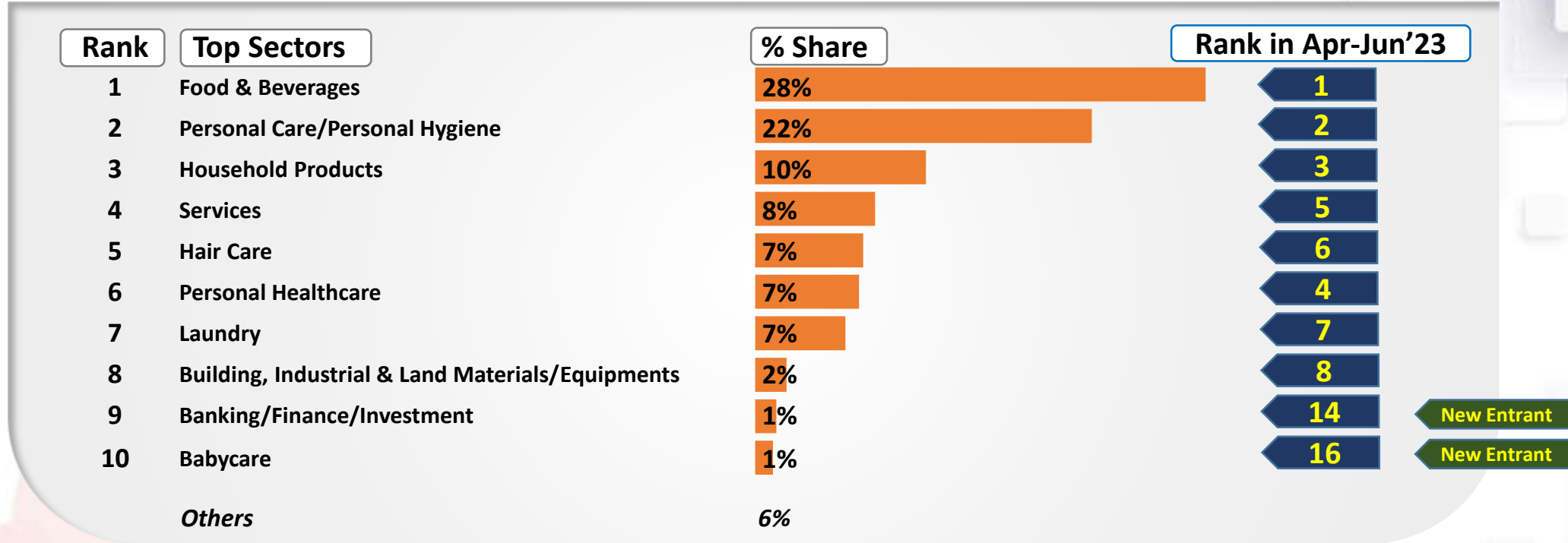
Television Ad Volumes in **GEC Genre** during Jul-Sept'23 and Apr-Jun'23 Vs Jan-Mar'23



Index: Jan-Mar'23=100

- **Television** ad volumes in the **GEC Genre** showed a steady **4%** increase during both the periods of Apr-Jun'23 and Jul-Sept'23 when compared to Jan-Mar'23.
- Additionally, **Jul-Sept'23** saw a **1%** rise compared to **Jul-Sept'22** in the GEC Genre.

'Food & Beverages' sector held the top position, accounting for 28% of GEC Genre Ad Volumes

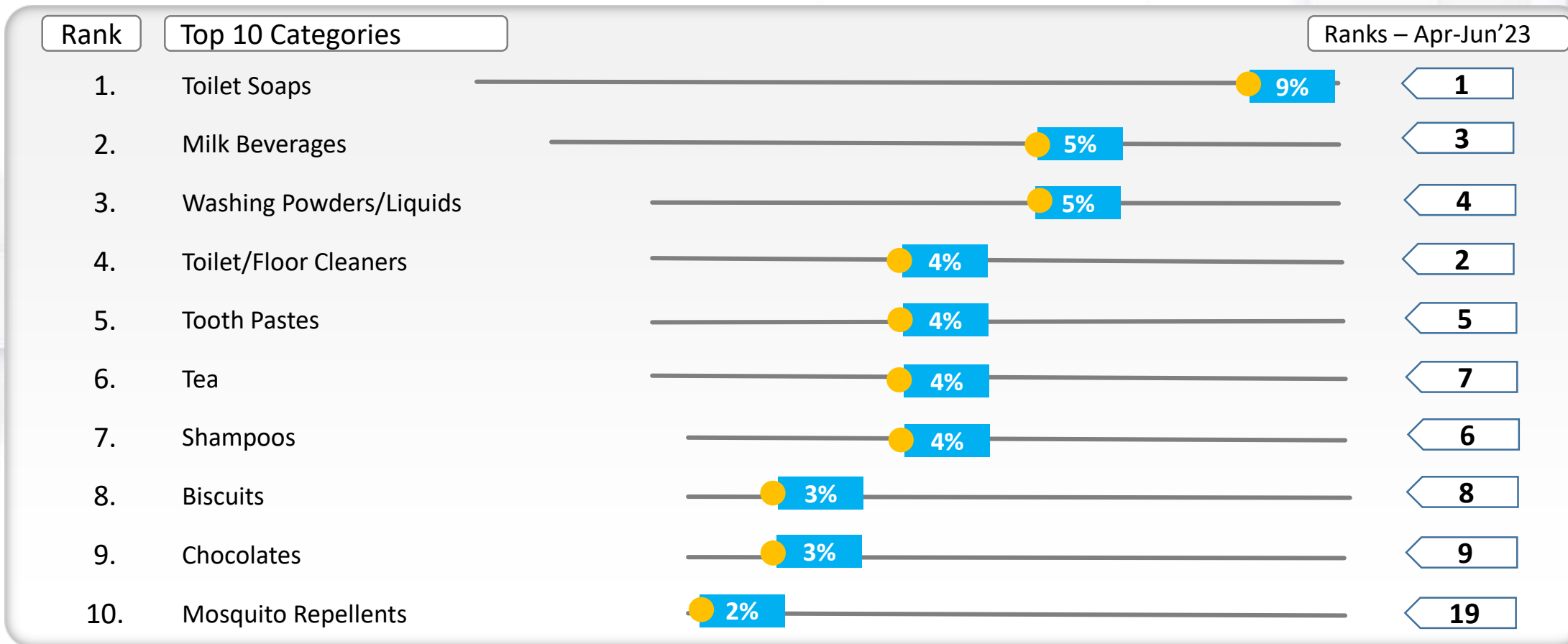


■ **Food & Beverages, Personal Care/Personal Hygiene and Household Products** Sectors maintained their rankings as 1st and 2nd and 3rd respectively, during Jul-Sept'23 compared to Apr-Jun'23.

■ **'Banking/Finance/Investment'** and **'Babycare'** emerged as newcomers in the top 10 list of sectors during Jul-Sept'23, surpassing their positions in Apr-Jun'23.

■ Together, the top 10 sectors accounted for 94% of the ad volumes during Jul-Sept'23.

'Toilet Soaps' retained its 1st position in Jul-Sept'23 over Apr-Jun'23.



New Entrant

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- The **Toilet Soaps** Category maintained its leading position, securing 9% of ad volumes during Jul-Sept'23 as it did in Apr-Jun'23.
- Additionally, **Toothpastes**, **Biscuits**, and **Chocolates** preserved their rankings at 5th, 8th, and 9th places, respectively, in Jul-Sept'23 compared to Apr-Jun'23.
- Collectively, the top 10 Categories contributed **43%** of ad volumes in Jul-Sept'23.
- Among these, **Mosquito Repellents** emerged as the sole new entry in the top 10 list of categories during Jul-Sept'23 when compared to Apr-Jun'23.

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Leading Advertisers GEC Genre: 'Hindustan Unilever' was the leading Advertiser throughout 1st, 2nd and 3rd quarters of 2023.

Total Advertisers: 1,380

Leading Advertisers: Jan-Mar'23

Hindustan Unilever
Reckitt Benckiser (India)
P&G
Cadburys India
Godrej Consumer Products
Coca Cola India
ITC
Britannia Industries
Pepsi Co
Nestle India

Total Advertisers: 1,400

Leading Advertisers: Apr-Jun'23

Hindustan Unilever
Reckitt Benckiser (India)
Godrej Consumer Products
P&G
ITC
Cadburys India
Coca Cola India
Nestle India
Pepsi Co
Wipro

Total Advertisers: 1,227

Leading Advertisers: Jul-Sep'23

Hindustan Unilever
Reckitt Benckiser (India)
Godrej Consumer Products
P&G
Cadburys India
ITC
Coca Cola India
Nestle India
Britannia Industries
Wipro

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- **Hindustan Unilever** and **Reckitt Benckiser (India)** retained their 1st and 2nd positions during Q'1, Q'2 and Q'3 of Y 2023.
- Together, the top 10 advertisers contributed **66%** share of ad volumes in Jul-Sept'23.
- In Jul-Sept'23, **Britannia Industries** was the only new entrant in the top 10 list of advertisers.

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'Dettol Toilet Soaps' ascended to 1st position in Jul-Sept'23 over Apr-Jun'23

Total Brands: 2.7K+

Leading Brands: Jan-Mar'23 (13%)

Harpic Power Plus 10x Max Clean
Dettol Antiseptic Liquid
Lizol All In 1
Dettol Skincare Soap
Close Up Ever Fresh
Moov Strong Spray
Maaza
Glow & Lovely Advanced Multivitamin
Harpic Bathroom Cleaner
Dettol Toilet Soaps

Total Brands: 2.6K+

Leading Brands: Apr-Jun'23 (13%)

Dettol Antiseptic Liquid
Harpic Power Plus 10x Max Clean
Lizol All In 1
Glow & Lovely Advanced Multivitamin
Close Up Ever Fresh
Dettol Lime Cool Soap
Dettol Toilet Soaps
Jiocinema App
Harpic Bathroom Cleaner
Surf Excel Easy Wash

Total Brands: 2.4K+

Leading Brands: Jul-Sep'23 (12%)

Dettol Toilet Soaps
Harpic Power Plus 10x Max Clean
Lizol All In 1
Dettol Antiseptic Liquid
Lifebuoy Toilet Soap
Glow & Lovely Advanced Multivitamin
Close Up Ever Fresh
Surf Excel Easy Wash
Horlicks
Clinic Plus Shampoo

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- **Dettol Toilet Soaps** ascended to 1st position in Jul-Sept'23 compared to its 7th position in Apr-Jun'23.
- The top 10 brands together covered **12%** share of ad volumes in Jul-Sept'23.
- **Lifebuoy Toilet Soap, Horlicks** and **Clinic Plus Shampoo** were the new entrants in the top 10 brands list in Jul-Sept'23 over Apr-Jun'23.
- Out of the top 10 brands, **4** of them belonged to **Reckitt Benckiser (India)** and **6** belonged to **Hindustan Unilever** in Jul-Sept'23.

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Top Growing Categories : 145+ Categories registered Positive Growth

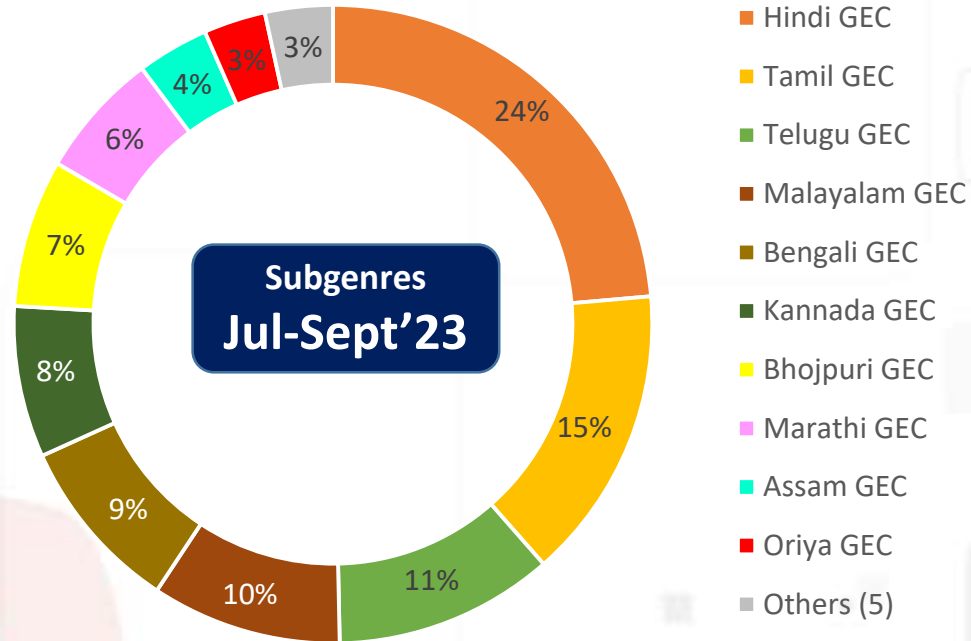
Rank	Top 10 Growing Categories (Jul-Sept'23) (based on highest increase in actual Ad Volumes)	Growth
1	Milk Beverages	27%
2	Tea	40%
3	Mosquito Repellents	68%
4	Toilet Soaps	11%
5	Biscuits	28%
6	Ecom-Online Shopping	83%
7	Diapers	4 Times
8	Coffee	67%
9	Rubs And Balms	48%
10	Washing Powders/Liquids	14%

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- The '**Ecom-Online Shopping**' category experienced the highest surge in ad secondages, boasting an **83%** increase in Television Advertising for **GEC** Genre.
- Among the Top 10 categories, **Diapers** exhibited the most substantial growth percentage, skyrocketing fourfold during Jul-Sept'23.

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Top 10 Channel Subgenres in GEC: Jul-Sept'23



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- In Jul-Sept'23, **Hindi GEC** maintained its leading position, claiming a **24%** share of ad volumes compared to **Apr-Jun'23**.
- The top 5 Channel Subgenres collectively represented **68%** of ad volumes during **Jul-Sept'23**.

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