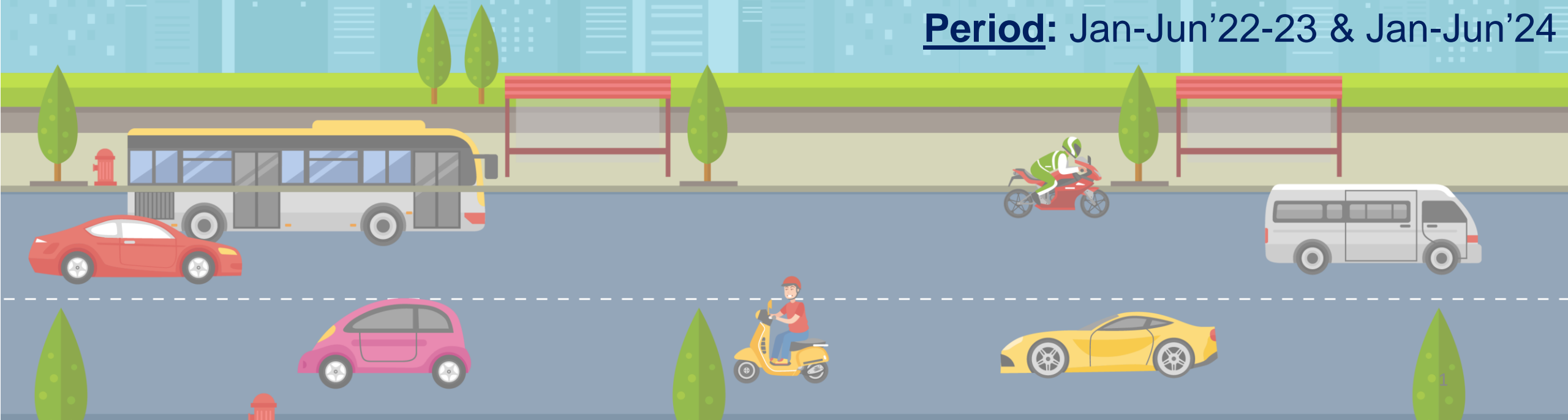




Half Yearly Report for Advertising in **AUTO SECTOR**

Media: TV, Print, Radio & Digital

Period: Jan-Jun'22-23 & Jan-Jun'24



Highlights – Part 1

Period : Jan-Jun'22 and Jan-Jun'23

Television

1.

Ad Volumes on **TV** for **Auto** Sector witnessed **de-growth** of **14%** during Jan-Jun'24 over Jan-Jun'23.

Two-wheelers was the leading category with **39%** share of ad volumes in H1'24.

2.

The top 10 brands together added **33%** share of ad volumes with **Honda Shine** leading the list.

NEWS was the leading Channel Genre of **Auto Sector** during Jan-Jun'24 with **65%** share.

Print

3.

Ad Space in **Print** was **increased** by **25%** in Jan-Jun'24 compared to Jan-Jun'23.

Honda Shine 100 was the leading brand in **Print** with **7%** share of ad space.

4.

Hindi was the most preferred publication language in Jan-Jun'24.

54% of the total ad space utilized by **Auto** sector's advertisers for different types of Sales Promotions in Print media.



Highlights - Part 2

Period : Jan-Jun'22 and Jan-Jun'23

Radio

5. Ad volumes for **Auto Sector** increased by **14%** in Jan-Jun'24 compared to Jan-Jun'23.
Cars was the leading category and **Maruti Suzuki India** among advertisers in H1'24 on Radio.

6. **Gujarat** was the leading state for **Auto Sector** Advertising on Radio during Jan-Jun'24.
The top 10 brands together added 35% share of ad volumes with **Nissan Magnite** leading the list.

Digital

7. Ad Impressions on **Digital** Medium witnessed a massive **growth** of **55%** during Jan-Jun'24 over Jan-Jun'23.
Cars was the leading category with **46%** share of ad impressions.

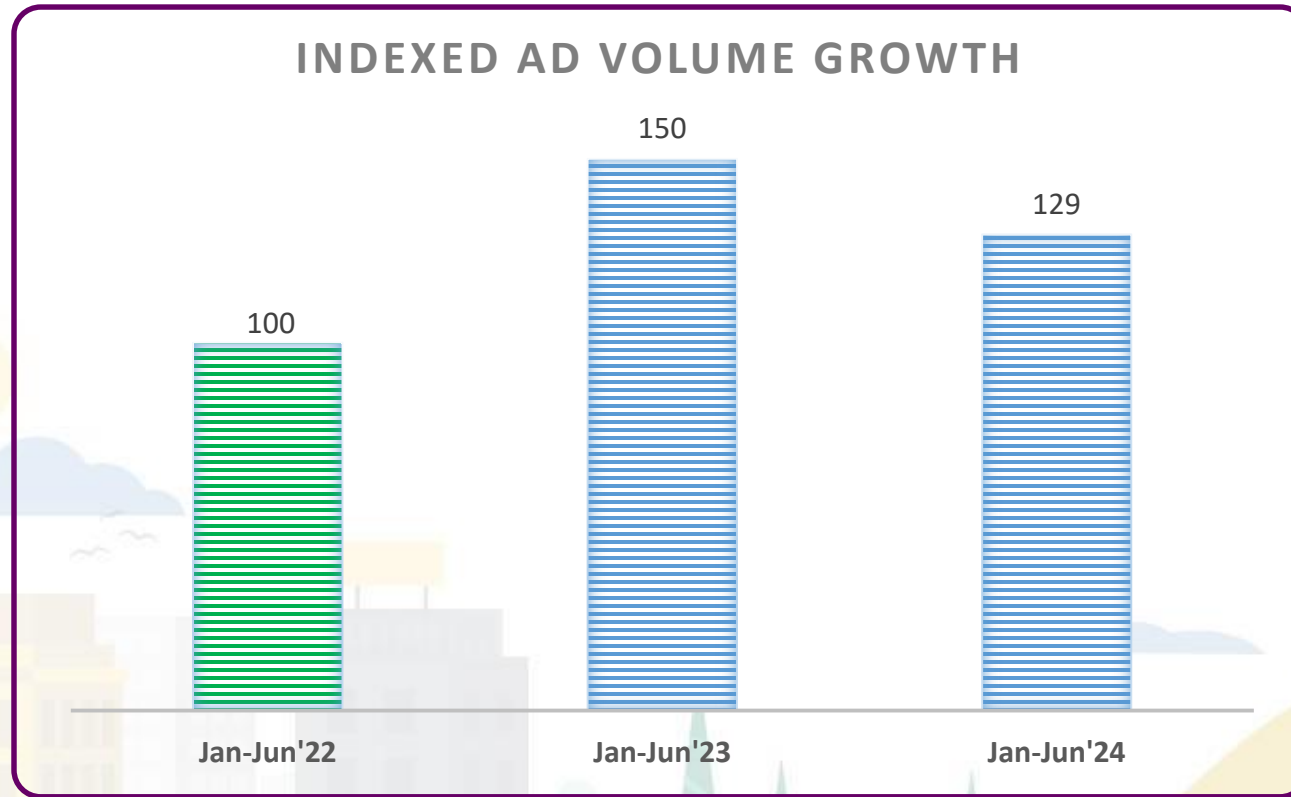
8. **Hyundai Motor India** was the leading brand on Digital Medium with **9%** share of ad impressions in H1'24.
During Jan-Jun'24, **Programmatic** transaction method had the highest share of ad impressions of **89%**.



TV



Ad Volumes for Auto sector on TV



Index: Jan-Jun'22=100

- Ad volumes on **TV** witnessed **degrowth** of **14%** during Jan-Jun'24 compared to Jan-Jun'23.
- The Auto sector experienced a **29%** growth during Jan-Jun'24 compared to the same period in 2022.

Top 10 Categories and Advertisers of Auto for TV

Top 10 Categories	% Share
Two Wheelers	39%
Cars	37%
Commercial Vehicles	8%
Tyres	7%
Auto-Air Freshners	4%
Automotive Fuel	3%
Ret Cars	1%
Corporate-Auto	1%
Auto Spares	0.4%
Ret Automobiles Range	0.3%

Top 10 Advertisers	% Share
TVS Motor Company	15%
Honda Motorcycle & Scooter India	13%
Tata Motors	10%
Hyundai Motor India	8%
Maruti Suzuki India	8%
KIA Motors Corporation	4%
MG Motor India	4%
Godrej Consumer Products	4%
JK Tyre & Industries	3%
Skoda Auto	3%

- The **Two-Wheeler** category surpassed **Cars** to claim the top position, capturing a **39%** share of ad volumes in H1 2024 compared to H1 2023.
- **Auto-Air Freshners** was a new entrant in the Top 10 categories during Jan-Jun'24 over Jan-Jun'23. The top 2 categories collectively added **76%** share of ad volumes in H1'24.
- The top 10 advertisers together added **73%** share of ad volumes in H1'24. **Maruti Suzuki India** ascended to **1st** position with **15%** share of ad volumes.

Top 10 Brands of Auto sector on TV

Top 10 Brands	% Share
Honda Shine	7%
Godrej Aero Car Fragrance	4%
TVS Jupiter 125 Smartxconnect	3%
Honda Cb 350	3%
Maruti Suzuki Swift	3%
Hyundai Creta	3%
JK Tyre	3%
TVS XI 100	3%
Ashok Leyland Bada Dost	3%
Honda SP 160	2%

- The top 10 brands together added **33%** share of ad volumes in Jan-Jun'24.
- Out of the top 10 brands in the **Auto sector** on TV, three belonged to **Honda Motorcycle & Scooter India**.

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

Channel Genres	% Share
News	65%
Movies	13%
GEC	9%
Music	7%
Sports	3%
Others (6)	3%

- **News** was the leading Channel Genre of **Auto** Sector during H1'24 with **65%** share of ad volumes.
- Top 2 channel genres on TV together accounted for **78%** of ad volumes share for **Auto sector** during Jan-Jun'24.

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

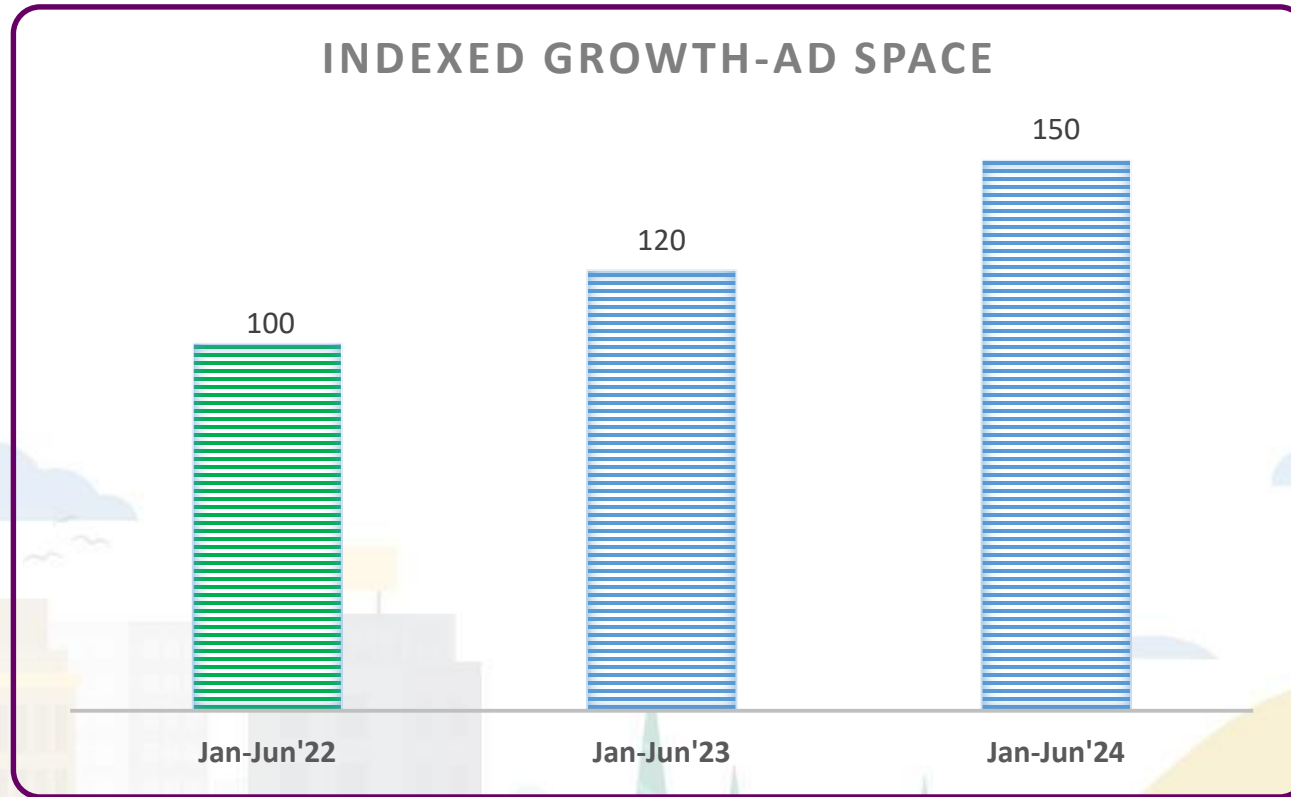
Program Genres	% Share
News Bulletin	51%
Feature Films	14%
Film Songs	5%
Interviews/Portraits/Discussion	4%
Drama/Soap	4%
Cricket	3%
Business Program	3%
Music Shows/Songs	2%
Film Based Magazines	2%
Reviews/Reports	2%

- **News Bulletin** genre was most preferred for promoting **Auto** brands on Television.
- Top 2 program genres i.e. **News Bulletin** and **Feature Films** together added **65%** to the total Ad Volume share of **Auto sector** on TV.

Print



Ad Space for Auto sector in Print



Index: Jan-Jun'22=100

- Ad space in Jan-Jun'24 for Auto Sector, witnessed **growth** of **25%** compared to Jan-Jun'23. While the growth witnessed during Jan-Jun'24 was 50% over Jan-Jun'22.

Top 10 Categories and Advertisers of Auto Sector on Print

Top 10 Categories	% Share
Cars	53%
Two Wheelers	36%
Ret Cars	2%
Commercial Vehicles	2%
Tyres	2%
Automotive Fuel	1%
Ret Two Wheelers	1%
Tractors	1%
Corporate-Auto	1%
Automobiles Range	0.3%

Top 10 Advertisers	% Share
Maruti Suzuki India	17%
Honda Motorcycle & Scooter India	13%
Hero Motocorp	12%
Renault India	5%
TVS Motor Company	5%
Toyota Kirloskar Motor	5%
Tata Motors	5%
KIA Motors Corporation	3%
Mahindra & Mahindra	3%
Hyundai Motor India	3%

- **Cars, Two Wheelers & Ret Cars** retained their **1st, 2nd** and **3rd** positions in H1'24 compared to H1'23. The top 3 categories collectively added **92%** share of ad space in Jan-Jun'24.
- **Maruti Suzuki India** retained its **top** positions in H1'24 over H1'23.
- The Top 10 advertisers together added **71%** share of ad space in Jan-Jun'24.

Top 10 Brands of Auto sector in Print

Top 10 Brands	% Share
Honda Shine 100	7%
Maruti Car Range	5%
Renault Triber	4%
Honda CB 350	2%
Skoda Car	2%
Kia Sonet	2%
Hero HF Deluxe	2%
Honda Activa H Smart	2%
Maruti Suzuki Grand Vitara	2%
Maruti Suzuki Swift	2%

- Top 10 Brands accounted for **28%** share of ad space in Jan-Jun'24 with **Honda Shine 100** leading the list.
- Out of the top 10 brands, **6** of them belonged to **Cars Category** and remaining **4** to **Two-wheelers category** in Jan-Jun'24.
- **Maruti Car Range** slide to **2nd** position in Jan-Jun'24 over Jan-Jun'23.

Newspaper: Publication Language and Genre for Auto sector in Print

Publication Language	% Share
Hindi	41%
English	18%
Marathi	9%
Telugu	8%
Tamil	6%
Others (8)	18%

Focus on Advertising on General Interest Newspapers by advertisers

Publication Genre	% Share
General Interest	98%
Business/Finance/Economy	2%

- **41%** of the total ad space utilized by Auto Sector advertisers was in **Hindi Publications**.
- Top 5 Publication Languages accounted for **82%** share of Auto sector's ad space.
- **General Interest** publication genre added **98%** share of Auto sector's ad Space.

Zone wise Advertising share of Auto sector in Print

Zone	% Share
North Zone	32%
South Zone	30%
West Zone	24%
East Zone	14%

Top 2 Cities - North Zone
New Delhi
Chandigarh

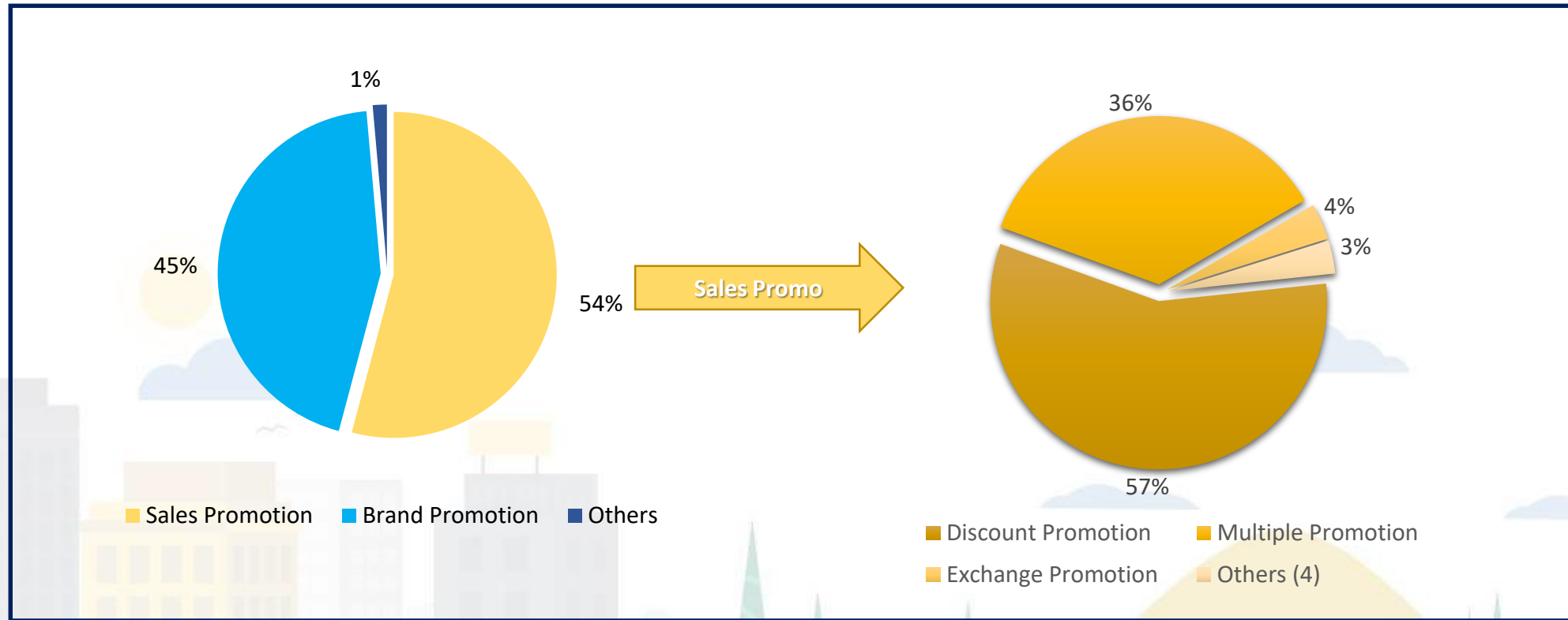
Top 2 Cities - South Zone
Bangalore
Hyderabad

Top 2 Cities - West Zone
Mumbai
Nagpur

Top 2 Cities - East Zone
Kolkata
Raipur

- Among 4 zones, **North** was the leading territory for Auto advertising with **32%** share of sector in Print during H1'24.
- **New Delhi & Mumbai** were top 2 cities in Pan India during Jan-Jun'24.

Advertising Promotions of Auto sector in Print

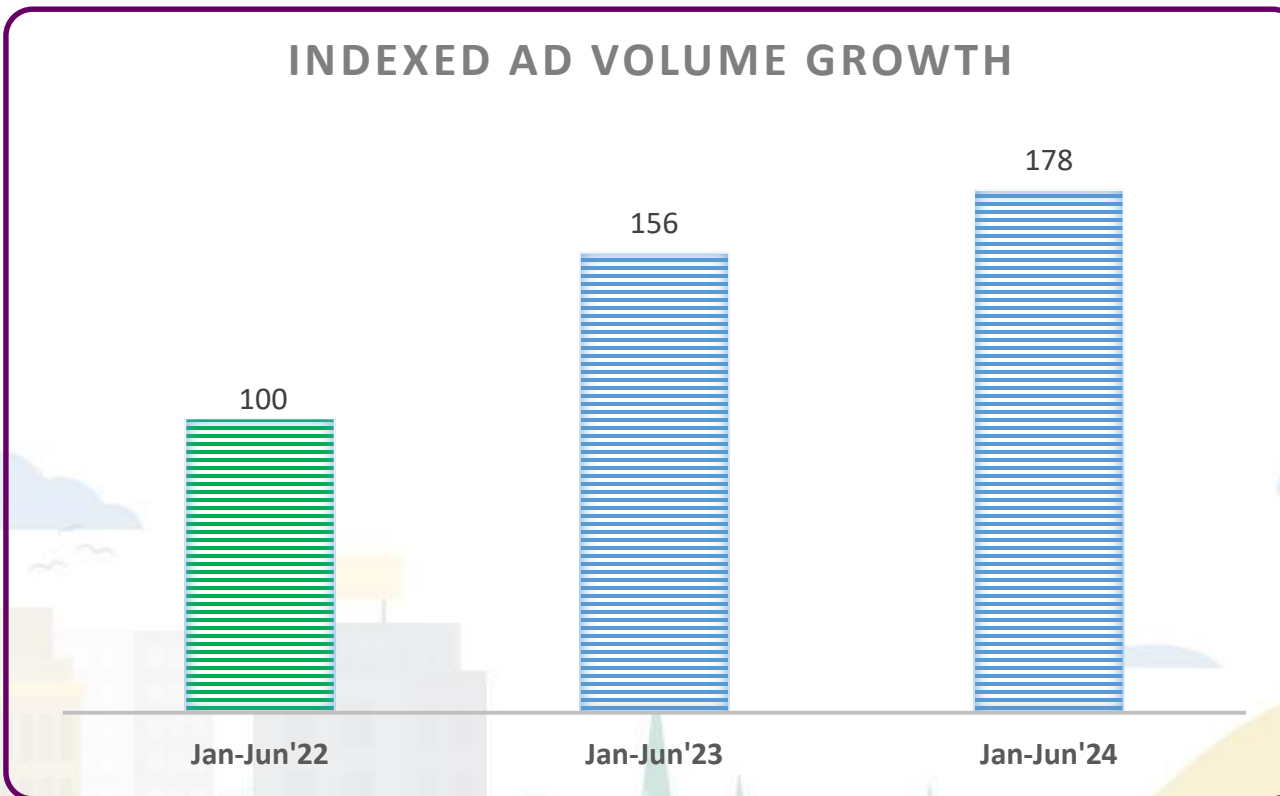


- **54%** of the total ad space utilized by **Auto** sector's advertisers for different types of **Sales Promotions** in Print media.
- Among Sales Promotions, **Discount Promotion** occupied **57%** share of the pie followed by **Multiple Promotion** with **36%** share in Jan-Jun'24.

Radio



Ad Volumes for Auto sector on Radio



Index: Jan-Jun'22=100

- Ad volumes for Auto Sector **increased** by **78%** in Jan-Jun'24 over Jan-Jun'22 in **Radio** Medium.
- A **14%** of ad volume growth witnessed during Jan-Jun'24 over Jan-Jun'23 in **Auto** Sector.

Top 10 Categories and Advertisers for Auto on Radio

Top 10 Categories	% Share
Cars	72%
Ret Cars	12%
Two Wheelers	5%
Automotive Fuel	3%
Ret Two Wheelers	3%
Corporate-Auto	2%
Tyres	2%
Other Auto Product & Service	1%
Tractors	0.3%
Commercial Vehicles	0.3%

Top 10 Advertisers	% Share
Maruti Suzuki India	18%
Tata Motors	10%
Renault India	7%
Hyundai Motor India	7%
Mahindra & Mahindra	6%
MG Motor India	6%
Nissan Motor Co	5%
Honda Cars India	5%
KIA Motors Corporation	4%
Indian Oil Corporation	3%

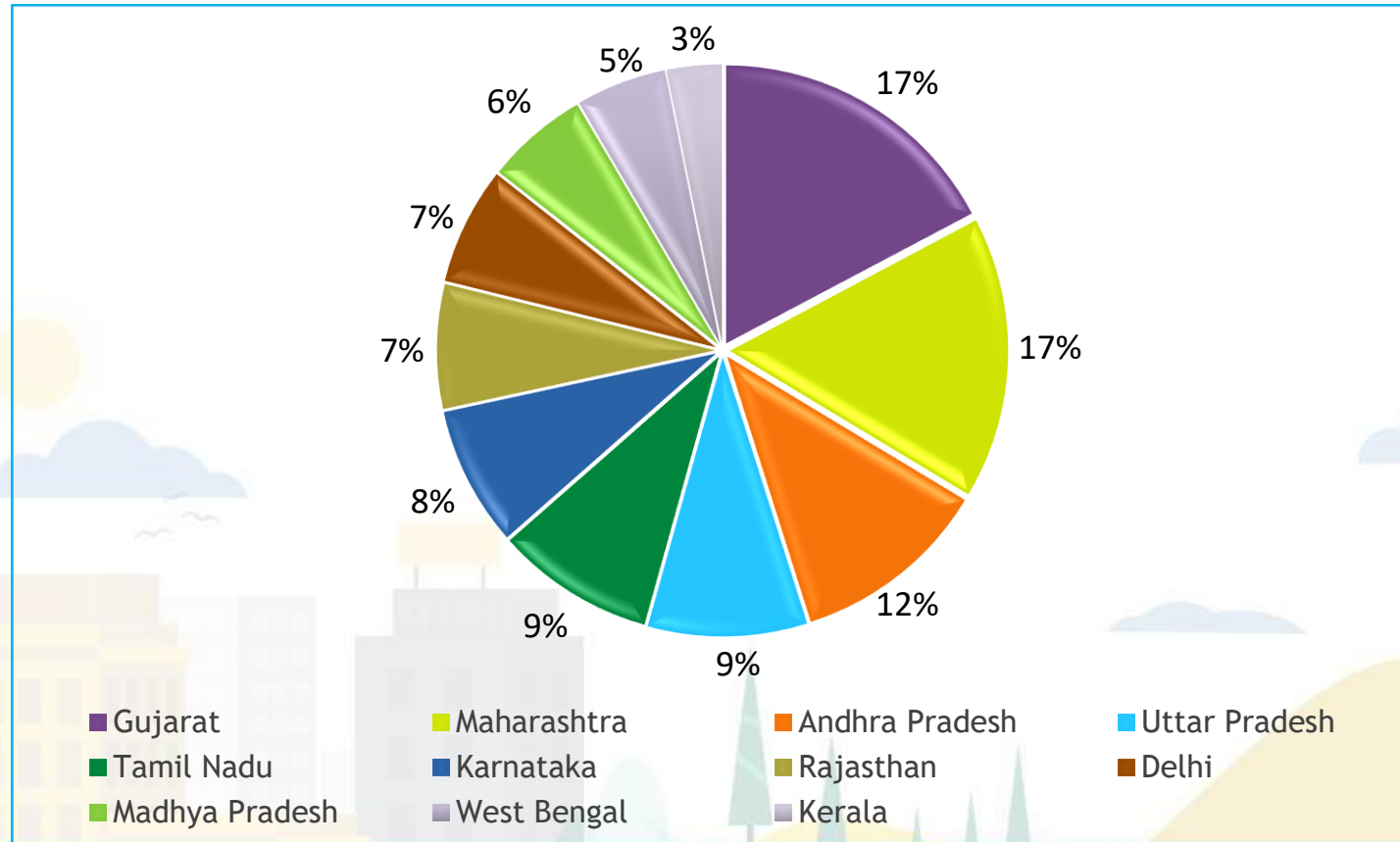
- **Cars** and Ret Cars retained their **1st & 2nd** position with **72% & 12%** share of ad volumes respectively in Jan-Jun'24 over Jan-Jun'23. The top 3 categories together contributed nearly **90%** share of ad volumes in H1'24.
- **Tractors** was the only new entrant in the top 10 categories for Jan-Jun'24 compared to top 10 of Jan-Jun'23.
- **Maruti Suzuki India** retained its **1st** position with **20%** share of ad volumes in H1'24 over H1'23. The top 10 advertisers together added **71%** share of ad volumes in H1'24.

Top 10 Brands of Auto sector on Radio

Top 10 Brands	% Share
Nissan Magnite	5%
Maruti Suzuki Arena	5%
Maruti Suzuki True Value	4%
Renault Cars	3%
Indian Oil Swagat	3%
Renault Kiger	3%
Tata Tiago/Tigor	3%
Maruti Suzuki Grand Vitara	3%
Hyundai Exter	3%
Hyundai Car Range	3%

- Among the Top 10 **Auto** brands, **3** brands belonged to **Maruti Suzuki India** and **2** belonged to **Hyundai**.
- Top 10 Brands accounted for **35%** share of ad volumes in Jan-Jun'24 with **Nissan Magnite** leading the Brand's list.
- **9** out of Top 10 brands on Radio belonged to **Car's** category and **only 1** belonged to **Automotive Fuel's** Category.

State-wise share of Auto advertising on Radio

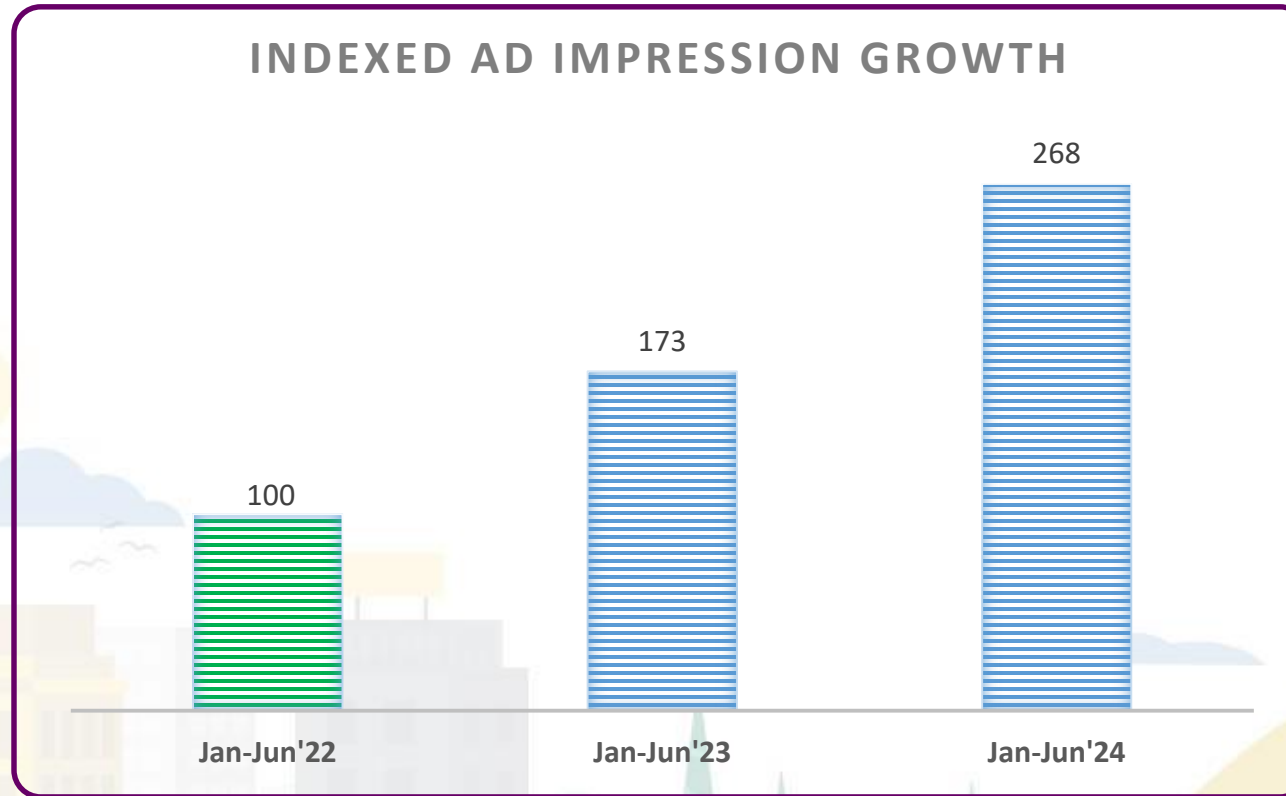


- The top 5 states accounted for **64%** share of ad volumes for the **Auto sector**.
- **Gujarat** ascended to **1st** position with **17%** share of ad volumes in Jan-Jun'24 compared to Jan-Jun'23.

Digital



Ad Impressions for Auto sector on Digital



Index: Jan-Jun'22=100

- **Digital** medium witnessed a significant **growth** of **55%** in ad impressions in Jan-Jun'24 over Jan-Jun'23.
- The Auto sector experienced a **2.68 times** growth during Jan-Jun'24 compared to the same period in 2022

Top 10 Categories and Advertisers of Auto Sector for Digital

Top 10 Categories	% Share
Cars	46%
Two Wheelers	23%
Corporate-Auto	16%
Other Auto Product & Service	6%
Tyres	4%
Commercial Vehicles	3%
Ret Two Wheelers	2%
Ret Cars	1%
Tractors	0.5%
Automotive Batteries	0.2%

Top 10 Advertisers	% Share
Maruti Suzuki India	26%
Hyundai Motor India	14%
TVS Motor Company	6%
Kia Motors Corporation	5%
Tata Motors	4%
Gobump	3%
Hero Motocorp	3%
Ola Electric Mobility	3%
Honda Motorcycle & Scooter India	2%
Twenty Two Motors	2%

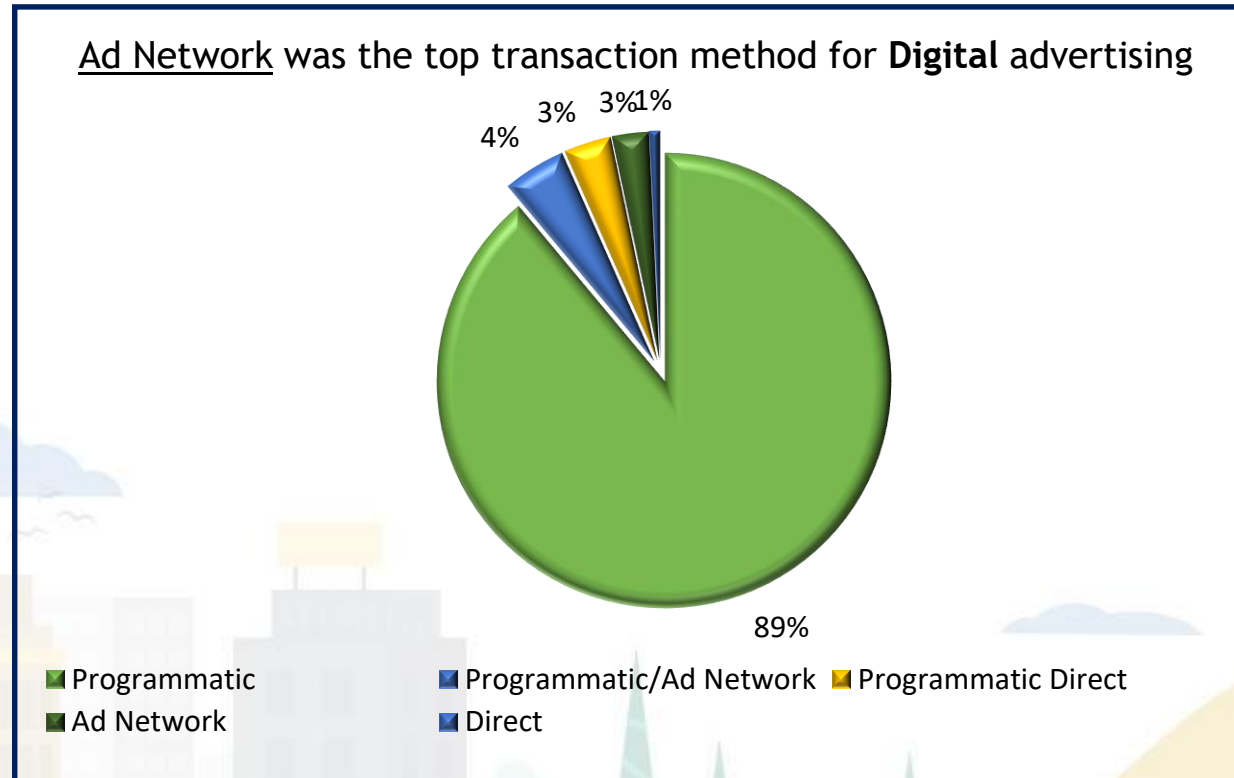
- **Cars & Two Wheelers** retained their 1st & 2nd positions in the top 10 categories during H1'24.
- **6 out of** top 10 categories were common during Jan-Jun'24 over Jan-Jun'23.
- Top 10 Advertisers accounted for **69%** share of ad impressions in Jan-Jun'24 with **Maruti Suzuki India** leading the list.

Top 10 Brands of Auto sector on Digital

Top 10 Brands	% Share
Hyundai Motor India	9%
Maruti Suzuki Brezza	7%
Maruti Suzuki Swift	5%
Gobump	3%
KIA Cars	3%
Bounce Infinity EV	2%
Ret Honda CB300F (Honda Bigwing)	2%
MY TVS	2%
Ola Electric Scooter	2%
Maruti Suzuki Grand Vitara	2%

- In Digital Medium, the top 10 brands together contributed **37%** share of ad impressions in Jan-Jun'24.
- Among the Top 10 brands, **4** of them belonged to category 'Cars' and **3** belonged to 'Two Wheelers' category.

Transaction Methods of Digital Advertising in Auto sector



- During Jan-Jun'24, **Programmatic** transaction method **ascended** to **1st** position with **89%** share of ad impressions for Digital Advertising in Auto Sector.

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