



Quarterly Report (Jan–Sep'24)

TELEVISION ADVERTISING



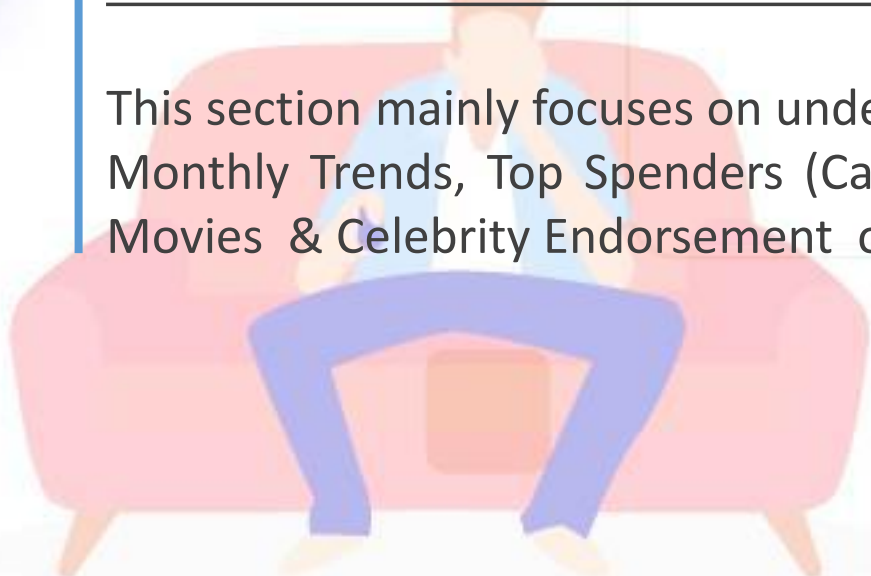
Source: AdEx India (A Division of TAM Media Research)

Advertising Overview on Television

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 advertising trends in comparison to the previous year, Monthly Trends, Top Spenders (Categories , Advertisers & Brands), Co-Branding Ads associated with Movies & Celebrity Endorsement on TV.



Highlights

01

TV Ad Volumes dropped marginally by **2%** in Jan-Sep'24 over Jan-Sep'23.

02

Food & Beverage was the leading Sector with **23%** share of ad volumes during Jan-Sep'24.

03

HUL was the leading advertiser during both period i.e. Jan-Sep'23-24.

04

5 out of Top 10 brands were from **Reckitt Benckiser (India)**. The Top 10 brands added **10%** to the total TV Ad Volumes in Jan-Sep'24.

05

Toilet Soaps Category retained its **1st** position with **7%** share of ad volumes in Jan-Sep'24 over Jan-Sep'23.

06

Rubs And Balms saw highest increase in Ad Volumes resulting in **56%** growth during Jan-Sep'24 compared to Jan-Sep'23.

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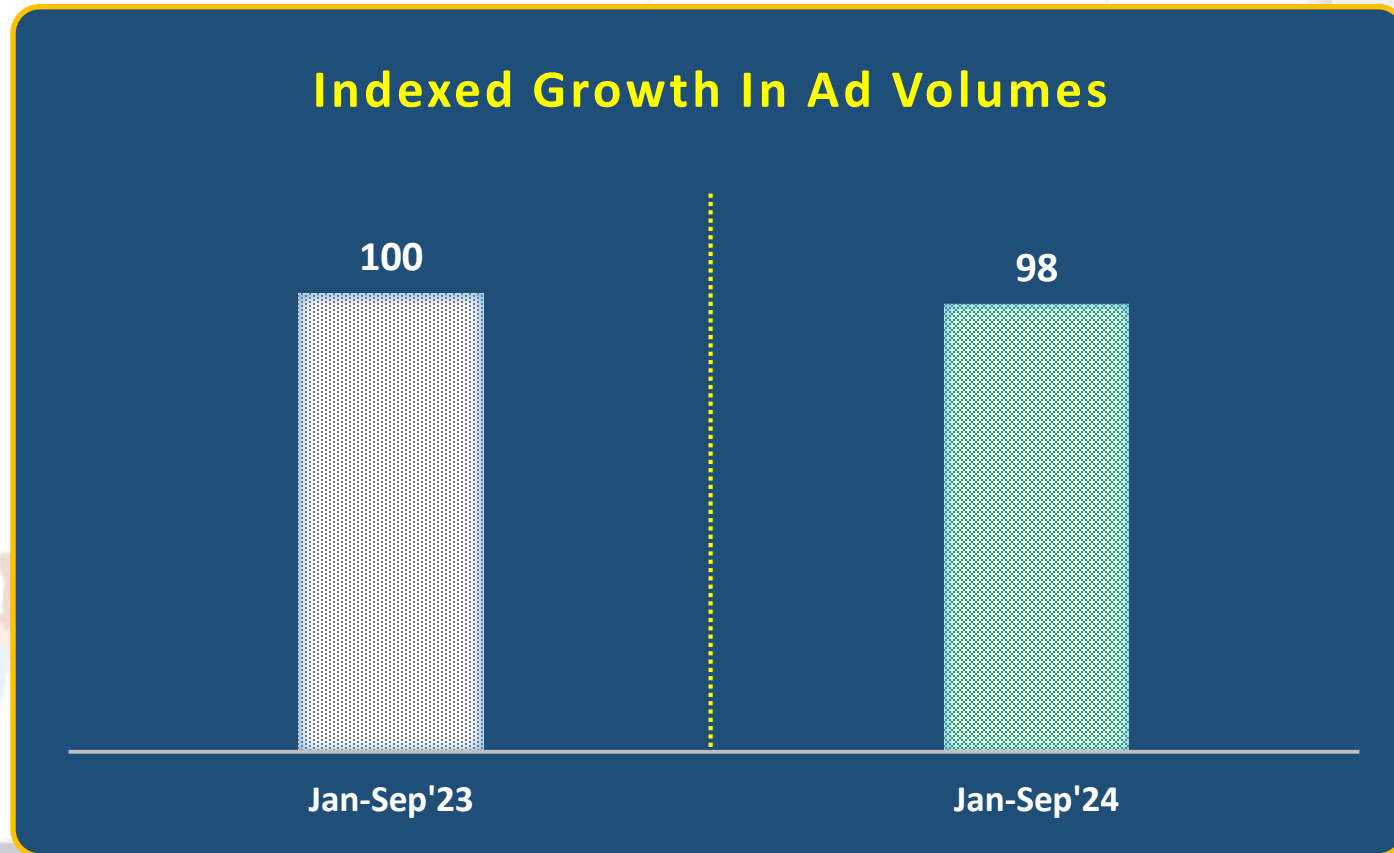
GEC and **News** were the most preferred channel genres on television during Jan-Sep'23 with combined advertising share of **56%**.

08

The Top 5 channel genres contributed more than **90%** share of ad volumes in Jan-Sep'23-24.

Period : Jan-Sep'23 and Jan-Sep'24

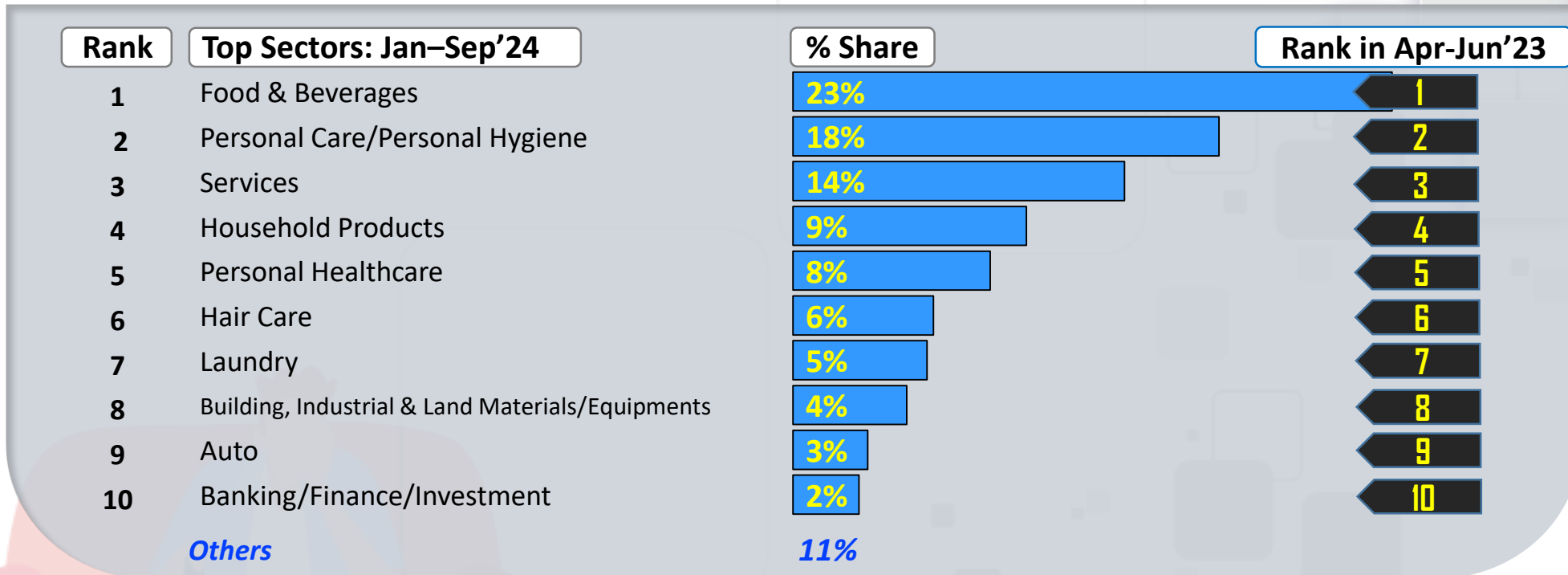
TV Ad Volumes saw meager 2% drop in Jan-Sep'24 over Jan-Sep'23



Index: Jan-Sep'23=100

- Ad Volumes on Television Advertising witnessed **growth** of **5%** in Apr-Jun'23 and **1% growth** in Jul-Sep'23 compared to Jan-Mar'23.
- Also, Jul-Sept'23 observed **de-growth** of **4%** in TV ad volumes compared to Jul-Sep'22.

'Food & Beverages': The Leading Sector covering nearly 1/4th of Ad Volumes



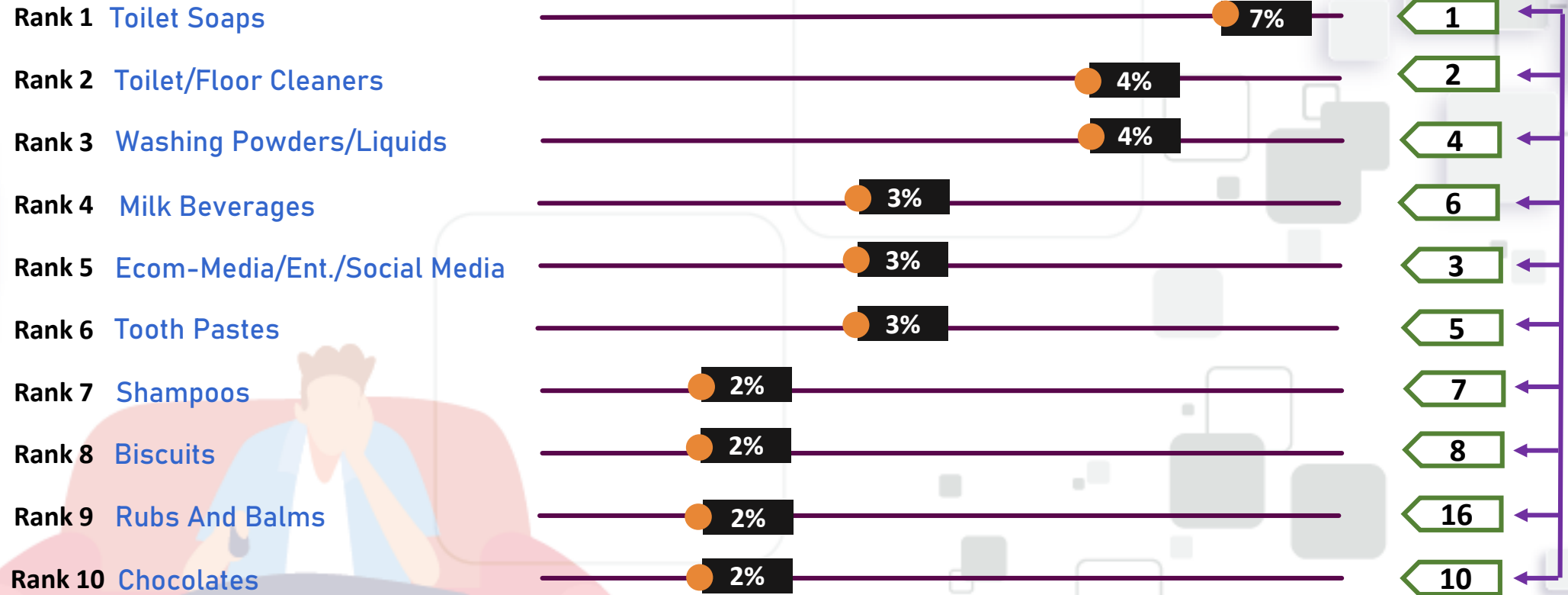
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 ■ **Food & Beverages** sector, topped the ranking with 23% ad volume share.
 ■ All the top 10 sectors retained their respective ranking in Jan-Sep'24 as compared to Jan-Sep'23.
 ■ The top 10 Sectors together added **89%** share of ad volumes in Jan-Sep'24.
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5 among Top 10 Categories maintained their rankings in Jan-Sep'24 over Jan-Sep'23



TOP 10 Categories

Rank in Jan-Sep'23



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- The top 10 categories collectively added **33%** share of ad volumes on **Television Advertising** during Jan-Sep'24.
- During Jan-Sep'24, **Rubs And Balms** was the only new entrant in the top 10 list of categories compared to Jan-Sep'23.
- **Washing Powder/Liquids, Milk Beverages** and **Rubs and Balms** observed positive rank shift in Jan-Sep'24 compared to Jan-Sep'23.

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Leading Advertisers: Across Jan-Sep'23-24

Total Advertisers: 6,250+

Leading Advertisers: Jan-Sep'24

Hindustan Unilever
Reckitt Benckiser (India)
Godrej Consumer Products
Procter & Gamble
ITC
Cadburys India
Coca Cola India
Wipro
Britannia Industries
Colgate Palmolive India

Total Advertisers: 6,350+

Leading Advertisers: Jan-Sep'23

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Procter & Gamble
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Coca Cola India
ITC
Wipro
Pepsi Co
Britannia Industries

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- **Top 4 Advertisers** retained their positions during Jan-Sep'24 compared to Jan-Sep'23.
- During Jan-Sep'24, the top 10 advertisers contributed **45%** share of ad volumes on TV Advertising.
- **Colgate Palmolive India** entered the top 10 list during Jan-Sept'24 compared to Jan-Sep'23.

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Leading Brands: Across Jan-Sep'23-24

Total Brands: 15,850+

Leading Brands: Jan-Sep'24

Harpic Power Plus 10x Advanced
Dettol Toilet Soaps
Dettol Antiseptic Liquid
Jiocinema App
Lizol All In 1
Surf Excel Easy Wash
Santoor Sandal And Turmeric
Harpic Bathroom Cleaner
Ultratech Cement
Close Up Ever Fresh

Total Brands: 10,100+

Leading Brands: Jan-Sep'23

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

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- In Jan-Sep'24, the top 10 brands together accounted for **10%** share of ad volumes on **Television Advertising**.
 - Out of the top 10 brands present in **Jan-Sep'24**, **5** of them belonged to **Reckitt Benckiser (India)** and **2** belonged to **Hindustan Unilever**.
 - Also, 3 brands each out of Top 10 belonged to **Personal Care/Personal Hygiene Sector** and **Household Products** during Jan-Sep'24.
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Top Growing Categories : 215+ Categories registered Positive Growth

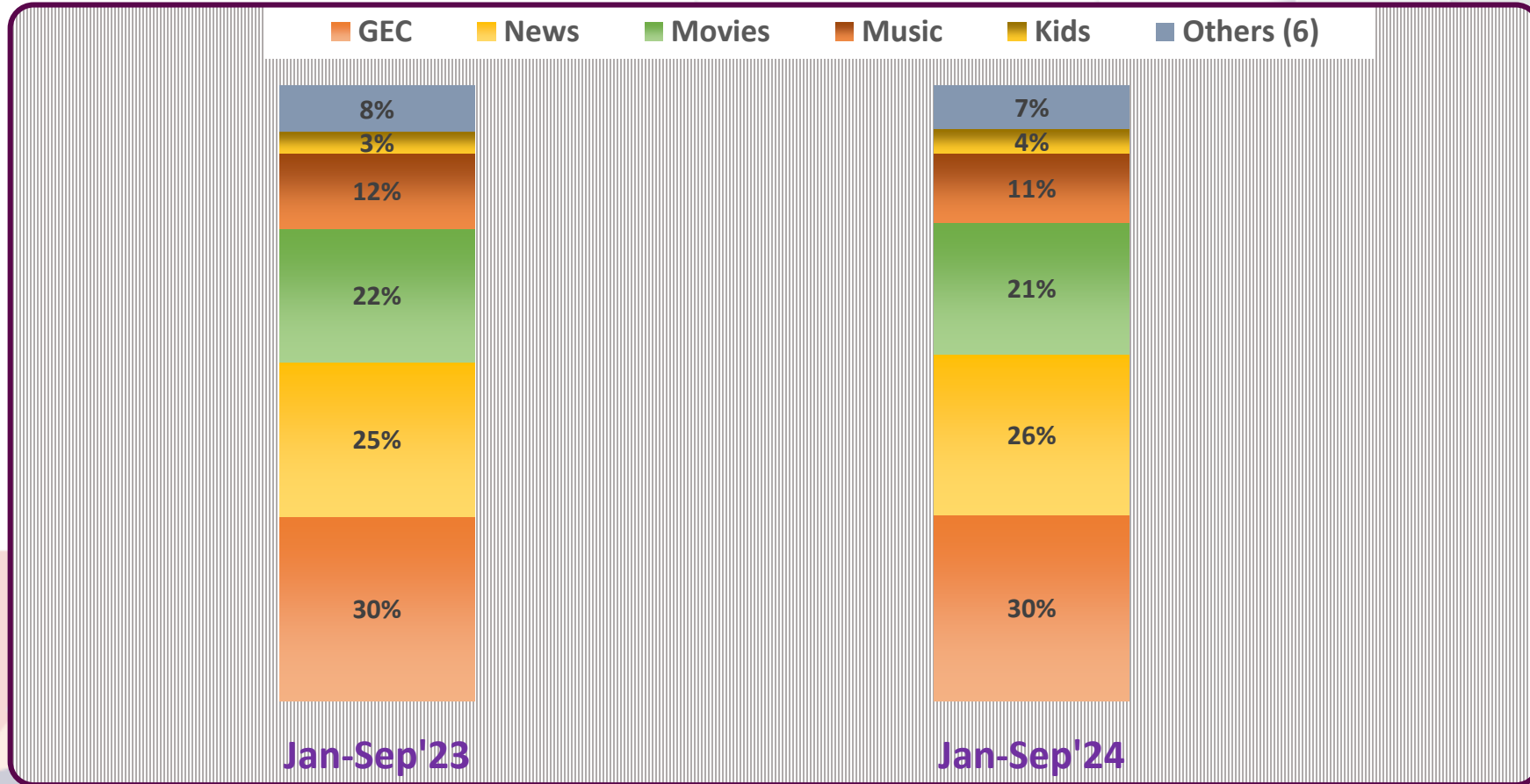
Rank	Top 10 Growing Categories (Jan-Sep'24) (based on highest increase in Ad Volumes)	Growth
1	Rubs And Balms	56%
2	Cement	77%
3	Milk Beverages	23%
4	Washing Powders/Liquids	19%
5	Toilet Soaps	9%
6	Ecom-Online Shopping	42%
7	Paints	55%
8	Vitamins/Tonics/Health Supplements	65%
9	Wafer/Chips	64%
10	Tea	16%

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- **Rubs And Balms** saw highest increase in Ad Volumes resulting in **56%** growth during Jan-Sep'24 compared to Jan-Sep'23 followed by **Cement** with **77%** growth.

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Top Channel Genres : GEC and News added 56% share of Ad Volumes in Jul-Sep'24



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- Compared to Jan-Sep'23, **GEC, News and Kids Genre** witnessed minor **rise** in % share of ad volumes in Jan-Sep'24. Whereas, **Movies and Music Genre's** share declined by margin for same set of periods.
- Ad Volume contribution of top 5 genres together grew consistently across each Jan-Sep period for last 2 years.

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