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BROADCAST AUDIENCE RESEARCH COUNCIL INDIA

What India Watches™

2021

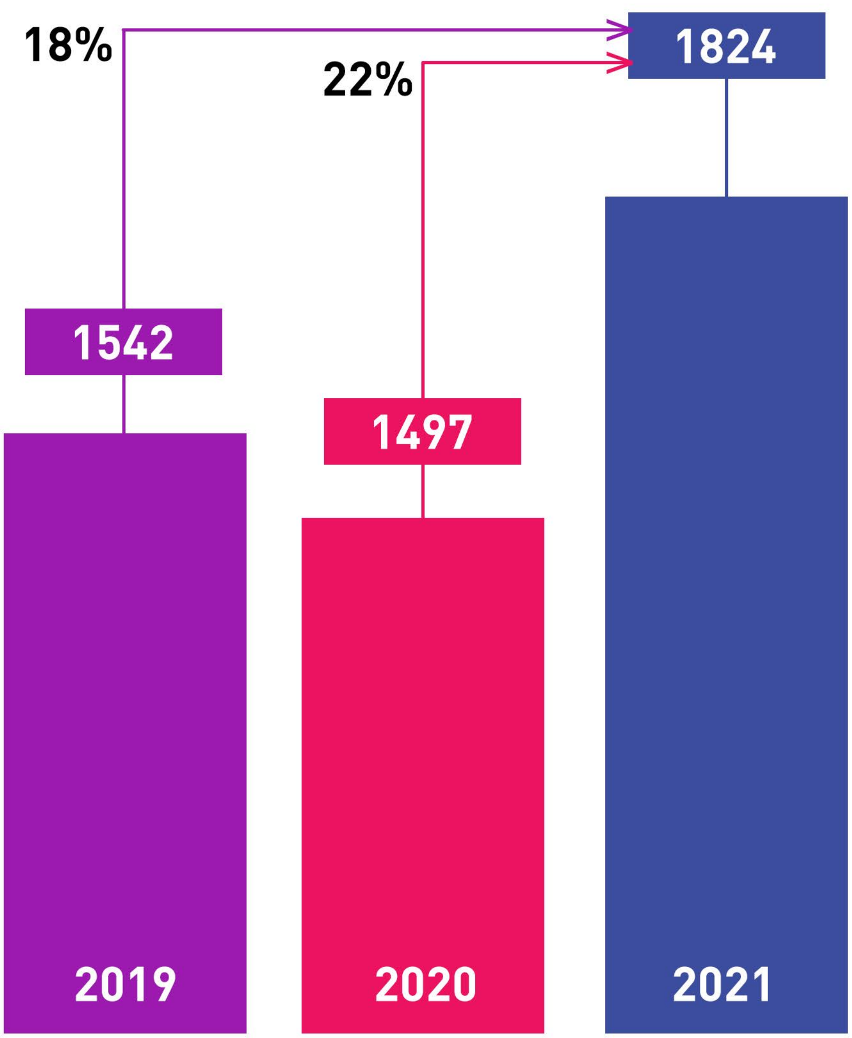
A VOLUMINOUS YEAR

YEARLY AD VOLUMES REPORT

2021 BOUNCED BACK WITH A SUBSTANTIAL DOUBLE DIGIT SPIKE

22% Ad Volumes Growth over 2020 and 18% over 2019

Jan-Dec: Ad Vol (Mn Sec)



Excludes: ASSOCIATIONS/SOCIAL/CULTURAL ORG; SOCIAL ADVERTISEMENTS-NGOS & FILLERS

~50% NEW & RETURNING ADVERTISERS ON TV

Total Count | New & Returning

	Total Count	New & Returning	
Advertisers	9239	4483	49% Contribution
Brands	14616	7470	51% Contribution

Data Insights

Sector-wise

- Contribution of Services Sector to Total TV Advertisers is highest - **21%**, followed by FMCG - **17%.**
- Ecommerce witnessed highest growth in number of advertisers - **67%** over 2019.
- BFSI saw **11%** & Auto **10%** more Advertisers as compared to 2020.
- Retail, Services, Ecommerce, Corporate Brand Image witnessed highest share of new & returning advertisers with over **60%**.

Language-wise

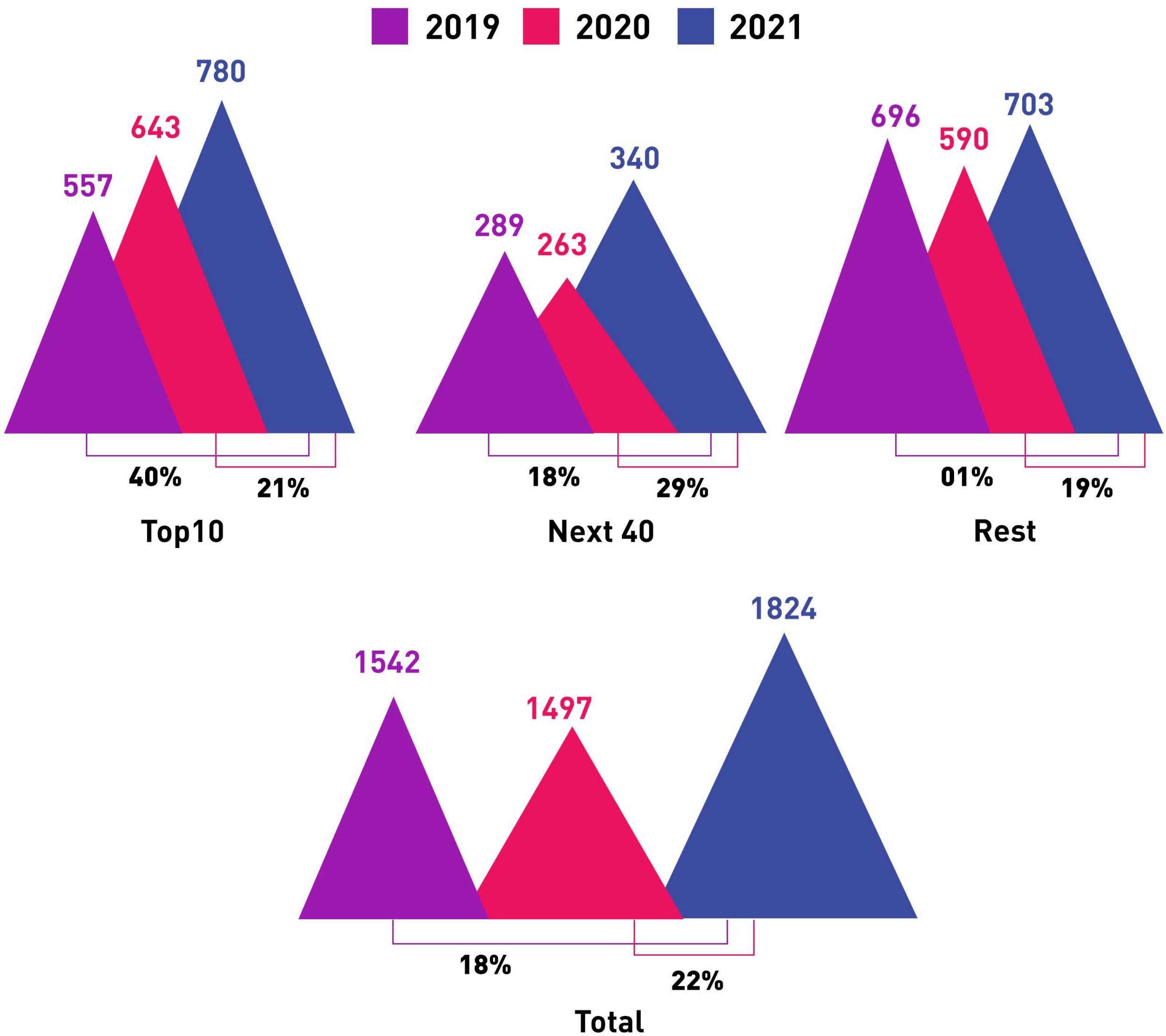
- Tamil language channels witnesses highest growth in number of advertisers since 2019.
- Gujarati sees highest growth in number of advertisers compared to 2020.
- Hindi witnesses highest share of new & returning advertisers - **48%.**

New & Returning Advertisers: Active in 2021 & Not Active in 2019 & 2020
Excludes: ASSOCIATIONS/SOCIAL/CULTURAL ORG; SOCIAL ADVERTISEMENTS-NGOS & FILLERS

TOP 10 ADVERTISERS GREW Y-o-Y WITH A CAGR OF 18%

Advertisers beyond Top 10 recover sharply with a 22% growth over 2020

Ad Vol (Mn sec)



Top 10 & Next 40 Excludes : Govt, Media & Film Trailor Advertisers
Excludes: ASSOCIATIONS/SOCIAL/CULTURAL ORG; SOCIAL ADVERTISEMENTS-NGOS & FILLERS

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TOP 20 ADVERTISER GROUPS OF 2021

Ad Vol (Mn Sec)

Top 20 Advertiser Groups	2019	2020	2021
HINDUSTAN UNILEVER LTD	226	294	331
RECKITT BENCKISER GROUP	95	129	201
PROCTER & GAMBLE	41	37	50
CADBURYS INDIA LTD	25	25	37
GODREJ GROUP	31	28	31
ITC LTD	36	35	29
COLGATE PALMOLIVE INDIA LTD	27	31	29
PEPSI FOODS (G)	11	12	26
GLAXOSMITHKLINE GROUP OF COMPA	30	21	24
AMAZON ONLINE INDIA PVT LTD	17	18	23
TATA (G)	13	10	17
GCMMF (GUJ COOP MILK MKT FED)	07	16	16
MARICO LTD	17	13	16
COCA COLA INDIA LTD	10	07	15
WIPRO (G)	29	24	15
WADIA (G)	07	09	13
ASIAN PAINTS (I) LTD	10	08	13
THINK & LEARN PVT LTD	02	07	11
NESTLE INDIA LIMITED	12	11	10
ABBOTT (G)	04	07	10

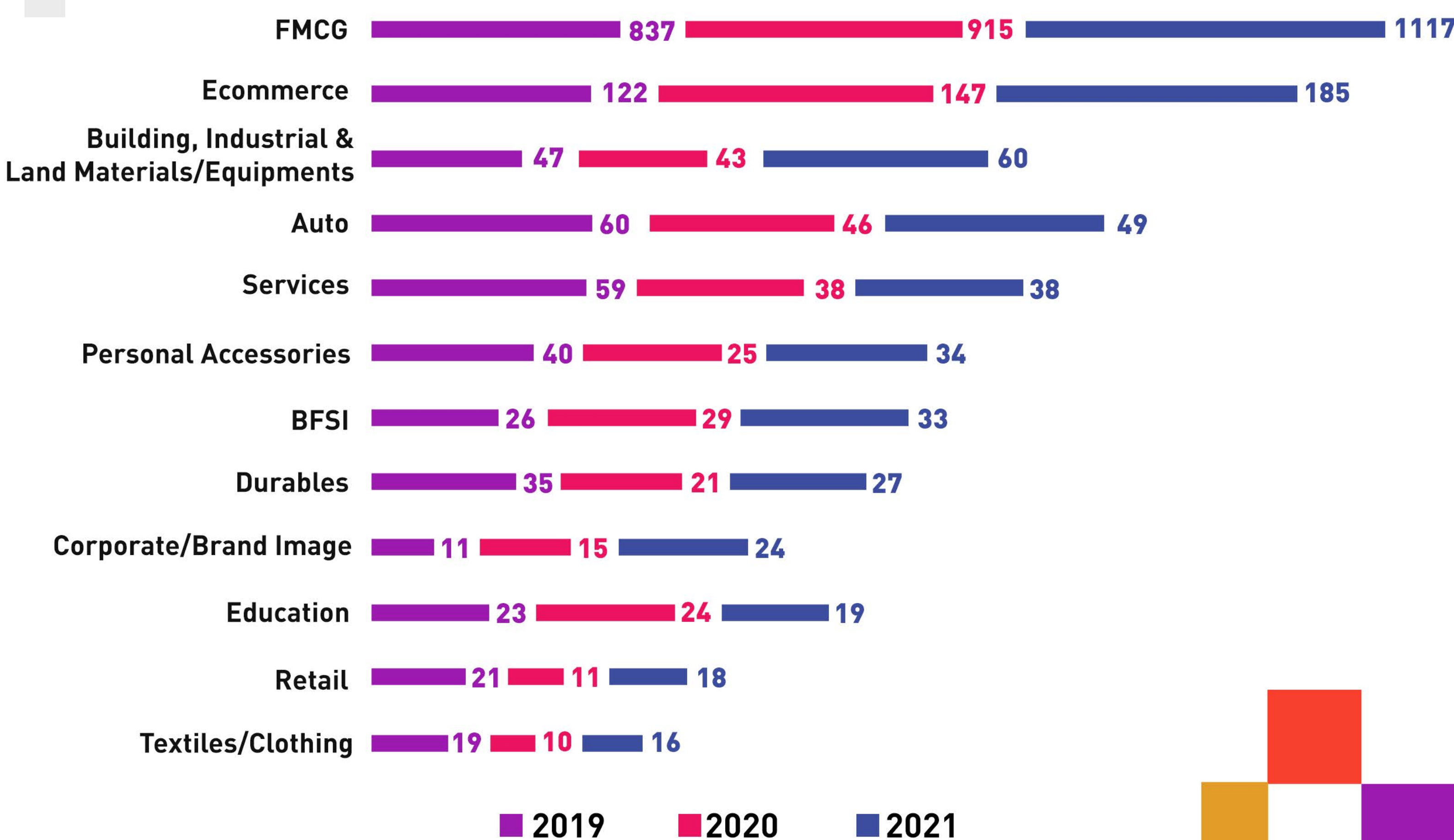
Top 20 excludes: Govt, Media & Film Trailor Advertiser Groups
Excludes: ASSOCIATIONS/SOCIAL/CULTURAL ORG; SOCIAL ADVERTISEMENTS-NGOS & FILLERS

TOP SECTORS CONTINUE TO LEAD AD VOLUMES ON TELEVISION IN 2021

Data Insights

- Ecommerce, FMCG, BFSI, Building, Industrial & Land Material remain resilient on TV with a strong Y-o-Y growth.
- TV continues to be an important medium for Corporate Brand Image with more than **2X growth** over 2019.
- Most sectors have shown a robust growth over 2020.
- Growth over 2020: Textile **72%**, Retail **56%**, Personal Acessories **40%**, Durables **30%.** .

Ad Vol (Mn Sec)



Excludes: ASSOCIATIONS/SOCIAL/CULTURAL ORG; SOCIAL ADVERTISEMENTS-NGOS & FILLERS

DEEP DIVE INTO KEY CATEGORIES OF TOP SECTORS

FMCG
A DEEP DIVE INTO TOILET/FLOOR CLEANERS

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ADVERTISER COUNT

	2019	2020	2021
Toilet/Floor Cleaners	15	28	21
Overall FMCG	1448	1552	1555

Data Insights

- Contribution of FMCG to Total TV Advertisers is second highest with **17%.**
- **38%** of FMCG Advertisers in 2021 are new & returning advertisers.

TOP 5 CATEGORIES OF FMCG

TOP 5 CATEGORIES	Ad Vol (Mn Sec) 2019	2020	2021	G/D over 2019	G/D over 2020
TOILET SOAPS	92	95	74	-20%	-23%
TOILET/FLOOR CLEANERS	43	48	66	53%	37%
SHAMPOOS	45	53	58	31%	10%
TOOTH PASTES	42	55	58	38%	7%
WASHING POWDERS/LIQUIDS	44	51	53	21%	3%
TOTAL FMCG	837	915	1117	33%	22%
REST OF CATEGORIES (WITHIN FMCG)	571	612	808		

Data Insights

- Contribution of FMCG to Total TV Ad Volume is highest.
- Share of FMCG has grown from **54%** in 2019 to **61%** in 2021
- Sector registered impressive **22% & 33%** growth over 2020 & 2019
- Toilet & Floor cleaners has shown a robust growth of **37%** over 2020, **53%** over 2019.
- Ad Volume share of category has grown on Hindi Channels from **16%** in 2019 to **22%** in 2021.

New & Returning Advertisers & Brands : present in 2021 & not present in 2019 & 2020.
Excludes: ASSOCIATIONS/SOCIAL/CULTURAL ORG; SOCIAL ADVERTISEMENTS-NGOS & FILLERS

E COMMERCE
A DEEP DIVE INTO EDTECH (EDUC-ECOM-EDUCATION)

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ADVERTISER COUNT

Advertiser Count	2019	2020	2021
Ed Tech	32	84	103
Overall Ecommerce	351	506	587

Data Insights

- Overall E-Commerce sector saw **67%** growth in number of Advertisers from 2019.
- **65%** new & returning EdTech Advertisers in 2021.
- **3x rise** in number of EdTech Advertisers since 2019.
- Share of Ed Tech Advertisers to E-Commerce up from **9%** in 2019 to **18%** in 2021.

TOP 5 CATEGORIES OF E-COMMERCE

TOP 5 CATEGORIES	Ad Vol (Mn Sec) 2019	2020	2021	G/D over 2019	G/D over 2020
ECOM-MEDIA/ENTERTAINMENT/SOCIAL MEDIA	34.8	53.3	53.8	54%	1%
EDUC-ECOM-EDUCATION	5.4	19.1	30.4	461%	59%
ECOM-ONLINE SHOPPING	16.8	18.1	26.1	55%	44%
ECOM-MATRIMONIALS	6.6	11.0	11.8	77%	7%
ECOM-FINANCIAL SERVICES	4.0	7.9	10.2	153%	30%
TOTAL E-COMMERCE	1222	1469	1846	51%	26%
REST OF CATEGORIES (WITH E COMMERCE)	54	37	52		

Data Insights

- Overall E commerce Sector has grown substantially - **51%** over 2019.
- EdTech has second highest share of E-Commerce Ad Volumes in 2021.
- Share of EdTech increased from **4%** in 2019 to **16%** in 2021.
- EdTech category has grown exponentially by **461%** over 2019 & **59%** over 2020.
- Category contribution to Ad Volumes on regional channels has grown from **30%** in 2019 to **39%** in 2021.
- EdTech Ad Volumes contribution on Multi Language channels was **30%**.

New & Returning Advertisers & Brands : present in 2021 & not present in 2019 & 2020.
Excludes: ASSOCIATIONS/SOCIAL/CULTURAL ORG; SOCIAL ADVERTISEMENTS-NGOS & FILLERS

BFSI
A DEEP DIVE INTO SECURITIES/SHAREBROKING

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Advertiser Count

	2019	2020	2021
Securities/Sharebroking	26	37	31
Overall BFSI	296	276	305

Data Insights

- **11%** growth in overall BFSI number of Advertisers from 2020.
- **19%** more Advertisers in securities/sharebroking as compared to 2019.
- **29%** securities/sharebroking advertisers in 2021 are new & returning advertisers.
- Securities/sharebroking category contributes **10%** of BFSI advertisers.

TOP 5 CATEGORIES OF BFSI

Ad Vol (Mn Secs)

TOP 5 CATEGORIES	2019	2020	2021	G/D over 2019	G/D over 2020
INSURANCE-LIFE	7.8	6.1	7.8	1%	28%
LOANS-MORTGAGE	3.9	5.2	6.0	53%	15%
SECURITIES/SHAREBROKING	1.0	1.6	3.6	271%	118%
BANKING-SERVICES & PRODUCTS	1.0	2.2	3.0	106%	-37%
CREDIT CARDS	2.5	1.7	1.7	-31%	5%
TOTAL BFSI	26.2	28.7	33.3	27%	16%
REST OF CATEGORIES (WITHIN BFSI)	10	10.8	12.2		

Data Insights

- BFSI has grown by robust **27%** over 2019
- Securities & Sharebroking has third highest share of BFSI Ad Volumes in 2021
- Category has grown exponentially over previous years. **271%** over 2019, **118%** over 2020
- Contribution to BFSI Sector increased from **4%** in 2019 to **11%** in 2021.
- Ad Volumes of securities/ sharebroking category dominant on Hindi & English Language channels in 2020 with **83%** contribution.
- Ad Volumes in 2021 more diversified with **44%** on regionals

New & Returning Advertisers & Brands : present in 2021 & not present in 2019 & 2020.
Excludes: ASSOCIATIONS/SOCIAL/CULTURAL ORG; SOCIAL ADVERTISEMENTS-NGOS & FILLERS

BUILDING, INDUSTRIAL & LAND MATERIALS
A DEEP DIVE INTO BUILDING MATERIALS / SYSTEMS

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Advertiser Count	2019	2020	2021
BUILDING MATERIALS/SYSTEMS	117	110	127
OVERALL BUILDING, INDUSTRIAL & LAND MATERIALS	469	451	458

Data Insights

1. **15%** growth in advertiser count in Building Materials / Systems from 2020.
2. **31%** Advertisers in 2021 are new & returning advertisers.
3. Share of Buidling Material Advertisers on a rise with **28%** contribution to Sector.

TOP 5 CATEGORIES OF BUILDING, INDUSTRIAL & LAND MATERIALS

Ad Vol (Mn Sec)

Category	2019	2020	2021	G/D over 2019	G/D over 2020
Paints	17.1	12.9	20.7	21%	60%
Cement	13.8	14.3	16.3	18%	14%
BuildingMaterials /Systems	6.8	6.2	9.9	45%	60%
Protective Coatings	1.3	2.1	2.3	74%	6%
Corporate Industrial/ B2B	0.5	1.4	2.1	285%	42%
Total Building/ Industrial	46.7	42.8	59.7	28%	39%
Rest of Categories (Building, Industrial & Land Materials)	7.2	5.8	8.4		

Data Insights

1. Building Industrial & Land Materials registered impressive **39%** & **28%** growth over 2020 & 2019
2. Building Materials has third highest share of Sector Ad Volumes in 2021
3. Building Materials/Systems has shown a robust growth of **60%** over 2020, **45%** over 2019.
4. Contribution to Sector increased from **14%** in 2020 to **17%** in 2021.
5. Category is regional focused with **73%** Ad Volume contribution in 2021 on regional channels

New & Returning Advertisers & Brands : present in 2021 & not present in 2019 & 2020.
Excludes: ASSOCIATIONS/SOCIAL/CULTURAL ORG; SOCIAL ADVERTISEMENTS-NGOS & FILLERS

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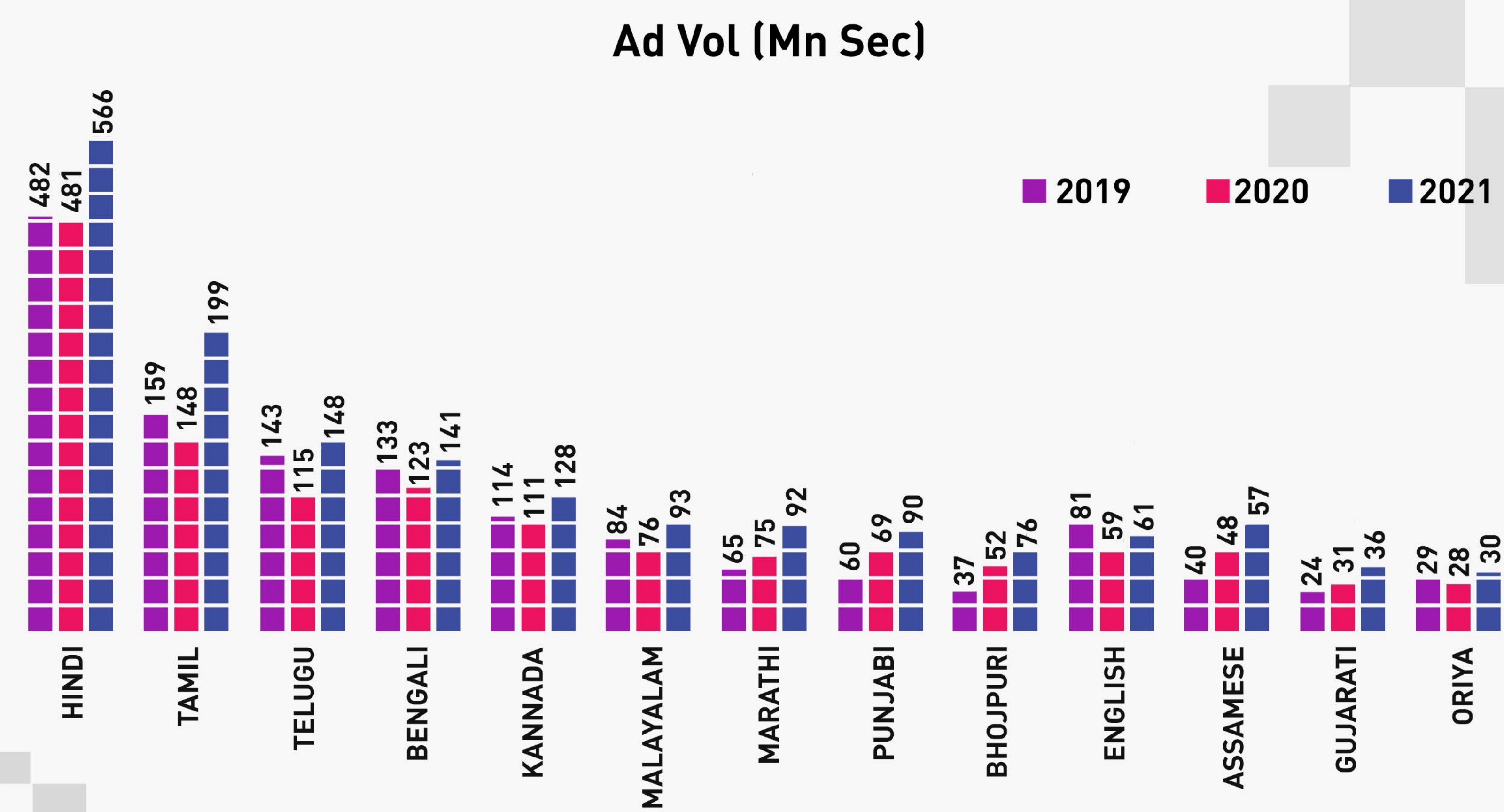
MANY LANGUAGES, ONE INDIA

Share of Ad Volumes on Regional Channels... increasing trend Y-O-Y; 63% in 2021

Data Insights

- Regionals show remarkable growth of **24%**; Hindi registers a strong **18%** growth over previous two years.
- Bhojpuri Language channels most impressive, doubling its ad volumes from 2019.
- Punjabi, Marathi, Gujarati, Assamese show a robust growth of more than **40%** over 2019.
- South language channels improved by **26%** over 2020.



"Mazhavil Manorama(v) is considered as Malayalam Channel. | Sony MAX(v) & Sony MAX HD(v) are considered as Hindi Channels"
Excludes: ASSOCIATIONS/SOCIAL/CULTURAL ORG; SOCIAL ADVERTISEMENTS-NGOS & FILLERS

BROADCAST AUDIENCE RESEARCH COUNCIL INDIA

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QUARTERLY DATA INSIGHTS

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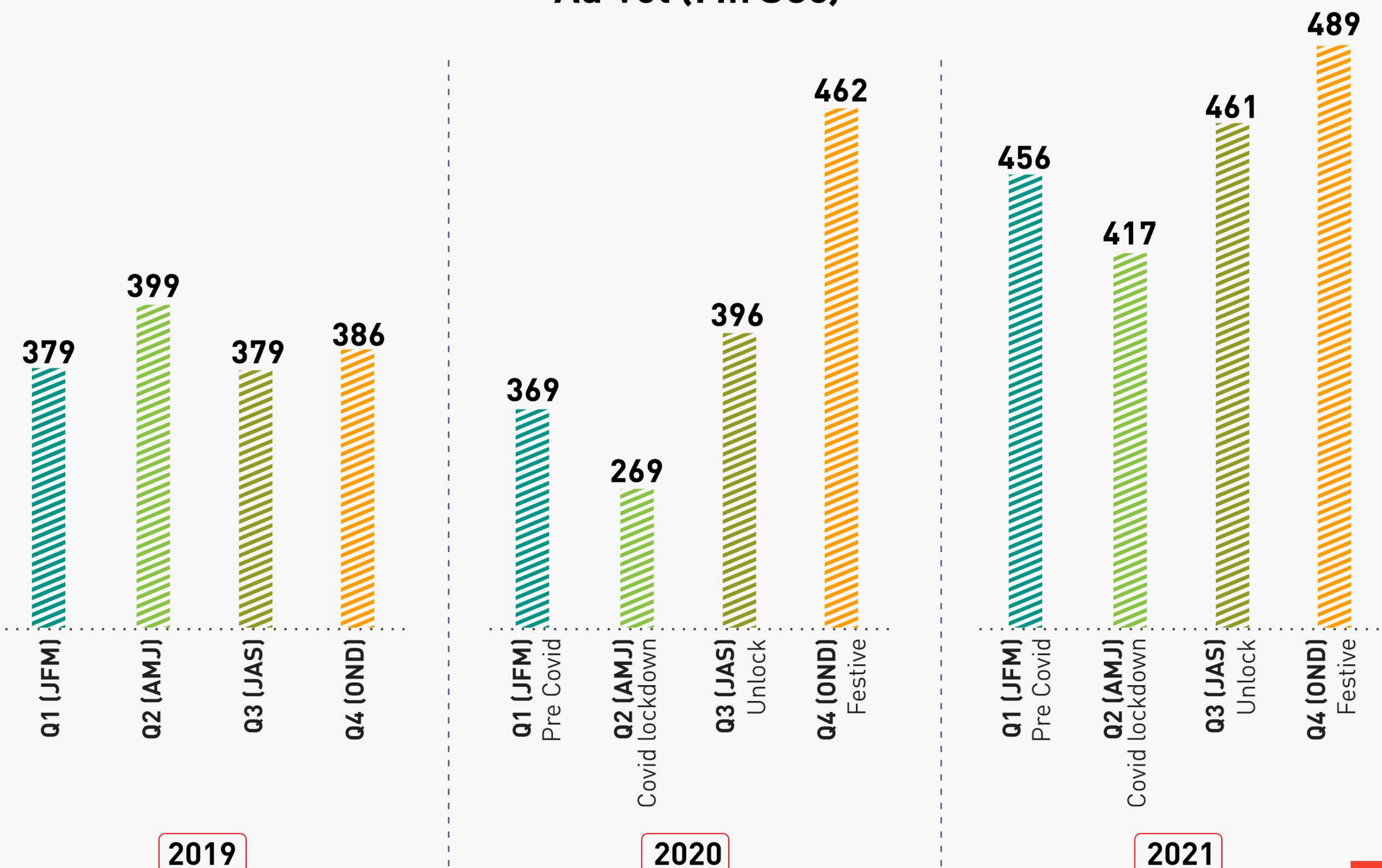
2021 WITNESSES A HUGE RISE EVERY QUARTER IN AD VOLUMES

Data Insights

- Q1'21 registered **24%** growth over Q1'20 and **21%** over Q1'19.
- Q2'21 higher than Q2'19 despite COVID-19 effect.
- Q3'21 bounces back with a **10%** growth over Q2'21 and **22%** growth over Q3'19.
- Q4'21 is highest quarter of all time with a bumper festive season.

Ad Vol (Mn Sec)



Pre-Covid months are Jan, Feb & Mar | Covid Lockdown months are Apr, May & June | Unlock months are Jul, Aug & Sept | Festive quarter covered Oct, Nov & Dec
Excludes: ASSOCIATIONS/SOCIAL/CULTURAL ORG; SOCIAL ADVERTISEMENTS-NGOS & FILLERS

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NO. OF ADVERTISERS CONTINUED TO GROW POST COVID-19 LOCK-DOWNS

2021 witnessed a total of 9,239 Advertisers

Data Insights

- Advertiser count on a growth trajectory in Q3'21 & Q4'21 post Covid-19 drop.
- Q3'21 & Q4'21 saw more Advertisers than Pre Covid-19 (Q1'21).
- Q4 witnessed highest number of Advertisers in 2021.
- Q1 saw highest share of new & returning Advertisers - **51%.**

Count of Advertisers

	Pre-Covid Q1 (JFM)	Covid lockdown Q2 (AMJ)	Unlock Q3 (JAS)	Festive Q4 (OND)	Total
2021	4177	3558	4228	4473	9239
New & Returning Advertisers	2137	1696	2147	2156	
% contribution	51.2%	48%	50.8%	48%	

Pre-Covid months are Jan, Feb & Mar | Covid Lockdown months are Apr, May & June |
Unlock months are Jul, Aug & Sept | Festive quarter covered Oct, Nov & Dec
New & Returning Advertisers & Brands : present in 2021 & not present in 2019 & 2020.
Excludes: ASSOCIATIONS/SOCIAL/CULTURAL ORG; SOCIAL ADVERTISEMENTS-NGOS & FILLERS

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MOST KEY SECTORS RECOVERED SHARPLY IN Q3'21 & Q4'21 POST LOCKDOWN

Textile grew 107%, Retail 78%, Ecommerce 49%, Personal Acessories 41% in Q4'21, compared to Q1'21 (Pre Covid)

Ad Volume (Mn Sec)

	Pre Covid Q1'21	Covid lockdown Q2'21	Unlock Q3'21	Festive Q4'21	Total	Q4'21 over Q1'21
FMCG	286	280	275	276	1117	-4%
Ecommerce	35	42	54	53	185	49%
Building, Industrial & Land Materials/Equipments	19	12	14	15	60	-20%
Auto	15	8	12	13	49	-13%
Services	13	6	8	10	38	-23%
Personal Accessories	10	4	7	13	34	41%
BFSI	10	4	8	11	33	8%
Durables	6	7	5	9	27	48%
Corporate/Brand Image	4	3	11	6	24	48%
Education	3	3	9	4	19	64%
Retail	4	3	5	6	18	78%
Textiles/Clothing	3	2	5	6	16	107%

Pre-Covid months are Jan, Feb & Mar | Covid Lockdown months are Apr, May & June | Unlock months are Jul, Aug & Sept | Festive quarter covered Oct, Nov & Dec
Excludes: ASSOCIATIONS/SOCIAL/CULTURAL ORG; SOCIAL ADVERTISEMENTS-NGOS & FILLERS

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DIFFERENT LANGUAGES... SAME PASSION

Languages have shown a steady growth post COVID-19 lockdowns.

Ad Volume (Mn Sec)	Pre Covid Q1'21	Covid lockdown Q2'21	Unlock Q3'21	Festive Q4'21
HINDI	134	131	144	157
TAMIL	54	45	49	51
TELUGU	36	33	38	41
BENGALI	38	35	35	35
KANNADA	34	29	32	33
MARATHI	24	22	24	23
MALAYALAM	23	22	23	25
PUNJABI	22	20	23	25
BHOJP	17	18	20	20
ENGLISH	14	12	16	19

Data Insights

Most Language channels have shown a steady growth in Q3'21 & Q4'21 after a decline in Q2'21 due to covid effect.

Hindi, English and Regional languages, including Telugu, Malayalam, Punjabi & Bhojpuri have shown a robust growth over pre-covid period.

Pre-Covid months are Jan, Feb & Mar | Covid Lockdown months are Apr, May & June | Unlock months are Jul, Aug & Sept | Festive quarter covered Oct, Nov & Dec
Excludes: ASSOCIATIONS/SOCIAL/CULTURAL ORG; SOCIAL ADVERTISEMENTS-NGOS & FILLER

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DEEPER INSIGHTS OF 2021

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SD CHANNELS IN 2021 WITNESSED A GROWTH OF 22% OVER 2020 WHILE HD CHANNELS GREW BY 11%

G/D over 20

HD Channels
11%

Total 22%

SD Channels
22%

G/D over 19

HD Channels
-11%

Total 18%

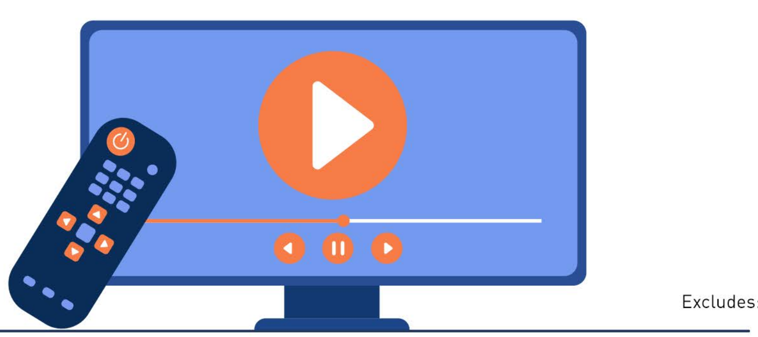
SD Channels
20%

Excludes: ASSOCIATIONS/SOCIAL/CULTURAL ORG; SOCIAL ADVERTISEMENTS-NGOS & FILLERS

AVERAGE COMMERCIAL DURATION (ACD) REMAINS CONSISTENT Y-O-Y

Commercial Dur (Sec)

	2019	2020	2021
ACD (SEC)	20.59	20.45	20.21
UPTO 10	10%	10%	10%
11-30	73%	73%	75%
31-60	13%	12%	10%
More Than 61	4%	5%	5%



Excludes: ASSOCIATIONS/SOCIAL/CULTURAL ORG; SOCIAL ADVERTISEMENTS-NGOS & FILLERS

TIMEBAND-WISE CONTRIBUTION

Ad Vol contribution

	2019	2020	2021
08:00 - 12:00 Hrs	24%	24%	24%
12:00 - 16:00 Hrs	24%	24%	24%
16:00 - 20:00 Hrs	25%	25%	25%
20:00 - 24:00 Hrs	27%	27%	27%

Analysis excludes ad volumes from 24:000 hrs to 08:00 hrs
Excludes: ASSOCIATIONS/SOCIAL/CULTURAL ORG; SOCIAL ADVERTISEMENTS-NGOS & FILLERS

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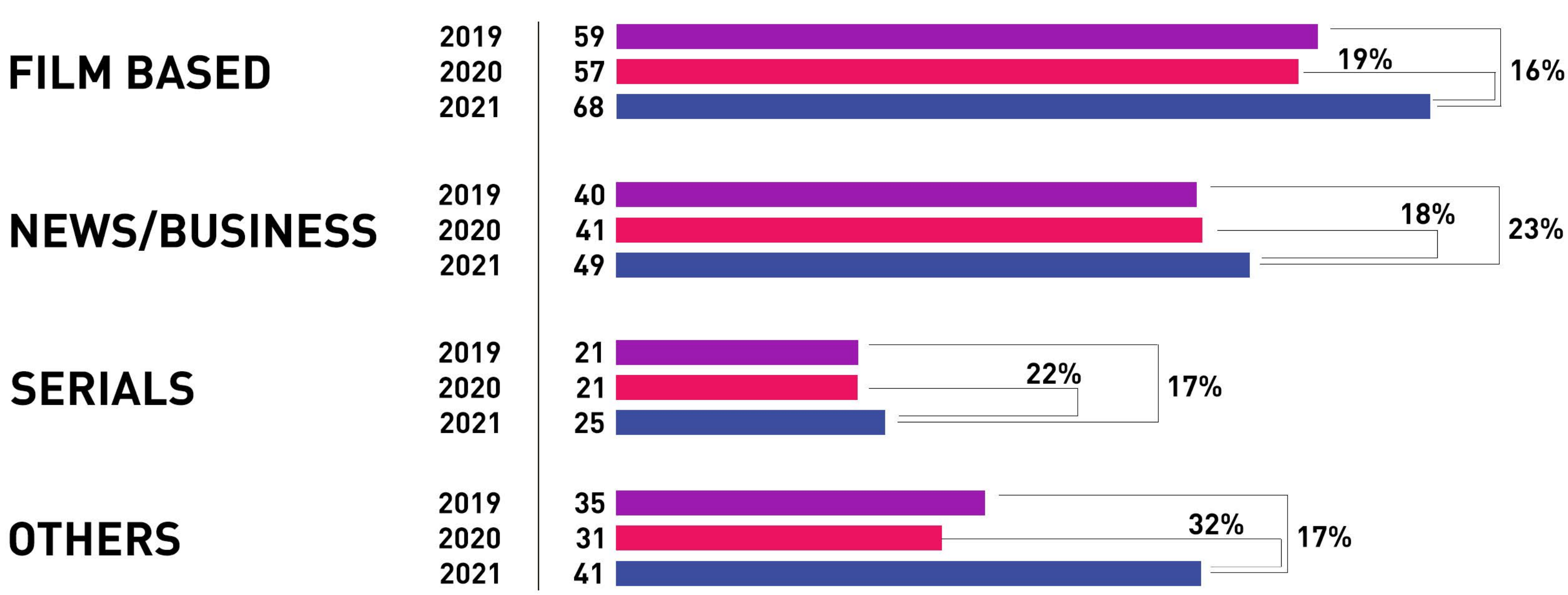
FILM BASED PROGRAMMES DOMINATE AD VOLUMES ON TV IN 2021.

Ad Vol (Mn Sec)

Commercial Programme Theme



OTHERS include Music, Sports, Lifestyle, Nature/Tourism, Game/Talk/Quiz, Miscellaneous.
Excludes: ASSOCIATIONS/SOCIAL/CULTURAL ORG; SOCIAL ADVERTISEMENTS-NGOS & FILLERS

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CONTRIBUTION OF AD VOLUMES IN LOCAL COMMERCIAL LANGUAGE HAS BEEN INCREASING Y-o-Y

Ad Volumes contribution of spots in Local Language

Language Channels	2019	2020	2021
Tamil	92%	93%	94%
Telugu	91%	91%	92%
Kannada	90%	92%	92%
Malayalam	88%	89%	91%
Hindi	87%	89%	90%
Bengali	89%	88%	90%
Marathi	80%	84%	85%
Assamese	74%	83%	81%
Oriya	74%	75%	75%
Bhojpuri	89%	77%	74%
Punjabi	56%	53%	60%
Gujarati	62%	62%	59%

Excludes: ASSOCIATIONS/SOCIAL/CULTURAL ORG; SOCIAL ADVERTISEMENTS-NGOS & FILLERS

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AD VOLUMES FOR IPL'21 WAS AT PAR WITH IPL'20. NUMBER OF ADVERTISERS HIGHER.

Data Insights

- Out of 119 Advertisers, **59** are new* to IPL'21 v/s IPL'20.
- Out of 228 Brands, **158** are new* to IPL'21.
- 88 categories present on IPL'21; **31** are new* to IPL'21.
- Top Sectors like Ecommerce, FMCG, BFSI, Building & Land Materials, Services,Retail, Textile registered growth over IPL'20.
- Top 10 Advertisers on IPL'21 contributed **35%** Ad Volumes.

	IPL 2020	IPL 2021
Ad Vol (Thousand sec)	1673	1680
Number Advertisers	103	119
Number Brands	245	228

*New - Not present on IPL'20

Excludes: ASSOCIATIONS/SOCIAL/CULTURAL ORG; SOCIAL ADVERTISEMENTS-NGOS & FILLERS
IPL'21 - L/T VIVO IPL-14. Channels: STAR Sports 1, Star Sports 1 Bangla, Star Sports 1 HD, Star Sports 1 HD Hindi, Star Sports 1 Hindi, Star Sports 1 Kannada, Star Sports 1 Tamil, Star Sports 1 Telugu, Star Sports 2 HD(v), Star Sports 2(v), Star Sports 3(v), Star Sports First, Star Sports Select 1 HD, Star Sports Select 1 SD
IPL'20 - L/T DREAM11 IPL-13. Channels: STAR Sports 1, Star Sports 1 Bangla, Star Sports 1 HD, Star Sports 1 HD Hindi, Star Sports 1 Hindi, Star Sports 1 Kannada, Star Sports 1 Tamil, Star Sports 1 Telugu, Star Sports 2 HD(v), Star Sports 2(v), Star Sports 3(v), Star Sports Select 1 HD, Star Sports Select 1 SD

DESPITE THE PANDEMIC, TOKYO OLYMPICS WITNESSES EXPONENTIAL RISE IN THE NUMBER ADVERTISERS AND BRANDS

Category	Tokyo Olympics (23rd Jul 8th Aug 2021)	Rio Olympics (5th Aug 21st Aug 2016)	G/D %
Ad Vol (Thousand Sec)	466	475	-2%
Number of Advertisers	34	14	143%
Number of Brands	61	36	69%

Data Insights

1. Out of **34** Advertisers on Tokyo Olympics, **28** are new to Tokyo Olympics v/s Rio Olympics.
2. Sectors like Ecommerce, Education, Telecom Products, Building, Industrial & Land Materials/Equipments new to Tokyo Olympics v/s Rio Olympics.
3. Share of FMCG, BFSI, Corporate Brand Image higher on Tokyo Olympics as compared to Rio Olympics.
4. **31%** Ad Volumes during Tokyo Olympics featured Olympians.

*New Advertisers: Present during Tokyo & not present during Rio Olympics.

Rio Olympics: "L/T RIO OLY-16"; Channels: STAR Sports 1, STAR Sports 2, STAR Sports 3, STAR Sports 4, STAR Sports HD1, STAR Sports HD2(v), STAR Sports HD3(v), STAR Sports HD4, DD National.

Tokyo Olympics: L/T TOKYO 2020 OLYMPICS-21; Channels: Sony SIX HD(v), Sony SIX(v), Sony Ten 1, Sony Ten 1 HD, Sony Ten 2, Sony Ten 2 HD, Sony Ten 3, Sony Ten 3 HD, Sony Ten 4 HD(v), Sony Ten 4(v), DD Sports

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