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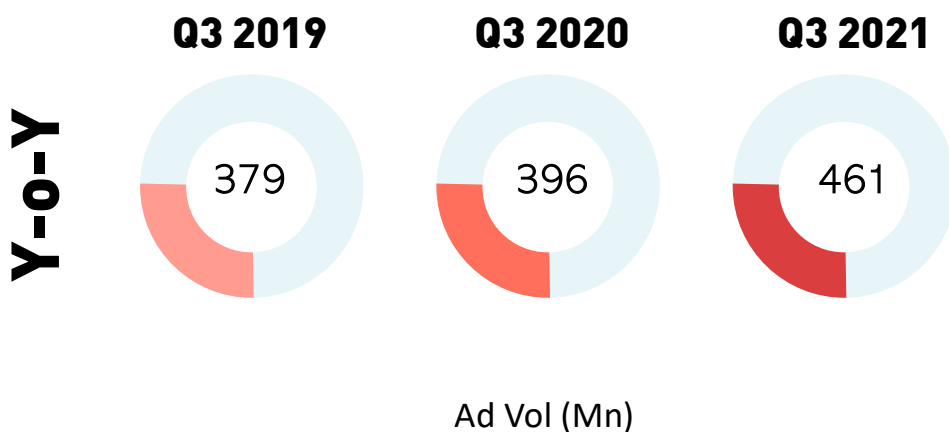
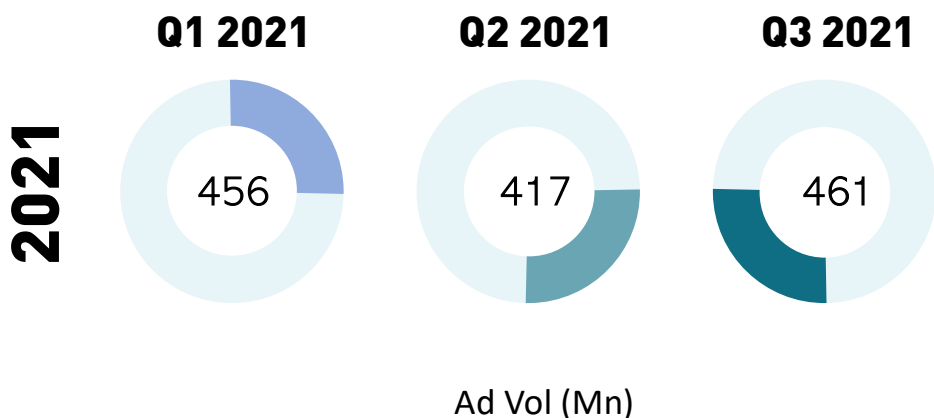
What India Watches™

AD VOLUMES REPORT

Jul-Sep 2021

SPECIAL FESTIVAL EDITION

Jul-Sep quarter registers highest Ad Volumes in 2021



Growth over Q3 2019

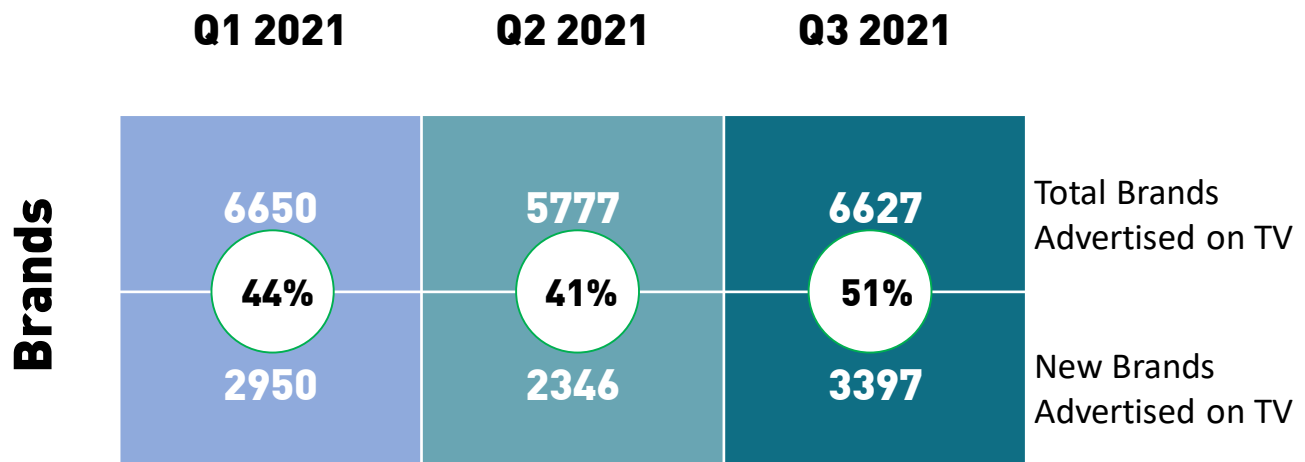
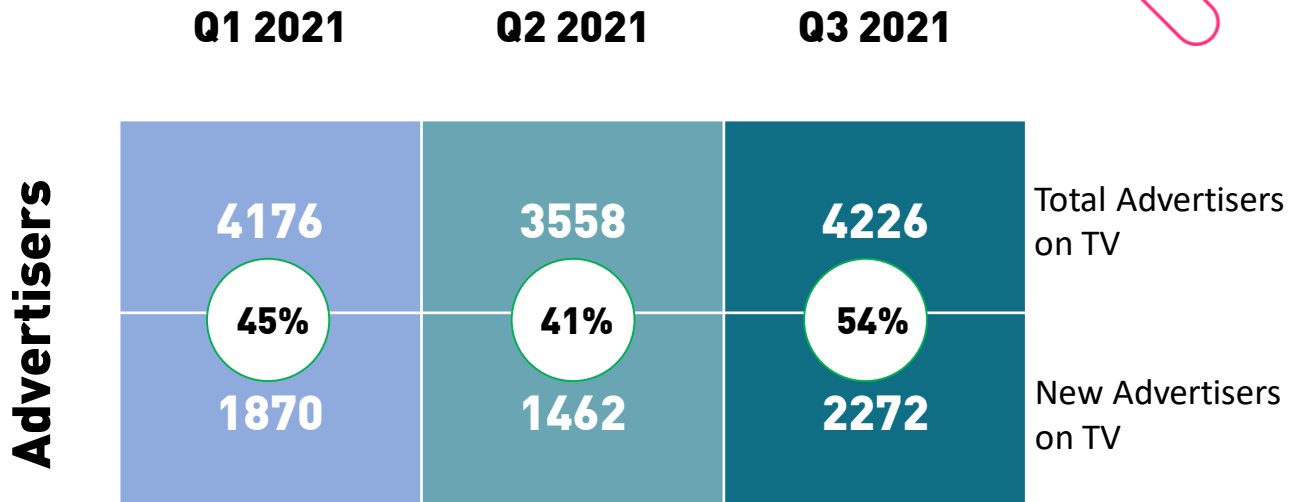
22%

Growth over Q3 2020

16%

Jul-Sep quarter had highest number of Advertisers on TV

Share of New Advertisers was also the highest



New Advertisers : Not present in previous quarter

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



Growth in Ad Volumes seen across Languages

- Bhojpuri, Gujarati, Punjabi, Marathi register highest growth over 2019
- Tamil, Telugu, English show sharp recovery from last year (post pandemic)

Top Language Channels *	Q3 2019	Q3 2020	Q3 2021	Growth over 2020
HINDI	113	125	141	13%
TAMIL	39	37	48	32%
TELUGU	35	30	38	28%
BENGALI	34	34	35	4%
KANNADA	28	30	32	6%
MALAYALAM	21	20	23	13%
MARATHI	17	21	23	10%
PUNJABI	15	20	23	11%
BHOJPURI	9	15	20	34%
ENGLISH	18	13	17	29%
ASSAMESE	10	13	13	3%
GUJARATI	6	8	9	6%
ORIYA	7	8	8	-1%

Ad Vol (Mn)

* basis Q3 2021

Excludes Multi Language Channels
Mazhavil Manorama(v) is considered as a Malayalam Channel, Sony MAX(v) & Sony MAX HD(v) are considered as Hindi Channels.

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



Ad Volumes on Multiple Language channels at highest levels in 2021

Top Language Channels *	Q1 2021	Q2 2021	Q3 2021
HINDI	132	129	141
TELUGU	36	33	38
MALAYALAM	23	21	23
PUNJABI	22	20	23
BHOJPURI	17	18	20
ENGLISH	14	13	17
ORIYA	7.5	6.8	7.9

Most top-Advertised Sectors registered a healthy growth over previous years

Top Advertised Sectors *	Q3 2019	Q3 2020	Q3 2021
FMCG	219	257	275
E-Com	29	42	54
Building, Industrial & Land Materials/Equipment	10	8	14
Auto	16	13	12
Corporate/Brand Image	2	3	11
Education	6	8	9
BFSI	6	7	8

Ad Vol (Mn)

* basis Q3 2021

Excludes Multi Language Channels
Mazhavil Manorama(v) is considered as a Malayalam Channel, Sony MAX (v) & Sony MAX HD (v) are considered as Hindi Channels.

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

Q3 Ad volumes for several sectors highest in 2021



Top Advertised Sectors *

	Q1 2021	Q2 2021	Q3 2021
Ecom	35	42	54
Corporate/Brand Image	4	3	11
Education	3	3	9
Retail	4	3	5
Textiles/Clothing	3	2	5
Agriculture	1	2	3
Media	2.85	2.65	2.99
Telecom/Internet Service Providers	1.54	2.32	2.73
Telecom Products	1.29	0.99	1.40
Computers	1.10	0.50	1.14



Ad Vol (Mn)

* basis Q3 2021

Excludes:
ASSOCIATIONS/SOCIAL/C
ULTURAL ORG; SOCIAL
ADVERTISEMENTS-NGOS
& FILLER

Top-Advertised Categories and Advertisers across key sectors



E-Commerce



Top 3 Categories	Q3 2021	Top 5 Advertisers	Q3 2021
Media/Entertainment/Social Media	15.78	Amazon Online India Pvt Ltd	6.99
Ecom-education	9.42	Whitehat Education Technology Pvt Ltd	2.40
Online Shopping	8.80	Think & Learn Pvt Ltd	2.27
		Myntra Designs Pvt Ltd	2.04
		Facebook Inc	1.73

Education



Top 3 Categories	Q3 2021	Top 5 Advertisers	Q3 2021
Multiple Courses	3.96	Delhi Skill & Entrepreneurship University	2.01
Govt Universities/Colleges	2.04	Think & Learn Pvt Ltd	0.71
Coaching Centre/Comp Exam	1.00	Chandigarh University	0.37
		Parul Arogya Seva Mandal	0.31
		K R Mangalam Group	0.31

Ad Vol (Mn)

* basis Q3 2021

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

Top-Advertised Categories and Advertisers across key sectors



Building, Industrial & Land Materials/Equipment

Top 3 Categories		Q3 2021	Top 5 Advertisers		Q3 2021
Paints		5.44	Asian Paints (I) Ltd		4.16
Cement		3.45	Aditya Birla Group		2.02
Building Materials/Systems		2.01	Shree Cement		0.41
			Srmb Srijan Ltd		0.34
			Dalmia Bharat Group		0.33

BFSI



Top 3 Categories		Q3 2021	Top 5 Advertisers		Q3 2021
Loans-mortgage		2.04	Muthoot Group		0.97
Insurance-life		1.43	AMFI (Association Of Mutual Funds India)		0.93
Financial Inst-corporate		0.94	LIC India		0.78
			ICICI (G)		0.52
			Au Small Finance Bank Limited		0.38

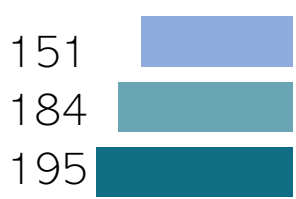
Ad Vol (Mn)

* basis Q3 2021

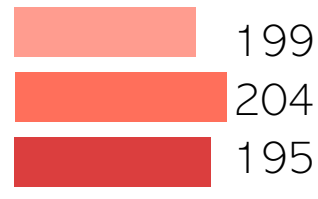
Excludes:
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Ad Volume Growth observed across spectrum of Advertisers

Advertisers beyond Top 50 register highest growth over 2020



Top 10



Next 40



Rest



TOTAL AD VOL



Ad Vol (Mn)

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

HUL, Reckitt Benckiser maintain top 2 spots. Cadbury, Amazon and Pepsi register strong growth over previous years

Top 10 Advertisers	2019 Q3	2020 Q3	2021 Q3
HINDUSTAN UNILEVER LTD	58	81	84
RECKITT BENCKISER GROUP	27	41	49
PROCTER & GAMBLE	13	10	12
CADBURY'S INDIA LTD	7	7	10
GODREJ GROUP	9	9	8
AMAZON ONLINE INDIA PVT LTD	5	6	8
COLGATE PALMOLIVE INDIA LTD	7	9	7
ITC LTD	8	9	6
PEPSI FOODS (G)	3	4	6

Ad Vol (Mn)

Top 10 Adv excludes : Govt, Media, Film Trailer Advertisers.

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

Top-Advertised Brands registered a robust growth over previous years

Top 10 Advertisers	2019 Q3	2020 Q3	2021 Q3
DETTOL			6.64
DETTOL TOILET SOAPS	1.91	5.03	6.01
HORLICKS	2.35	2.66	5.44
AMAZON.IN	2.62	2.56	4.19
LIZOL	2.89	2.90	4.16
DETTOL ANTISEPTIC LIQUID	1.41	6.83	3.64
HARPIC BATHROOM CLEANER	2.26	1.85	3.34
CLINIC PLUS SHAMPOO	2.00	3.35	3.32
CLOSE UP EVER FRESH	1.72	1.92	3.09
SURF EXCEL EASY WASH	2.22	3.26	3.03

Ad Vol (Mn)

Top 10 Adv excludes : Govt, Media, Film Trailer Advertisers.

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



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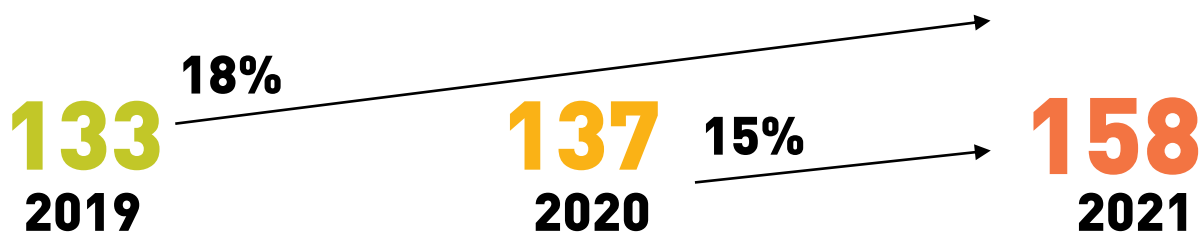
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What India Watches™

AD VOLUMES REPORT

SEPTEMBER 2021

Ad Volumes in Sep'21 higher than previous years



Most Sectors register growth over previous years

Corporate Brand Image, Ecommerce, FMCG register highest growth over 2019
Textile, Durables, BFSI, Building, Industrial & Land material show sharp recovery from last year post pandemic effect

Top Sectors	Sep'19	Sep'20	Sep'21	2021 Vs 2020
FMCG	72	89	93	4%
Ecom	12	15	19	26%
Building, Industrial & Land Materials/Equipments	5	3	6	73%
Auto	7	5	4	-16%
BFSI	3	2	4	52%
Services	4	3	3	1%
Textiles/Clothing	2	0	3	972%
Personal Accessories	3	1	2	78%
Durables	2	1	2	118%
Corporate/Brand Image	1	1	2	77%

Ad Vol (Mn)

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

Growth observed across Language Channels over previous years ¹⁴

Bhojpuri, Punjabi, Assamese register maximum growth over 2019

Tamil, Telugu show max growth over 2020

	Sep'19	Sep'20	Sep'21	G/D over 2020
HINDI	40	42	47	12%
TAMIL	13	13	17	30%
TELUGU	12	10	13	33%
BENGALI	13	12	12	3%
KANNADA	10	10	11	8%
PUNJABI	5	7	8	21%
MARATHI	6	7	8	11%
MALAYALAM	8	7	7	14%
BHOJPURI	3	5	7	38%
ASSAMESE	3	5	5	-5%
ORIYA	2	3	3	10%

Ad Vol (Mn)

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

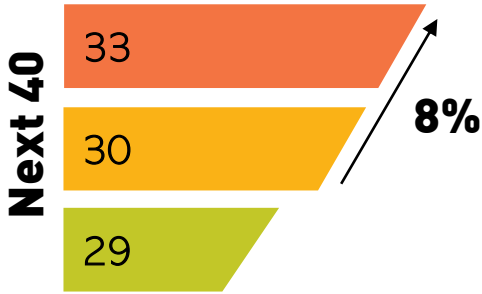
Excludes Multi Language Channels

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Growth observed across Advertiser spectrum

Advertisers beyond top 50 buoyant over last year with a sharp recovery of 35%

Sep'19 Sep'20 Sep'21



Ad Vol (Mn)

Total Advertisers Active

2910
2258
2620

Sep'19

Sep'20

Sep'21

Total Brands Active

4707
3684
4199

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

Top 10 & Next 40 Excludes : Govt, Media & Film Trailer Advertisers

Ad Volumes for HUL, RBG, Cadbury¹⁶ have grown more than 50%

Top 10 Advertisers basis Sep 2021	Sep'19	Sep'20	Sep'21
Hindustan Unilever Ltd	18.88	25.09	28.75
Reckitt Benckiser Group	8.47	15.61	15.52
Procter & Gamble	4.47	3.22	4.01
Cadburys India Ltd	2.10	2.10	3.90
Amazon Online India Pvt Ltd	2.41	1.98	2.80
Itc Ltd	2.44	3.65	2.41
Colgate Palmolive India Ltd	2.49	2.91	2.19
Godrej Group	3.12	3.65	2.06
Glaxosmithkline Group Of Compa	1.98	1.27	1.82
Coca Cola India Ltd	1.52	0.81	1.74

Ad Vol (Mn)

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



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AD VOLUMES REPORT

SEPTEMBER
2021

**Festival
Special**



Ad Volumes during Ganpati Festival¹⁸ grew 4% over previous 4 weeks ; 28% over 2019

	Previous 4 Week Avg	Ganpati Week	Growth
2019	28.50	29.20	2%
2020	29.87	30.48	2%
2021	35.86	37.24	4%

Ad Vol (Mn)

Number of Advertisers during Ganpati Festival 2021 witnessed growth over previous years.

Total Advertisers Active

1777
1881
1945

Sep'19

Sep'20

Sep'21

Total Brands Active

2968
2936
3130

Ad Vol (Mn Sec)

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

Ganpati Week period	
2019	27th Aug - 2nd Sep
2020	16th -22nd Aug
2021	4th -10th Sep

Growth witnessed across Marathi & South Language Channels



Channel Language	Previous 4 Week Avg	Ganpati Week	Growth
TAMIL	3.7	4.1	9%
TELUGU	2.9	3.2	8%
KANNADA	2.5	2.6	4%
MARATHI	1.7	1.9	7%

Ad Vol (Mn Sec) 2021

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

Ganpati Week period	
2019	27th Aug - 2nd Sep
2020	16th -22nd Aug
2021	4th -10th Sep



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