

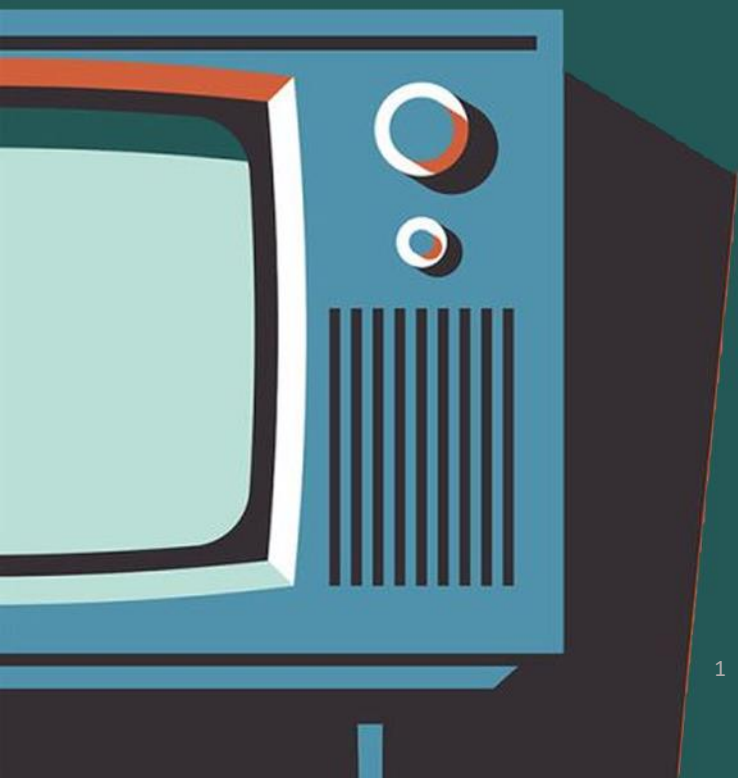


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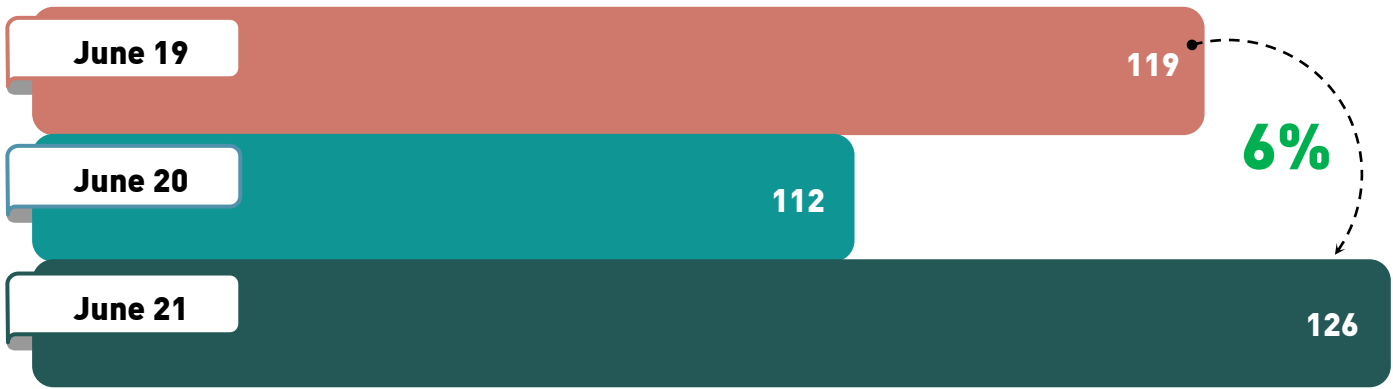
# TV Ad Volumes Insights:

## The Mid-Year Analysis



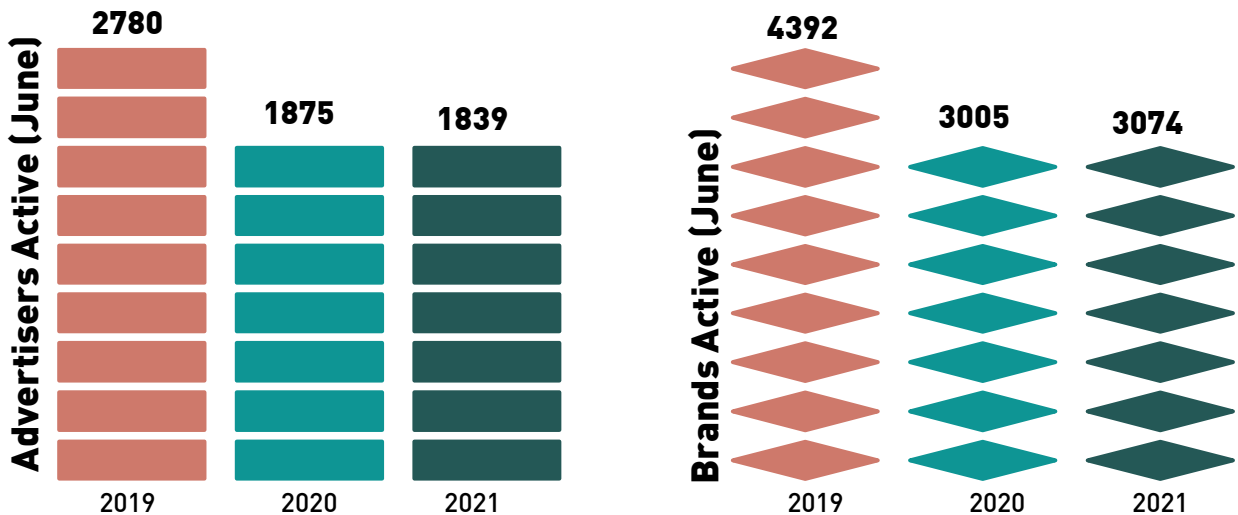
# June'21 is **6%** higher than June'19

Ad Volumes for June 2021 are higher than in 2019 & 2020, despite the impact of Covid-19.



Ad Volumes (Mn secs) ; Excluding: ASSOCIATIONS/SOCIAL/CULTURAL ORG, Fillers, SOCIAL ADVERTISEMENTS-NGOS

## Number of active Advertisers & Brands in June 2021 at par with June 2020

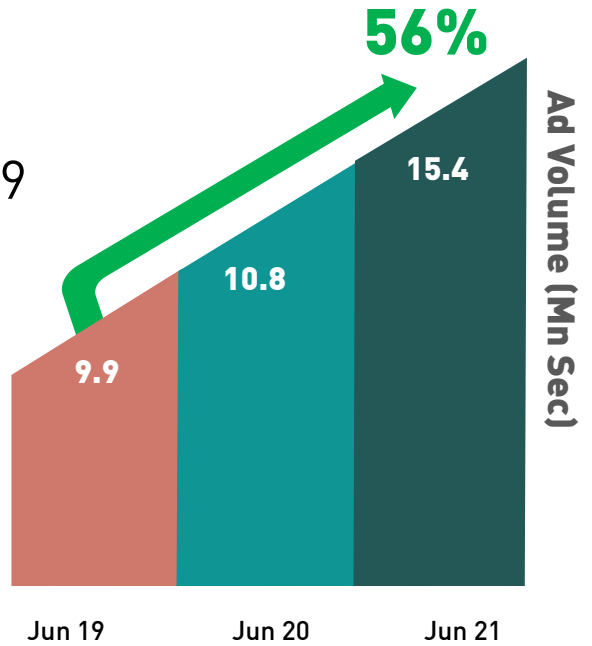


Excluding: ASSOCIATIONS/SOCIAL/CULTURAL ORG, Fillers, SOCIAL ADVERTISEMENTS-NGOS

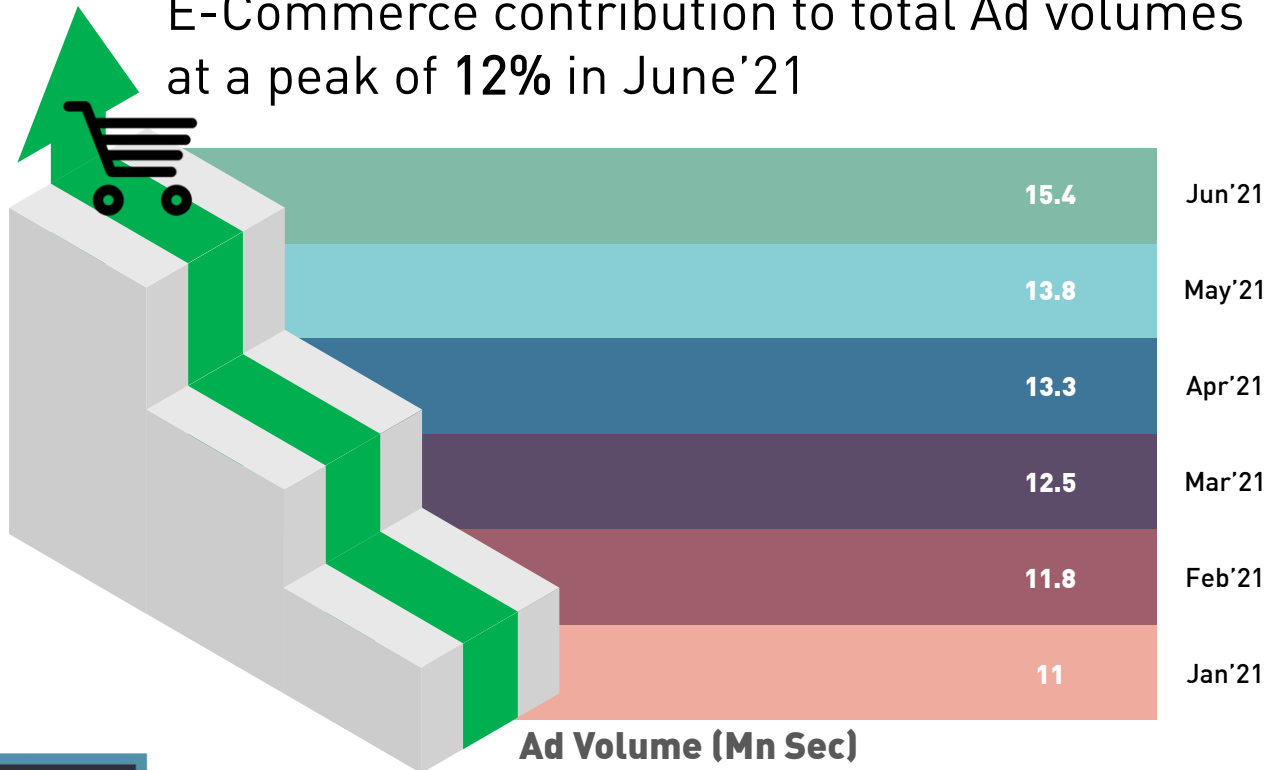


# E-Commerce at an all time high in June'21

56% growth over June'19

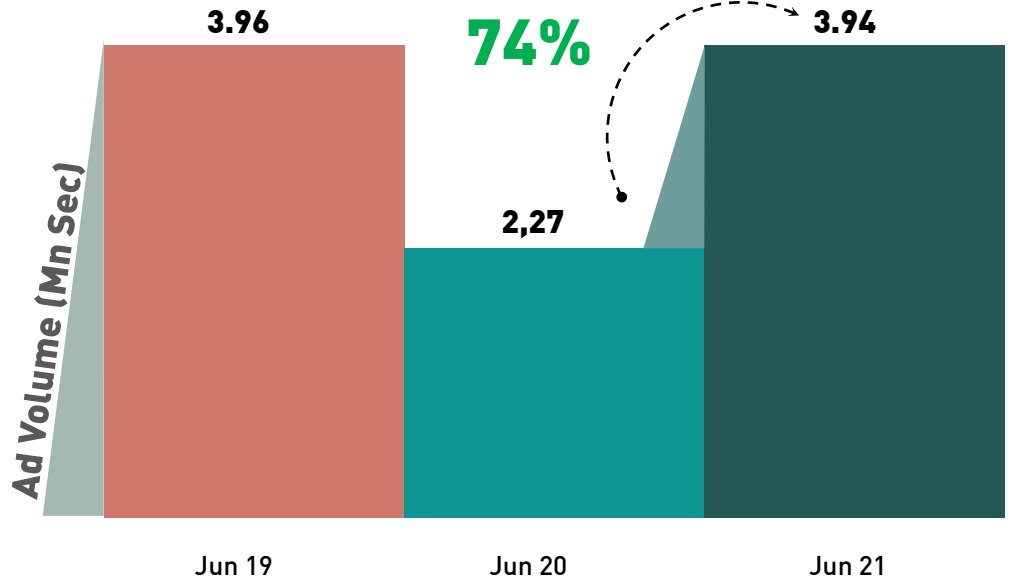


E-Commerce contribution to total Ad volumes  
at a peak of 12% in June'21

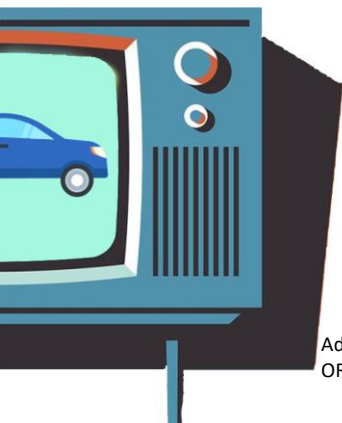
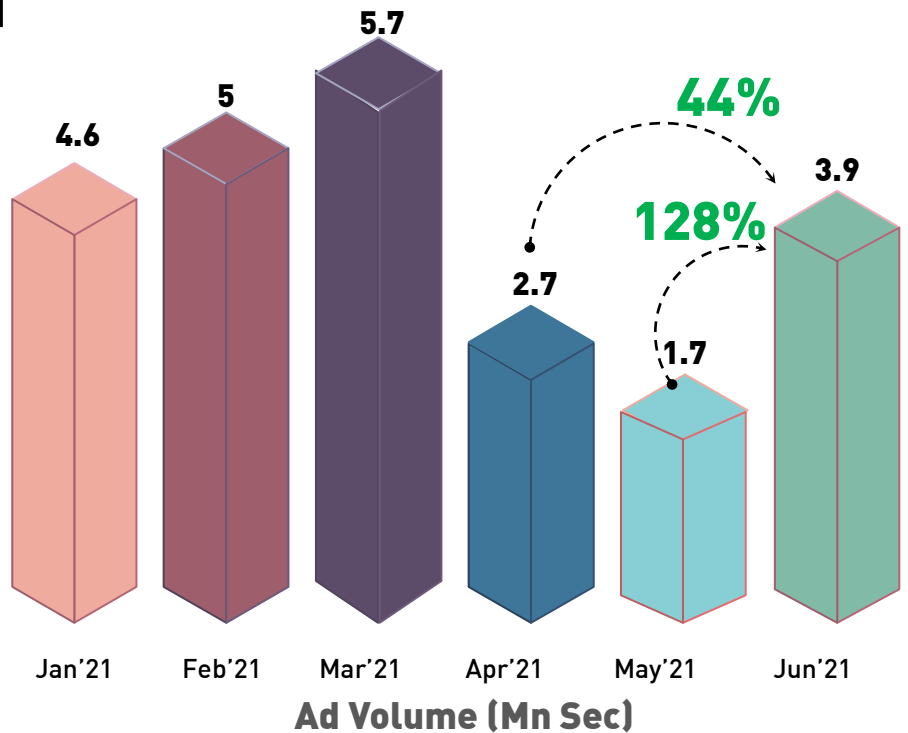


# Auto sector Ads make a comeback in June'21 post 2nd wave Lockdown

At par with June 2019  
74% higher than 2020

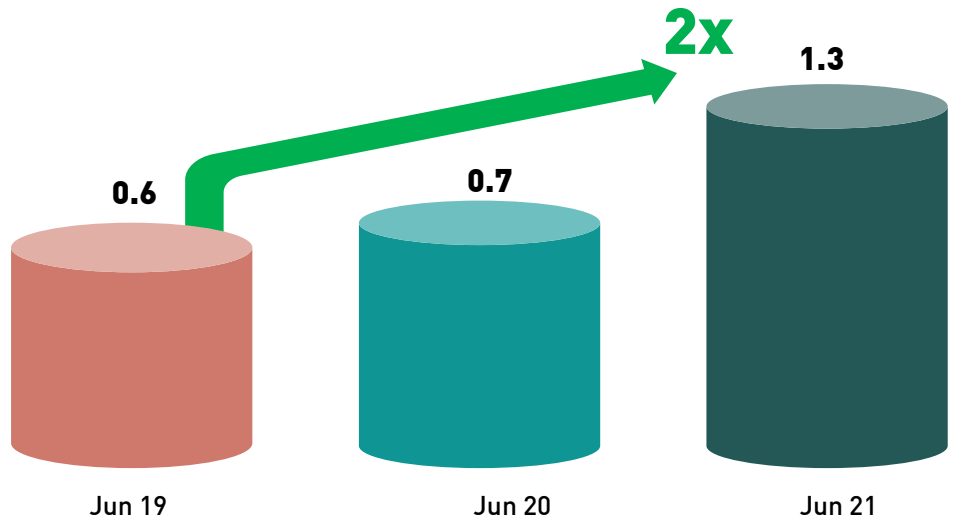


Auto Sector ads in June'21 recorded **128%** growth over May'21  
**44%** over April'21

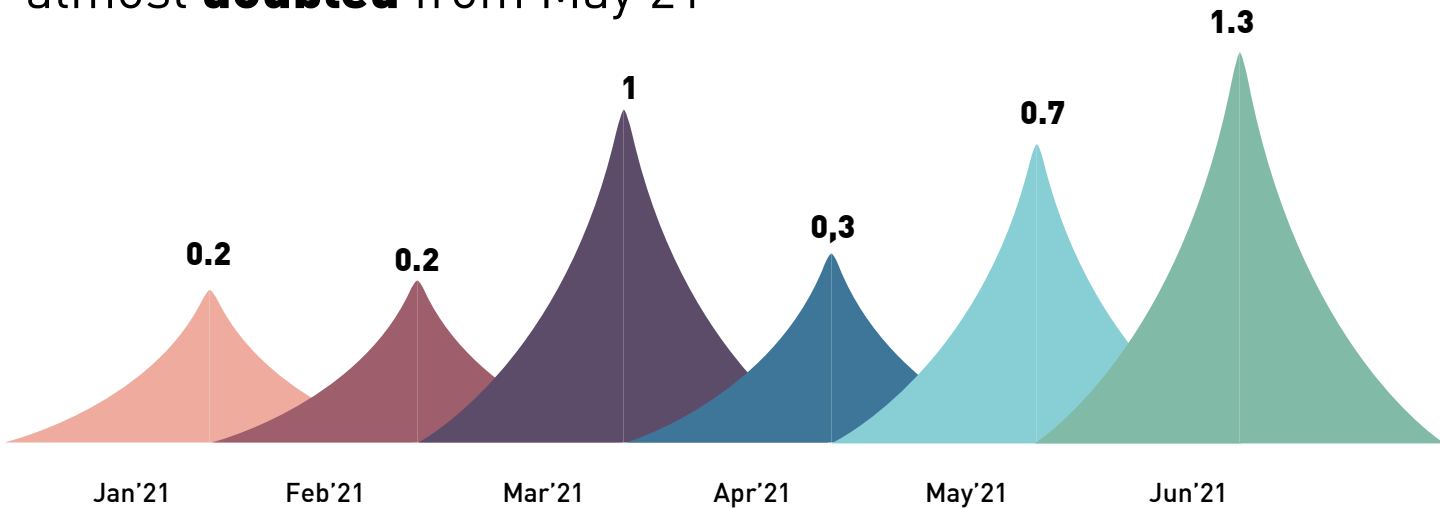


# Ad Volumes for Telecom are the highest in 2021

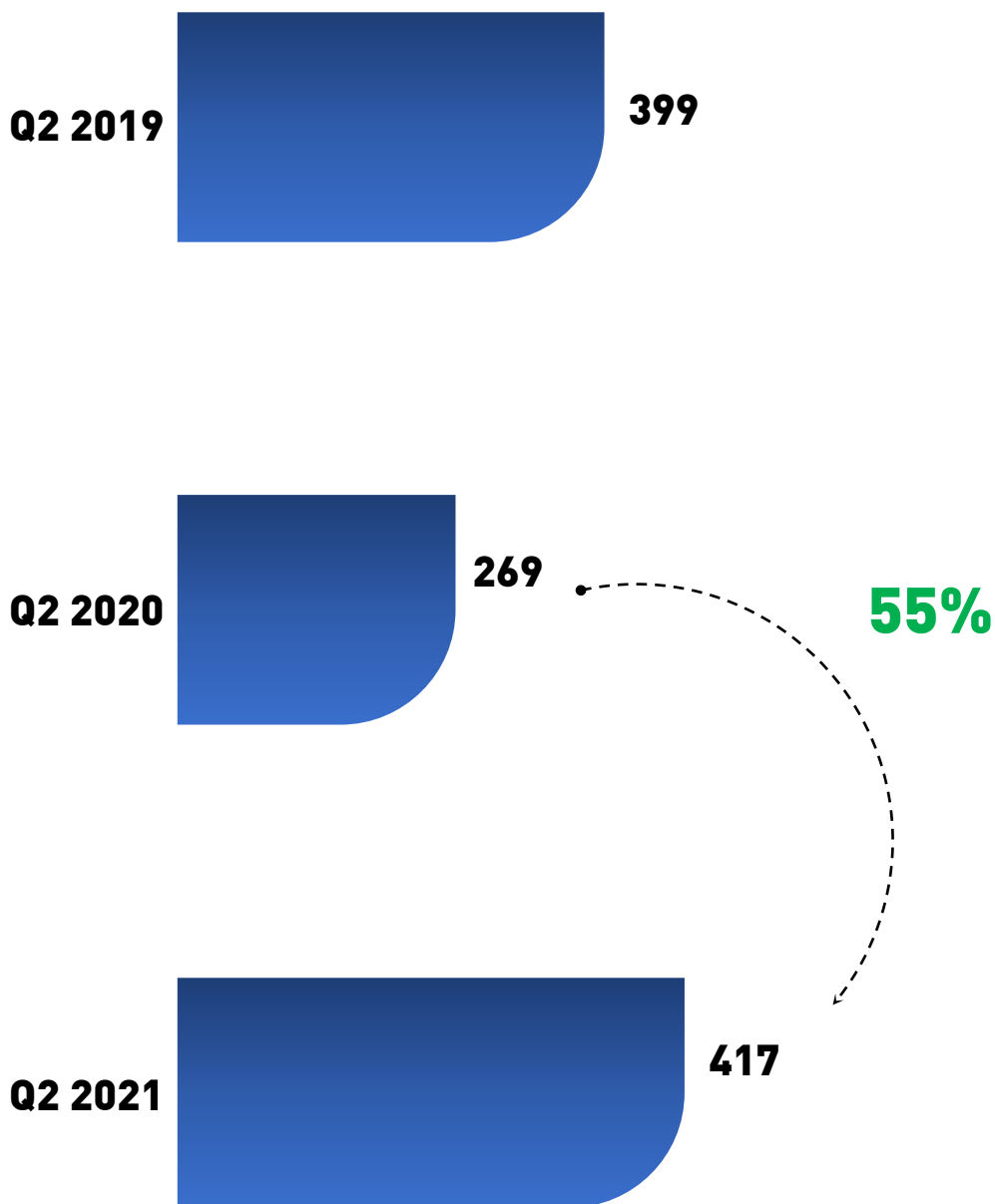
June'21 Ad Volume more than double of June'19



Telecom Ad Volume in June'21 almost **doubled** from May'21



# Q2 2021 is the highest compared to 2019 and 2020, despite the effect of COVID-19 55% higher than previous lockdown



Ad Volumes (Mn secs) ; Excluding: ASSOCIATIONS/SOCIAL/CULTURAL ORG, Fillers, SOCIAL ADVERTISEMENTS-NGOS



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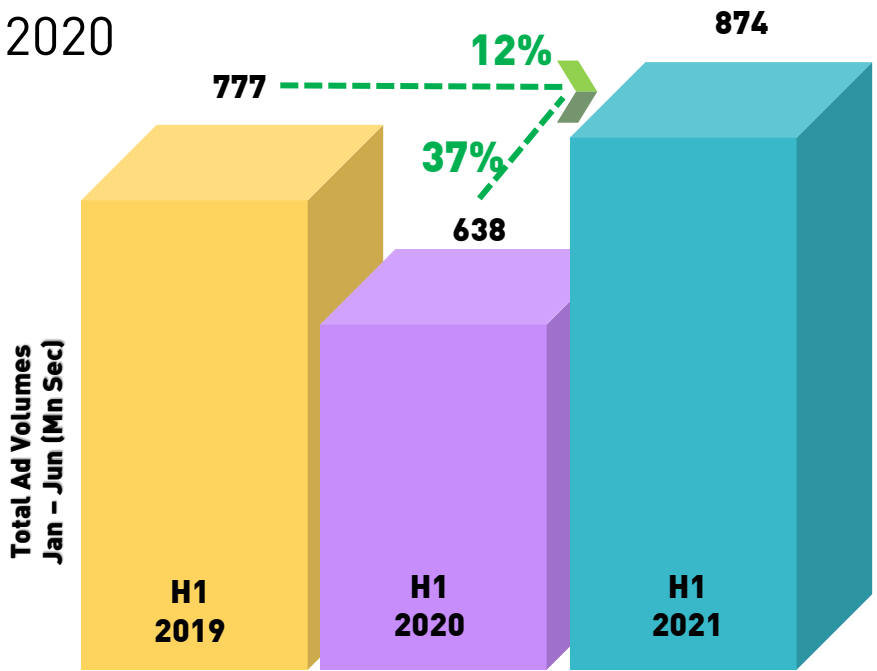
# H1'21

# Ad Volume Analysis



# Ad Volumes in H1 2021 higher than previous years despite Covid-19 effect in second quarter

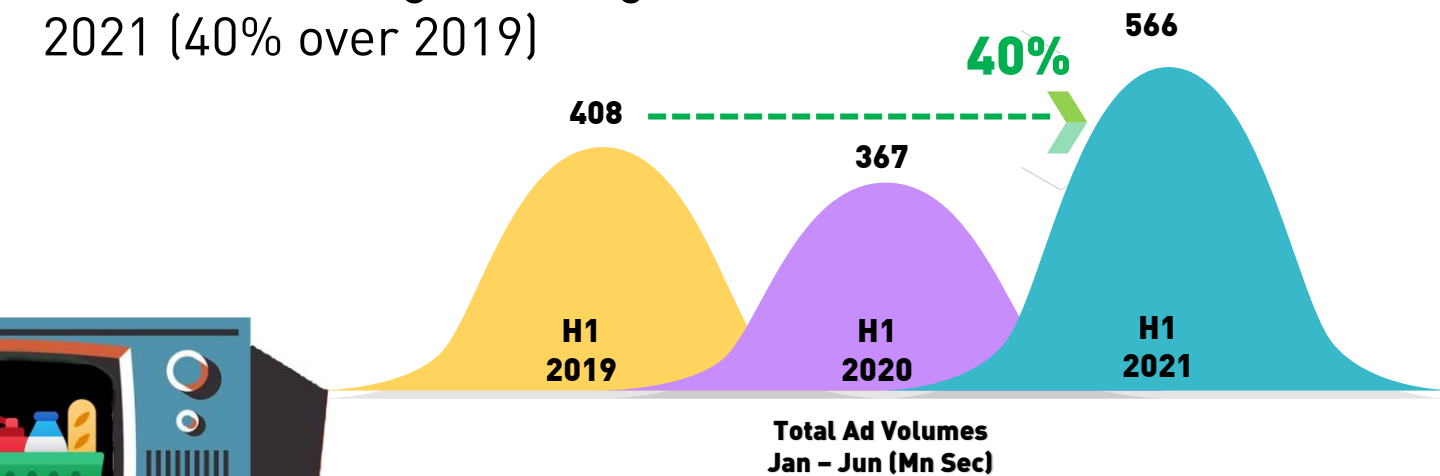
- 12% higher than 2019
- 37% higher than 2020



Excluding: ASSOCIATIONS/SOCIAL/CULTURAL ORG, Fillers, SOCIAL ADVERTISEMENTS-NGOS

## FMCG continues to lead Ad Volumes on television.

FMCG shows significant growth in 2021 (40% over 2019)



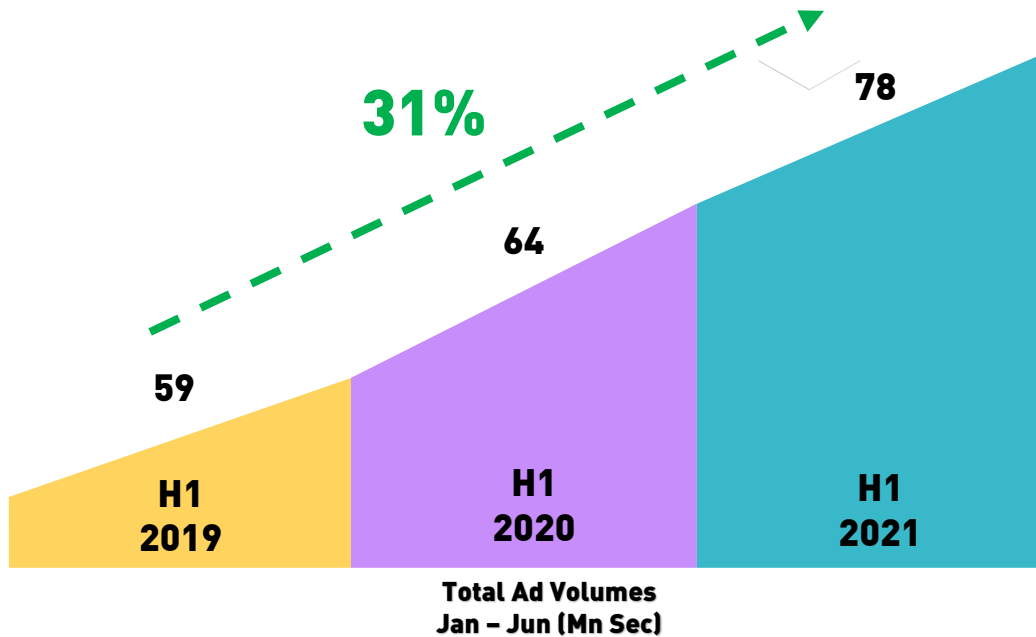
Excluding: ASSOCIATIONS/SOCIAL/CULTURAL ORG, Fillers, SOCIAL ADVERTISEMENTS-NGOS



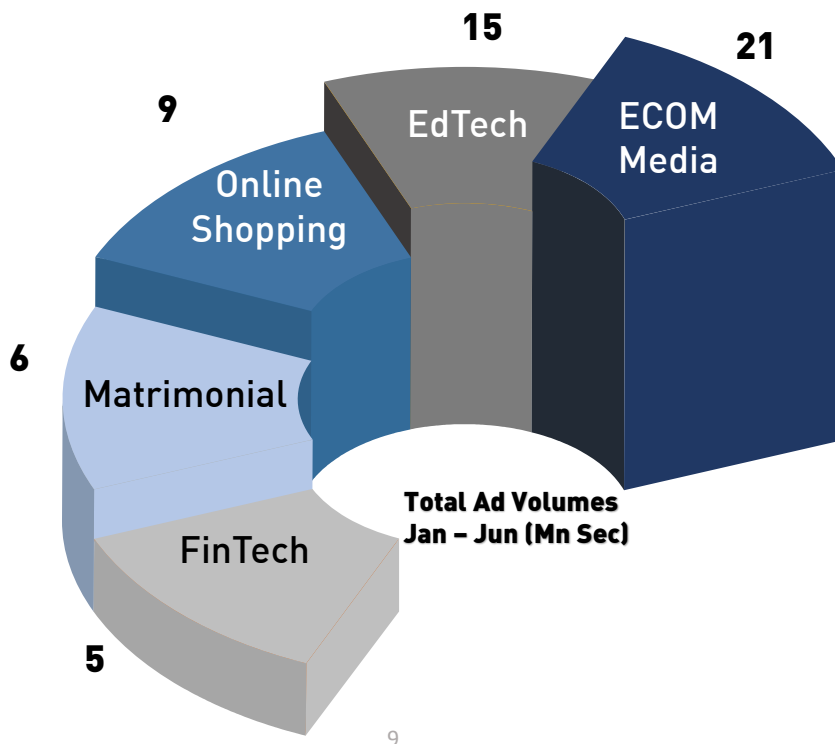


# E-Commerce Ad volumes continue to grow year on year

E-Commerce Ads have grown at a CAGR of 15% & 31% over 2019



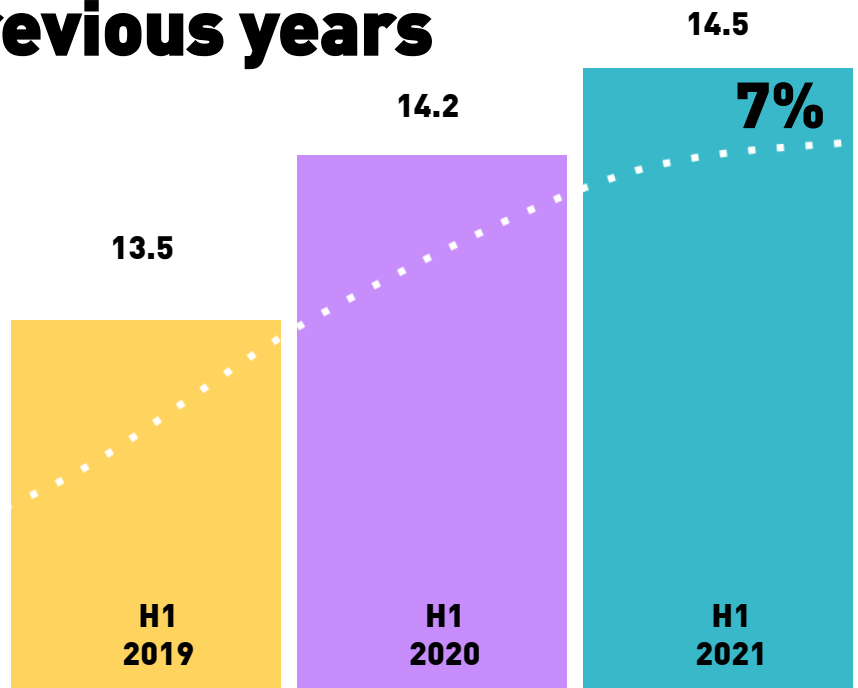
ECom - Media leads category with **27%** contribution  
EdTech grew exponentially over 2019 (7x)



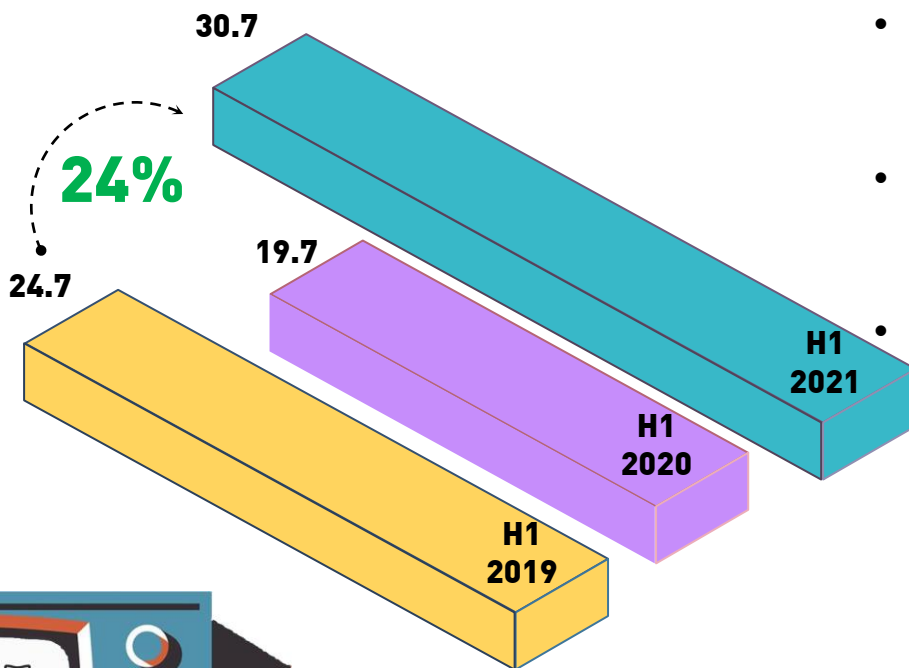
Excluding: ASSOCIATIONS/SOCIAL/CULTURAL ORG, Fillers, SOCIAL ADVERTISEMENTS-NGOS

# BFSI & Building Industrial & Land Material/Equipment Ad Volumes higher than previous years

- BFSI registers 7% growth over 2019.
- Life Insurance leads sector with 29% contribution.
- Securities/Share broking category registers highest growth (4x) over 2019



**BFSI**  
Jan – June Ad Volume (Mn Sec)



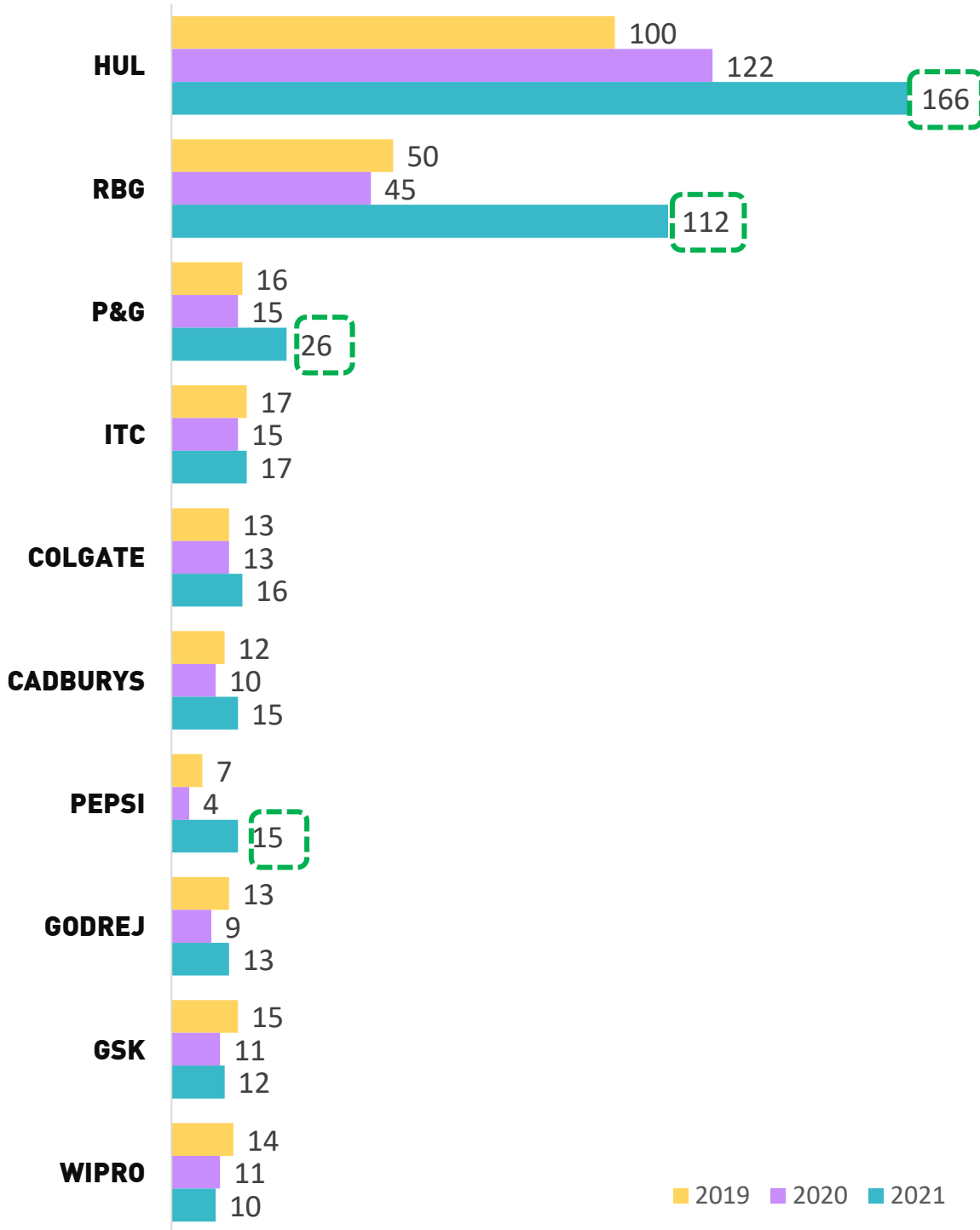
## Building Industrial & Land Material / Equipment

Jan – June Ad Volume (Mn Sec)

- Building sector registers a 24% growth over 2019.
- Paints category leads sector with 36% contribution.
- Industrial Equipment registers highest growth (4x) over 2019

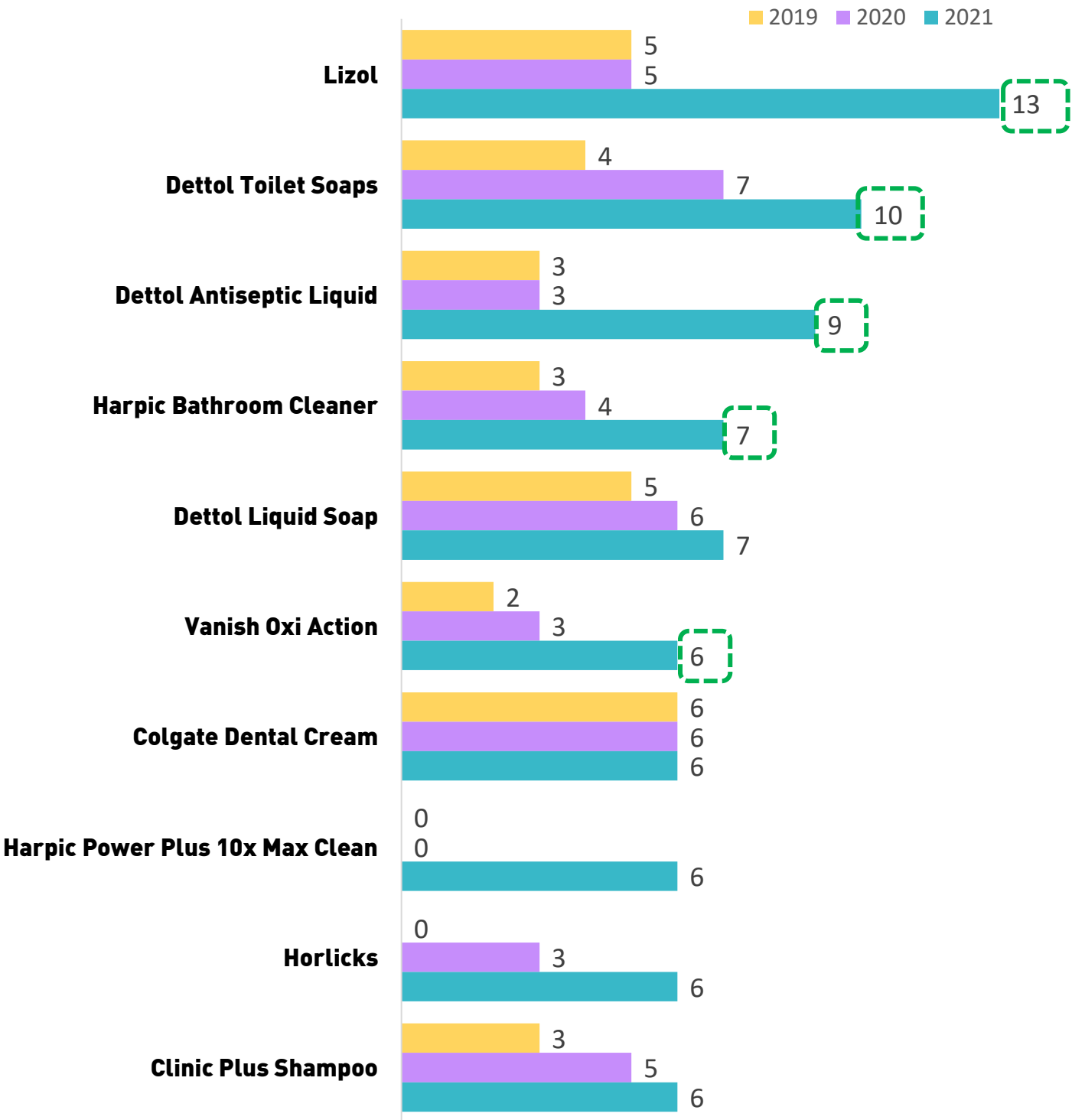


# HUL, Reckitt Benckiser, P&G, Pepsi have shown maximum growth over previous years



# Top Brands have grown exponentially over previous years

7 of Top 10 brands are Reckitt, 2 are HUL.





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