



THINK



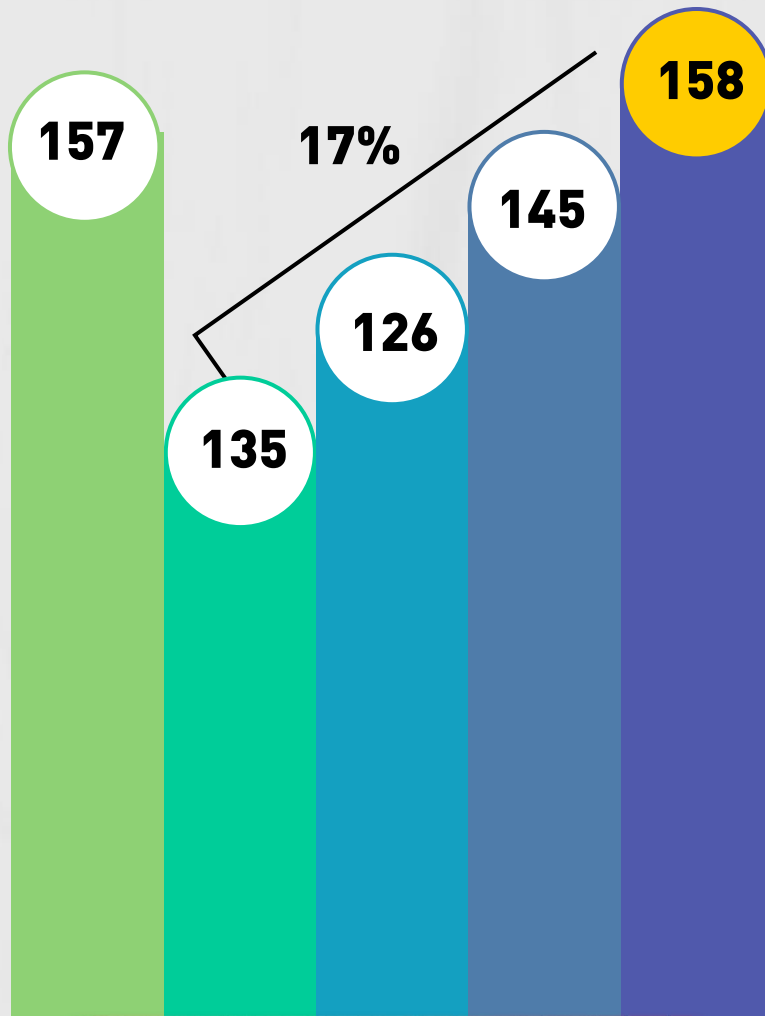
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What India Watches™

August'21 Ad Volume Analysis

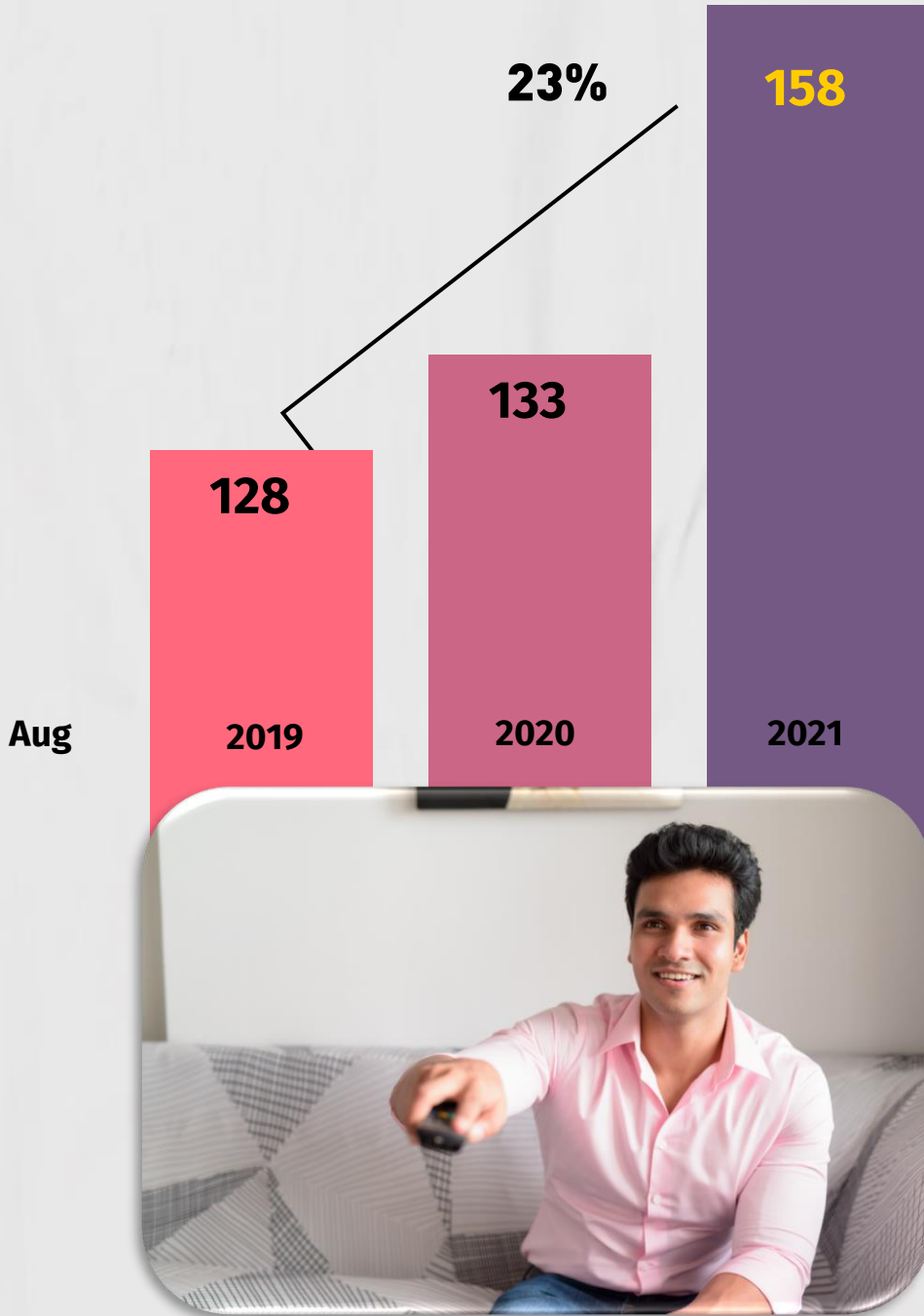


Ad Volumes in August'21 on a robust growth trajectory.



- Apr-21 ●
 - May-21 ●
 - Jun-21 ●
 - Jul-21 ●
 - Aug-21 ●
- Ad Vol (Mn Sec)

Ad Volumes for August'21 higher than previous years... 23% growth over 2019

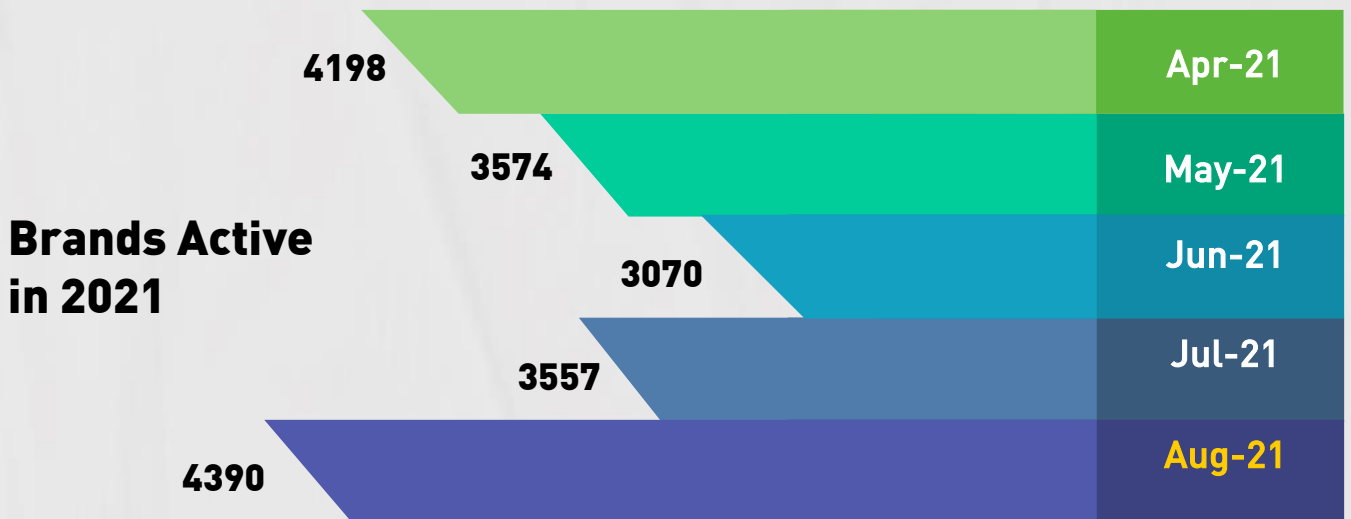
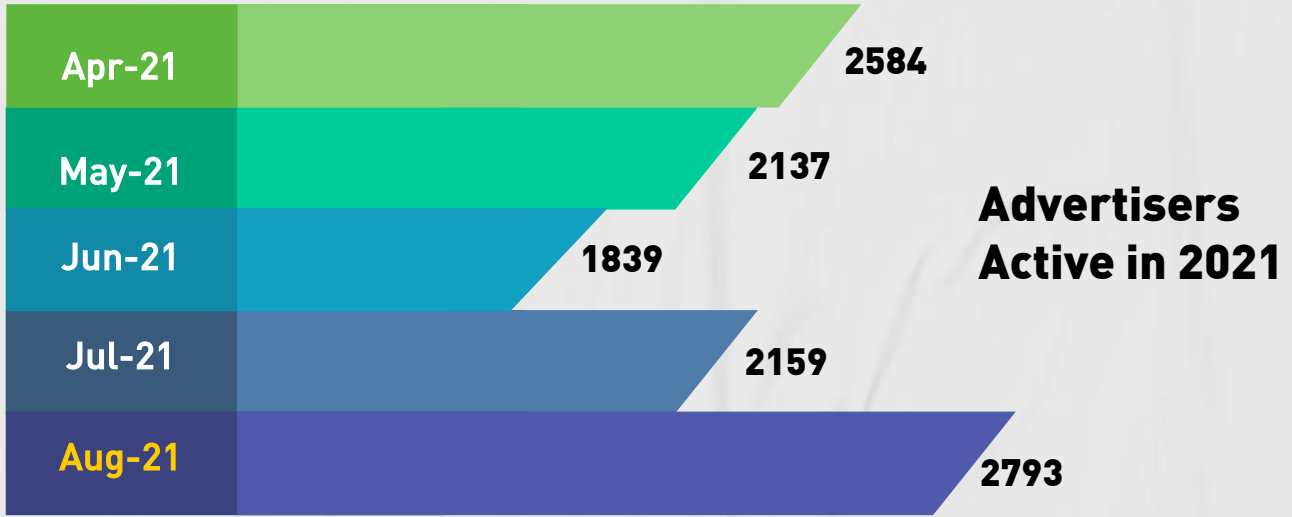


Ad Vol (Mn Sec)

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

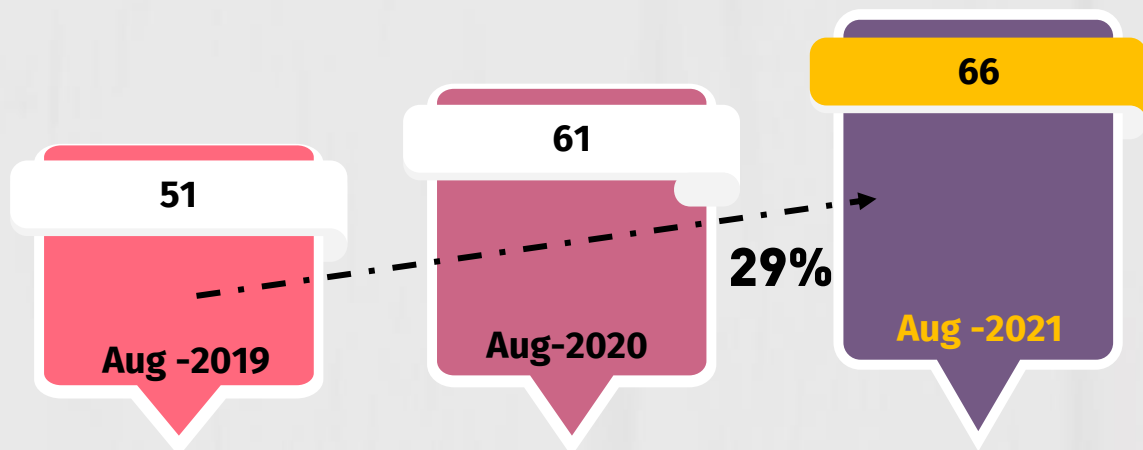
Number of Advertisers & Brands also on the rise. **Highest in 2021.**

Number of Advertisers & Brands in August'21 higher than the previous two years.

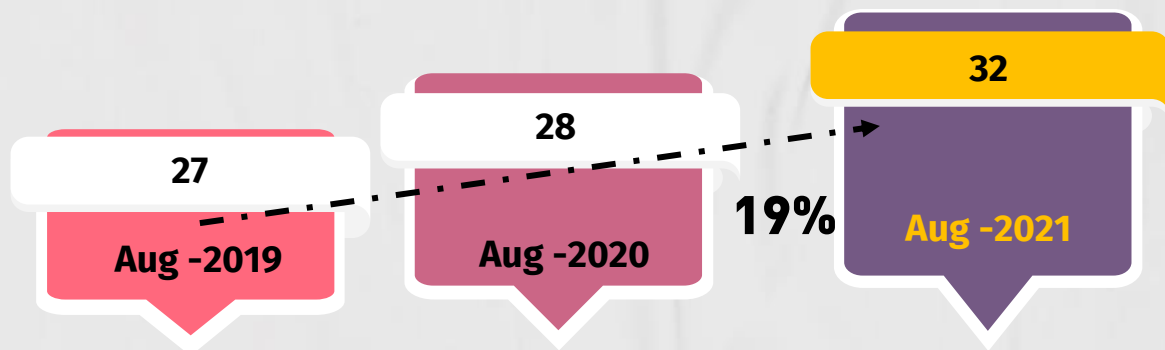


Excluding: ASSOCIATIONS/SOCIAL/CULTURAL ORG, Fillers, SOCIAL ADVERTISEMENTS-NGOS

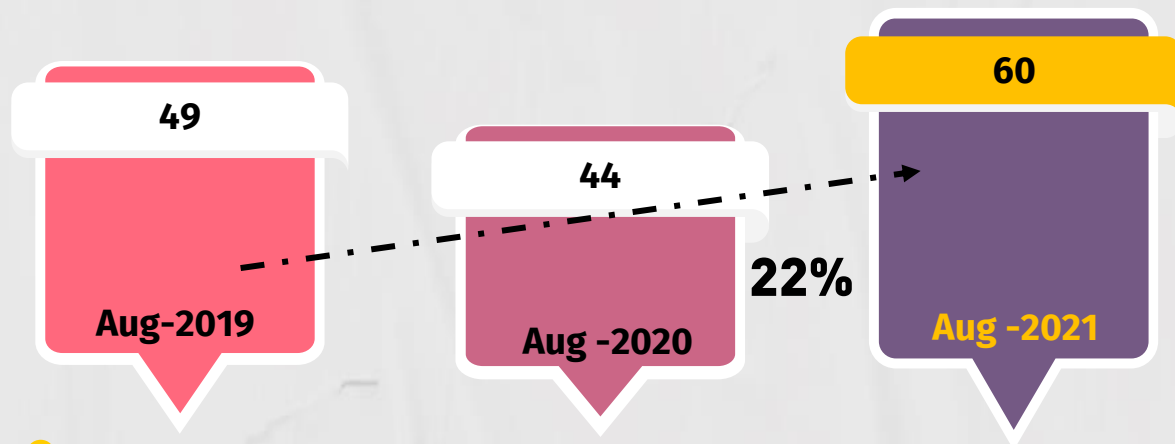
Growth witnessed across spectrum of Advertisers.



Top 10 Advertisers



Next 40 Advertisers



Others



Ad Vol (Mn Sec)

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

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



What India Watches™

Most of the top sectors register growth over 2019.

BFSI, E-Commerce & Corporate Brand Image register exponential growth.



Top 10 Sectors	Aug - 2019	Aug - 2020	Aug - 2021	G/D over 2019
FMCG	76.2	84.6	92.9	22%
Ecommerce	8.8	14.8	18.5	109%
Building, Industrial & Land Materials / Equipment	3.2	2.3	5.1	60%
Corporate/Brand Image	0.7	0.6	4.4	570%
Auto	5.1	4.6	3.9	-24%
Services	4.6	2.7	2.7	-41%
BFSI	1.3	2.5	2.7	110%
Education	1.8	3.5	2.6	45%
Personal Accessories	2.8	1.6	2.5	-10%
Durables	2.2	1.3	2.2	3%

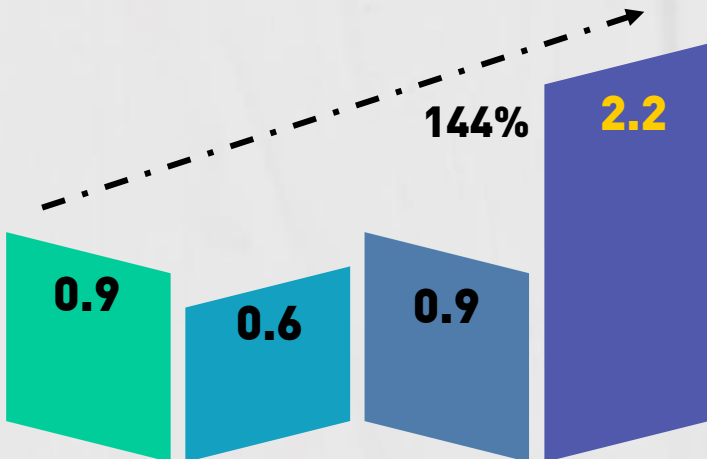
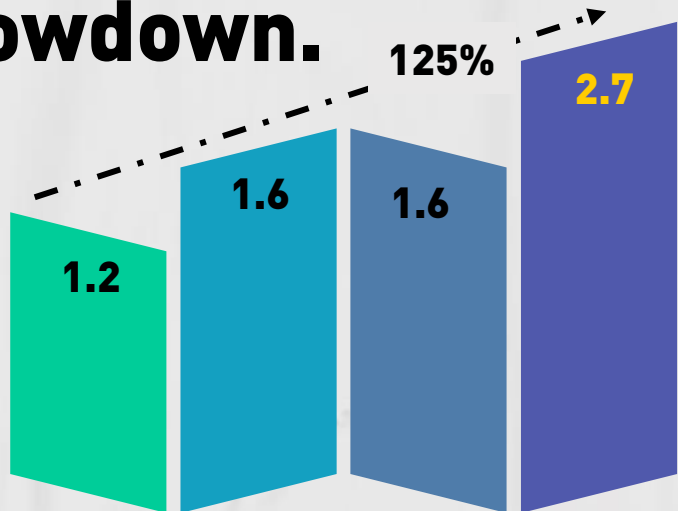
Ad Vol (Mn Sec)

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

BFSI, Durables, Building Industrial & Land Materials/Equipment has seen a sharp increase in August post COVID-19 slowdown.



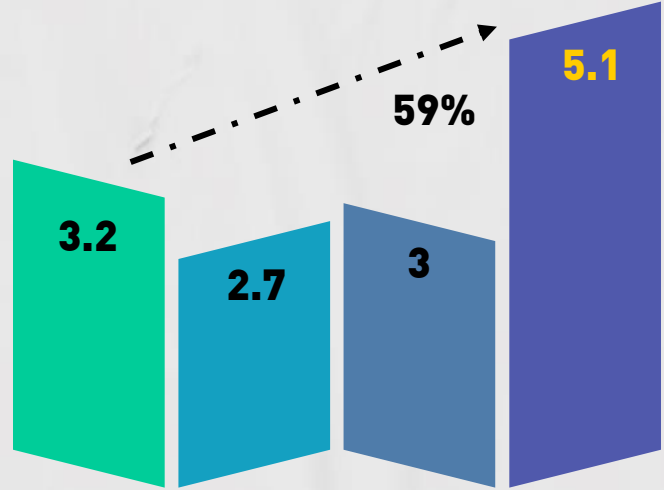
BFSI



DURABLES



Building Industrial & Land Material/Equipment



May-21 ● Jun-21 ● Jul-21 ● Aug-21 ●

Ad Vol (Mn Sec)

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

Ecommerce, Retail, Agriculture, Textile continue the growth momentum in August.



	May'21	June'21	July'21	Aug'21
E-commerce	13.80	15.37	16.23	18.47
Corporate/Brand Image	1.31	1.45	4.13	4.40
Personal Accessories	0.59	1.27	2.16	2.49
Retail	0.59	0.50	1.45	1.87
Agriculture	0.54	0.92	1.27	1.32
Textiles/Clothing	0.55	0.17	0.81	1.16
Computers	0.02	0.10	0.37	0.38

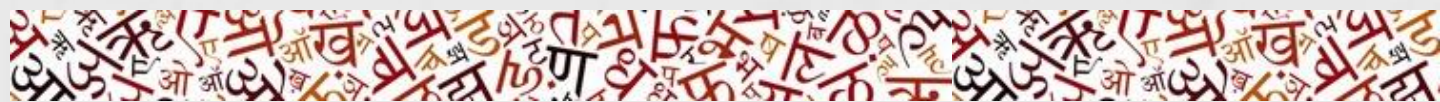
Ad Vol (Mn Sec)

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

Corporate/Brand Image, Includes

- Corporate-Power
- Corporate/Brand Image
- Corporate-Infrastructure
- FMCG-Corporate
- Corporate-Sports

Most Language Channels register growth over 2019.



	Aug - 2019	Aug - 2020	Aug - 2021	G/D over 2019
HINDI	38	43	49	28%
TAMIL	13	12	17	28%
TELUGU	12	10	13	7%
BENGALI	11	11	12	8%
KANNADA	10	10	11	12%
MALAYALAM	8	7	9	13%
MARATHI	6	7	8	32%
PUNJABI	5	6	7	47%
BHOJPURI	3	5	7	113%

Ad Vol (Mn Sec)

Excluding: ASSOCIATIONS/SOCIAL/CULTURAL ORG, Fillers, SOCIAL ADVERTISEMENTS-NGOS
Does not include multiple language channels



What India Watches™

HUL continue to lead followed by RBG



Aug - 2019

Aug - 2020

Aug - 2021

HINDUSTAN UNILEVER LTD

20

25

28

RECKITT BENCKISER GROUP

10

15

17

PROCTER & GAMBLE

5

3

4

CADBURYS INDIA LTD

3

2

3

GODREJ GROUP

3

3

3

ASIAN PAINTS (I) LTD

1

0

2

GLAXOSMITHKLINE GROUP OF COMPA

3

1

2

COLGATE PALMOLIVE INDIA LTD

2

3

2

ITC LTD

3

3

2

PEPSI FOODS (G)

1

1

2

Ad Vol (Mn Sec)

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



What India Watches™

All top brands register growth over previous years.



Aug - 2019

Aug - 2020

Aug - 2021

DETTOL TOILET SOAPS	0.64	1.72	2.56
DETTOL			2.51
HORLICKS	0.89	1.10	1.99
DETTOL ANTISEPTIC LIQUID	0.49	2.15	1.46
LIZOL	1.04	1.11	1.42
CLINIC PLUS SHAMPOO	0.64	0.98	1.16
HARPIC BATHROOM CLEANER	0.76	0.66	1.10
ASIAN PAINTS ROYALE GLITZ			1.04
SURF EXCEL EASY WASH	0.69	1.06	1.02
VEET HAIR REMOVAL SYSTEM	0.12	0.44	1.01

Ad Vol (Mn Sec)

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

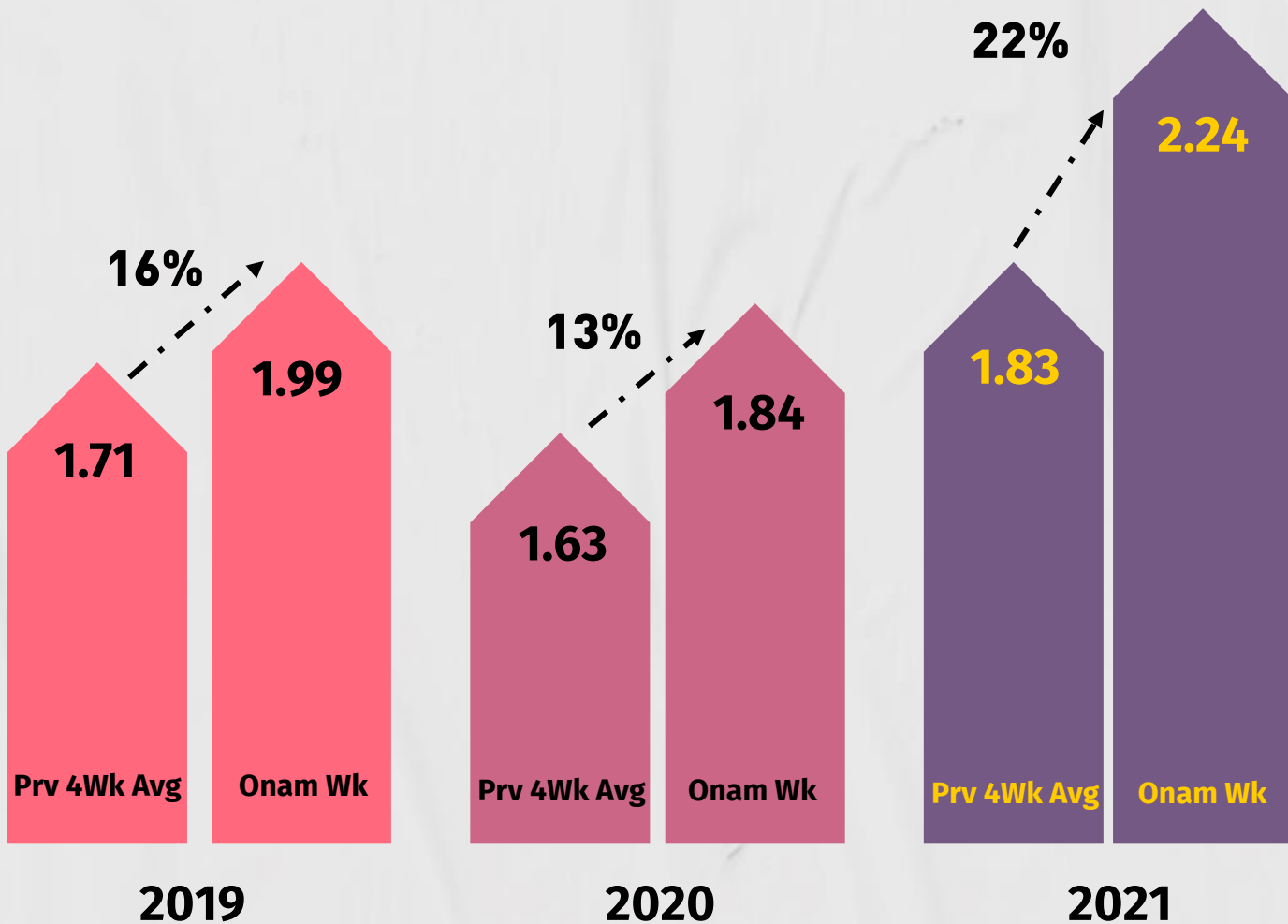


What India Watches™

Start of festive Season brings cheer to Ad Volumes



Ad Volumes during Onam Week 2021 increased by **22%** compared to previous 4 weeks on Malayalam Channels.



Ad Vol (Mn Sec)

Onam Week: 2019 – 26th Aug-1st Sep, 2020 -24th-30th Aug, 2021- 16th-22nd Aug

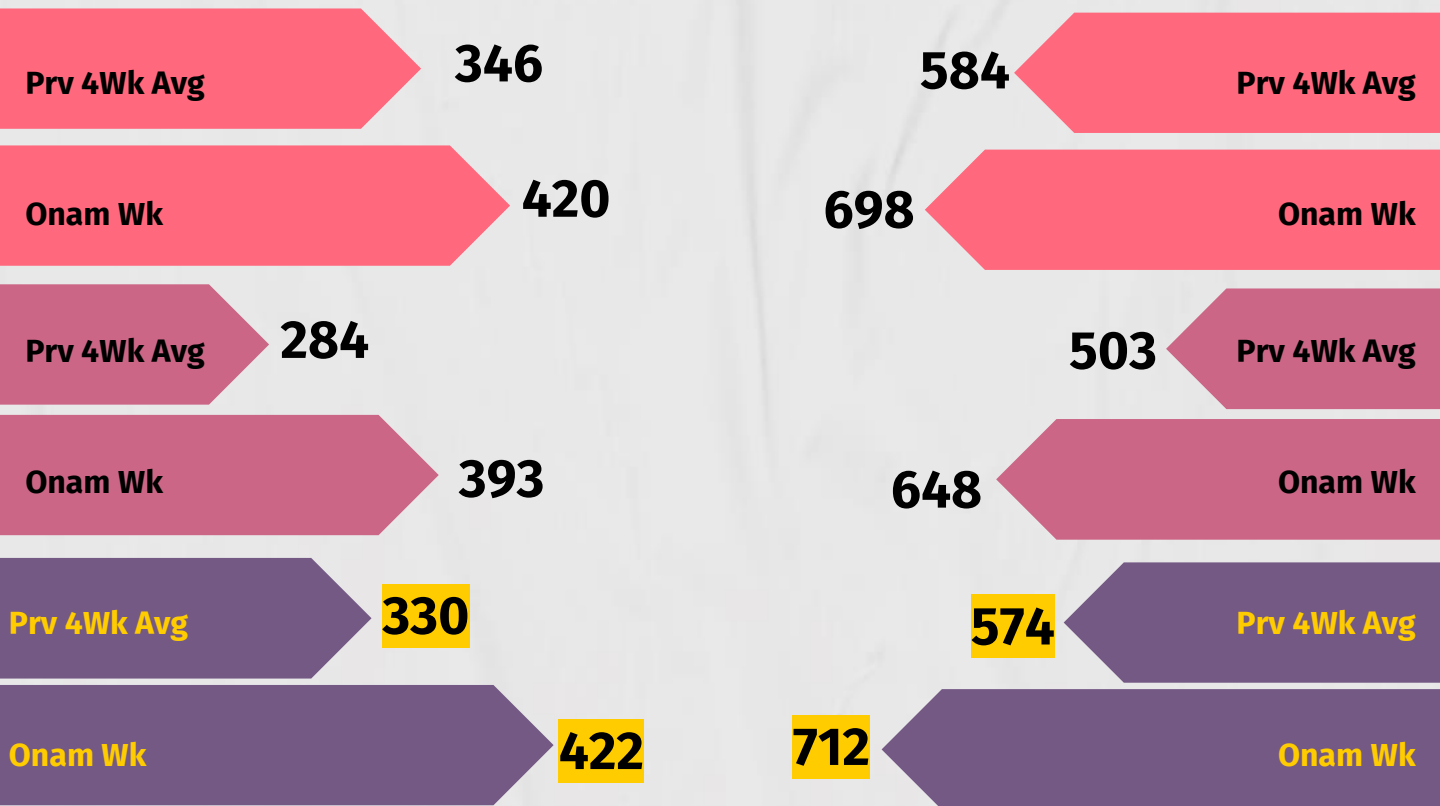
Mazhavil Manorama(v) is considered as Malayalam Channels

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

28% more Advertisers, 24% more Brands, during Onam Week 2021 as compared to previous 4 weeks.



Number of Advertisers & Brands during Onam Week 2021 higher than previous years



Advertiser Count (Malayalam Channels)

Brand Count (Malayalam Channels)

- Aug 2019 ●
- Aug 2020 ●
- Aug 2021 ●

Onam Week: 2019 – 26th Aug-1st Sep, 2020 -24th-30th Aug, 2021- 16th-22nd Aug

Mazhavil Manorama(v) is considered as Malayalam Channels

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



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