



THINK

BARC INDIA

2021- ADVERTISING REPORT

Ad Volumes Surge at the Start of the Year

Jan – Feb 2021



SUMMARY

Total Ad Volumes in 2021 (Jan-Feb) is at an all time high since 2017, registering a growth of 21% compared with the same period in 2020.

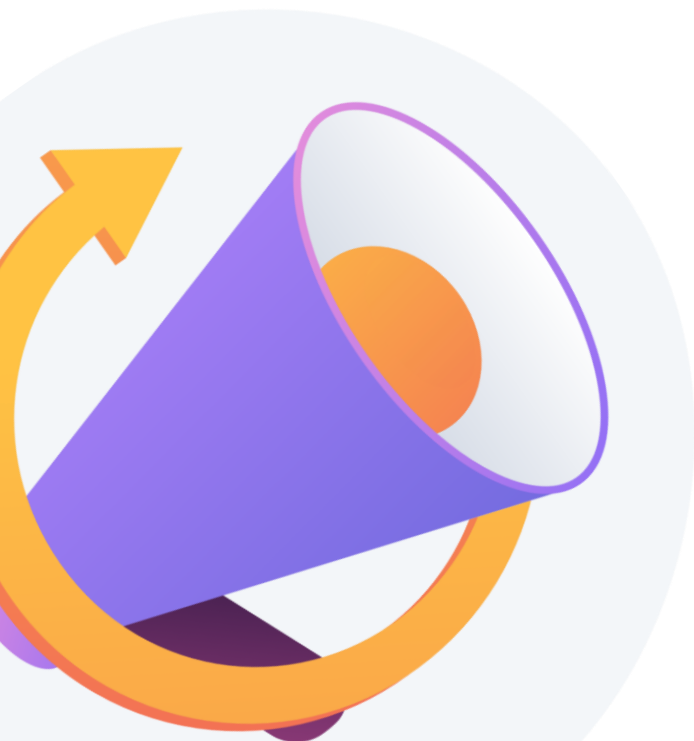
Along with Top 10 Advertisers, next 40 also grew significantly.

ECOM category has shown a consistent growth in Ad Volumes year on year. It grew by 21% in Jan-Feb 2021 vs 2020.

Other categories like Retail and Building, Industrial & Land Materials are also showing a steady growth.

Brands like Whitehat Jr., Harpic Power Plus and Vaseline Intensive Care, are the new entrants in this period in 2021.

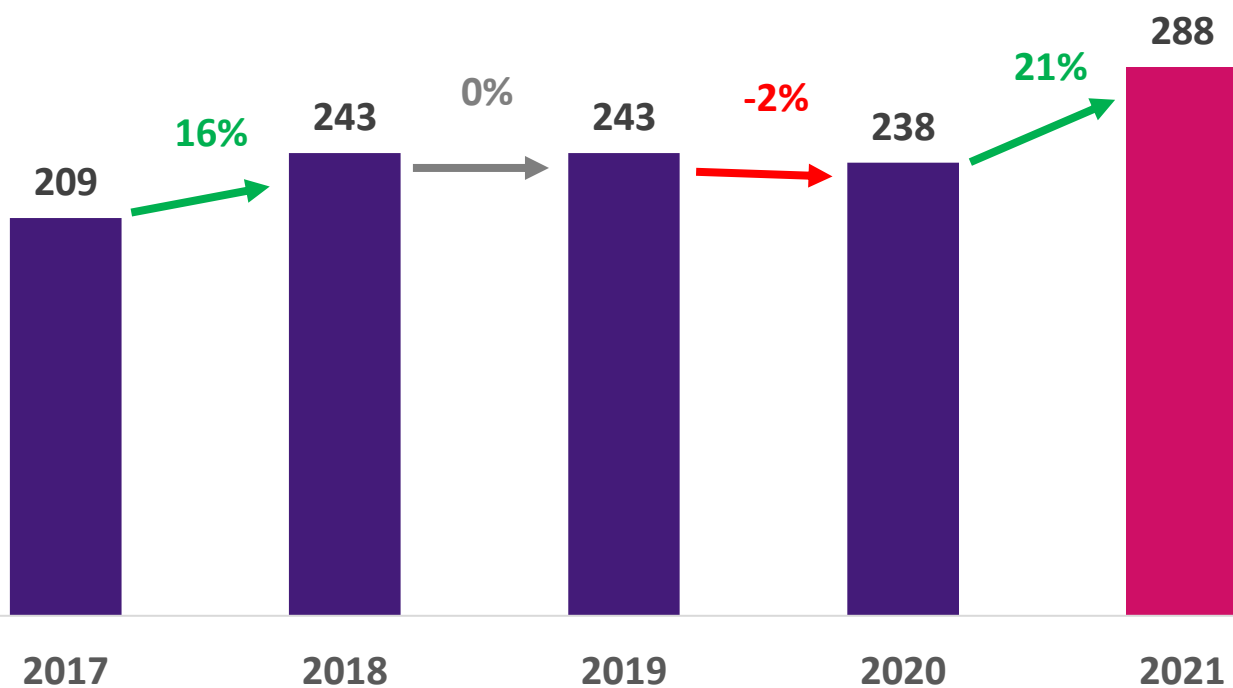
Non-FMCG Brands have increased their presence on TV during Jan-Feb 2021 vs 2020.



1 Overall, Ad Volumes in FY2021 (Jan-Feb), was at an **all time high compared to previous years.**

Despite a decline in the count of Advertisers and Brands during Jan-Feb 2021, overall Ad Volumes registered a **21% growth** compared to the same period in 2020.

Ad Vol (Mn Sec)



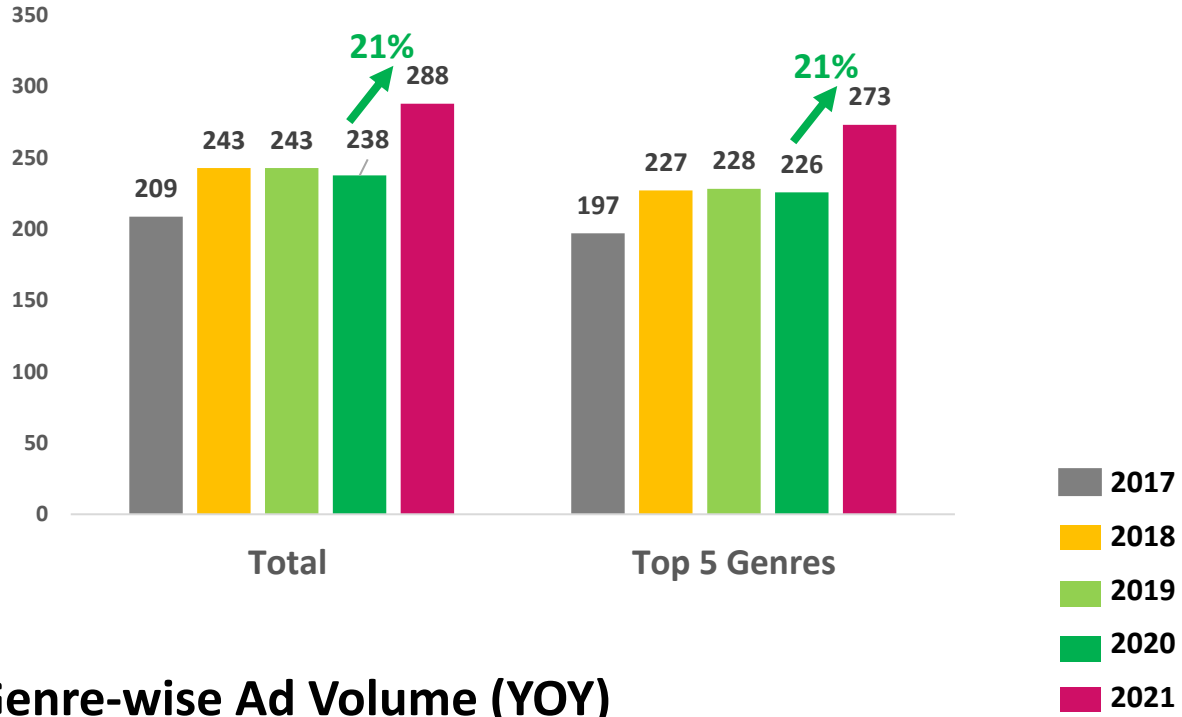
Ad Volumes (Mn secs); Jan-Feb for respective years

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

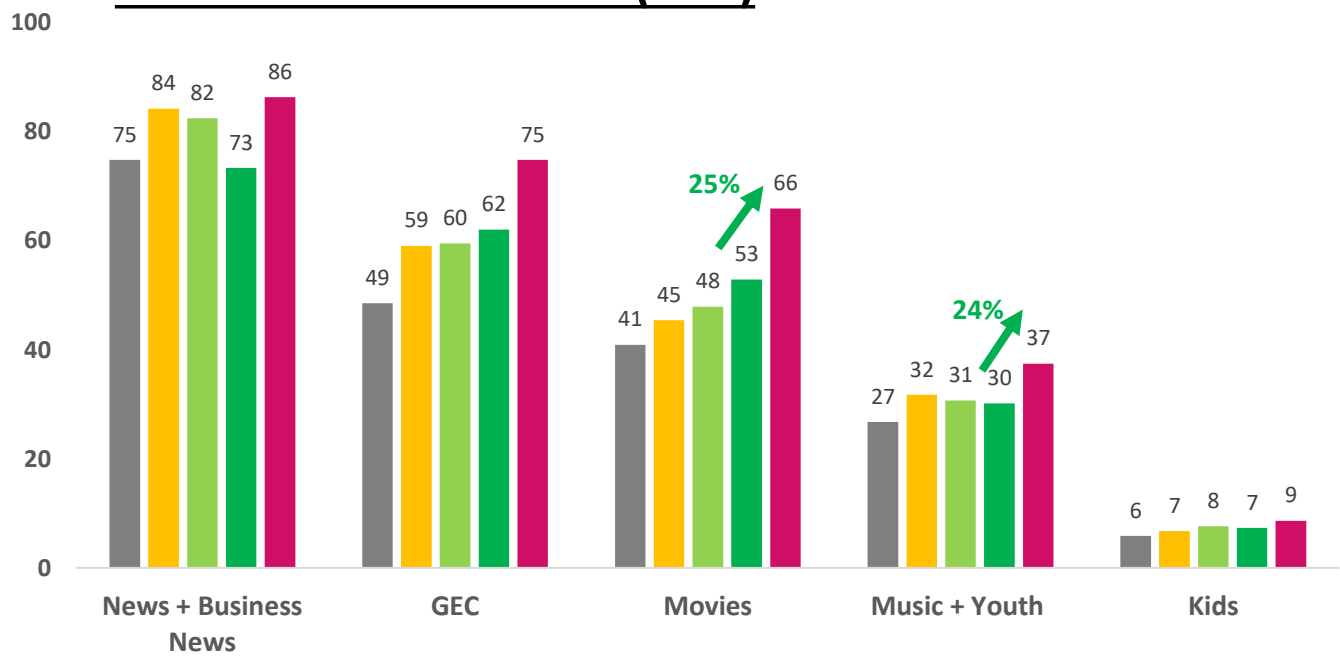
2

Movies and Music+Youth registered a higher growth than the average growth of 21% in Overall Ad Volumes.

Overall Ad Volumes (Mn secs)



Genre-wise Ad Volume (YOY)



Ad Volumes (Mn secs); Jan-Feb for respective years

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

3 Next 40 Advertisers showed a **significant growth** along with Top 10 advertisers.

	2017	2018	2019	2020	2021
Top 10 Advertisers	67	75	82	96	130 ^{35%}
Share% Of Top 10 Advertisers	32%	31%	34%	40%	45%
Next 40	44	60	47	47	59 ^{25%}
Share% Of Next 40	21%	25%	19%	20%	20%
Remaining	98	108	114	95	100 ^{5%}
Share% Of Remaining	47%	44%	47%	40%	35%
Total	209	243	243	238	288 ^{21%}

Ad Volumes (Mn secs); Jan-Feb for respective years

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

Govt ads, Broadcasters and Film Trailers excluded in Top 10 and next 40

Govt ads, Broadcasters and Film Trailers included in Remaining section along with other remaining advertisers

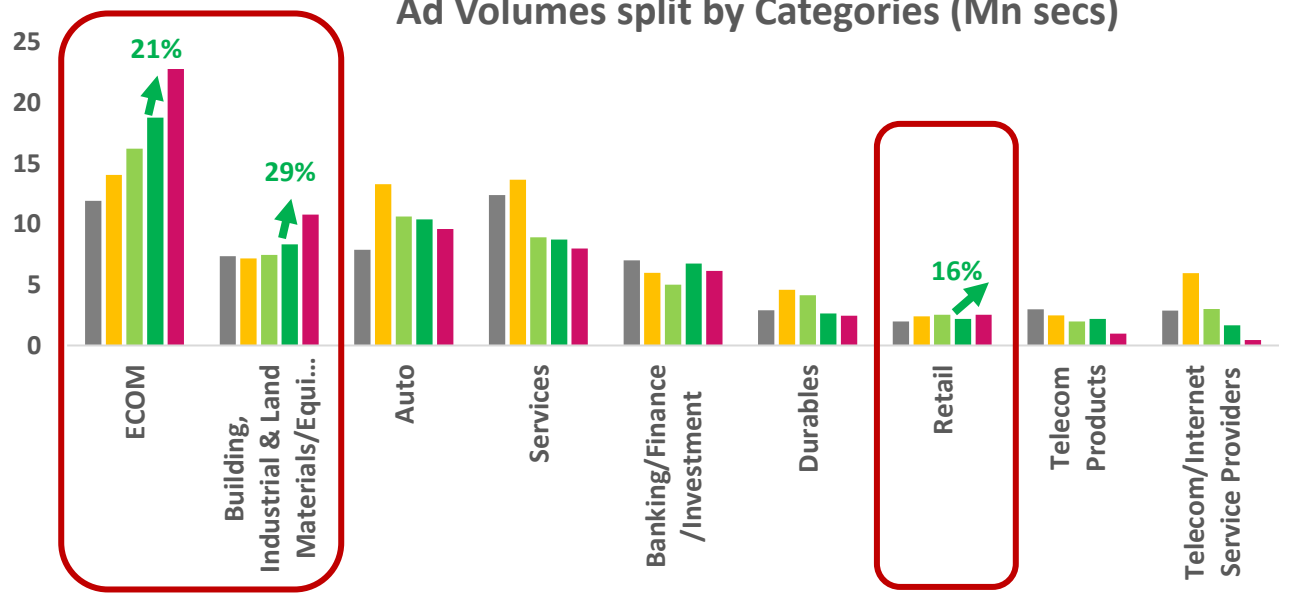
4 ECOM shows consistent growth

over the years.

Building, Industrial & Land Materials makes a strong comeback.

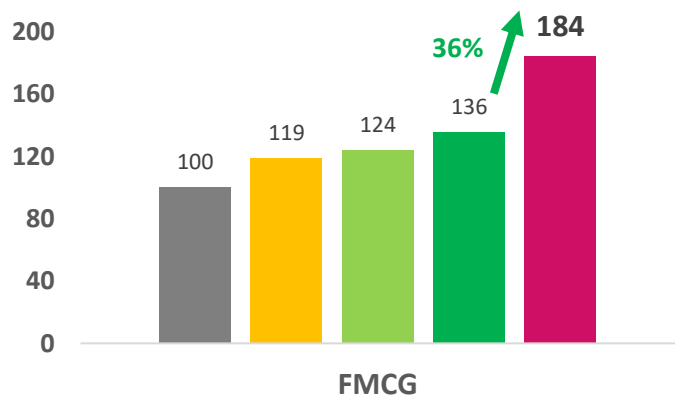
Retail slowly bouncing back in 2021 vs 2020.

Ad Volumes split by Categories (Mn secs)



2017 2018 2019 2020 2021

Ad Volumes (Mn secs)



FMCG

Ad Volumes (Mn secs); Jan-Feb for respective years

*Excludes: ASSOCIATIONS/SOCIAL/CULTURAL ORG; SOCIAL ADVERTISEMENTS-NGOS & FILLER (ECOM Includes ECOM-AUTO PRODUCTS&SERVICES, ECOM-AUTO RENTAL SERVICES, ECOM-CLOTHING/TEXTILE/FASHION, ECOM-FINANCIAL SERVICES, ECOM-FOOD/GROCERY, ECOM-GAMING, ECOM-HOME/INTERIOR/FURNITURE, ECOM-MATRIMONIALS, ECOM-MEDIA/ENTERTAINMENT/SOCIAL MEDIA, ECOM-ONLINE SHOPPING, ECOM-OTHER SERVICES, ECOM-PAYMENT BANKS, ECOM-PHARMA/HEALTHCARE, ECOM-REAL ESTATE, ECOM-TRAVEL & TOURISM, ECOM-WALLETS & EDUC- ECOM-EDUCATION/EDUC- DIGITAL CLASSROOMS) FMCG:- Baby Care, Food & Beverage, Hair Care, Household Products, Laundry, Personal Care/ Hygiene, Personal Healthcare

5 Brands like Whitehat Jr., Harpic Power Plus and Vaseline Intensive Care, are the new entrants during this period in 2021.

Lizol, Dettol and Harpic are the most advertised brands during Jan-Feb 2021.

Top 20 Brands Jan-Feb 2021	2017	2018	2019	2020	2021	Change% 2021 Vs 2020
LIZOL	0.7	1.3	1.2	1.9	4.0	107%
DETTOL ANTISEPTIC LIQUID	0.6	0.9	0.9	1.2	3.3	165%
HARPIC BATHROOM CLEANER				1.5	2.3	56%
DETTOL TOILET SOAPS	0.7	1.2	1.2	1.9	2.2	16%
SANTOOR SANDAL AND TURMERIC	0.9	1.4	2.2	2.2	2.1	-1%
COLGATE DENTAL CREAM	1.5	1.6	1.6	1.9	2.1	12%
GLOW & LOVELY ADVANCED MULTIVITAMIN					2.1	
VANISH OXI ACTION	0.1	1.1	0.7	1.5	2.0	31%
HARPIC POWER PLUS/BATHROOM CLEANER	0.8	1.1	1.1		1.9	
CLINIC PLUS SHAMPOO	0.9	0.8	0.9	1.4	1.8	29%
LUX TOILET SOAP	0.8	0.6	1.2	1.9	1.8	-7%
LALITHAA JEWELLERY	0.2	2.4	2.3	1.6	1.8	9%
WHITEHAT JR					1.8	
HARPIC POWER PLUS 10X MAX CLEAN					1.8	
HORLICKS	0.9	1.2	1.4	0.9	1.7	103%
COLIN				0.3	1.6	419%
TRESEMME KERATIN SMOOTH SHAMPOO			0.5	0.1	1.6	1337%
AMAZON.IN	1.0	1.8	0.1	1.1	1.5	36%
DETTOL LIQUID SOAP	0.9	1.2	2.5	0.0	1.5	38610%
VASELINE INTENSIVE CARE DEEP MOISTURE BODY LOTION					1.5	

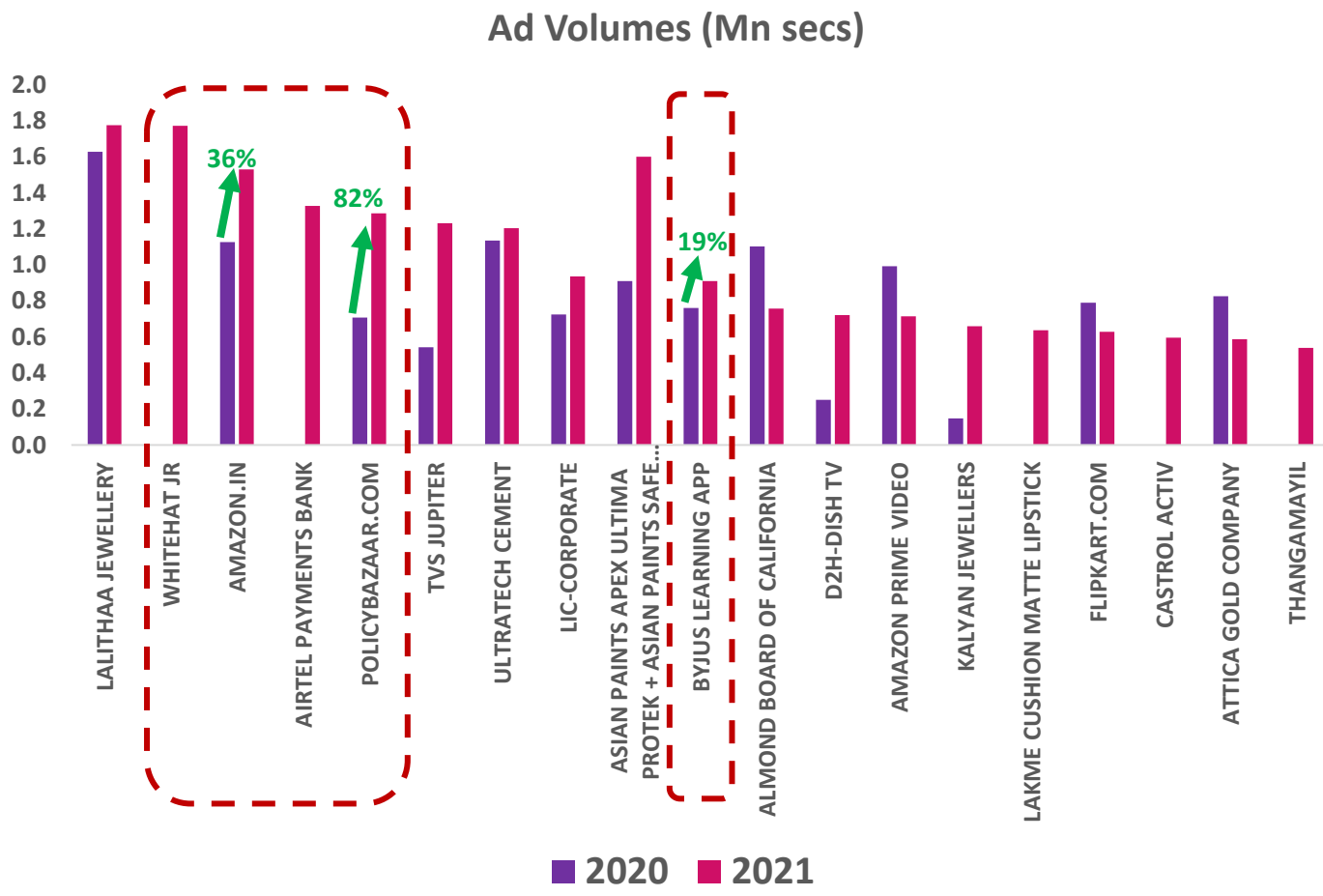
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Excludes Broadcaster & Govt Ads; Data Sorted basis 2021

6 **Non-FMCG Brands** have increased their presence on TV during Jan-Feb 2021 vs 2020.

ECOM brands increased Ad Volumes on TV during lockdown in 2020 and have continued to do so in 2021.



Ad Volumes (Mn secs); Jan-Feb for respective years
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