

Tuesday, 5 February, 2008

**Latest Newsletter from AdEx India, a division of TAM Media Research**

**Subject: Snapshot on TV Advertising in 2007 – Part 2**

(Note: The entire analysis is based on Secondages)

**Before we begin with the analysis of TV advertising in 2007 -Part 2, let's have a quick re-cap of the preceding Newsletter:**

**Highlights:**

- **31% growth in TV ad volumes during 2007 compared to 2006.**
- **'Food & Beverages' sector leads in TV advertising during 2007.**
- **'HUL' maintained its 1<sup>st</sup> rank in the top 10 advertisers list on TV across both the years 2006 and 2007.**
- **TV advertising at its peak during the last quarter of 2006 and 2007.**

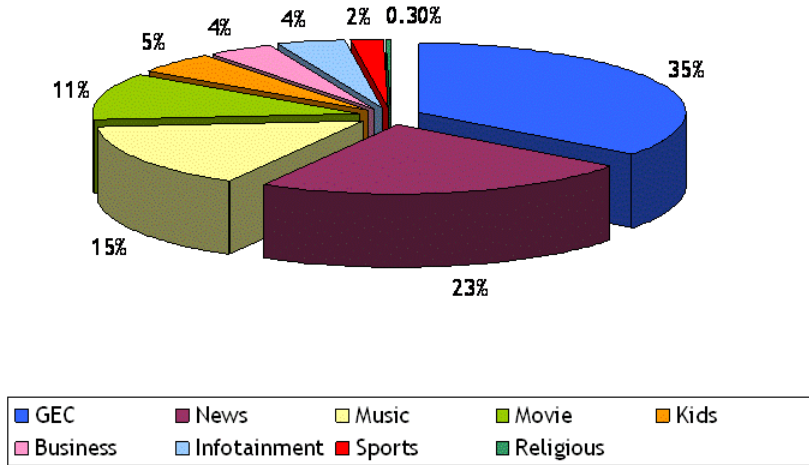
***This week AdEx India brings to you the 2<sup>nd</sup> part of TV Advertising during 2007.***

**Today's Highlights:**

- **General Entertainment channels had the largest share of TV advertising during 2007.**
- **There was 45% rise in Print Media promotion and 172% growth in Radio Channel promotion on TV during 2007 compared to 2006.**
- **'Wrigleys' was at number one position in the exclusive advertisers list on TV during 2007.**
- **'Home Shop 18' topped the chart of new brands advertised on TV during 2007.**

**Share of Channel Genre**

GEC and News channels accounted for approx. 60% share of TV ad volumes in 2007



Source: AdEx India (A Division of TAM Media Research)

Note: Figures are based on Secondages

- General Entertainment Channel leads with 1/3<sup>rd</sup> share, followed News and Music Channel with 23% and 15% share respectively during 2007

**Top 3 categories in top Channel genres**

**Top Categories across the Top Channel Genres**

Rank	Top Categories on GEC	% Share
1	Social Advertisements	6%
2	Toilet Soaps	5%
3	Shampoos	3%

Rank	Top Categories on News	% Share
1	Cellular Phone Service	5%
2	Corporate/Brand Image	4%
3	Internet/SMS Service	3%

Rank	Top Categories on Music	% Share
1	Soft Drink Aerated	4%
2	Cellular Phone Service	3%
3	Cellular Phones	3%

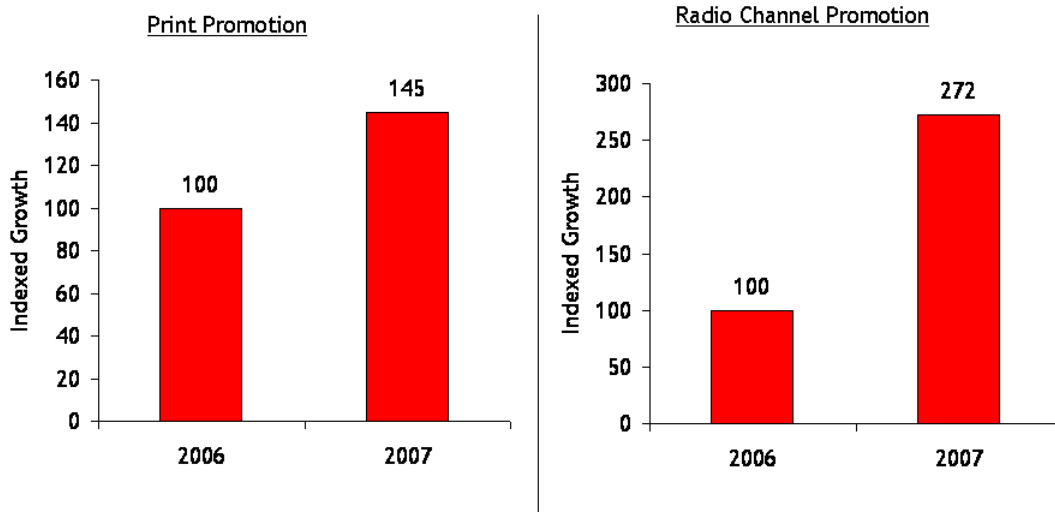
Source: AdEx India (A Division of TAM Media Research)

Note: Figures are based on secondages

- Social Advertisements topped the category chart on General Entertainment Channels, followed by 'Toilet Soaps' and 'Shampoos'.
- 'Cellular Phone Service' took 1<sup>st</sup> position in the category list of News Channels whereas stood at 2<sup>nd</sup> place on Music channels.

**Print Media and Radio Channel Promotion on TV**

**Print and Radio channel promotion on TV during 2007**



Index year : 2006 = 100

Source: AdEx India (A Division of TAM Media Research)

Note: Figures are based on secondages

- During 2007, Print media advertising on TV increased by 45% compared to 2006.
- Ad volumes of Radio Channel promotion grew by 172% during 2007 over 2006.

**Top Exclusive Advertisers on TV**

Top Exclusive advertisers on TV in 2007

Top Exclusive Advertisers	% Share
Wrigleys	10%
West Bengal Information & Culture	5%
Ministry Of Overseas Indian Affairs	3%
Home Solutions	2%
www.jobstreet.com	2%
ALG Inc India Liason Office	2%
Direc TV	1%
Trinayani	1%
Cobra Indian Beer Private Ltd	1%

Source: AdEx India (A Division of TAM Media Research)

Note: Figures are based on secondages

- Among the top 10 Exclusive advertisers, 2 of the advertiser's viz. 'Ministry of Overseas Indian Affairs' and 'Trinayani' had advertised for the social cause.

**Top New Brands advertised on TV**

**New brands advertised on TV during 2007**

2 brands each under 'Personal Care/Personal Hygiene', 'Hair Care' and 'Personal Accessories' made it to the top 10 list

Rank	Top Brands
1	Home Shop18
2	Moser Baer DVD/VCD
3	Ponds Age Miracle
4	Dove Zero Damage
5	Vodafone Cellular Phone Service
6	Forevermark-DTC
7	Set Wet Zatak Gold
8	Colgate Max Fresh Citrus Blast
9	Minute Maid Pulpy Orange
10	Clinic All Clear Men

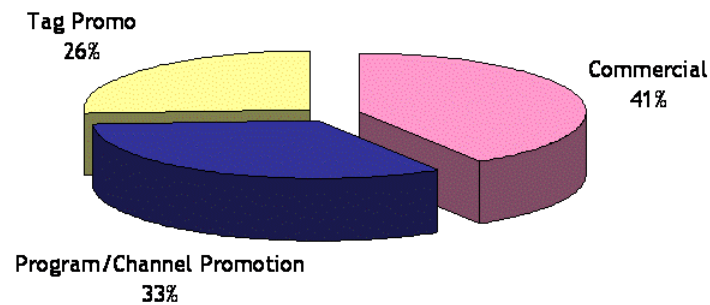
Source: AdEx India (A Division of TAM Media Research)

Note: Rank are based on secondages

- Top 3 new brands on TV were 'Home Shop 18', 'Moser Baer DVD/VCD' and 'Ponds Age Miracle' during 2007.

**Share of Commercial, Program/Channel Promotion and Tag Promo**

Type of advertising in TV during 2007

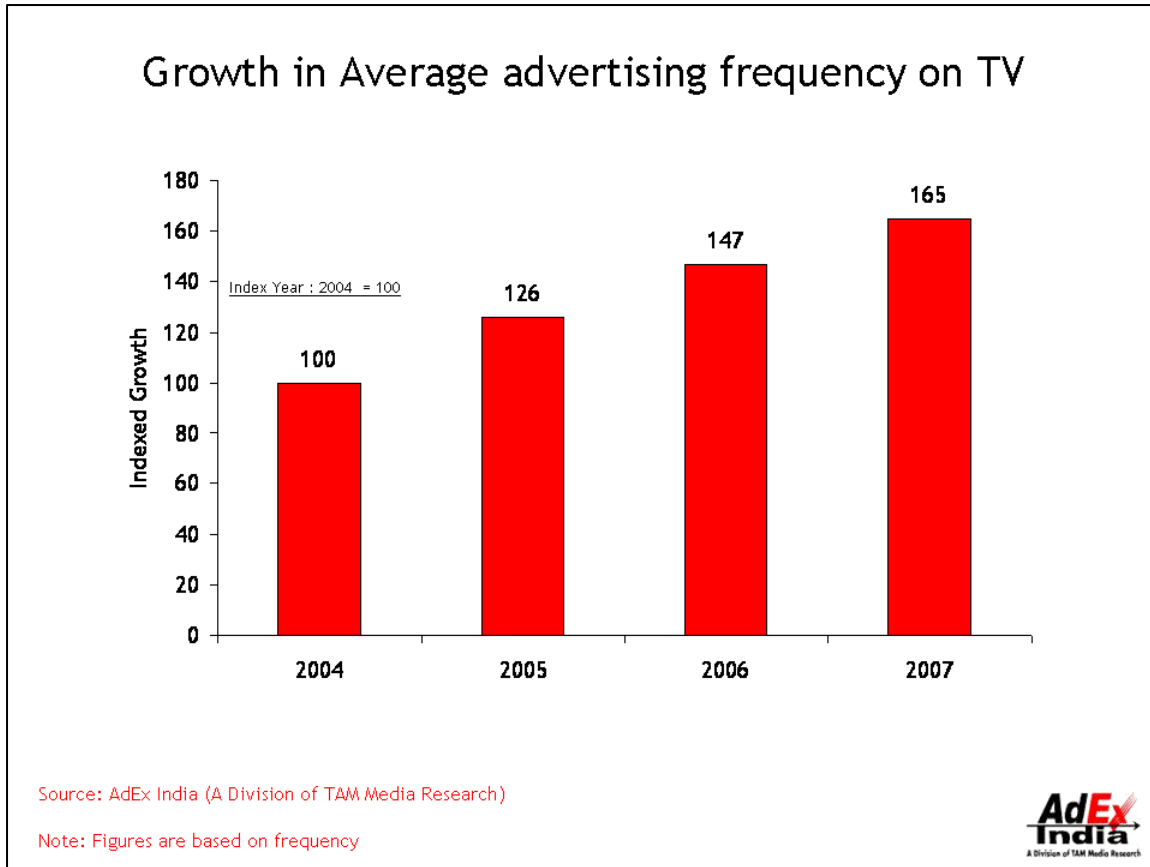


Source: AdEx India (A Division of TAM Media Research)

Note: Figures are based on Frequency

- During 2007, Commercial advertising had maximum share of 41% followed by 'Program/Channel promotion' and 'Tag Promo' with 33% and 26% share respectively.

**Growth in average advertising frequency on TV**



- Average advertising frequency per day on TV grew by 13% during 2007 over 2006, Whereas it rose by 65% during 2007 compared to 2004.

**(Analysis from AdEx India-A Division of TAM Media Research)**

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