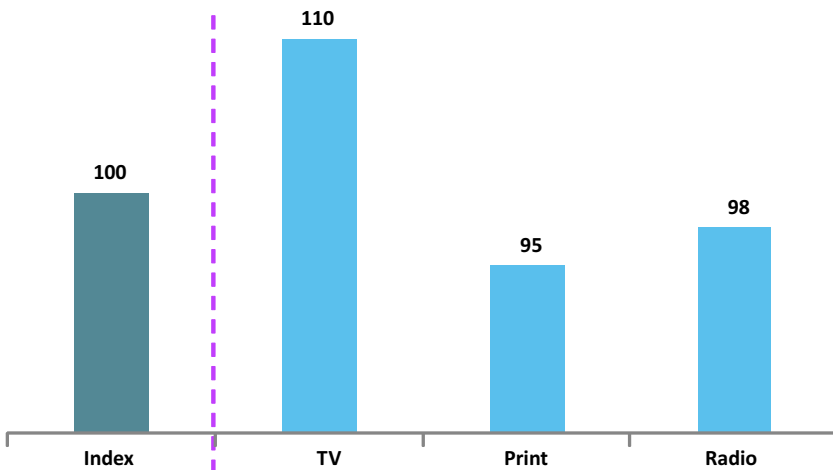


Highlights

- Advertising on TV grew by 10% during Aug-Oct '17 compared to Aug-Oct '16.
- TV had 72% share of Ad Insertions, followed by Radio with 21% share.
- On TV, DTH Service Providers category stepped up in ranking by 14 positions during Aug-Oct '17 to reach 9th Place in the list.
- Uber India Systems Pvt Ltd entered into Top 10 list of Aug-Oct '17 with jump of whopping 691 ranks compared to Aug-Oct '16 on Radio.
- Among Sales Promotions, Multiple Promotion had 59% share of advertising in Print.

Growth in Ad Volumes for each medium during Festive Period: Aug-Oct '17

Advertising on TV rose during Aug-Oct '17 compared to Aug-Oct '16



Index : Aug-Oct '16 = 100

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

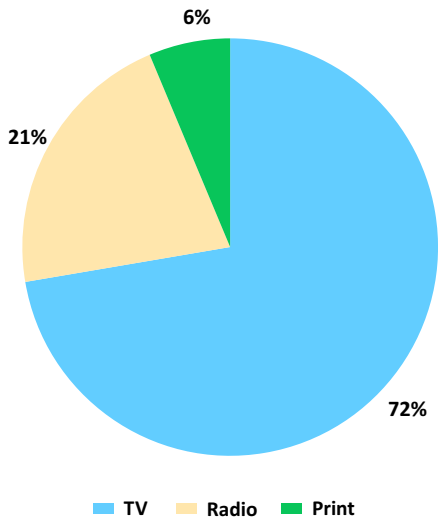
Note: Figures are based on Col*Cms for Print and Secondages for TV and Radio Period : Aug-Oct '17

AdEx
India
A Division of TAM Media Research

- Advertising on TV grew by 10% during Aug-Oct '17 compared to Aug-Oct '16.
- Advertising in Print and Radio declined by 5% and 2% respectively.

Media-wise contribution of Ad Insertions during Festive Season

TV had 72% share of Ad Insertions



- TV had 72% share of Ad Insertions, followed by Radio with 21% share.
- Print contributed merely 6% share of Ad Insertions in Aug-Oct '17.

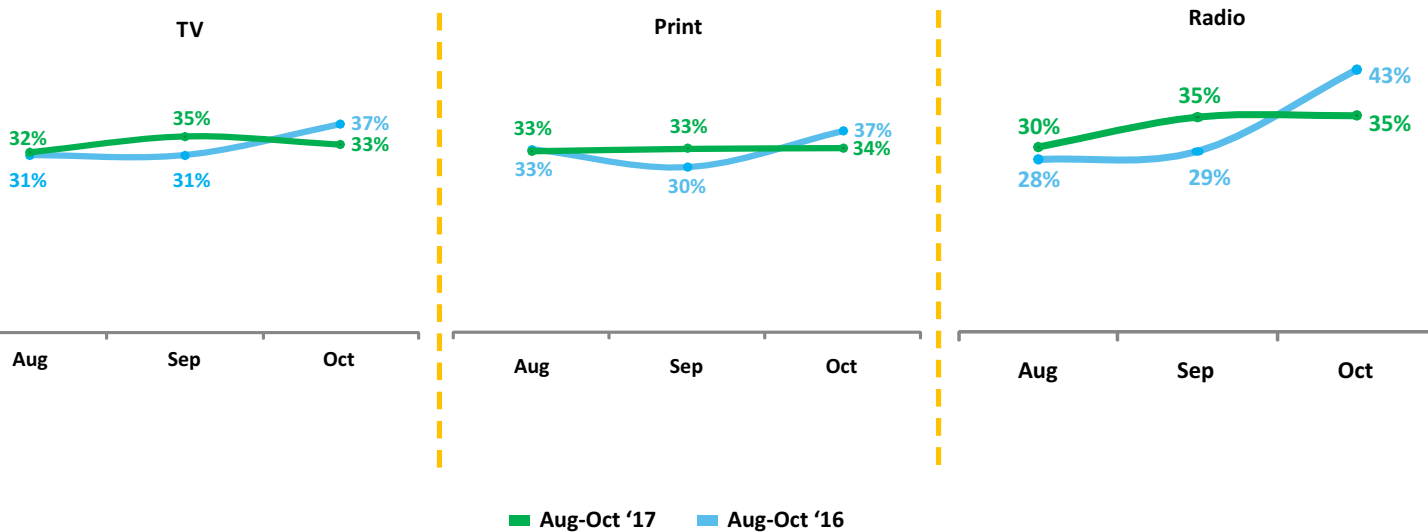
Source: AdEx India (A Division of TAM Media Research)

Note: Figures are based on Ad Insertions for TV, Radio and Print Period: Aug-Oct '17



Monthly Trends based on Ad Insertions

Ad volume with almost flat trend observed during Aug-Oct '17 in all mediums



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

Note: Figures are based on Ad Insertions for TV, Radio and Print

Period: Aug-Oct '17



- Advertising in Sep '17 increased in all mediums compared to Sep '16.
- August month did not witness significant variations in advertising share for both the years.

Top 10 Categories and Advertisers on TV

Top 10 categories and advertisers added nearly 29% share each on TV

Categories	Rank	
	Aug-Oct '17	Aug-Oct '16
Toilet Soaps	1	1
B2C & Online Shopping	2	2
Tooth Pastes	3	4
Two Wheelers	4	8
Shampoos	5	7
Washing Powders/Liquids	6	5
Cars/Jeeps	7	6
Retail Outlets-Jewellers	8	19
DTH Service Providers	9	23
Perfumes/Deodorant	10	9

Green font: Rise
Red font: Drop

Advertisers	Rank	
	Aug-Oct '17	Aug-Oct '16
Hindustan Unilever Ltd	1	1
Reckitt Benckiser (India) Ltd	2	2
Patanjali Ayurved Ltd	3	4
Cadburys India Ltd	4	3
Procter & Gamble	5	5
Brooke Bond Lipton India Ltd	6	6
Videocon Industries Ltd	7	47
ITC Ltd	8	10
Colgate Palmolive India Ltd	9	9
Amazon Online India Pvt Ltd	10	14

Source: AdEx India (A Division of TAM Media Research)
Note: Figures are based on Secondages for TV

Period: Aug-Oct '17 


- DTH Service Providers category stepped up in ranking by 14 positions to reach 9th Place in the list.
- Videocon Industries Ltd entered in the Top 10 list with rank 7 compared to 47th position in the last year.

Top 10 Program Genres preferred by Advertisers in Festive Season on TV

Feature Films was the top Program Genre on TV

Rank	Program Genres	% Share
1	Feature Films	24
2	News Bulletin	19
3	Film Songs	10
4	Drama/Soap	8
5	Film Based Magazines	3
6	Cartoons/Animation	3
7	Reviews/Reports	3
8	Religious/Devotional/Astrology	3
9	Music Shows/Songs	3
10	Interviews/Portraits/Discussion	3

Source: AdEx India (A Division of TAM Media Research)
Note: Figures are based on Secondages for TV

Period: Aug-Oct '17 

- Feature Films was the top Program Genre with 24% share of advertising on TV, followed by News Bulletin with 19% share.

Top 10 Categories and Advertisers in Print

Top 10 categories and advertisers added nearly 40% and 15% share in Print respectively

Categories	Rank	
	Aug-Oct '17	Aug-Oct '16
Two Wheelers	1	1
Cars/Jeeps	2	2
Retail Outlets-Electronics/Durables	3	6
B2C & Online Shopping	4	4
Properties/Real Estates	5	3
Hospital/Clinics	6	5
Retail Outlets-Jewellers	7	10
Retail Outlets-Clothing/Textiles/Fashion	8	9
Consumer Durables/Home Appliances	9	8
Televisions	10	12

Advertisers	Rank	
	Aug-Oct '17	Aug-Oct '16
Hero Motocorp Ltd	1	1
Amazon Online India Pvt Ltd	2	5
Maruti Suzuki India Ltd	3	10
Hindustan Unilever Ltd	4	4
Honda Motorcycle & Scooter I Ltd	5	2
Sony India Ltd	6	16
TVS Motor Company	7	13
Emami Limited	8	15
Mahindra & Mahindra	9	14
Future Retail Ltd	10	18

Green font: Rise
Red font: Drop

Source: AdEx India (A Division of TAM Media Research)
Note: Figures are based on Col*Cms for Print

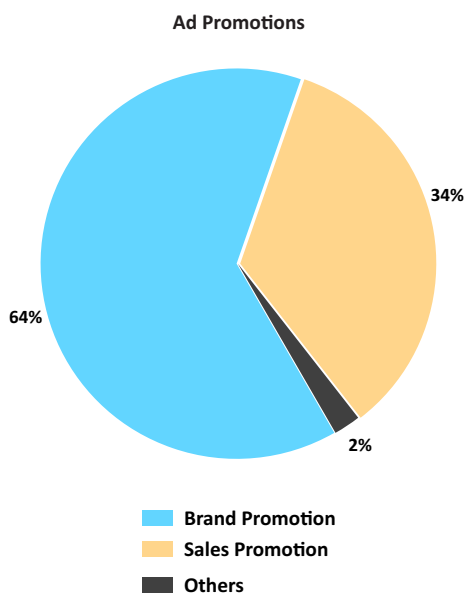
Period: Aug-Oct '17



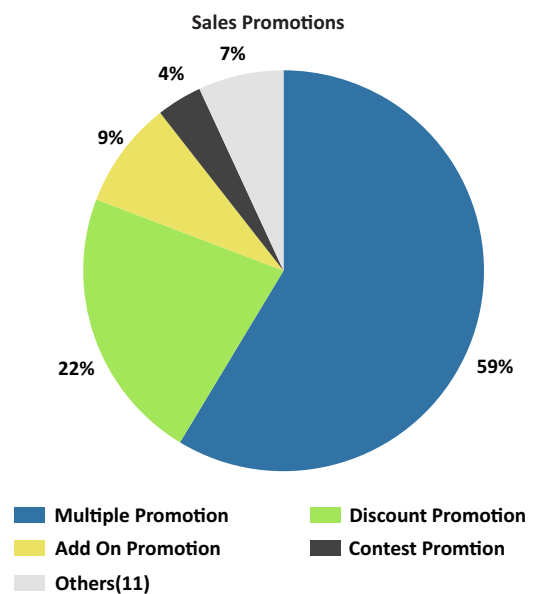
- Retail Outlets-Electronics/Durables moved to 3rd rank during Aug-Oct '17 compared to 6th rank in Aug-Oct '16.
- 5 advertisers were new entrants in the Top 10 list during Aug-Oct '17 compared to same period for the last year.

Advertising Promotions during festival period in Print

Brand Promotion had 64% share of Ad space space



Sales Promo.



Source: AdEx India (A Division of TAM Media Research)
Note: Figures are based on Col*Cms for Print

Period: Aug-Oct '17



- Brand Promotion owned 64% share of Ad space, while Sales Promotion had 34% share.
- Among Sales Promotions, Multiple Promotion had 59% share of advertising in Print.

Zone, Language and City wise Advertising share in Print

South Zone was on top with 31% share of advertising in Print

Zone	% Share	City	% Share	Ad Language	% Share
South Zone	31	Mumbai	5	English	40
North Zone	29	New Delhi	4	Hindi	27
West Zone	24	Bangalore	3	Marathi	7
East Zone	14	Kolkata	3	Telugu	6
National	1	Hyderabad	3	Tamil	5
		Chennai	3	Kannada	4
		Chandigarh	3	Gujarati	3
		Ahmedabad	2	Malayalam	3
		Lucknow	2	Oriya	2
		Pune	2	Bengali	1

*City & Ad Language table provides Top 10 records

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

Note: Figures are based on Col*Cms for Print

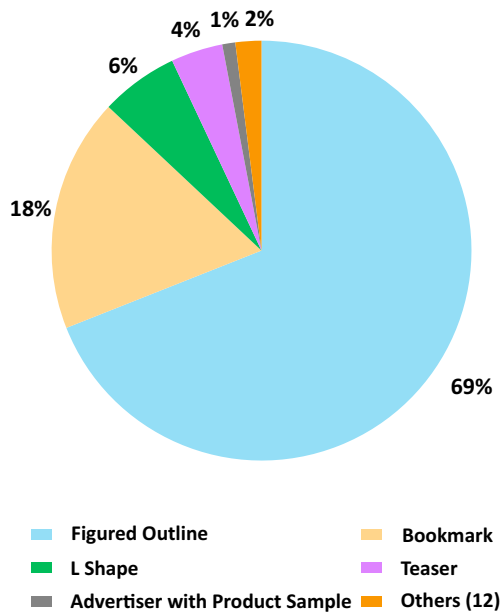
Period: Aug-Oct '17



- Mumbai was the top city with 5% share of ad space in Print.
- English topped the list of Ad Languages with 40% share of advertising in Print.

Top 10 innovations preferred by Advertisers in Festive Season

Advertising in Print saw Figured Outline as the top Innovation



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

Note: Figures are based on Col*Cms for Print

Period: Aug-Oct '17



- Figured Outline was the top innovation with 69% share of innovative advertising in Print, followed by Bookmark with 18% share.

Top 10 Categories and Advertisers on Radio

Top 10 Categories and Advertisers covered 44% and 12% share respectively

Categories	Rank	
	Aug-Oct '17	Aug-Oct '16
Properties/Real Estates	1	1
Retail Outlets-jewellers	2	4
Cars/Jeeps	3	3
B2C & Online Shopping	4	2
Retail Outlets-Clothing/Textiles/Fashion	5	5
Retail Outlets-Electronics/Durables	6	6
Pan Masala /Zarda /Gutkha	7	10
Hospital/Clinics	8	7
Cellular Phones-Smart Phones	9	13
Life Insurance	10	11

Advertisers	Rank	
	Aug-Oct '17	Aug-Oct '16
Vishnu Packaging	1	10
Maruti Suzuki India Ltd	2	16
Life Insurance Corporation of India	3	1
Honda Motorcycle & Scooter I Ltd	4	2
Samsung India Electronics Ltd	5	9
K P Pan Foods Pvt Ltd	6	31
Honda Cars India Ltd	7	33
Hindustan Unilever Ltd	8	3
Uber India Systems Pvt Ltd	9	700
Muthoot Fincorp Ltd	10	5

Green font: Rise
Red font: Drop

Source: AdEx India (A Division of TAM Media Research)
Nnote: Figures are based on Secondages for Radio

Period: Aug-Oct '17



- Cellular Phones-Smart Phones moved up by four positions and appeared on 9th place in the Top 10 list.
- Uber India Systems Pvt Ltd entered into Top 10 list with jump of whopping 691 ranks.

Comparison of State wise Advertising during Festive Season on Radio

Gujarat was the top state followed by Maharashtra in Aug-Oct '17

States	Rank	
	Aug-Oct '17	Aug-Oct '16
Gujarat	1	2
Maharashtra	2	1
Tamil Nadu	3	3
Delhi	4	4
West Bengal	5	6
Karnataka	6	7
Andhra Pradesh	7	8
Uttar Pradesh	8	9
Rajasthan	9	5
Madhya Pradesh	10	10
Kerala	11	11

Green font: Rise
Red font: Drop

Source: AdEx India (A Division of TAM Media Research)
Nnote: Figures are based on Secondages for Radio

Period: Aug-Oct '17



- Rajasthan observed significant negative rank shift, moving to 9th place during Aug-Oct '17 from 5th in Aug-Oct '16.

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