

Abstract geometric lines in black on a white background, forming various overlapping polygons and shapes.

OOH AD SPEND REPORT

2019-21 Analysis & 2022 Forecast

ABOUT OOH

Out of home advertising (OOH) is a form of advertising that can be found outside of a consumer's home. Traditionally this includes everything from billboards to bus shelters, benches, and everything in-between. If you see an ad outside of your home (and it's not on your mobile!), then you are most likely looking at some kind of OOH ad.

HISTORICAL TREND

Analysis & Infographic Representation of past 12 Year's AD Spend.

2019-2021 ANALYSIS

Analyzed Report of Category Contribution & Growth in each individual Financial Year w.r.t Out Of Home Media.

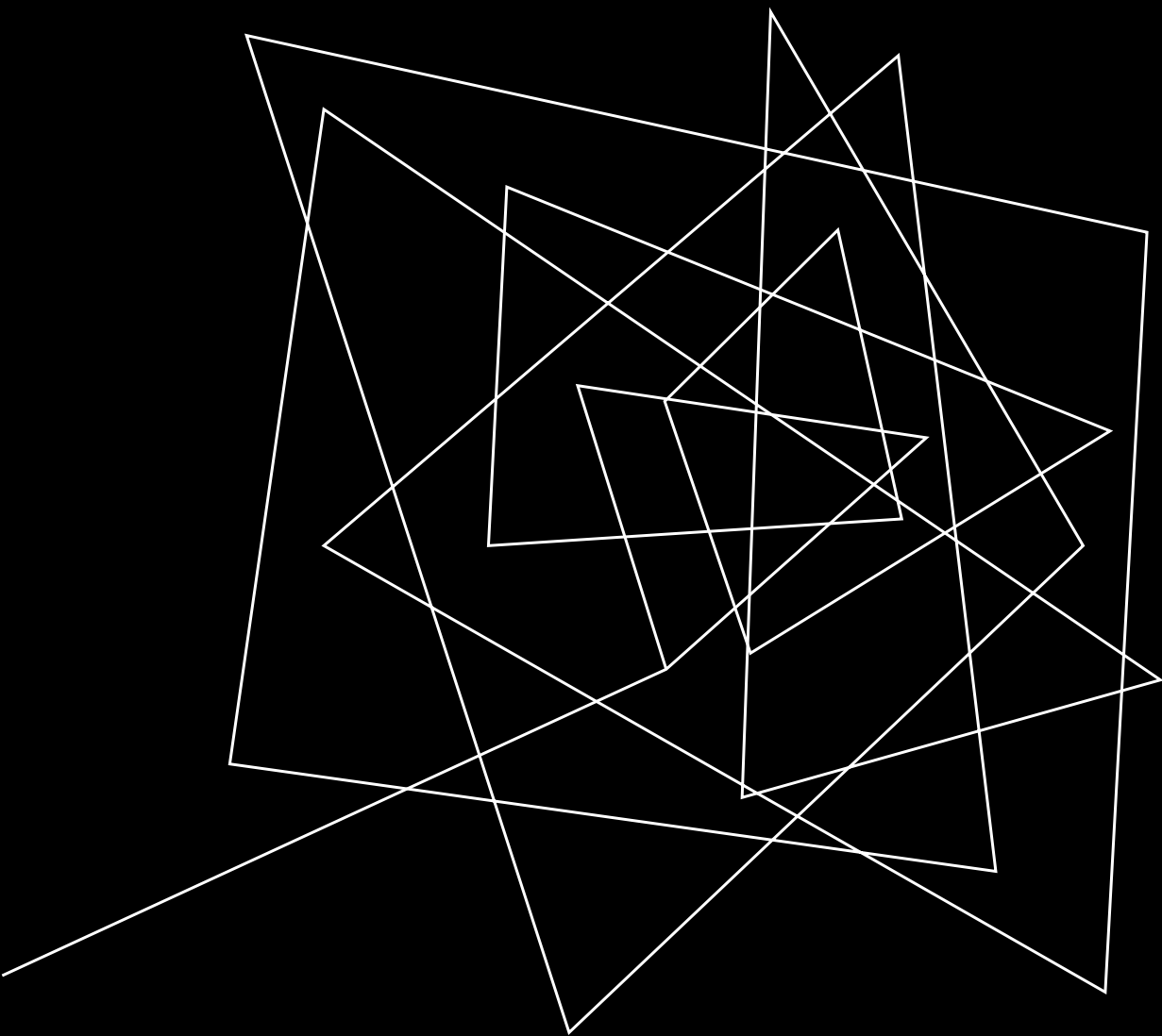
COVID 19'S IMPACT

Insight to how the pandemic affected different Advertisement Sectors including OOH.

FORECAST 2022

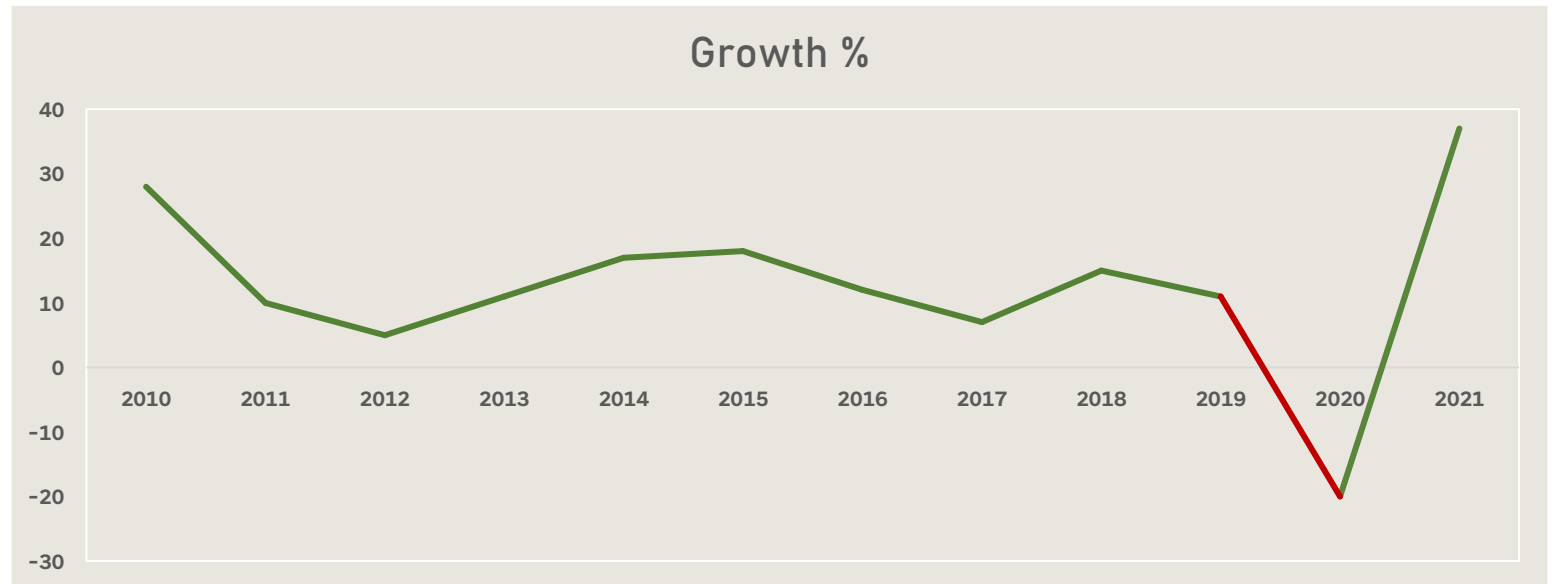
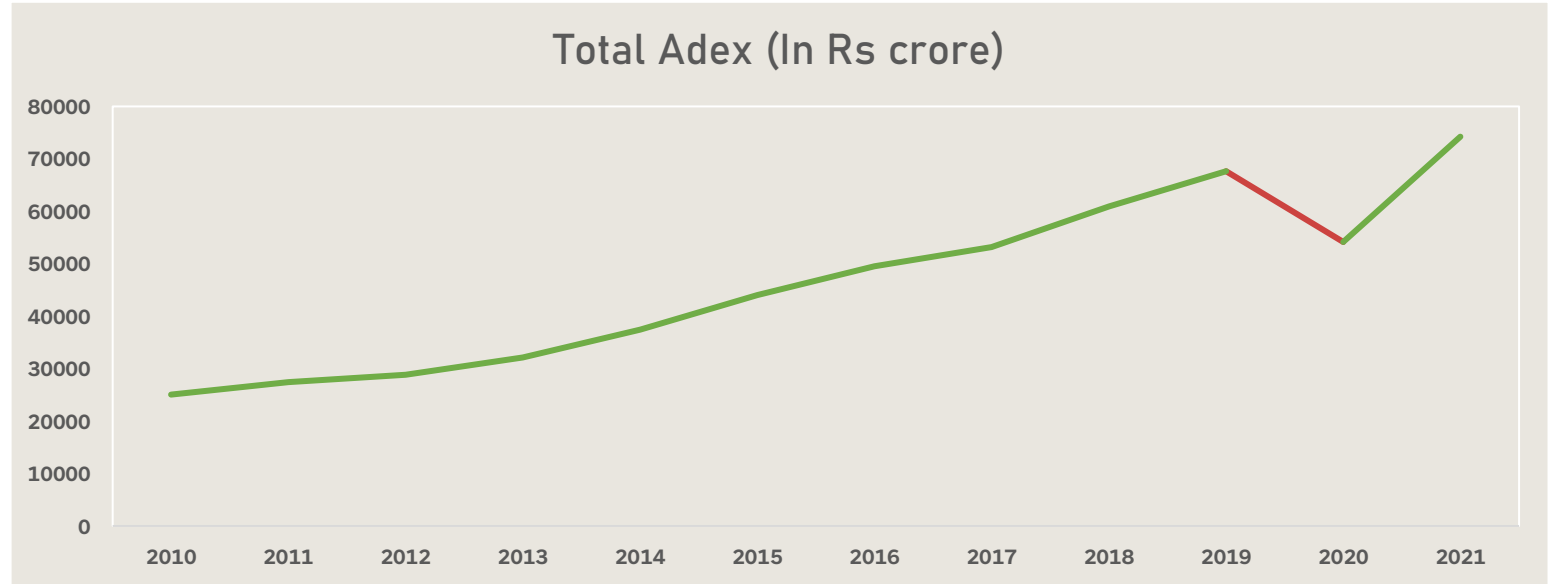
Prediction of Growth in 2022 & Comparison with Global Ad Market.

CONTENT



HISTORICAL TREND

INDIAN ADVERTISING MARKET OVER LAST 12 YEARS



KEY INSIGHTS

STEADY SPEND

A **steady** Growth in Ad Expenditure has been noted over the last decade.

VOLATILE GROWTH

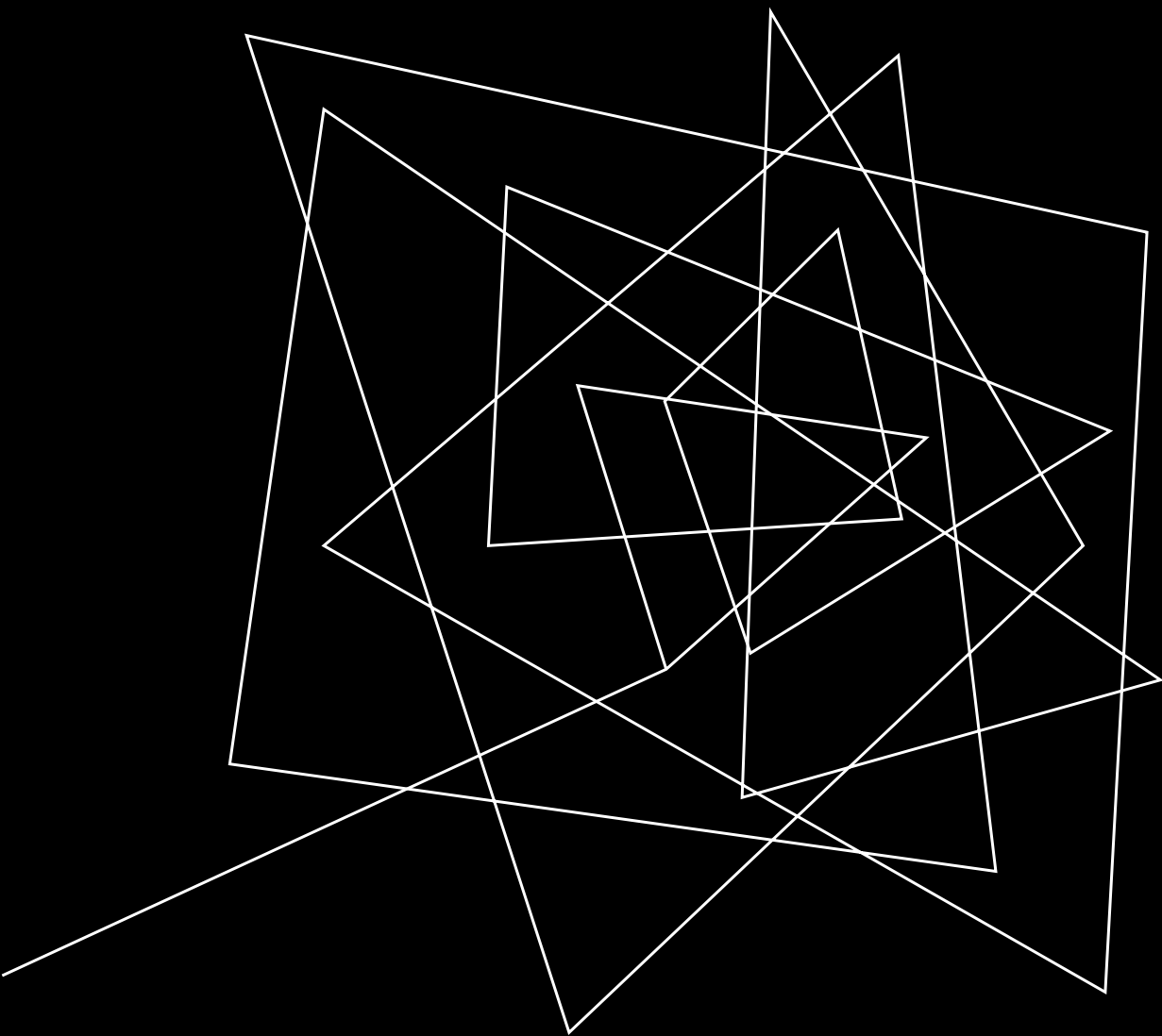
Though there have been a lot of highs and lows in Market Growth, the overall trend is on the **bright side**.

YEAR 2020

The pandemic has affected a steep **downfall** in Growth & Spend in FY 2020.

EXCELLENT RECOVERY

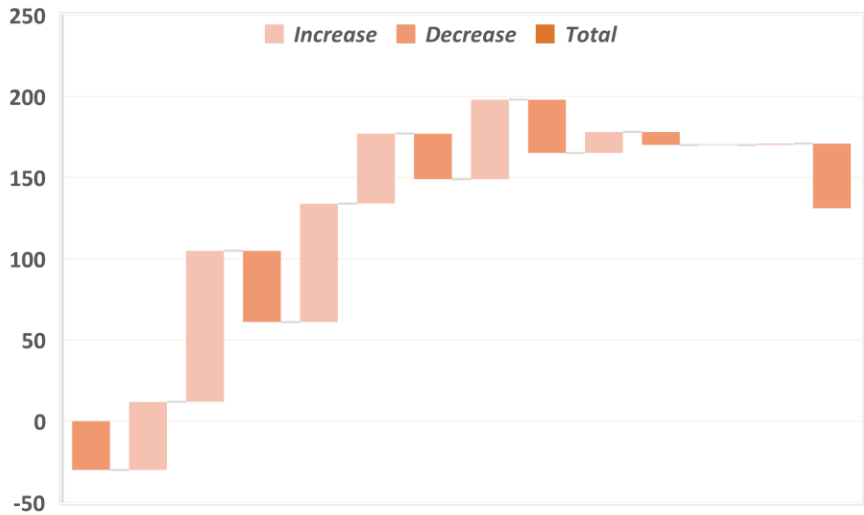
The Indian Ad Market has made an excellent comeback with **37%** Growth in 2021 & **Rs. 20,080Cr** increase in Adex.



2019-2021 ANALYSIS

2019

GROWTH CONTRIBUTION



Contribution to Growth

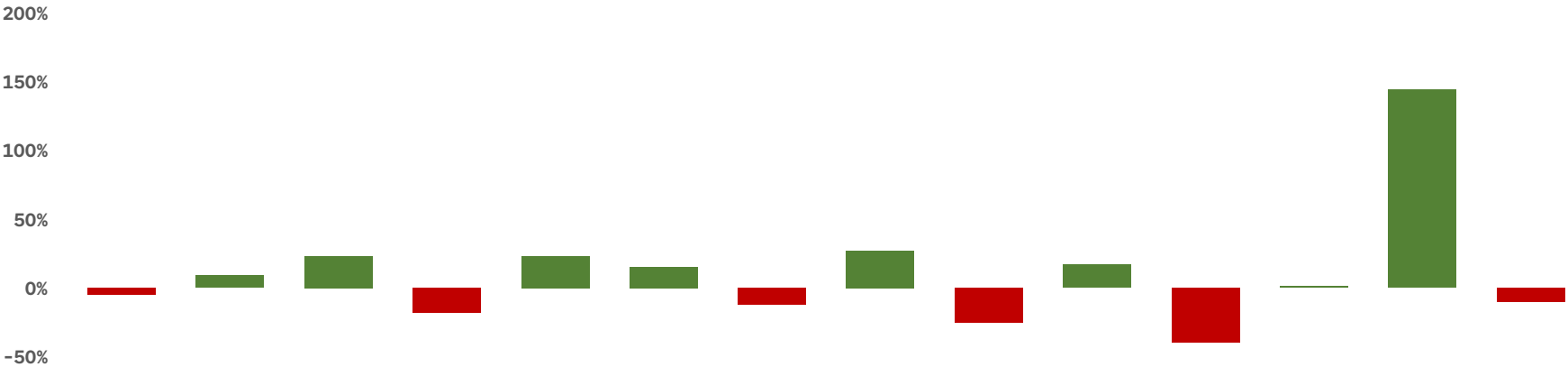


Category Contribution



CATEGORY CONTRIBUTION & CATEGORY GROWTH IN OOH IN 2019

Category Growth OOH



KEY INSIGHTS 2019

AVERAGE PERFORMANCE

A slow moving progress was noticed in OOH Advertisement Medium.

TOP CATEGORIES

Organized Retail, Consumer Services and Real Estate are the top 3 Performers in OOH Media.

LEAST PERFORMING CATEGORIES

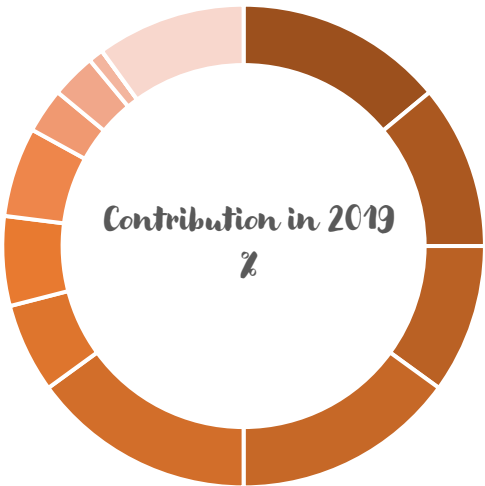
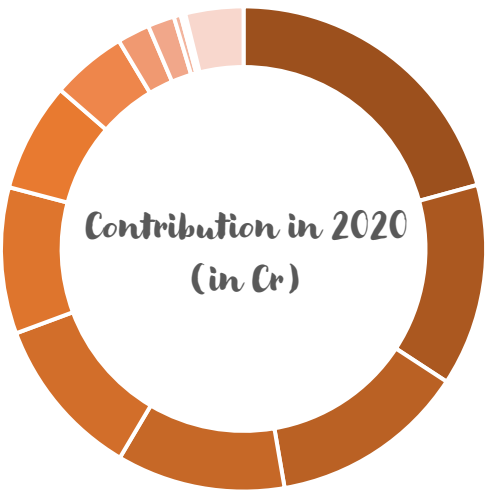
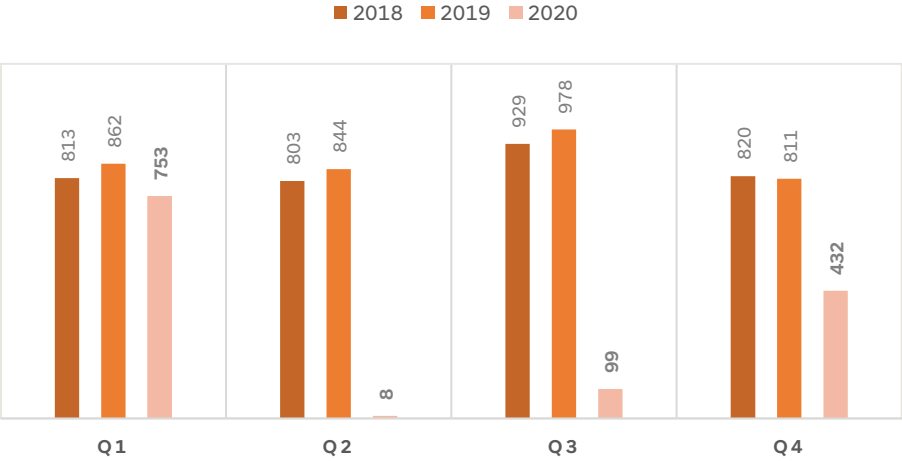
Petroleum, E-commerce & Telecom are the worst performing sectors of OOH Media.

CONTRIBUTION TO TOTAL ADEX

OOH Media made a 5% contribution to the overall ADEX of the FY 2019

2020

OOH MEDIA SPEND(IN RS CR)



Category Growth OOH



CATEGORY CONTRIBUTION
& CATEGORY GROWTH IN
OOH IN 2020

KEY INSIGHTS 2020

DRASTIC FALL

Not a single sector in OOH survived the Covid 19 pandemic's economic effects.

TOP SURVIVORS

Real Estate, FMCG & Financial Services kept the OOH Category of Marketing barely alive.

WORST SUFFERERS

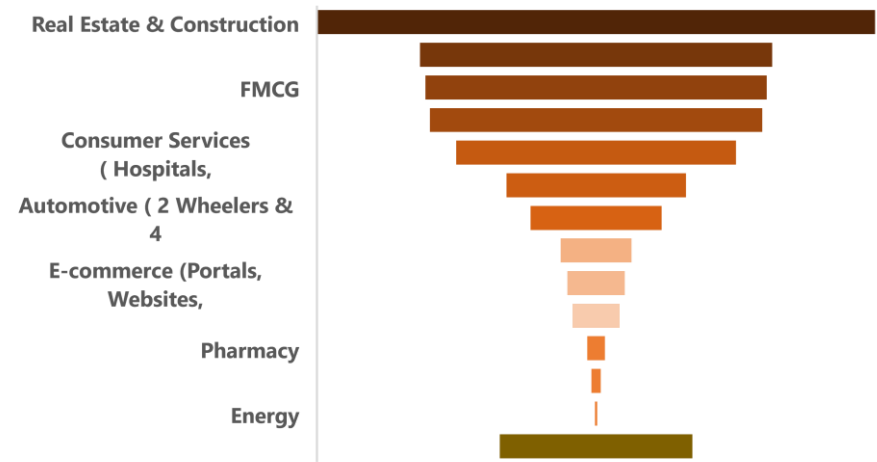
Consumer durables, lubricants, telecom and retail de-grew the most and were affected brutally in FY 2020.

DE-GROWTH

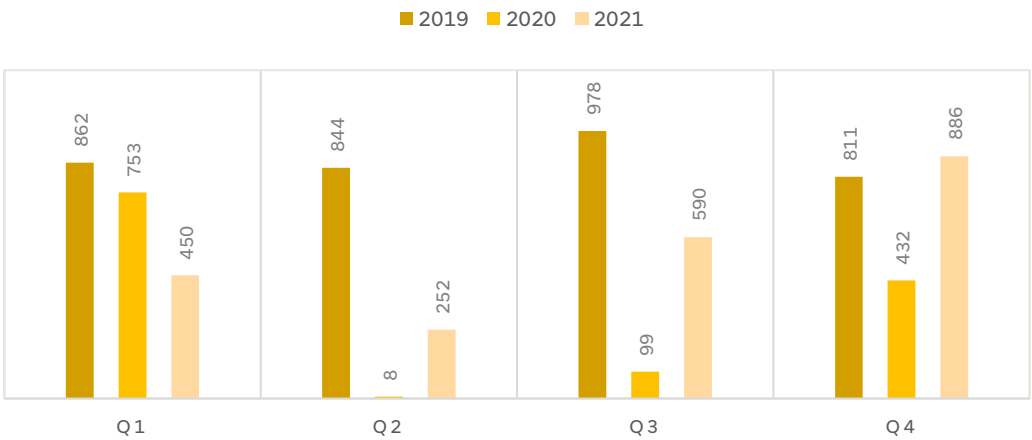
Total of 63% de-growth(with Q2 being the most hit) was encountered in 2020 due to lockdowns and empty roads in the Corona stricken FY.

2021

2021 ADEX



OOH MEDIA SPEND (IN RS CR)

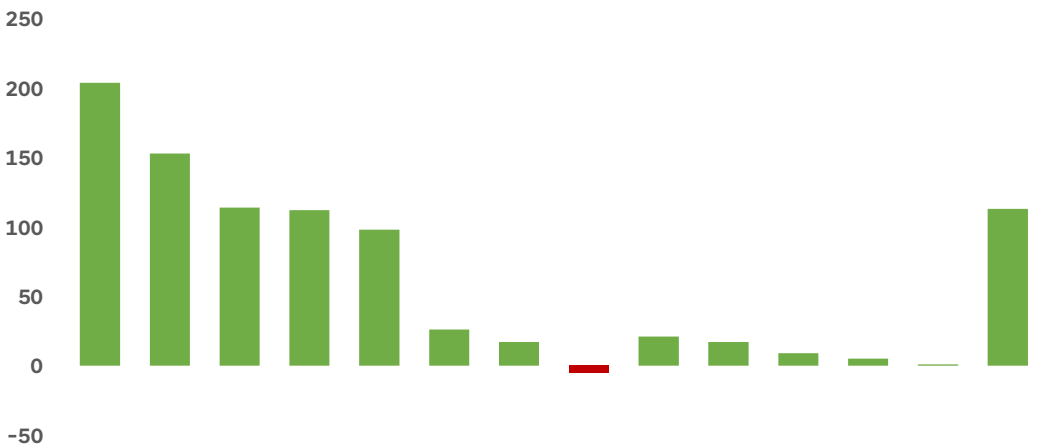


CATEGORY CONTRIBUTION 2020-21



Category Contribution & Category Growth in OOH in 2021

ABSOLUTE GROWTH IN 2021



KEY INSIGHTS 2021

EXCELLENT COMEBACK

Out-of-Home has bounced back in 2021 with a 69% increase over 2020

D-OOH YET TO SUCCEED

DOOH spends moved up phenomenally from Rs. 50 crore to 300 crore in 2021. But, DOOH(13.77%) is far below the global average of 40%.

TOP PERFORMERS

Real Estate , FMCG & Retail continue to dominate OOH Media's growth %

TELECOM AT DANGER

Telecom was the only product category that failed to spring back from 2020's economic attack. It suffered a drop of 8%.

OOH MARKET GROWTH



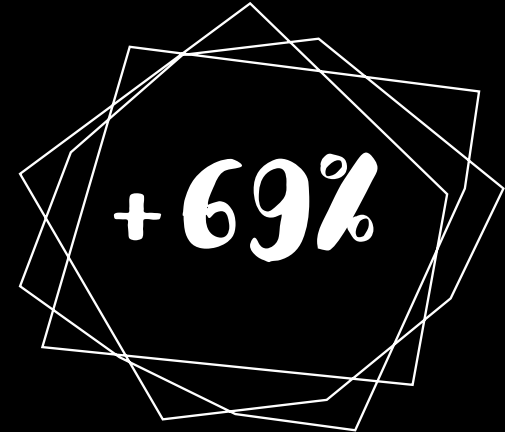
2019

ADEX GROWTH



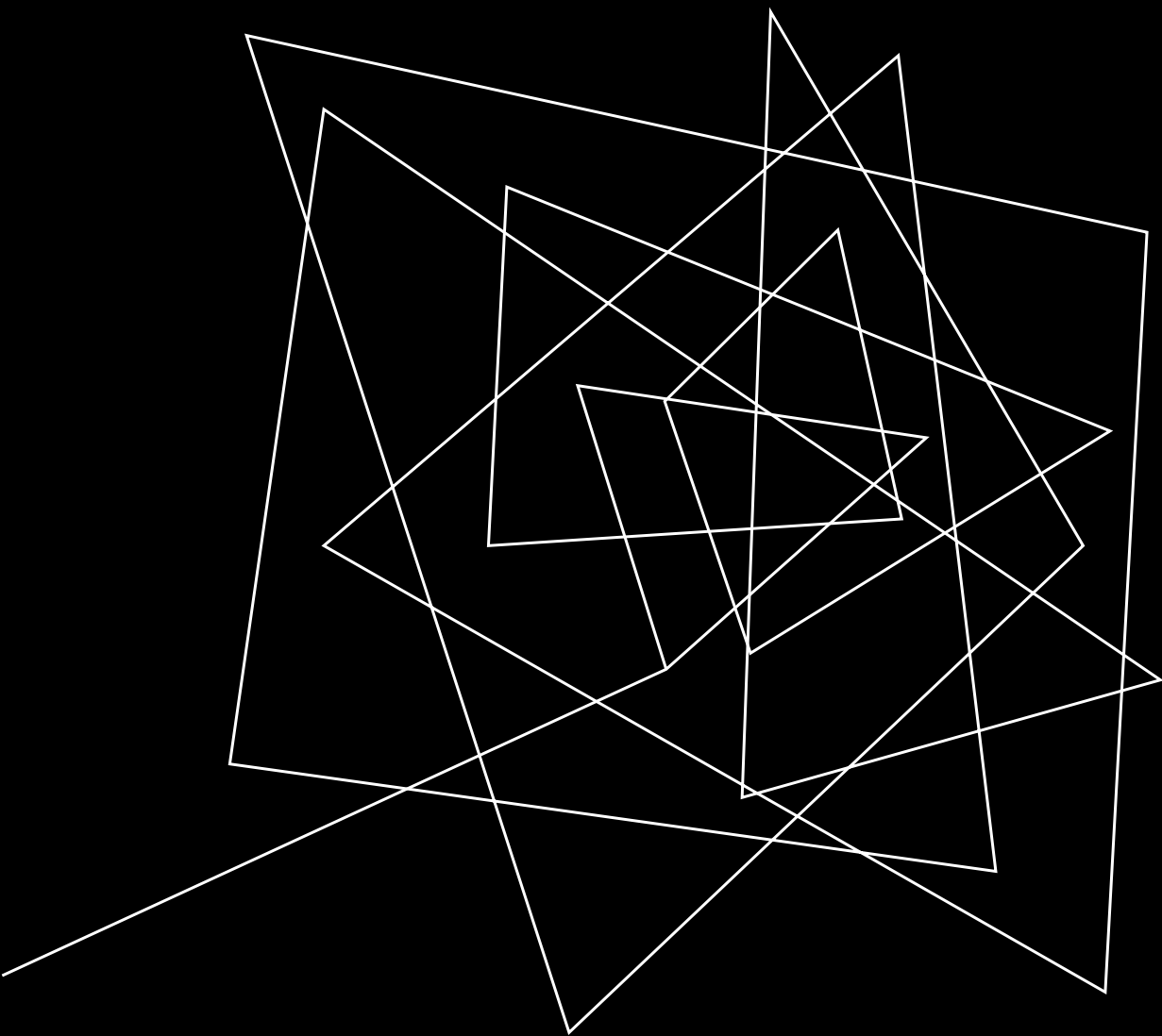
2020

ADEX GROWTH



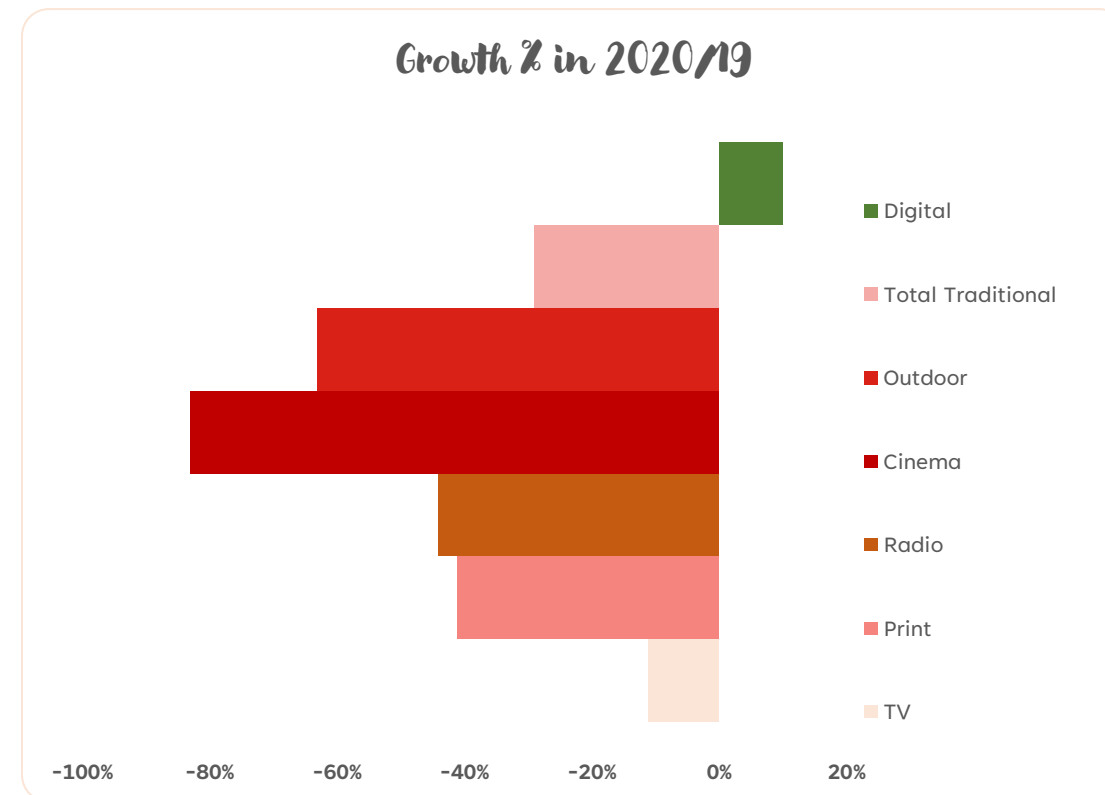
2021

ADEX GROWTH

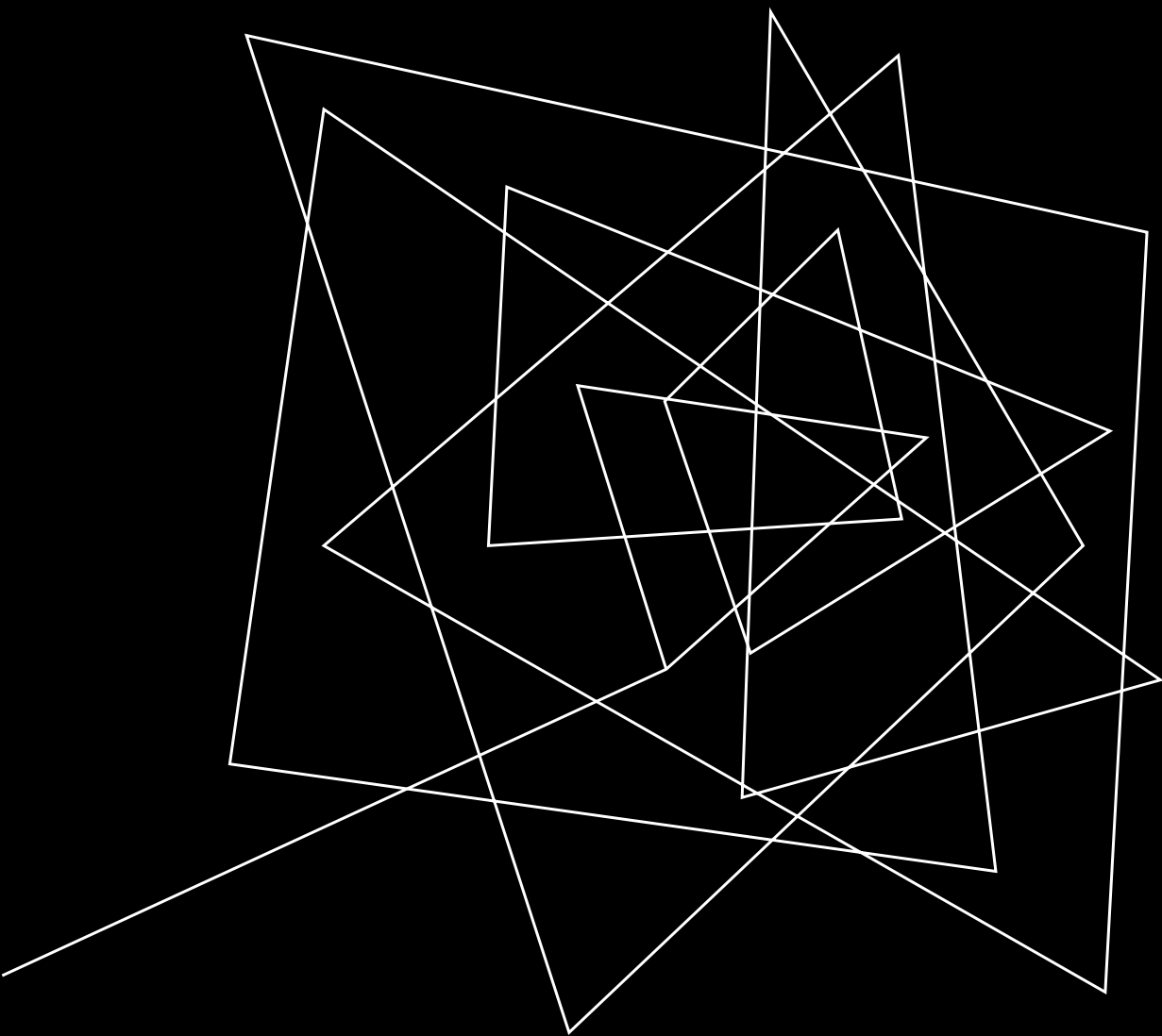


COVID 19'S IMPACT

COVID'S IMPACT ON ADVERTISEMENT MARKET



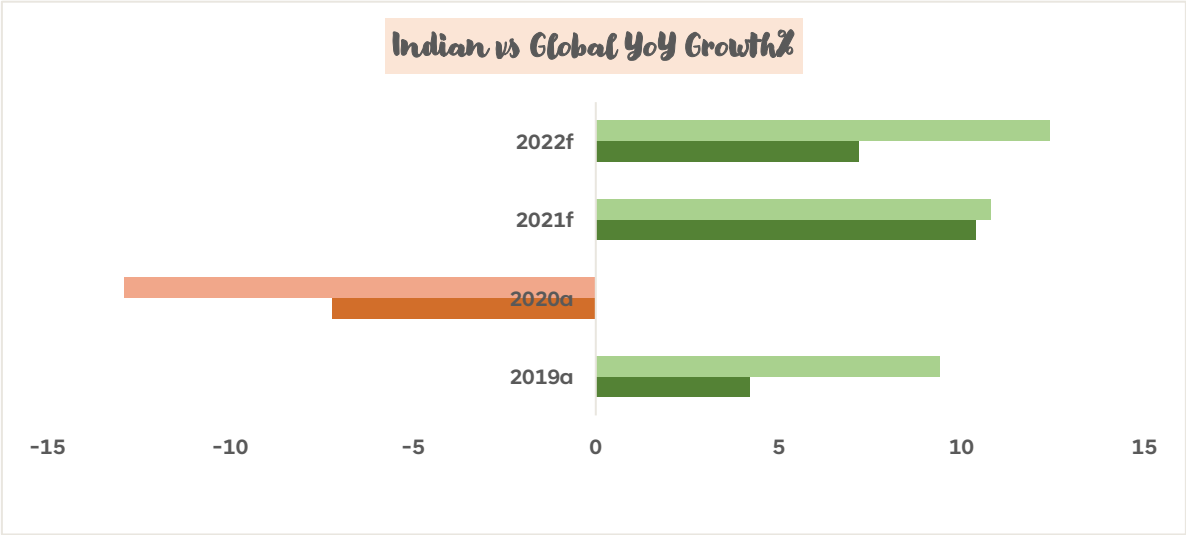
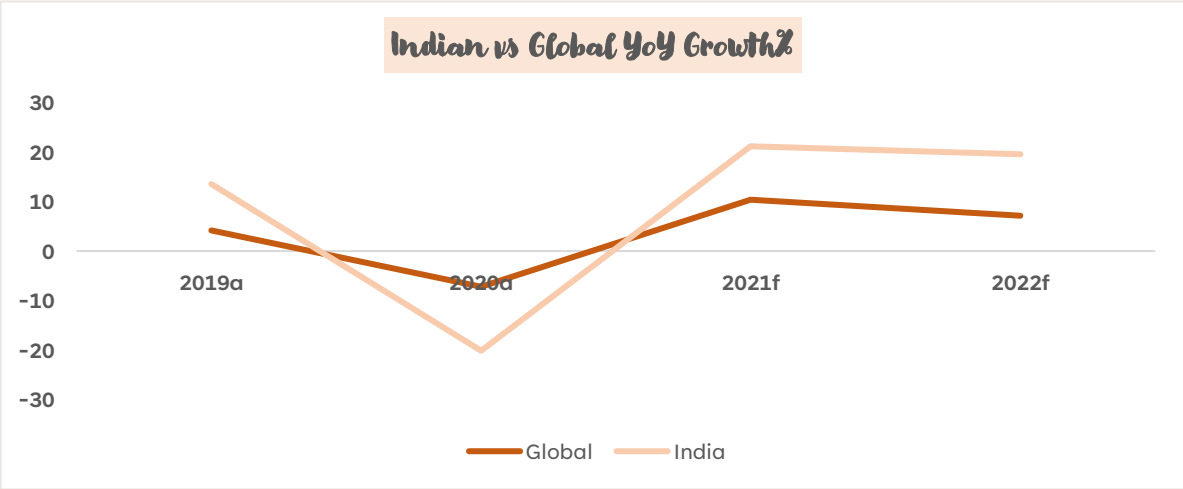
- Out-of-home (OOH) advertising took a hit in 2020 due to lockdowns and shifting attention towards Digital channels.
- While OOH advertising revenue went down, advertisers and businesses found new ways to reach customers.
- Except Digital , all other sectors of advertising got hit, with OOH being the 2nd most loss making sector after Cinema.



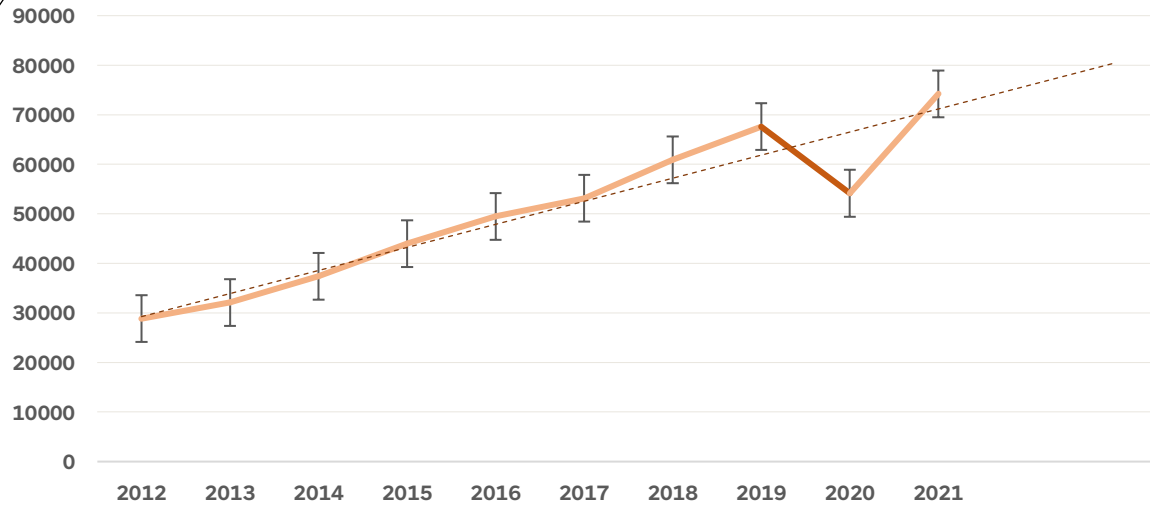
FORECAST 2022

Growth in Global vs Indian ad spend between 2019 and 2022

Year-on-year % growth at current prices

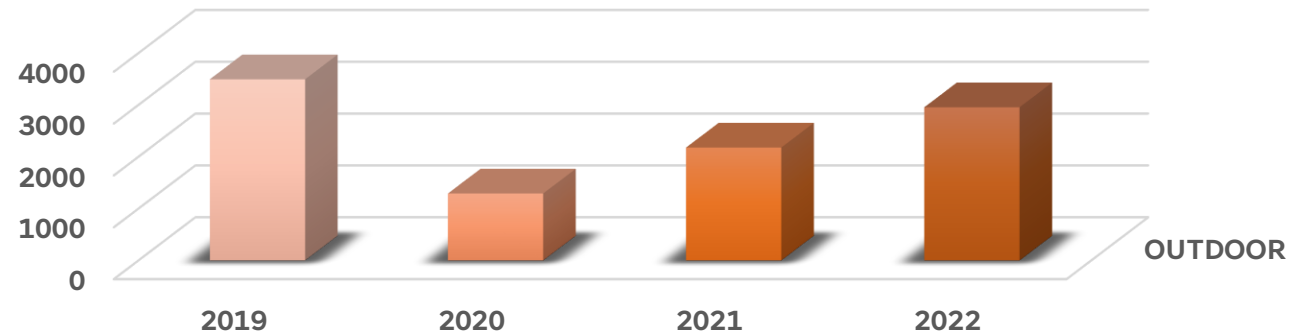


TOTAL ADEX TRENDLINE

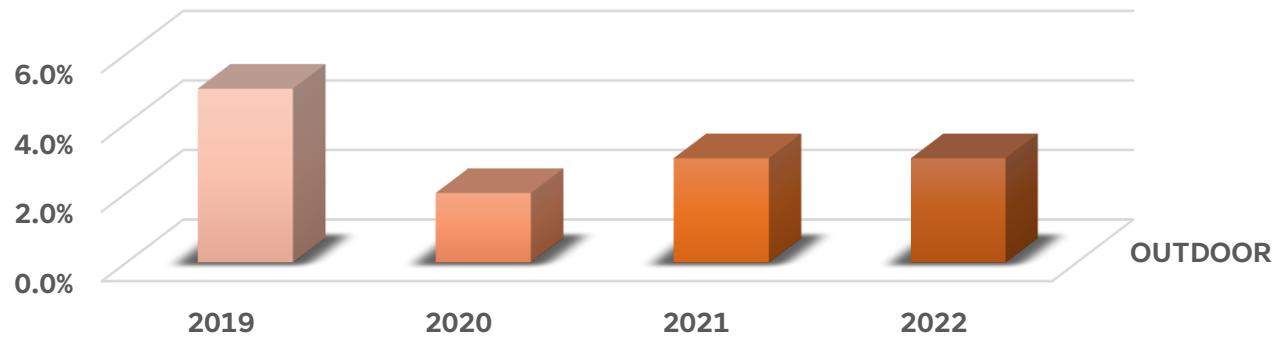


FORECAST 2022

2022 OOH Forecast (in Cr)



2022 OOH Forecast (Share %)



KEY INSIGHTS 2022 FORECAST

OVERALL MARKET

The entire Advertisement Market in India is expected to grow by 20% in 2022.

OOH FUTURE BRIGHT-ISH

Outdoor is expected to grow by 36% in 2022, taking the total Outdoor Advertising market close to Rs. 3,000 crore, but settle at a share of just 3%.

BREAKTHROUGH: DIGITAL OOH

DOOH Adex expected to move up from Rs. 300 to Rs. 800 crore and establish a substantial share of 27% in OOH Adex

COVID & OOH

With decrease in Covid cases, an increase in population on road is encountered leading to more exposure of OOH Marketing.

INFERENCE

With rapid rates of vaccination & a steep decline in new covid cases graph, more and more people are seen to come out of their homes which directly impacts the growth of OOH Advertisement. Also, with the budding & innovative Digital OOH Advertisements, as well as Traditional OOH Methods, OOH Adex is expected to slowly but steadily make its way back into the top Adex Growth Contributors.

RESOURCES

- Pitch Madison 2019 Data: [PMAR 2020 | Home \(e4mevents.com\)](#)
- Pitch Madison 2020 Data: [Pitch Madison Advertising Report 2021, PMAR 2021 - Exchange4media \(e4mevents.com\)](#)
- Pitch Madison 2021 Data: [Pitch Madison Advertising Report 2022, PMAR 2022 - Exchange4media \(e4mevents.com\)](#)



THANK YOU

Indrashis Bhadra

Business Analyst Intern

+91-9874717802

Indrashis.bhadra@gmail.com