Media systems and structures in a dynamically developing India

Panel presentation for INC

July 17, 2017

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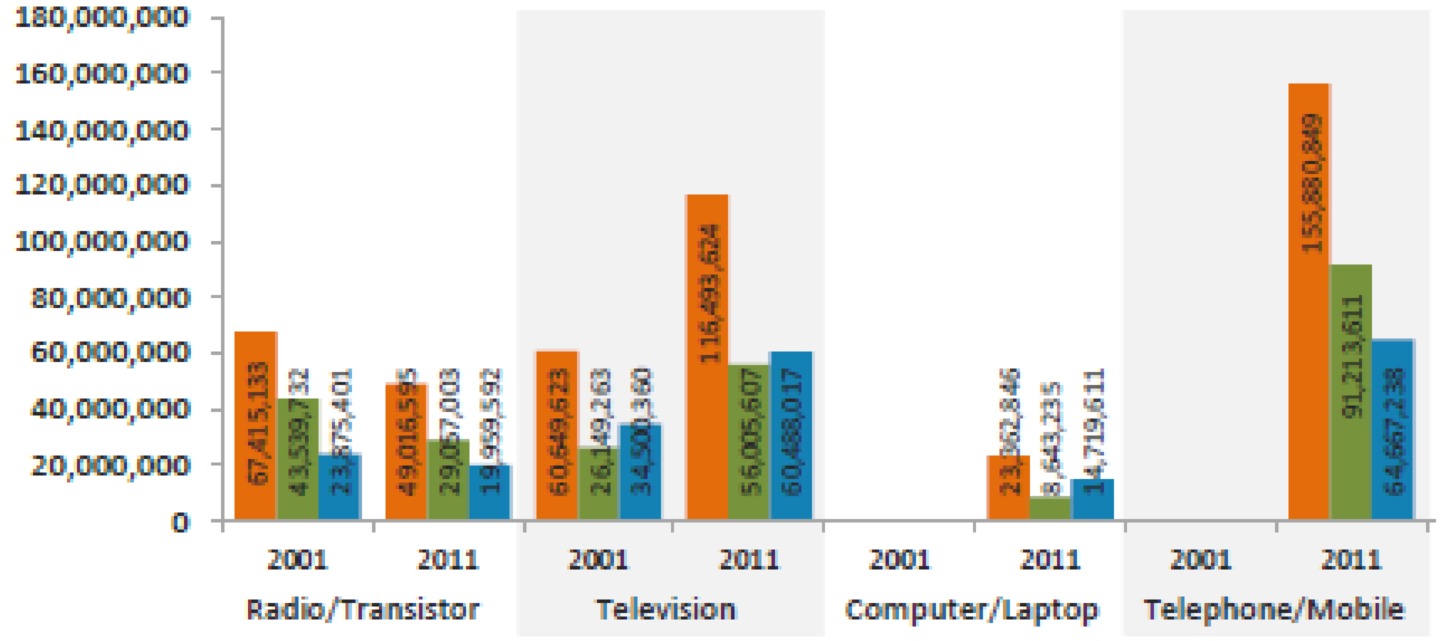
- Media system colonial
  - Print through the era-traditions of comparable journalism
  - Broadcasting-skeletal and build up the BBC as ideal
  - Cinema, established and a viewing culture established

- Post Independence to Emergency
  - Print media grows-Literacy levels limit
  - Broadcasting-transition to state control with elusive pursuit of BBC ideal
  - Development/social change-mass media for national development discourse
  - Television-educational goals first, satellite as the basis for nationwide reach
  - Entertainment jostles and wins the race-development rhetoric continues

Household As



Spread and access-moving towards optimum what are the issues and concerns

- Expectations of the legacy media and shifts
- Changing demographic consumption of media
- Print media in regional languages-advertising vehicle
- Reorientation of contents-to suit new consumer/reader profile
- Broadcasting in the context of robust M&E sector
- Mobile phones and content
- Social media and the issues of user generated content-its potential and concerns about its impact on a fragile socio-economic order

Media and its relationship to the abiding faith in democracy

Access and consumption-yes but is there equity and participation?

Professionalism and ethics in news content

Relationship of ownership to such content-corporate and political

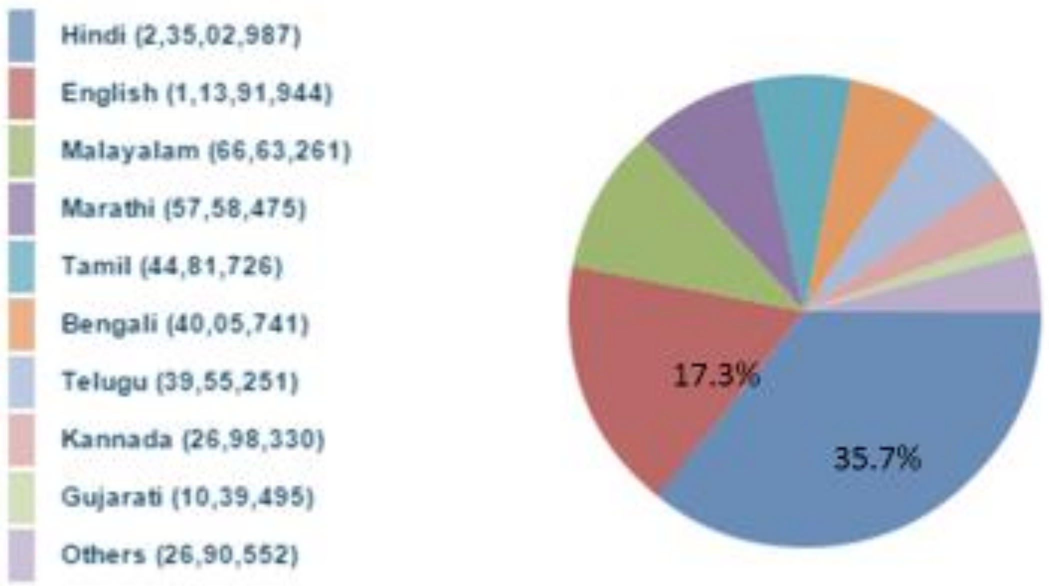
Profile of journalists and lack of diversity with regard to who is telling whose story

The concerns pertaining to paid content are now text book references

Dissent or building consensus

- Paid news
- Opaque Private treaties
- Blatant blackmail
- Widening legal-regulatory gap
- Flawed audience measurement and reach metrics
- Under scanner EC and PCI
- Ownership issues a larger regulatory and legal issue
- Blackmail and revenue dynamics of soft sponsored content
- BARC and impression system claims and counter claims

Language wise ABC certified circulation figures

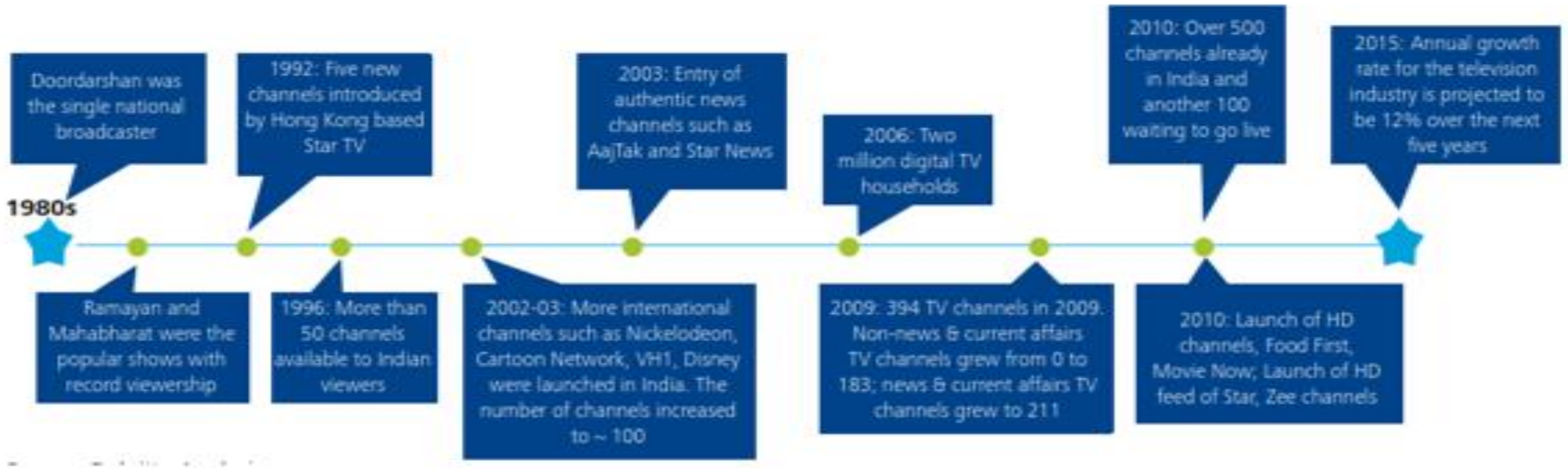


Hindi and English publications among ABC members constitute 53% of circulation

Post 1990s

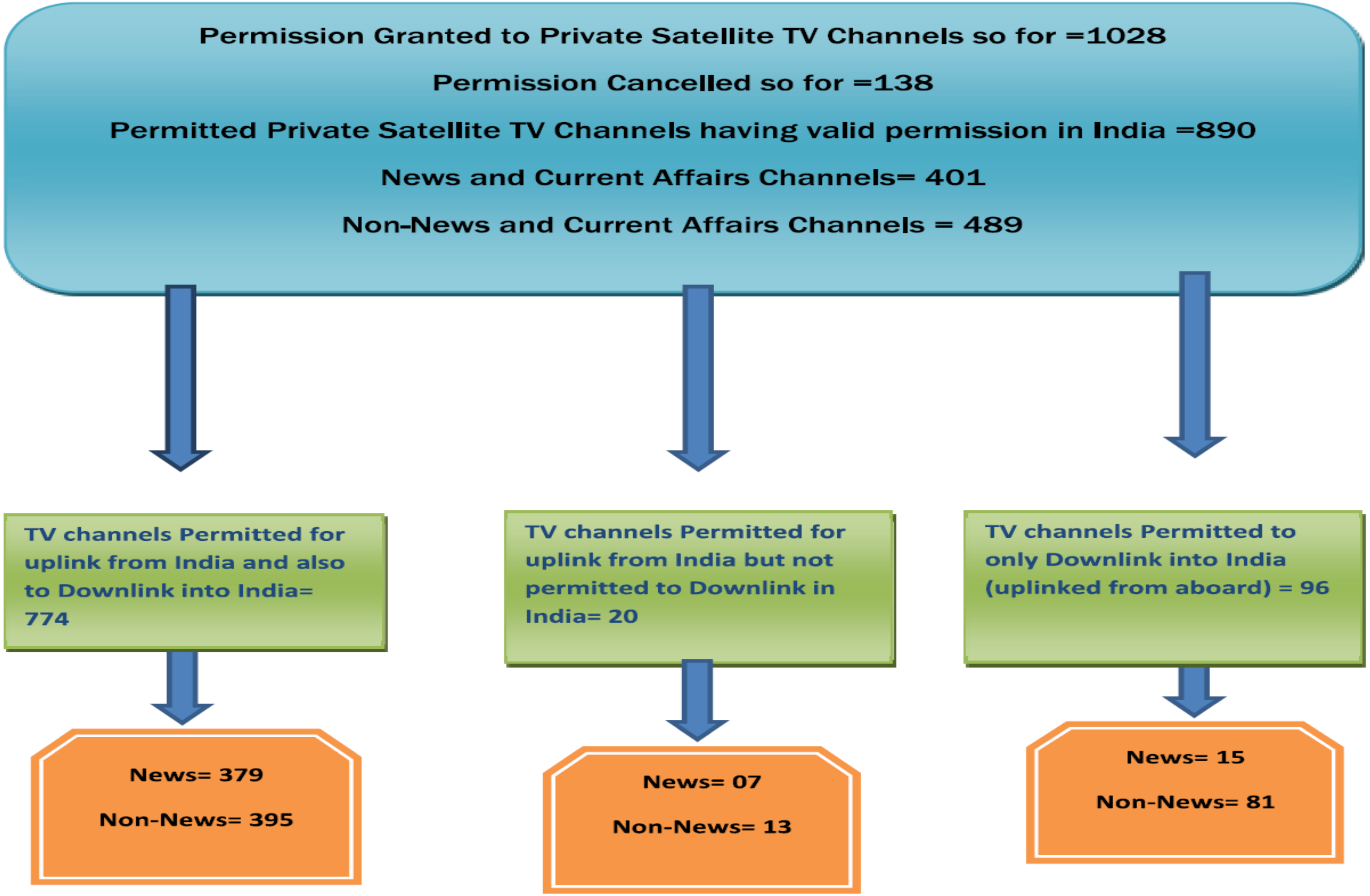
- Unregulated cable distribution establishes a grid for distribution
- Partnerships for software content with national broadcaster
- Licensing as a form of development of channels

Figure 7: Evolution of TV Channels in India



PERMITTED PRIVATE SATELLITE TV CHANNELS IN INDIA

(AS ON 31-05-2016)



Disruptions

2nd largest smart phone market by 2017[1]

54% over the age of 25 by 2018[2]

Face of new digital India is expected to be far more diverse with strong youth centric demographic

High speed Broadband penetration to breach 53% by 2020[3]

High speed broadband and increased internet penetration with development of infrastructure

Digital Ad Spend share of overall ad spend to cross 20% by 2020[4]

Allocation to digital ad spends to increase dramatically within overall advertising spend as it is close to the lowest globally

15x increase in mobile wallets in last five years[5]

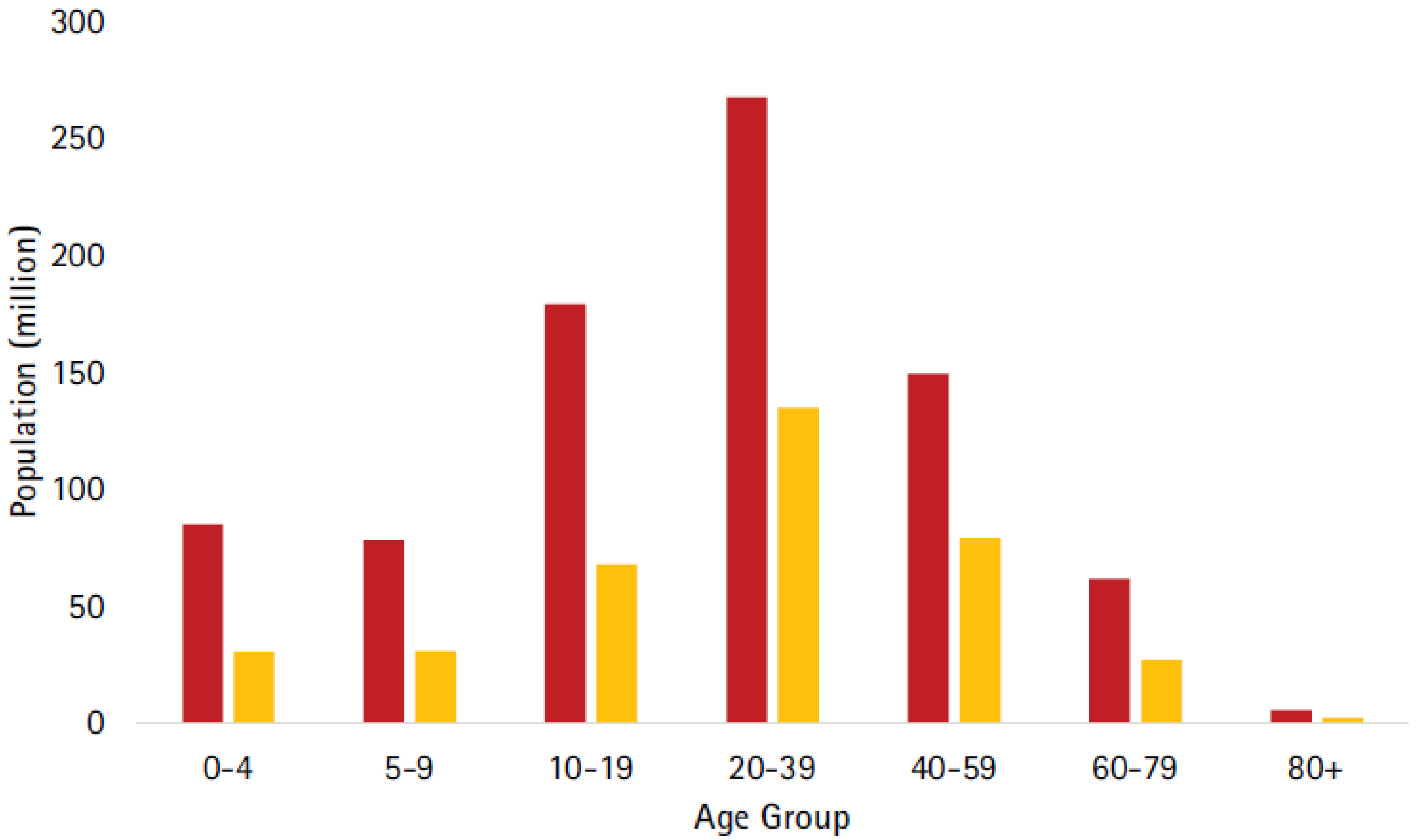
Increased usage of payment wallet and operator billing model to drive micro payments

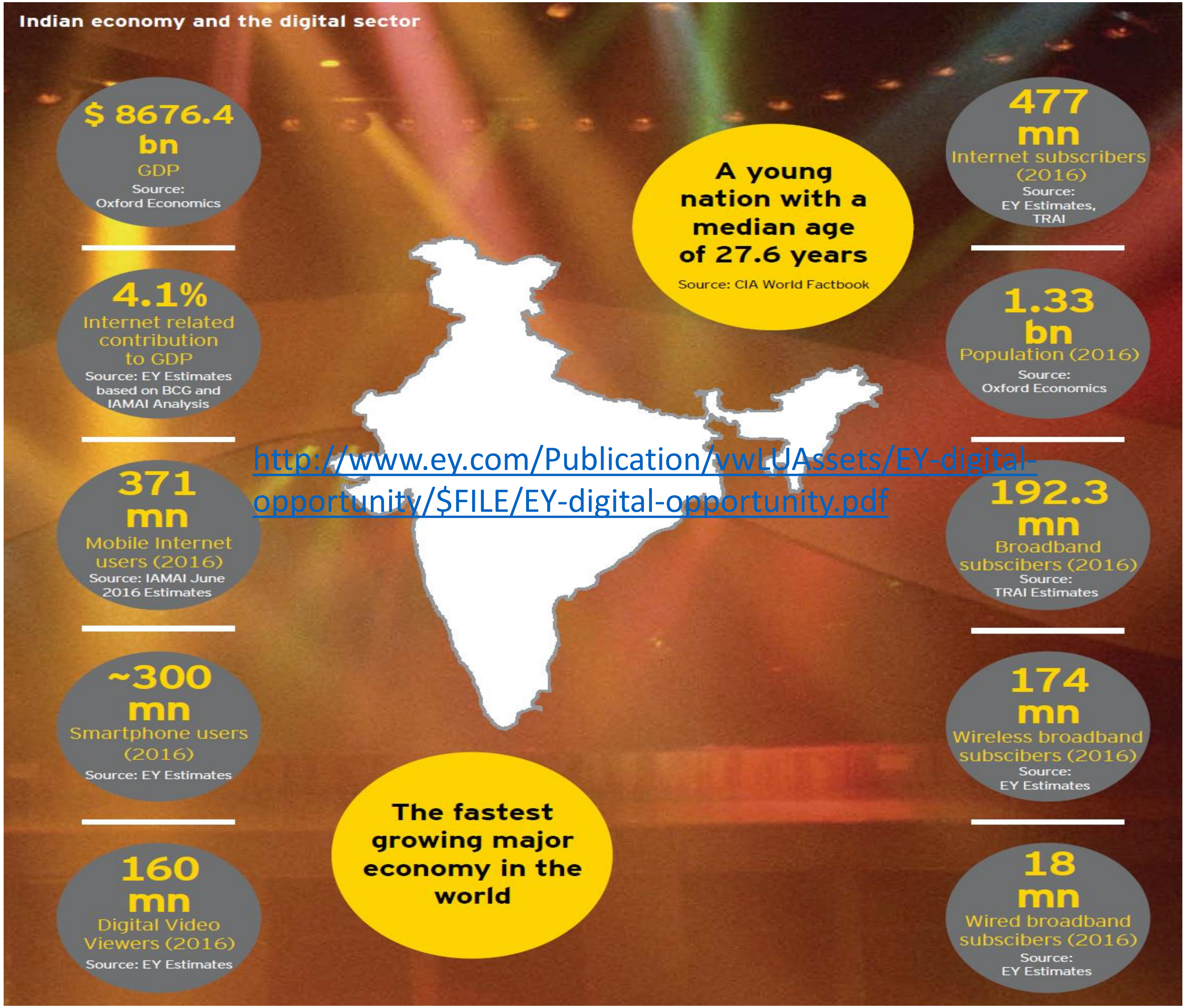
Opportunity[2]

High consumption of digital media especially video (450 million by 2020) Source: EY Analysis	Opportunity for international studios and content owners to showcase their content and garner additional revenues
'Snackable' content consumption driving the growth with user engagement being driven through Apps	Opportunity for content producers by focusing on short form or exclusive content
OTT and MCN platforms capturing growth in video and music streaming consumption	Opportunity for international studios and content owners to showcase their content and garner additional revenues
Growth of e-celebs on the digital platforms	Partner to leverage their digital following through different content marketing approaches
Growth of regional and vernacular content	Aggregating and producing vernacular content may help capture larger share of users in India
A significant shift is observed towards mobile gaming from traditional formats like console and PC gaming (87% CAGR during 2016 - 2020)[6]	With in-app advertising and purchases, the mobile gaming space has witnessed a lot of traction, especially on the freemium model

Source: Census of India(2011)

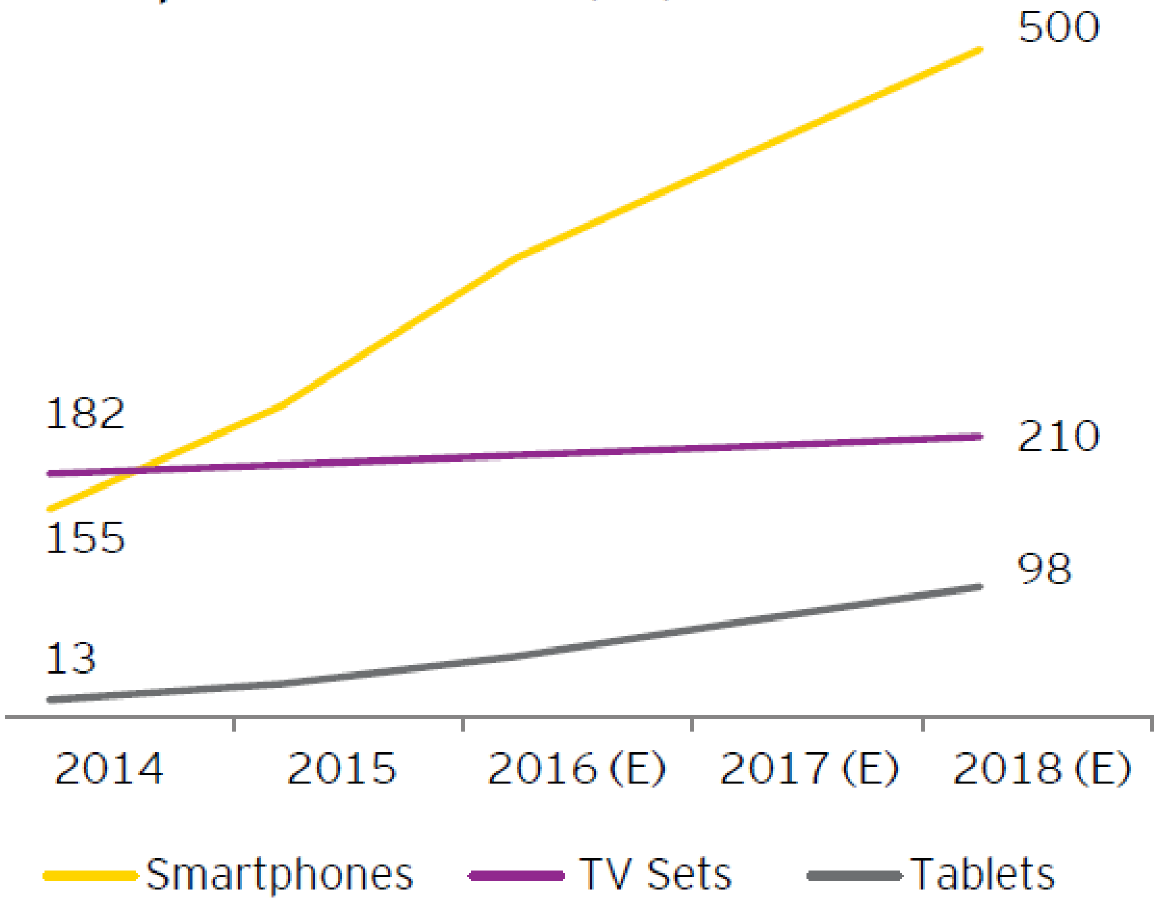
Figure 2: India's demographic dividend





http://www.ey.com/Publication/vwLUAssets/EY-digital-opportunity/$FILE/EY-digital-opportunity.pdf

Device penetration in India (mn)



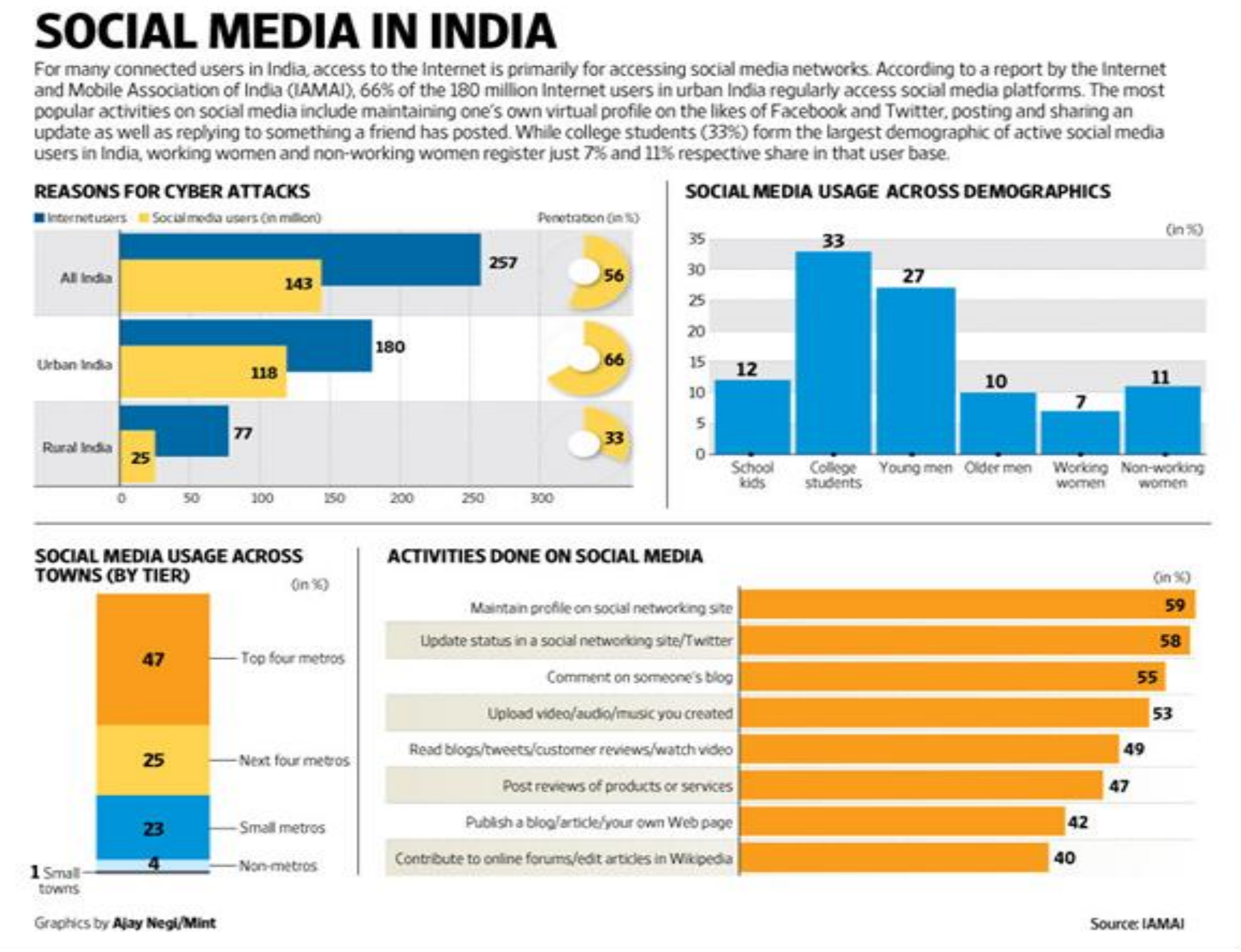
Source: Ovum Telecom Forecast

The changing face of the digital user

	2003	2018
Older	40% over the age of 25	54% over the age of 25
Rural	29% rural audience	40% - 50% rural, semi-urban audience
Gender balanced	2.6 men for every woman	1.9 men for every woman among 18-24 year olds
Mobile	60% - 70% of the user base	70% - 80% of the user base
Vernacular	45% of the users consume regional language based content	70% - 90% Indian do not speak English, less than 1% as a primary language
Per Capital Income (PPP)	USD 5418	USD 6700

Source: IAMAI

Total Digital Media Market	2016 (In INR crores)	2020 (In INR crores)
OTT and digital advertising	8,100	18,500
Video OTT subscription	170	1,230
Music OTT subscription	115	1,030
Gaming (In App/ Paid Subscription)	105	770
Total	**8,490**	**21,530**

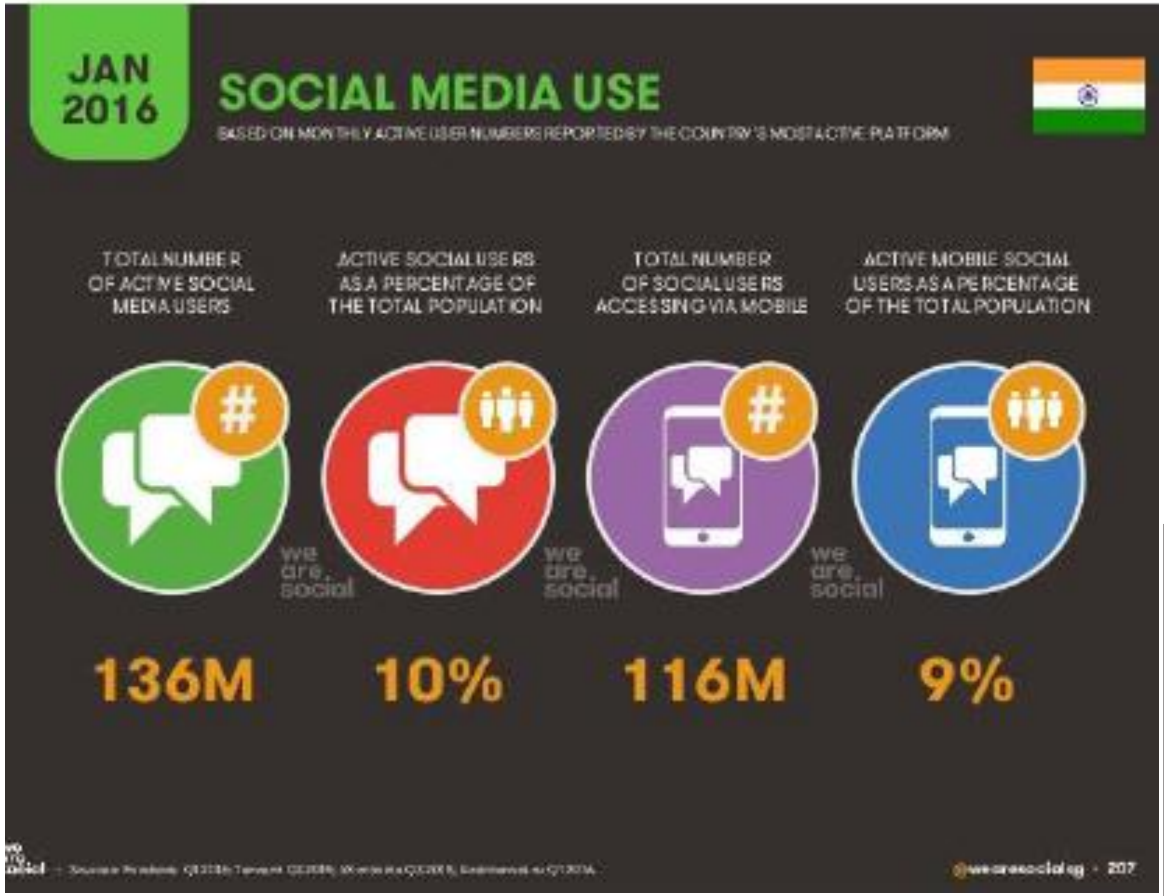


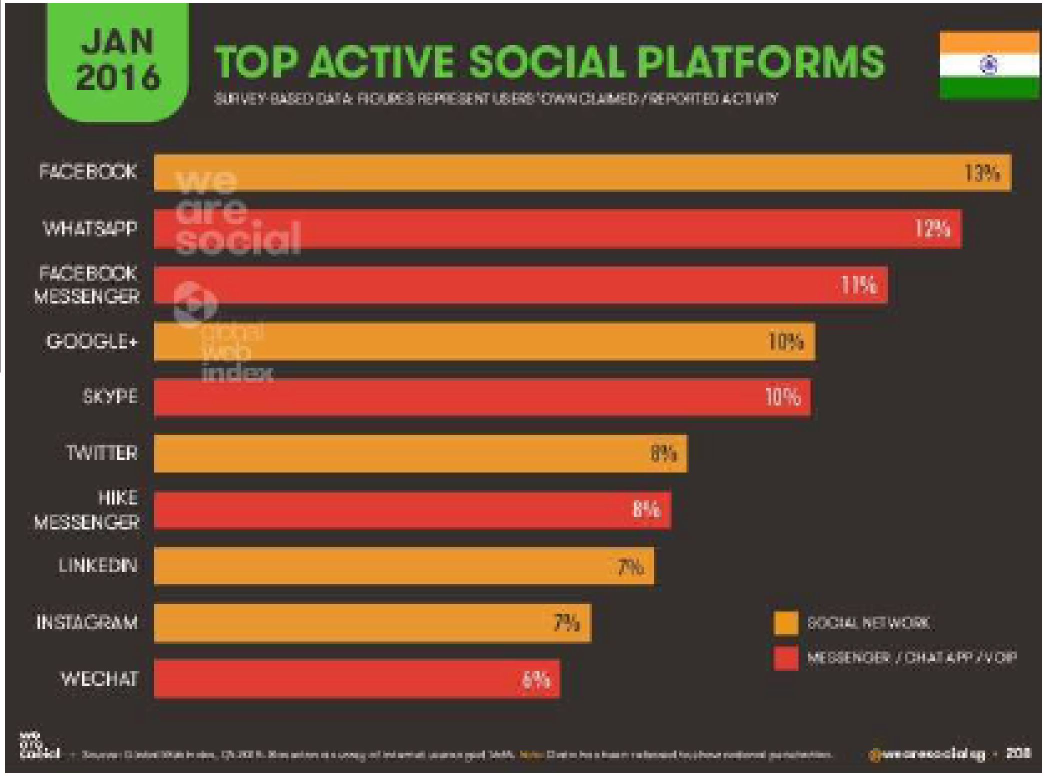
State surveillance is one dimension
Internet shutdowns as a mechanism
Of controlling spread of content

UN resolution condemning shutdowns

31 shutdowns reported in 2016

Ones own virtual profile popular activity


JAN 2016
SOCIAL MEDIA USE
BASED ON MONTHLY ACTIVE USER NUMBERS REPORTED BY THE COUNTRY'S MOST ACTIVE PLATFORM
TOTAL NUMBER OF ACTIVE SOCIAL MEDIA USERS
ACTIVE SOCIAL USERS AS A PERCENTAGE OF THE TOTAL POPULATION
TOTAL NUMBER OF SOCIAL USERS ACCESSING VIA MOBILE
ACTIVE MOBILE SOCIAL USERS AS A PERCENTAGE OF THE TOTAL POPULATION
136M
10%
116M
9%
@wearesocialsg • 207


JAN 2016
TOP ACTIVE SOCIAL PLATFORMS
SURVEY-BASED DATA: FIGURES REPRESENT USERS' OWN CLAIMED / REPORTED ACTIVITY
FACEBOOK 13%
WHATSAPP 12%
FACEBOOK MESSENGER 11%
GOOGLE+ 10%
SKYPE 10%
TWITTER 8%
HIKE MESSENGER 8%
LINKEDIN 7%
INSTAGRAM 7%
WECHAT 6%
SOCIAL NETWORK
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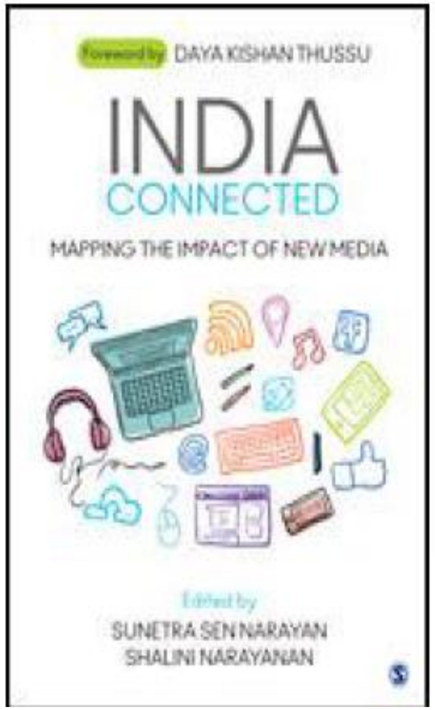

India Connected

Mapping the Impact of New Media

Edited by:

Sunetra Sen Narayan - Associate Professor, Indian Institute of Mass Communication, New Delhi
Shalini Narayanan - Independent Media Consultant and Trainer

A first-of-its-kind analysis of the growth of new media in Digital India from a broad communications and interdisciplinary perspective

Can new media help in bringing about development or contribute to social movements? Who is left out of the new media equation? How is the public sphere affected by it? How will it be regulated?

Providing answers to these important questions, this book critically examines the growth of new media in India. It looks at how new media can be theorized in the Indian context and offers a perspective on the opportunities and challenges this poses to governance, development, and businesses as well as in social marketing efforts.

With the government and the corporate sector's growing emphasis on 'Digital India', India Connected creatively delves into various aspects such as digitization, convergence, interactivity, and ubiquity, which are affecting the Indian media landscape.