



Conference of the International
Association for Media and
Communication Research

Media systems and structures in a dynamically developing India

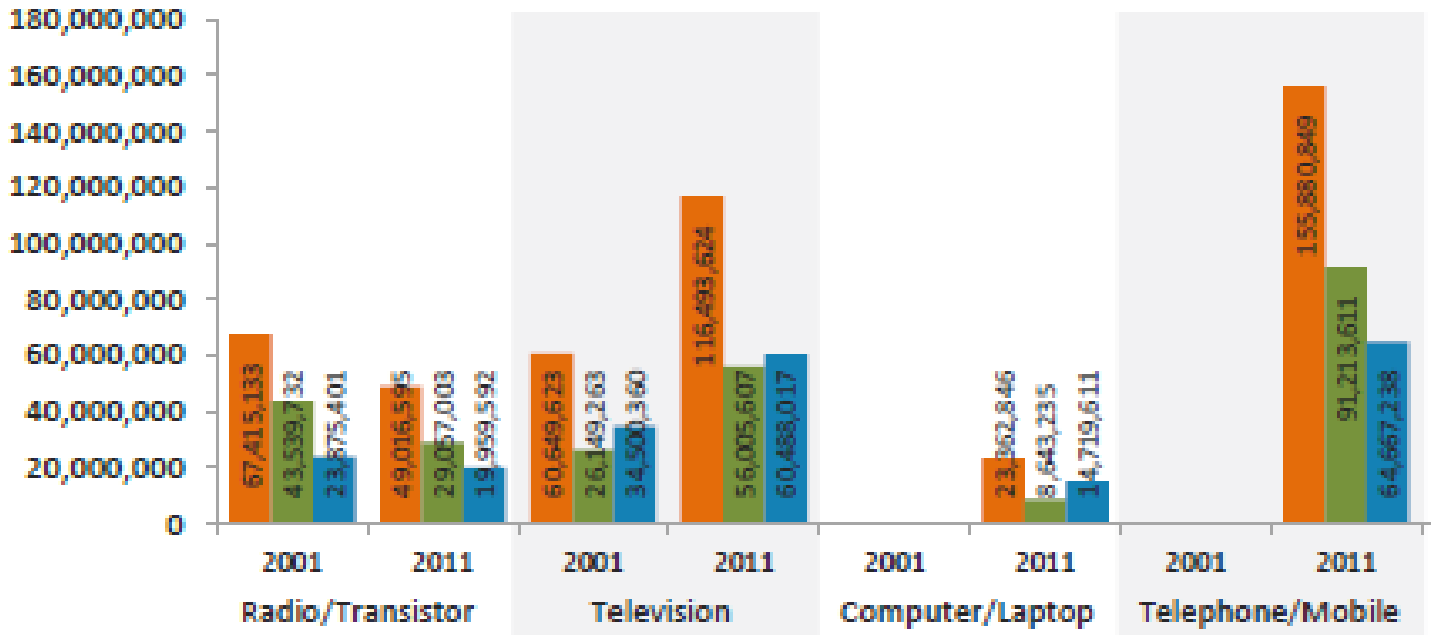
Panel presentation for INC

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 Ass



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



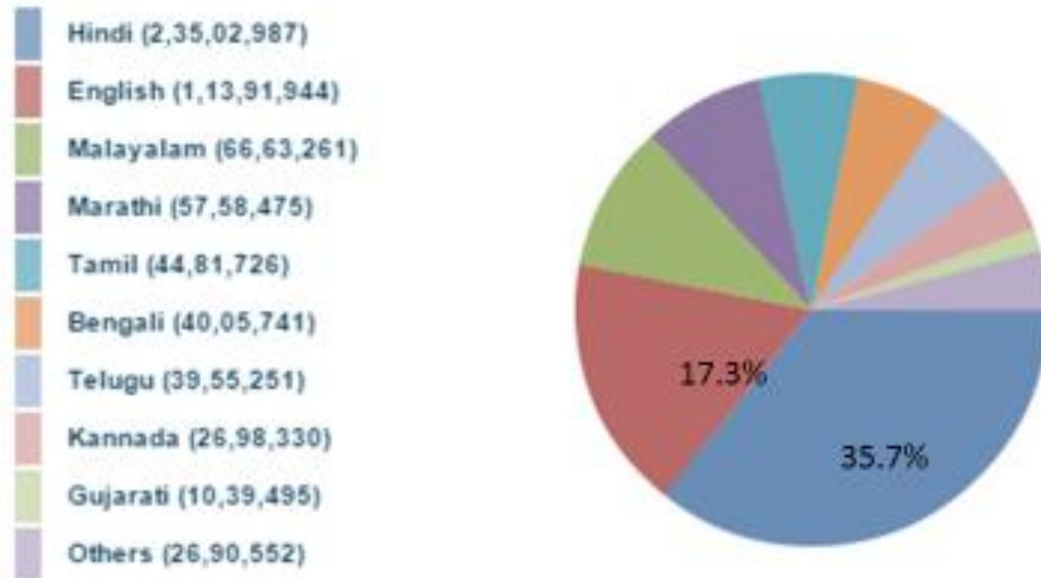
AICTE



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Language wise ABC certified circulation figures

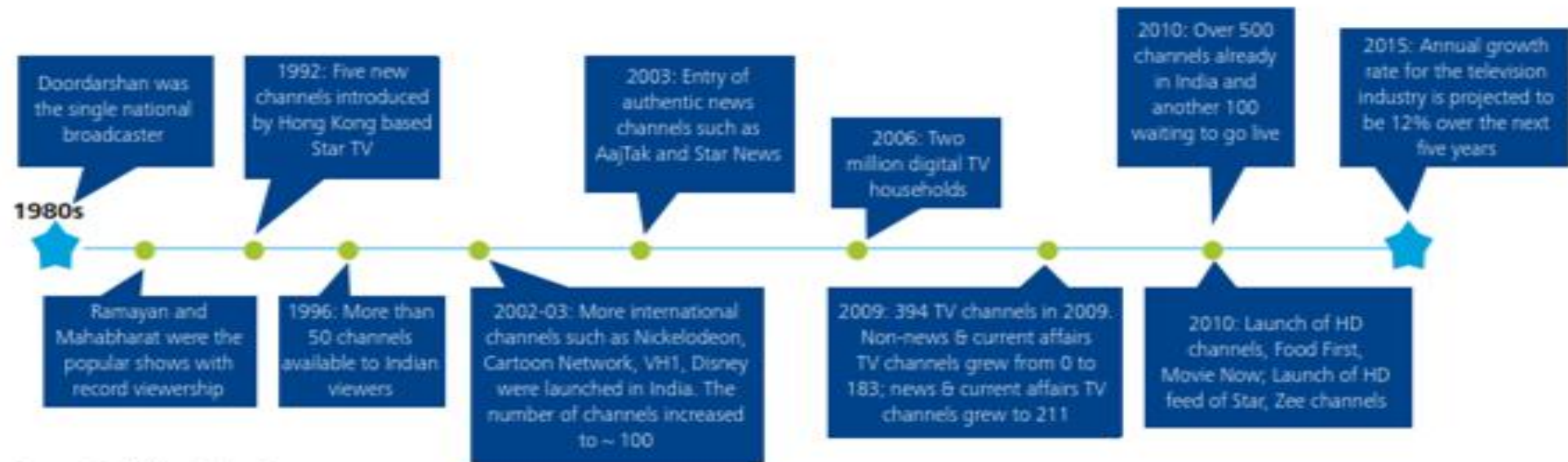


Hindi and English publications among ABC members constitute 53% of circulation

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 31-05-2018)

Permission Granted to Private Satellite TV Channels so far =1028

Permission Cancelled so far =138

Permitted Private Satellite TV Channels having valid permission in India =890

News and Current Affairs Channels= 401

Non-News and Current Affairs Channels = 489

TV channels Permitted for uplink from India and also to Downlink into India= 774

TV channels Permitted for uplink from India but not permitted to Downlink in India= 20

TV channels Permitted to only Downlink into India (uplinked from aboard) = 96

News= 379
Non-News= 395

News= 07
Non-News= 13

News= 15
Non-News= 81

Disruptions

2nd largest smart phone market by 2017¹

54% over the age of 25 by 2018²

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 2020³

High speed broadband and increased internet penetration with development of infrastructure

Digital Ad Spend share of overall ad spend to cross 20% by 2020⁴

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 years⁵

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

Opportunity²

High consumption of digital media especially video (450 million by 2020)

Source: EY Analysis

'Snackable' content consumption driving the growth with user engagement being driven through Apps

OTT and MCN platforms capturing growth in video and music streaming consumption

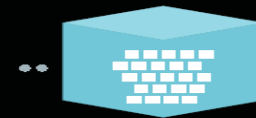
Growth of e-celebs on the digital platforms

Growth of regional and vernacular content

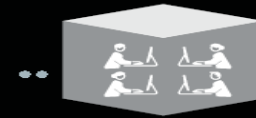
A significant shift is observed towards mobile gaming from traditional formats like console and PC gaming (87% CAGR during 2016 - 2020)⁶



Opportunity for international studios and content owners to showcase their content and garner additional revenues



Opportunity for content producers by focusing on short form or exclusive content



Opportunity for international studios and content owners to showcase their content and garner additional revenues



Partner to leverage their digital following through different content marketing approaches

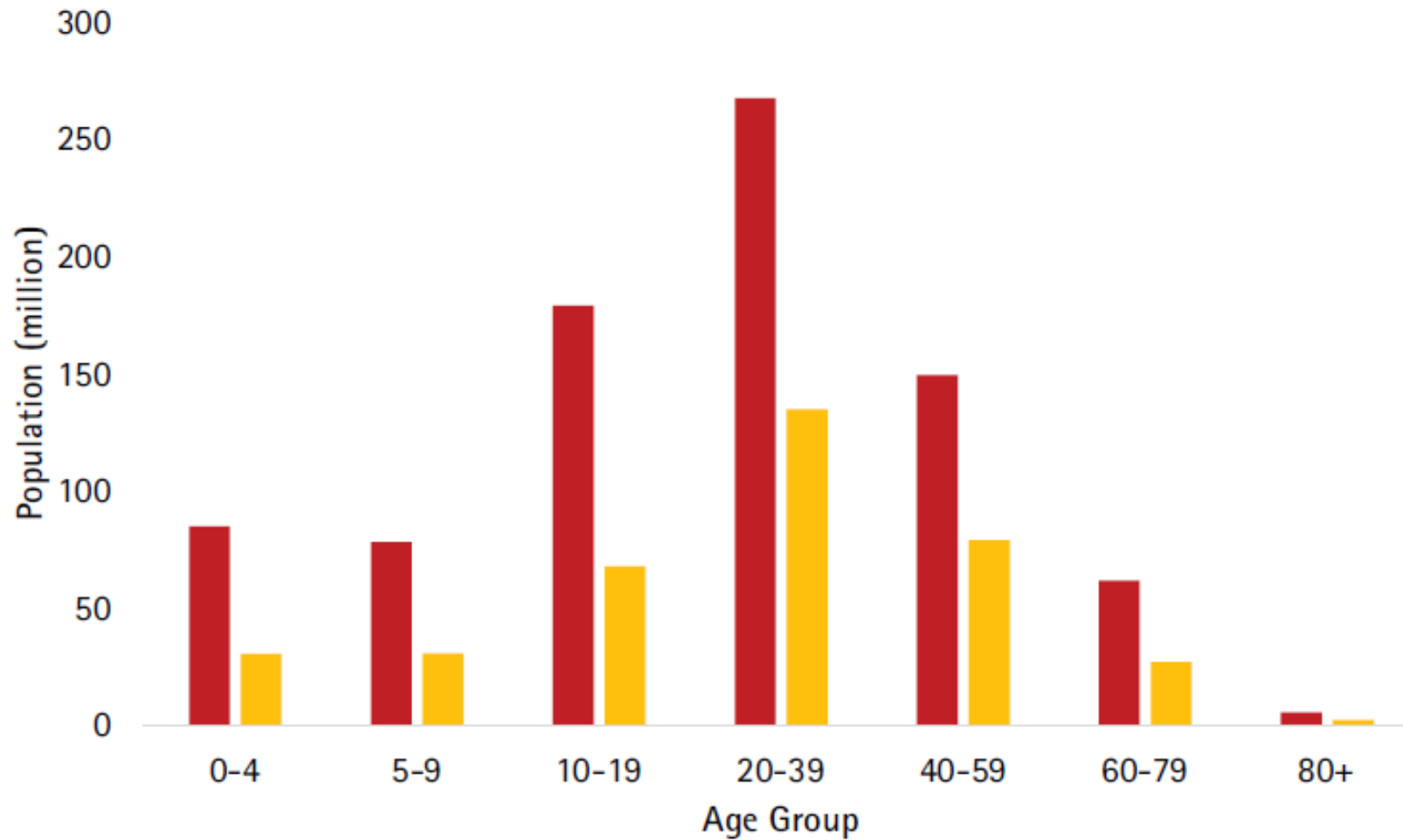


Aggregating and producing vernacular content may help capture larger share of users in India



With in-app advertising and purchases, the mobile gaming space has witnessed a lot of traction, especially on the freemium model

Figure 2: India's demographic dividend



Indian economy and the digital sector

\$ 8676.4

bn

GDP

Source: Oxford Economics

4.1%

Internet related contribution to GDP

Source: EY Estimates based on BCG and IAMAI Analysis

371 mn

Mobile Internet users (2016)

Source: IAMAI June 2016 Estimates

~300 mn

Smartphone users (2016)

Source: EY Estimates

160 mn

Digital Video Viewers (2016)

Source: EY Estimates

A young nation with a median age of 27.6 years

Source: CIA World Factbook

477 mn

Internet subscribers (2016)

Source: EY Estimates, TRAI

1.33 bn

Population (2016)

Source: Oxford Economics

192.3 mn

Broadband subscribers (2016)

Source: TRAI Estimates

174 mn

Wireless broadband subscribers (2016)

Source: EY Estimates

18 mn

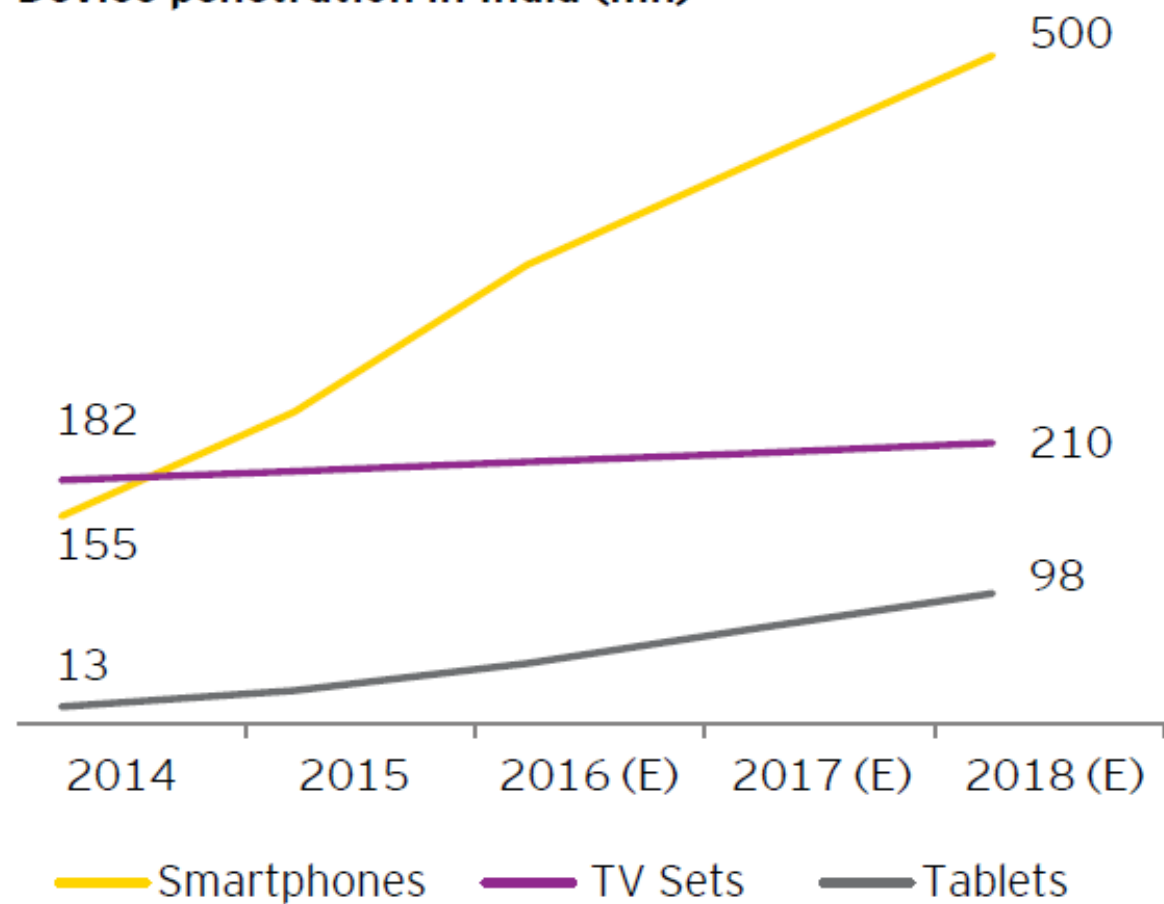
Wired broadband subscribers (2016)

Source: EY Estimates

The fastest growing major economy in the world

[http://www.ey.com/Publication/vwLUAssets/EY-digital-opportunity/\\$FILE/EY-digital-opportunity.pdf](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****2020**

(In INR crores)

(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

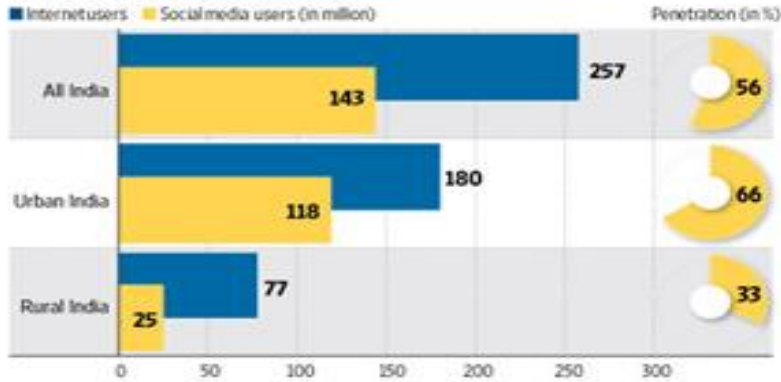
770

Total**8,490****21,530**

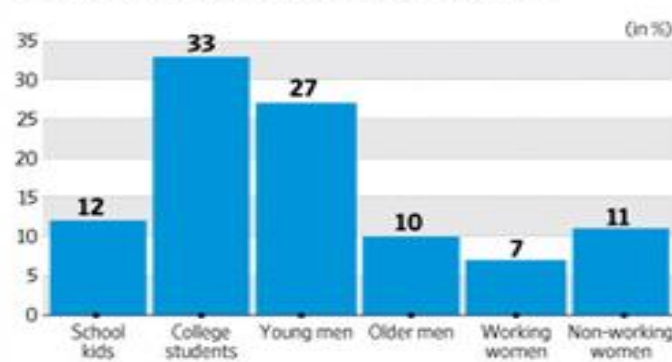
SOCIAL MEDIA IN INDIA

For many connected users in India, access to the Internet is primarily for accessing social media networks. According to a report by the Internet and Mobile Association of India (IAMAI), 66% of the 180 million Internet users in urban India regularly access social media platforms. The most popular activities on social media include maintaining one's own virtual profile on the likes of Facebook and Twitter, posting and sharing an update as well as replying to something a friend has posted. While college students (33%) form the largest demographic of active social media users in India, working women and non-working women register just 7% and 11% respective share in that user base.

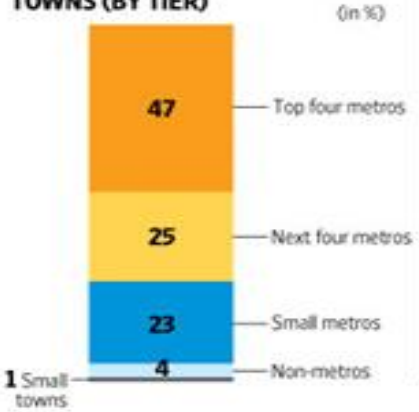
REASONS FOR CYBER ATTACKS



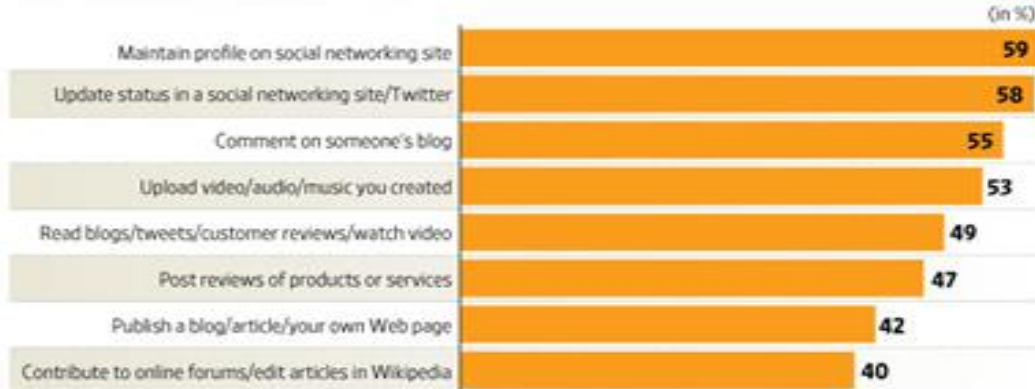
SOCIAL MEDIA USAGE ACROSS DEMOGRAPHICS



SOCIAL MEDIA USAGE ACROSS TOWNS (BY TIER)



ACTIVITIES DONE ON SOCIAL MEDIA



Graphics by Ajay Negi/Mint

Source: IAMAI

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



136M

ACTIVE SOCIAL USERS AS A PERCENTAGE OF THE TOTAL POPULATION



10%

TOTAL NUMBER OF SOCIAL USERS ACCESSING VIA MOBILE



116M

ACTIVE MOBILE SOCIAL USERS AS A PERCENTAGE OF THE TOTAL POPULATION



9%

we are social

we are social

we are social

we are social

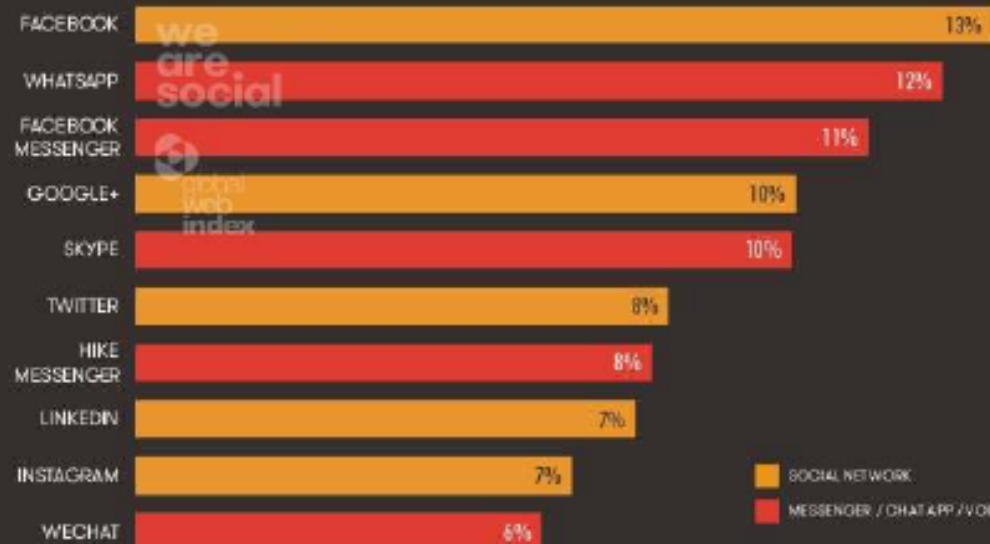
Source: We are social | Q1 2016 | January | Q1 2016 | We are social | Q1 2016 | India | We are social | Q1 2016

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JAN 2016

TOP ACTIVE SOCIAL PLATFORMS

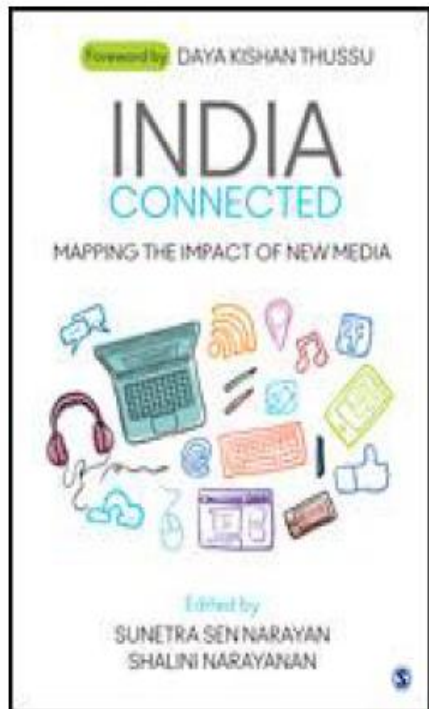
SURVEY-BASED DATA. FIGURES REPRESENT USERS' OWN CLAIMED / REPORTED ACTIVITY



we are social

Source: We are social | Q1 2016 | January | Q1 2016 | We are social | Q1 2016 | India | We are social | Q1 2016

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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.