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NEWS OF THE MONTH

INDIA/APRIL 2017

Media and entertainment industry to grow at a faster pace of 14% over the period of 2017-21: FICCI – KPMG report 2017

The Indian media and entertainment industry in 2016 was able to sustain a healthy growth on the back of strong economic fundamentals and steady growth in domestic consumption coupled with growing contribution of rural markets across key segments. These factors aided the industry to grow at 9.1 per cent on the back of advertising growth of 11.2 per cent, despite demonetization shaving off 150 to 250 basis points in terms of growth across all sub-segments at the end of the year. The **'FICCI – KPMG Media & Entertainment Industry Report 2017'** launched today at **FICCI Frames 2017** held at Mumbai, aims to capture a comprehensive picture of the industry's growth story, challenges, future projections, and key underlying themes. The big story in 2016 has been the evolution of FTA channels post expansion of rural measurement in the television segment coupled with the impact of the 4G rollout and the resulting price wars. Both these factors have resulted in media consumption penetrating deeper into India.

Television:

The TV industry clocked a slower growth in 2016 at 8.5 per cent, attributed to tepid growth of 7 per cent in subscription revenues and a lower than estimated 11 per cent growth in advertising revenues. A key theme in 2016 was the emergence of FTA channels as a key focus area following the expansion in rural measurement by BARC and the resultant increased interest by both broadcasters and advertisers. Additionally, strong performance of sports properties and increased spending for the launch of 4G by telecom operators helped alleviate some of the pressure.

Growth trajectory in size over the last six years

Overall industry size (USD billions) (for calendar year)	2011	2012	2013	2014	2015	2016	Growth vs 2015
TV	329.0	370.1	417.2	474.9	542.2	588.2	8.9%
Print	206.8	229.1	249.2	262.1	261.4	261.3	7.9%
Films	82.9	112.4	129.5	126.4	138.2	142.2	8.8%
Digital advertising	15.4	21.7	38.1	45.5	68.1	76.9	28.8%
Animation and VFX	21.8	28.3	39.7	44.3	51.1	55.5	18.4%
Advertising	11.0	16.3	29.2	23.5	26.5	30.8	18.2%
ODM	17.8	18.2	18.3	22.0	24.4	26.1	5.0%
Radio	11.5	12.7	14.6	17.2	19.8	22.7	14.8%
Music	9.9	10.0	9.8	9.9	10.9	12.2	13.4%
Total	728.4	821.6	916.1	1005.6	1161.5	1302.1	9.1%

Projections for the next five years:

Overall industry size (USD billions) (for calendar year)	2016	2017P	2018P	2019P	2020P	2021P	CAGR (2017-21)
TV	588.3	631.0	706.9	819.8	1,014.6	1,165.6	14.3%
Print	301.2	320.9	340.4	370.6	406.5	421.1	3.3%
Films	142.3	166.0	166.0	178.2	191.6	204.8	7.3%
Digital advertising	76.9	101.9	134.0	174.3	226.5	294.5	30.8%
Animation and VFX	55.5	69.5	81.2	95.5	111.1	131.7	17.2%
Advertising	38.8	51.2	64.2	82.2	99.7	119.8	18.2%
ODM	26.1	28.0	32.5	36.4	40.8	45.7	10.8%
Radio	22.7	24.6	28.7	32.9	41.5	47.8	16.1%
Music	12.2	14.6	16.1	19.9	23.1	28.4	15.8%
Total	1302.1	1409.7	1608.7	1861.0	2175.5	2478.0	15.9%

<http://tvnews4u.com/media-and-entertainment-industry-to-grow-at-a-faster-pace-of-14-over-the-period-of-2017-21/>

VIEW FROM THE TOP

YTBrandcast 2017: It's all about 'attentive reach'

Over 180 million Indians are watching YouTube every month on mobile. The watch time in India has grown 400 per cent year-on-year and 80 per cent of this comes from mobile

YouTube hosted the 4th edition of Brandcast India in Mumbai on Friday, March 24, 2017. The event brought together top advertisers, agencies and partners from all across the country to discuss YouTube as the destination



Talking about the growing appetite among Indian consumers to watch videos online, Rajan Anandan, Vice-President, Google India and South-East Asia, shared some data from App Annie

<http://www.bestmediainfo.com/2017/03/youtube-brandcast-2017-its-all-about-attentive-reach/>

Indie films scores big on Digital platform

Indie filmmakers in India have today found a new platform that is not restricted to a niche audience. There are ample opportunities to showcase short films and reach out to a wider audience base. Earlier the shelf life of short films was limited to Doordarshan tele-films and film festivals.

However, the interest of youth towards social media has boosted the indie film market. With the web space getting more crowded and the digital platform booming since past few years, there is a great opportunity for actors. Since smartphones and apps have revolutionised lives, new entrants like TVF are able to reach out to the youth. If you have a good story with good content, people will love and appreciate your work

<http://indianexpress.com/article/entertainment/entertainment-others/digital-media-india-indie-films-social-media-indie-filmmakers-short-films-web-series-youtube-4598558/>

Sarabhai VS Sarabhai on Hotstar: An Analysis

Just because it's going to be on the web this time around we're not treating it any differently, neither is Star," assures JD Majethia, founder, Hatsoff Productions, the production house that's working on Sarabhai VS Sarabhai, an erstwhile television show, a cult comedy that became very popular in the 2000s. A couple of days back, news that the show is making a comeback - in a new avatar - was broken.



The Star Plus sitcom will now be available on Hotstar, Star India's video-on-demand platform. The show will retain its original star cast but will have a few new characters on board. On Hotstar, a digital platform, audience preferences are expected to be very different from those of the TV viewer. "We are making Sarabhai VS Sarabhai and it will be what it was. There won't be a whole lot of changes

http://www.afaqs.com/news/story/50057_Sarabhai-VS-Sarabhai-on-Hotstar-An-Analysis

Hotstar and Zapr join hands to drive next wave of mobile audience analytics in India

Hotstar, an OTT platform, and Zapr Media Labs, a Bangalore-based media tech company, has announced a strategic partnership to drive the next wave of mobile audience analytics in India. According to press release shared by the company, the two companies will work together to create a deep understanding of mobile audiences that can be leveraged by brands to create personalized communication and offers.



Commenting on the partnership Ajit Mohan, CEO, Hotstar, says, "In the transition from the broadcast world to the digital world, advertisers got a data bonanza but in the process had to give up the ability to engage consumers who are actually paying attention to what they are saying.

http://www.afaqs.com/news/story/49997_Hotstar-and-Zapr-join-hands-to-drive-next-wave-of-mobile-audience-analytics-in-India

TV INDUSTRY-

Sony Pictures Networks India names its kids channel 'Yay'; to launch after IPL



Sony Pictures Networks India has been gearing up to launch a kids channel is known. Here's an update on that front: the network will call the channel 'Yay'. Sources have confirmed this news to afaqs!.

Moreover, the channel, we learn, is scheduled to go on air post the Indian Premier League; the tournament ends on May 21, 2017.

"At the moment, the entire network is concentrating on its flagship property IPL. Yay, a channel that will target kids will only go live after IPL," says the source.

In a recent cover story interview with afaqs!, NP Singh, chief executive officer, Sony Pictures Networks India, said: "There are two gaps in our portfolio. One is kids and the second, edutainment... When we launch our kids channel it will have multiple feeds."

http://www.afaqs.com/news/story/50127_Sony-Pictures-Networks-India-names-its-kids-channel-Yay-to-launch-after-IPL

IPL and Amazon.in enter BARC's Top 10 Brands list @Week 12

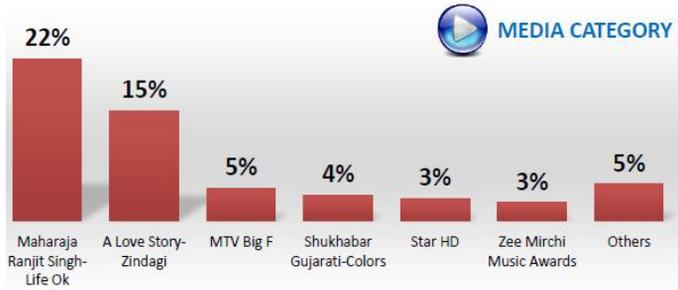
Dettol Toilet Soaps retained its top spot in BARC's Top 10 Brands Across Genres for Week 12 (March 18–24) of 2017's viewership and ad insertions with 10,621 insertions.

OLX.in and Close Up Ever Fresh moved up to the second and sixth spots with 9,292 and 7,301 insertions respectively.

Rank	Brands	Insertions
		Week 12
1	DETTOL TOILET SOAPS	10621
2	OLX.IN	9292
3	AIRTEL CELLULAR PHONE SERVICE	8728
4	IPL-10	8003
5	COLGATE DENTAL CREAM	7503
6	CLOSE UP EVER FRESH	7301
7	HONDA WRV	7149
8	AMAZON.IN	6966
9	HERO SPLENDOR RANGE	6149
10	FOGG SCENT	6098

TOP 10 Brands *Across Genre : All India (U+R) : 2+ Individuals, To get this data on your Twitter timeline, tweet with #BarcTweet Top 10 Brands

Category Specific Brands active on Cinema Screen for the month of March



KEY HIGHLIGHTS

TOP CATEGORIES

- 96% APPAREL
- 94% BEAUTY & PERSONAL CARE
- 94% BANKING & FINANCE

TOP BRAND

- 78% LIC
- 72% Manyavar
- 65% AcneStar

BRANDS	SPOTS	CATEGORY	BRAND
Total 245 brands were screened National Brands = 151 Local Brands = 94	Total no. of spots 4469 20 sec : 1008 30/35 sec : 1731 40 sec : 289 60 sec : 646	Maximum no. of spots BEAUTY & PERSONAL CARE category (Total Spots - 567)	Maximum no. of spots for a brand WOODLAND (Total Spots - 206)

Source: Kantar-IMRB and Interactive

INNOVATION

BACARDI FANS AND FOLLOWERS BECOME DIGITAL DJs

International spirits brand Bacardi sought to engage consumers in an unexpected way by offering their own Instagram Stories as a digital DJ platform. By tapping through the various stories users could create their own set by scratching vinyl records and creating loops. This mobile-first, vertically viewed execution was an organic play offered for 24 hours then published to Bacardi's profile and social channels for further buzz.

As the amount of advertising formats and channels continue to increase, its important for advertisers to analyze insights to leverage behaviors that can help push boundaries and establish their disruptive innovative brand thinking

<http://www.adweek.com/digital/bacardi-and-swizz-beatz-just-created-new-kind-dj-experience-instagram-175058/>

Bacardi has a long history of going big on music. The Bermuda-based company and Swizz Beatz recently collaborated on a three-day cultural experience at The Arches in London, in which art and music combined for the No Commission Art Fair "This is noteworthy because Bacardi is first to market with this kind of hack," Quarles said. "And we love how it brings to life the brand's commitment to music."



DO YOU KNOW?

- 5 Mobile Ready Brands worldwide: 1- Facebook 2- Amazon 3- 7-Eleven 4-Hyundai 5- Microsoft
- 26% of Indian watch TV Serials / Movies on their mobile devices outside their home
- Week 14, 2017; VIVO IPL-10 T20 2017 - First 3 Matches Avg. TVR 4.7;
- Indian Messaging App Usage: 38min – WhatsApp, 14min – Wechat, 11min – Viber, 9min- Snapchat, 8min – FB Messenger

