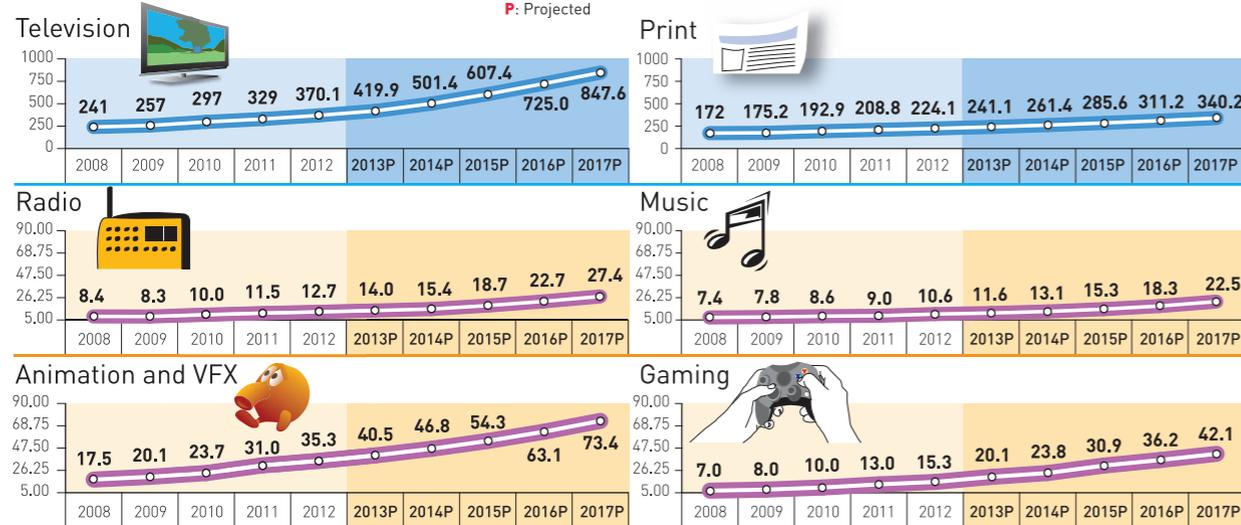


Optimistic on media

The Indian media and entertainment industry is poised to double in size by 2017.

Industry size and projections (in Rs. '00 crore)



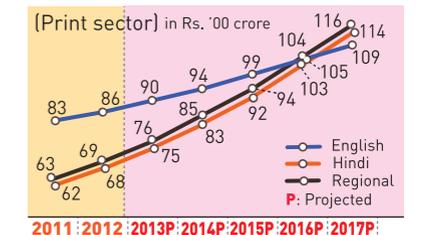
Advertisement revenue of TV and the print media



Advertising mix of print sector

Years	English	Hindi	Regional	Total
2009	49	31	30	110
2010	53	37	36	126
2011	57	41	42	139
2012	59	45	46	150
2013P	62	49	51	162
2014P	66	56	57	179
2015P	70	64	66	200
2016P	74	73	75	222
2017P	79	83	85	248

English vs other languages



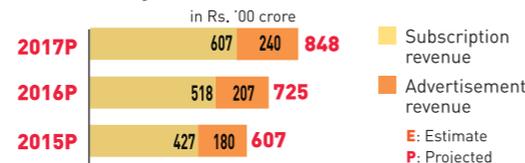
The size of the Indian media and entertainment industry will touch Rs.91,700 crore in 2013 with an estimated growth of 11.8 per cent and is projected to grow at a healthy compounded annual growth rate (CAGR) of 15.2 per cent to reach Rs.1.66 lakh crore by 2017, says the FICCI-KPMG Media and Entertainment 2013 report.

The impetus introduced by digitisation, the continued growth of regional media, the upcoming elections, the strength in the film sector and the fast-increasing new media businesses offered a positive growth chart for the industry.

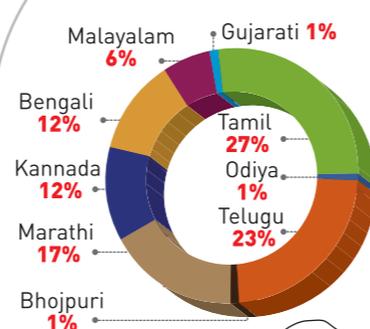
While 2012 was a challenging year for the industry, the prognosis for 2013 looks better with some improvement likely in the global economy and with India's real GDP expected to be between 6.1 per cent and 6.7 per cent, the report added.

Television continues to be the dominant segment. However, the report records strong growth achieved by new

TV industry size



Viewership share of regional television channels in 2012



media sectors, animation and VFX, and a comeback by the film and music sectors on the strength of strong content and the benefits of digitisation. Radio, after the rollout of Phase-3 licensing, is expected to see a spurt in growth at a CAGR of 16.6 per cent over 2012-17. The benefits of Phase 1 cable digital access system (DAS) rollout and continued Phase 2 rollout are expected to contribute significantly to growth in television revenues and the ability of the sector to invest in and monetise content. The sector is expected to grow at a CAGR of 18 per cent over the period 2012-17.

The total advertising spend across media was Rs.32,740 crore in 2012. In the light of the continued economic slowdown, advertising revenues saw a dip in growth to 9 per cent in 2012 from 13 per cent in 2011 and 17 per cent in 2010. The print media continue to be the largest beneficiary, accounting for 46 per cent of the advertising pie, at Rs.15,000 crore.

The continued growth in Hindi and regional print markets backed by rising literacy levels, growing advertiser engagement through activation solutions to leverage "local" strengths of the medium, and the fact that digital platforms are yet to constitute a threat, are all assumed to continue to drive ad spends on the print medium.

The media and entertainment industry is still advertisement-dependent in India. Thus, it remains sensitive to the impact of business cycles. The print sector saw some increases in circulation revenues and some increases in the cover price in some areas, but cover prices still remain significantly lower than elsewhere.

Print media: pattern of revenue

