A decorative border composed of numerous small, multi-colored squares (red, yellow, green, orange) arranged in a roughly rectangular shape, framing the central text.

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CREATING A NICHE FOR INDIAN CONTENT AMONGST A GLOBAL AUDIENCE

Bharat Kumar Ranga

Chief Content & Creative Officer



KANTAR MEDIA

ESSEL GROUP: KEY MEDIA BUSINESSES

A pioneer in every business...

Essel Group's Media Businesses

Zee Entertainment Enterprise Ltd

- India's leading television broadcasting Company
- Global presence, close to 500 million viewers
- Extensive library - over 100,000 hrs + 3000 movies
- Zee TV, Zee Cinema, Zee Sports, Zee Marathi, Zee Bangla, Zing and English channels

Started operations in 1992



Zee News Ltd

- Leading News and Regional language broadcaster
- Zee News, Zee Business, Zee Punjabi, Zee Telugu, Zee Kannada etc.

Started operations in 2004



Wire And Wireless (India) Ltd

- India's largest Multi System Operator
- Presence in 45 cities of India.
- Plans to have a dominant share of the digital cable market.

Started operations in 2006



Dish TV India Ltd

- India's largest Direct to Home (DTH) service provider
- 7 million subscribers
- 800 distributors & 48,000 dealers - around 6600 towns across the country.
- Growing rapidly

Started operations in 2005



E-city

- Family Entertainment Centres
 - multiplexes
 - fast food
 - shopping
 - games
 - real estate dev.

Incorporated 1999



Diligent Media

- DNA - English Newspaper launched in Mumbai

Incorporated 2005



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DIVERSIFIED PRODUCT OFFERING

GENERAL ENTERTAINMENT



MOVIE



REGIONAL ENTERTAINMENT



RELIGIOUS



ENGLISH ENTERTAINMENT



NEWS



SPORTS



MUSIC



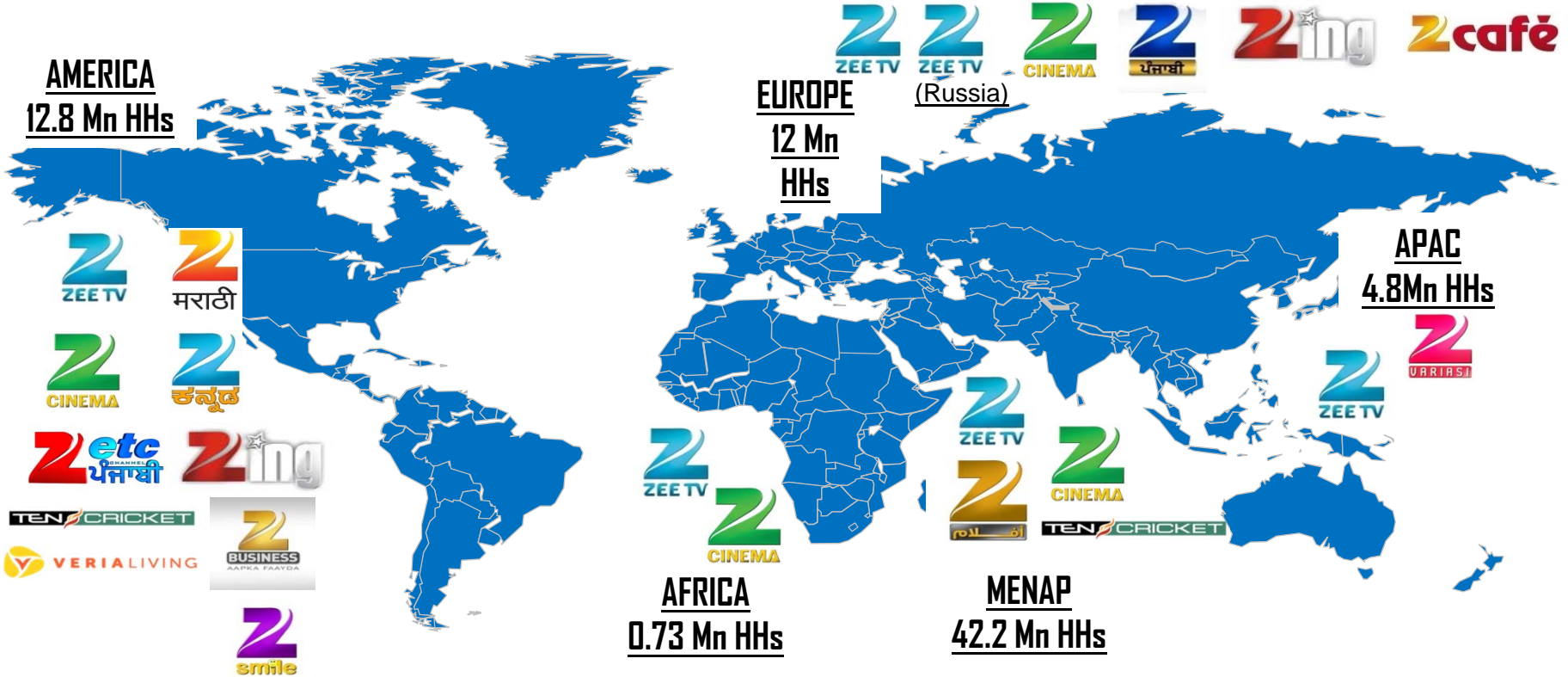
INTERNATIONAL



GAMING



ZEE INTERNATIONAL REACHES 72 MN. HHS ACROSS 168 COUNTRIES!



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INDIA MEDIA SCENARIO



KANTAR MEDIA

The Indian Television industry was valued at US\$ 5.91 billion in 2011. The industry is forecast to grow at a compound annual growth rate (CAGR) of 17% to reach a value of US\$13.21 billion in the next five years.

Overall Industry Size (USD bn) Calendar Years	2011	Growth in 2011 over 2010	2012 PP	2013 PP	2014 PP	2015 PP	2016 PP	CAGR (2011-16)
TV	5.91	10.8%	6.83	7.82	9.24	11.11	13.21	17.0%
Print	3.75	8.3%	4.06	4.42	4.85	5.30	5.81	9.0%
Film	1.67	11.5%	1.80	1.97	2.18	2.42	2.70	10.0%
Radio	0.21	15.0%	0.23	0.29	0.36	0.43	0.53	21.0%
Music	0.16	4.7%	0.18	0.20	0.24	0.28	0.33	15.0%
OOH	0.32	7.6%	0.35	0.39	0.42	0.47	0.52	10.0%
Animation and VFX	0.56	31.2%	0.65	0.77	0.92	1.10	1.24	17.0%
Gaming	0.23	30.0%	0.32	0.41	0.52	0.66	0.83	29.0%
Digital Advertising	0.28	54.0%	0.36	0.46	0.60	0.79	1.02	30.0%
Total	13.09	11.7%	14.78	16.74	19.32	22.54	26.19	14.9%



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KEY TRENDS IN THE MEDIA INDUSTRY

DIGITALIZATION

- Digital technology continues to revolutionize media distribution – be it the rapid growth of DTH and the promise of digital cable or increased digitalization of film exhibition – and has enabled wider and cost effective reach across diverse and regional markets and the development of targeted media content.
- The revenue share is expected to evolve as digitization progresses. Broadcasters and MSOs are expected to see a significant increase in their bargaining power over LCOs.

Stake-holder revenue share	Pre-digitization	Post 2016
Consumer ARPU	100%	100%
LCO	65-70%	35-50%
Distributor	5%	0-5%
MSO	15%-20%	25-30%
Broadcaster	10%-15%	30-35%

Source: KPMG in India Analysis, Industry discussions



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KEY TRENDS IN THE MEDIA INDUSTRY

MEDIA ON THE GO

- A Seminal change is brought about by the proliferation of screens – making media consumption more personal than ever. Multiple media including TV, Films, News, Radio, Music etc are being impacted with this change. This has impacted the way the content is being created and distributed.

INCREASINGLY “SAVVY” AND “NEW AGE” CONSUMERS

- As consumers evolve and with India’s growing young population, there is a heightened need to engage them across platforms and experiences. There is a greater need for integration and innovation across traditional and new media, with changing media consumption habits and preferences for niche content. Media companies today have no choice but to provide more touch points to engage with audiences.



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KEY TRENDS IN THE MEDIA INDUSTRY

REGIONAL MARKETS BUCKING THE RECESSIONARY TRENDS AND CONTINUING GROWTH MOMENTUM

- Regional television and print continued its strong growth trajectory owing to growth in incomes and consumption in the regional markets. National advertisers are looking at these markets as the next consumption hubs and local advertisers are learning the benefits of marketing their products.

M&E STILL AN ADVERTISING REVENUE DEPENDANT INDUSTRY

- The Indian consumer is still not used to paying for content and hence the industry players are sensitive to the impact of macro economic slowdowns which affect advertising budgets of spenders.



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BOLLYWOOD

Bollywood movies are being widely broadcasted and syndicated across the world.

Some of the countries where Bollywood is accepted by the locals are;

AMERICAS	EUROPE	MENAP	APAC	AFRICAS
<i>USA</i>	<i>UK</i>	<i>KSA</i>	<i>Srilanka</i>	<i>South Africa</i>
<i>Canada</i>	<i>Russia</i>	<i>UAE</i>	<i>China</i>	<i>Mauritius</i>
<i>Caribbean</i>	<i>Romania</i>	<i>Turkey</i>	<i>Philippines</i>	<i>Kenya</i>
<i>Guiana</i>	<i>Netherland</i>	<i>Oman</i>	<i>Myanmar</i>	<i>Nigeria</i>
<i>Brazil</i>	<i>Germany</i>	<i>Qatar</i>	<i>Cambodia</i>	<i>Ethiopia</i>
	<i>France</i>	<i>Morocco</i>	<i>Afghanistan</i>	<i>Reunion Islands</i>
	<i>Portugal</i>	<i>Algeria</i>	<i>Malaysia</i>	
	<i>Poland</i>	<i>Pakistan</i>	<i>Indonesia</i>	
			<i>Singapore</i>	



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Late night slot of Bollywood movies garners 60,000 impacts in average among locals in local channels in UK

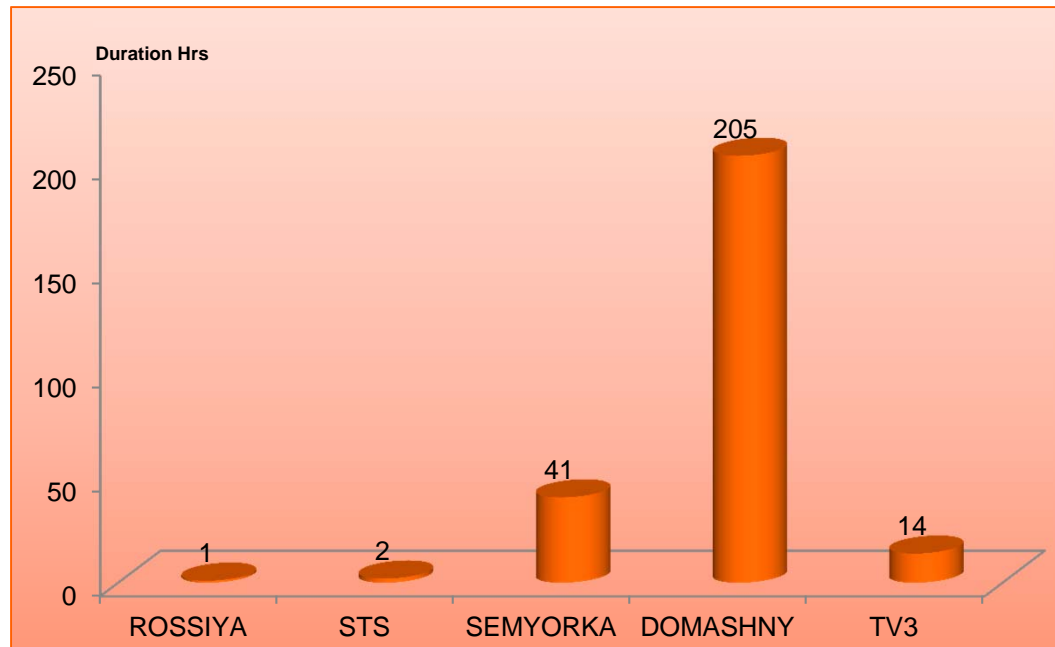
Title	Channel	Genre	000s
FILM: 3 IDIOTS (2009)	CH4	Films:Cinema	338.6
FILM: UDAAN (2010)	CH4	Films:Cinema	100.3
FILM: MITHYA (2008)	CH4	Films:Cinema	72.2
FILM: RAAVANAN (2010)	CH4	Films:Cinema	60
FILM: UDAAN (2010)	CH4	Films:Cinema	57.8
FILM: ISHQIYA (2010)	CH4	Films:Cinema	49.2
FILM: KANCHIVARAM: THE TREACHERY (2009)	CH4	Films:Cinema	49.1
FILM: RAAVANAN (2010)	CH4	Films:Cinema	39.3
FILM: SURAJ KA SATWAN GHODA (1993)	CH4	Films:Cinema	39.1
FILM: HUM DONO	CH4	Films:Cinema	35.9
FILM: ISHQIYA (2010)	CH4	Films:Cinema	34.5
FILM: BAAZI	CH4	Films:Cinema	27.5
FILM: JAANE BHI DO YAARO (1983)	CH4	Films:Cinema	26.9
FILM: HARE RAMA HARE KRISHNA (1971)	CH4	Films:Cinema	26.5
FILM: BAAZI	CH4	Films:Cinema	23.7
FILM: JAANE BHI DO YAARO (1983)	CH4	Films:Cinema	21.7
FILM: ROCKET SINGH: SALESMAN OF T (2009)	CH4	Films:Cinema	21



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DOMASHNY broadcasted the highest number of Indian Movies in Russia in the year 2011 – 78 Movies with total duration of more than 205 hours

Volume of Indian Content - Movies



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BOLLYWOOD MOVIES IN RUSSIA

Title	Channel	Genre	TVR
Seeta Aur Geeta	Domashny	Movie	1.10
Raja Jani	Domashny	Movie	0.90
Sholay	Domashny	Movie	0.80
Dance Dance	Domashny	Movie	0.80
Parivar	Domashny	Movie	0.70
Kabhi Alvida Na Kehna	Domashny	Movie	0.70
Haathi Mere Saathi	Domashny	Movie	0.70
Khooon Bhari Maang	Domashny	Movie	0.70
Tum Haseen Main Jawan	Domashny	Movie	0.60
Bulandi	Domashny	Movie	0.60
Ram teri ganga maili	Domashny	Movie	0.60
Phool aur Pathar	Domashny	Movie	0.50
Nagina	Domashny	Movie	0.50
Jaanoo	Domashny	Movie	0.50
Disco Dancer	Domashny	Movie	0.50



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Several Mainstream channels in Saudi Arabia telecast Bollywood Movies weekly or more and they garner better ratings than other language Movies

Title	Channel	Genre	ALL NORMALISED 15 Min. GRPs
KISMAT KONNECTION	AL RAI	Movies	13.68
PAATHSHAALA	FOX	Movies	9.11
HEER RANJHA	FOX	Movies	9.56
AL MUGHAMER	LBC SAT	Movies	7.19
KARTHIK CALLING KARTHIK	FOX	Movies	7.77
AL MUGHAMER	LBC SAT	Movies	5.57
PHIR MILENGE	AL RAI	Movies	6.15
AL MUGHAMER	LBC SAT	Movies	4.33
GARV : PRIDE AND HONOUR	AL RAI	Movies	6.01
PAATHSHAALA	FOX	Movies	3.81
DIL NE JISE APNA KAHAA	FOX	Movies	3.04
TEES MAAR KHAN	AL RAI	Movies	3.22
KISMAT KONNECTION	AL RAI	Movies	2.53
KARTHIK CALLING KARTHIK	FOX	Movies	2.32
PHIR MILENGE	AL RAI	Movies	0.48



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Bollywood Movies garner better ratings than some of the high profile sporting events and Hollywood Movies among Malays.

Title	Channel	Genre	TVR
PANG.SABTU -KUCH KUCH HOTA HAI	TV3	MOVIES	19.63
PANG.SABTU -KUCH KUCH HOTA HAI	TV3	MOVIES	17.89
PANG.SABTU -MUJHE DOSTI KAROGE	TV3	MOVIES	12.12
PANG.SABTU -MUJHE DOSTI KAROGE	TV3	MOVIES	10.95
PANG.SABTU -DUPLICATE	TV3	MOVIES	9.58
BOLLYGOOD -MANN	TV2	MOVIES	8.75
PANG.SABTU -DILWALE DULHANIA L	TV3	MOVIES	8.61
BOLLYGOOD -DILWALE DULHANIA L.	TV2	MOVIES	8.36
PANG.SABTU -DIL TO PAGAL HAI	TV3	MOVIES	8.16
BOLLYGOOD -KAL HO NAA HO	TV2	MOVIES	8.14
BOLLYGOOD -DIL TO PAGAL HAI	TV2	MOVIES	8.08
PANG.SABTU -TAARE ZAMEEN PAR	TV3	MOVIES	8.01
PANG.SABTU -MUJHE DOSTI KAROGE	TV3	MOVIES	7.91
PANG.SABTU -SIVAJI THE BOSS	TV3	MOVIES	7.90
PANG.SABTU -DIL TO PAGAL HAI	TV3	MOVIES	7.87
PANG.SABTU -KABHI ALVIDA NAA K	TV3	MOVIES	7.83
NEW YR.MOV.SPEC. -3 IDIOTS	TV3	MOVIES	7.74
PANG.SABTU -DUPLICATE	TV3	MOVIES	7.58
PANG.SABTU -BOBBY	TV3	MOVIES	7.53
PANG.SABTU -KABHI ALVIDA NAA K	TV3	MOVIES	7.26



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Bollywood Movies in Local FTA channels in Indonesia garner better ratings than other Movies

Title	Channel	Genre	TVR
KAHO NAA... PYAAR HAI	MNCTV	Movie:Drama	4.10
KABHI KHUSHI KABHIE GHAM..	MNCTV	Movie:Drama	4.00
JOSH	MNCTV	Movie:Drama	3.90
DIL SE..	MNCTV	Movie:Drama	3.60
DHOOM:2	MNCTV	Movie:Drama	3.60
MOHABBATEIN	MNCTV	Movie:Drama	3.40
KABHI KHUSHI KABHIE GHAM..	MNCTV	Movie:Drama	3.30
KUCH KUCH HOTA HAI	MNCTV	Movie:Drama	3.30
DIL HAI TUMHAARA	MNCTV	Movie:Drama	3.20
DHADKAN	MNCTV	Movie:Drama	3.20
RAB NE BANA DI JODI	MNCTV	Movie:Drama	2.90
OM SHANTI OM	MNCTV	Movie:Drama	2.80
DHOOM:2	MNCTV	Movie:Drama	2.80
THE DARLING OF VRINDAVAN	MNCTV	Movie:Animation/Puppet	2.70
JOSH	MNCTV	Movie:Drama	2.70
DIL TO PAGAL HAI	MNCTV	Movie:Drama	2.6
BAADSHAH	MNCTV	Movie:Drama	2.60
CHORI CHORI CHUPKE CHUPKE	MNCTV	Movie:Drama	2.50
MUJHSE DOSTI KAROGE!	MNCTV	Movie:Drama	2.40
KRRISH	MNCTV	Movie:Drama	2.30



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Bollywood Movies garner 50% more average ratings than other Movies broadcasted in South Africa

Title	Channel	Genre	TVR
DOSTANA	SABC 3	Movies	4.59%
SALAAM-E-ISHQ	SABC 3	Movies	3.91%
RAB NE BANA DI JODI	SABC 3	Movies	3.75%
DRONA	SABC 3	Movies	3.51%
GOD TUSSI GREAT HO	SABC 3	Movies	3.46%
NAMASTEY LONDON	SABC 3	Movies	3.43%
PARTNER	SABC 3	Movies	3.39%
SALAAM-E-ISHQ	SABC 3	Movies	3.38%
NISHABD	SABC 3	Movies	3.32%
YUVVRAAJ	SABC 3	Movies	3.17%
DUS KAHANIYAAN	SABC 3	Movies	3.16%
GOD TUSSI GREAT HO	SABC 3	Movies	3.13%
SARKAR RAJ	SABC 3	Movies	2.96%
DIL MAANGE MORE	SABC 3	Movies	2.84%
CHEENI KUM	SABC 3	Movies	2.80%
BHOOL BHULAIYAA	SABC 3	Movies	2.74%
DRONA	SABC 3	Movies	2.66%
DIL MAANGE MORE	SABC 3	Movies	2.64%
NAACH	SABC 3	Movies	2.61%
ROJA	SABC 3	Movies	2.59%



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ZEE INITIATIVES TOWARDS GLOCALISATION



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ZEE AFLAM



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ZEE AFLAM BOLLYWOOD BIL ARABIYA



- Zee Aflam was one of the first ventures of Zee in Glocalising Indian content in the Middle East and North Africa markets.
- Done extensive research to launch this channel
- Catering to the core target audience of “Local Females”.
- Credibility & Expertise - Zee Aflam is top of mind & Synonymous with Bollywood!
- It was one of the most successful media launch of the decade



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Promo of Zee Aflam



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ZEE AFLAM BOLLYWOOD BIL ARABIYA

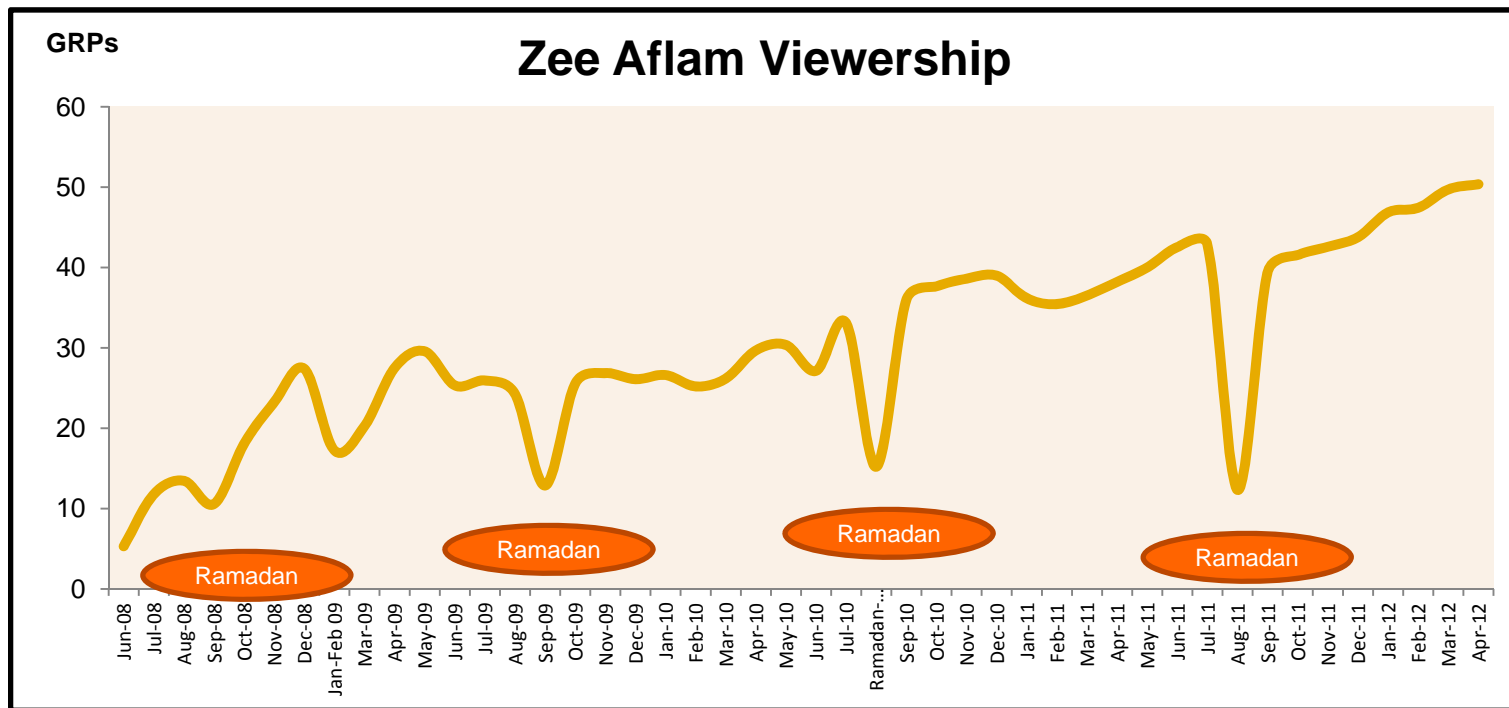


ACCOLADES

- Zee Aflam won the Prestigious Gold Award: Effies MENA Awards '2009
- Gold Award for Marketing in “Media / Content / Internet Provider” category.
- GEMAS Effie Mena is the only Effie awards programme in the Middle East and North Africa.



Barring the lows in Ramadan period Zee Aflam has consistently grown in viewership since its launch in June' 2008



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ZEE VARIASI



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ZEE VARIASI

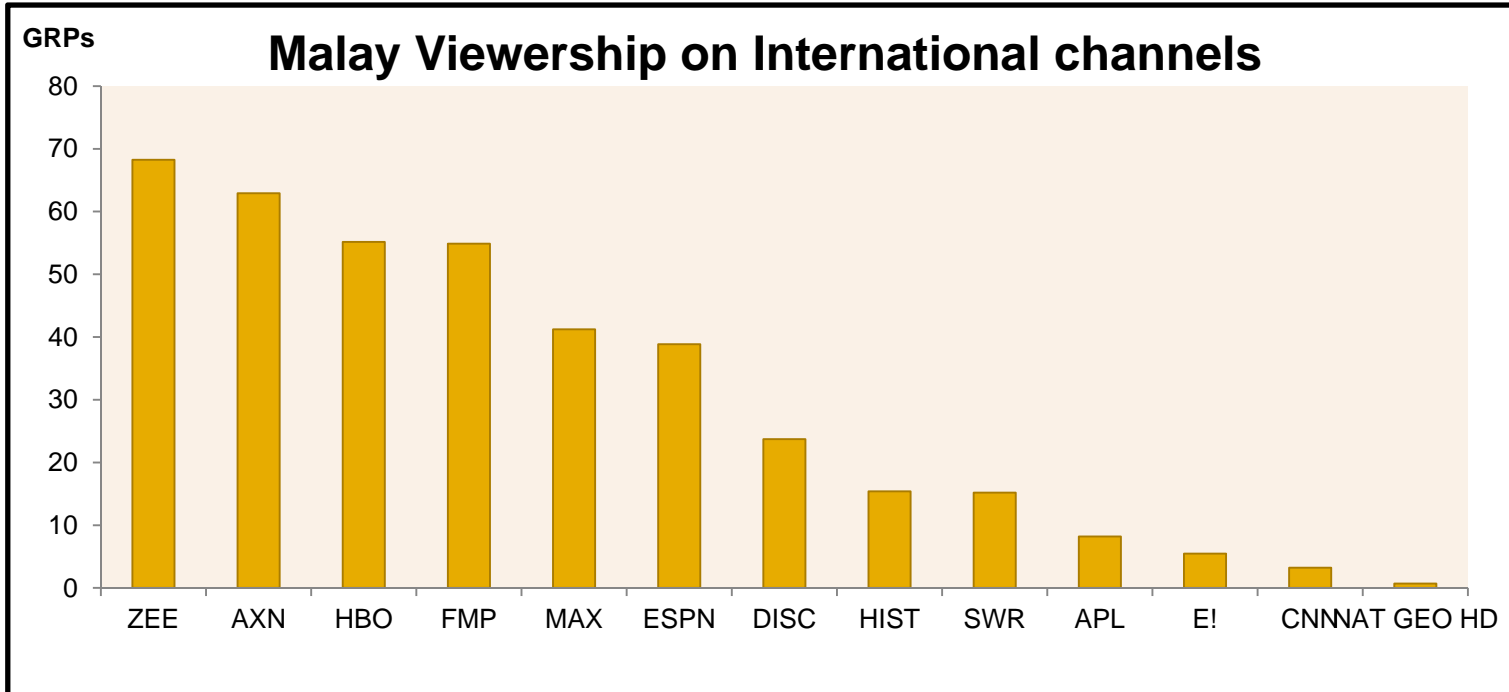


- Zee Variasi is another success story of Zee, taking Indian content to the Malay Audiences.
- Catering to the core target audience of “Malays”.
- Zee Variasi programming has a mix of Bollywood and Indian drama content.
- Bollywood Movies on this channel garner better ratings than some of the high profile sporting events and Hollywood Movies on other channels among Malays.



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Zee Variasi has consistently been among the top two International Channels among Malays in Malaysia




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“JAI HO”



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