



Govt. of India
 Ministry of Commerce and Industry
 DEPARTMENT OF COMMERCE
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SERVICES EXPORT PROMOTION COUNCIL
 (Set up by Ministry of Commerce and Industry, Government of India)



ASSOCIATION
 OF SOUTHEAST
 ASIAN NATIONS



International Chamber for Service Industry
Empowering Service Industry
 (Govt. - Corporate - NRI's Business Interface)

INTERNATIONAL CONFERENCE

North East Calling

Cinematic Tourism Destination North East India & ASEAN

with MEDIA ENTERTAINMENT INDUSTRY



Special Session - ASEAN Countries

(Philippines, Vietnam, Brunei, Malaysia, Myanmar,
 Indonesia, Thailand, Singapore, Laos, Cambodia)

RECOGNITION & HONOURS

Friday, 30th June 2017, 10:30 AM Onwards, JW Marriott, Mumbai Sahar
 IA Project Road, Chhatrapati Shivaji International Airport, Andheri, Mumbai

INDIAN SCENARIO

The Indian Media and Entertainment (M&E) industry is a sunrise sector for the economy and is making high growth strides. It comprises of print, electronic, radio, internet and outdoor segments. Digitization will facilitate increased number of channels and high quality viewing. India is a fast digitizing market and the consumer shift towards digital services is exhibited through the expansion of digitized households.

Of the more than 70,000 newspapers printed in India, around 90% are published in Hindi and other vernacular languages. There are over 800 private satellite TV channels, permitted by the Information and Broadcasting Ministry.

The Indian media & entertainment sector is expected to grow at a Compound Annual Growth Rate (CAGR) of 14.3 per cent to touch Rs 2.26 trillion (US\$ 33.9 billion) by 2020, while revenues from advertising is expected to grow at 15.9 per cent to Rs 99,400 crore (US\$ 14.91 billion).

Over FY 2015-20, radio will likely grow at a CAGR of 16.9 per cent, while digital advertising will grow at 33.5 per cent. The largest segment, India's television industry, is expected to grow at a CAGR of 15 per cent, while print media is expected to grow at a CAGR of 8.6 per cent.!

India is one of the highest spending and fastest growing advertising market globally. The country's expenditure on advertising is estimated at 15.5 per cent in 2016, and is expected to grow by 11.2 per cent in 2017, based on various media events like T20 Cricket World Cup, the Indian Premier League (IPL) and State elections. Television segment, which continues to hold highest share of spending, is expected to grow by 12.3 per cent in 2016 and 11 per cent in 2017, led by increased spending by packaged consumer goods brands and e-commerce companies.

The Foreign Direct Investment (FDI) inflows in the Information and Broadcasting (I&B) sector (including Print Media) in the period April 2000 December 2016 stood at US\$ 6.3 billion, as per data released by Department of Industrial Policy and Promotion (DIPP).

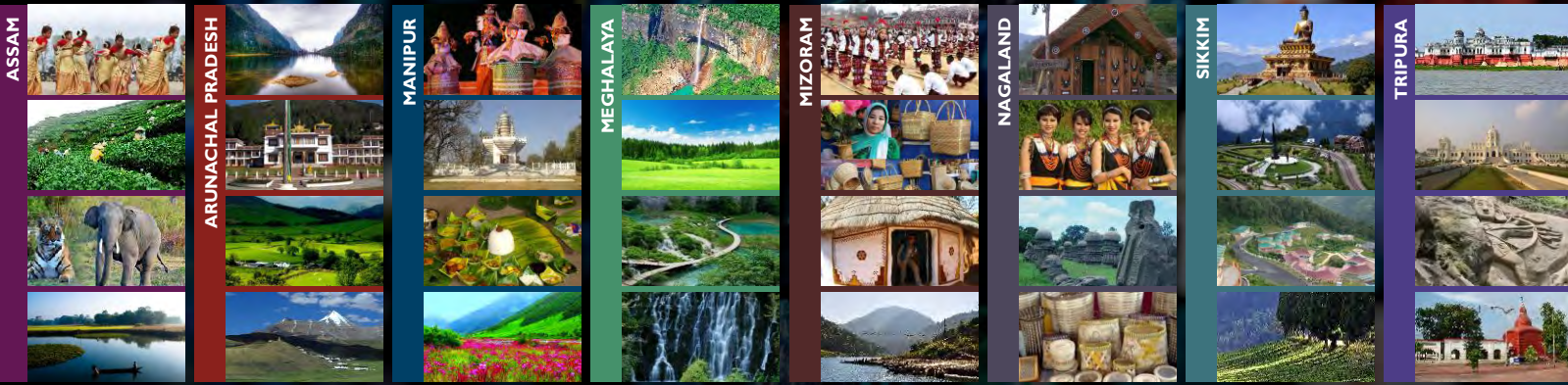
Overall industry size (INR billion) (For calendar years)	2016P	2017P	2018P	2019P	2020P	CAGR (2015-2020)
TV	617.0	709.6	823.3	956.8	1097.6	15.1%
Print	305.2	329.6	355.9	383.6	412.5	7.8%
Films	158.7	174.1	190.0	207.8	227.3	10.5%
Radio	23.4	28.4	32.7	37.8	43.3	16.9%
Music	12.1	14.0	16.1	18.4	20.6	13.8%
OOH	28.3	31.6	35.4	40.0	45.2	13.1%
Animation and VFX	58.3	67.1	78.1	91.3	108.0	16.1%
Gaming	30.8	34.4	39.0	45.4	50.7	13.9%
Digital Advertising	81.1	113.6	153.3	199.3	255.2	33.5%
Total	1,315	1,502	1,724	1,980	2,260	14.3%

Overall industry size (INR billion) (For calendar years)	2010	2011	2012	2013	2014	2015	Growth in 2015 over 2014
TV	297.0	329.0	370.1	417.2	474.9	542.2	14.2%
Print	192.9	208.8	224.1	243.1	263.4	283.4	7.6%
Films	83.3	92.9	112.4	125.3	126.4	138.2	9.3%
Radio	10.0	11.5	12.7	14.6	17.2	19.8	15.3%
Music	8.6	9.0	10.6	9.6	9.8	10.8	10.2%
OOH	16.5	17.8	18.2	19.3	22.0	24.4	10.9%
Animation and VFX	23.7	31.0	35.3	39.7	44.9	51.1	13.8%
Gaming	10.0	13.0	15.3	19.2	23.5	26.5	12.8%
Digital Advertising	10.0	15.4	21.7	30.1	43.5	60.1	38.2%
Total	652	728	821	918	1,028	1,157	12.8%

Source: KPMG in India analysis, 2016



Northeast India Calling - Come Visit us ... It AWAITS....



Invitation to Production Houses, Film Makers, TV- Ad Film Animation Industry Heads from India and ASEAN to Invest in North East India

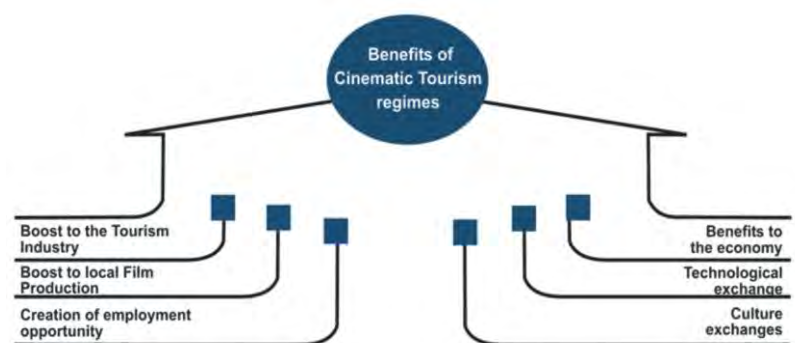
Northeast States of India is one of Asia's last great natural and anthropological sanctuaries which very few has explored. From valleys and hills to cascading waterways and unending plains, the region is any film-maker's dream destination. Rakesh Roshan took Shahrukh Khan and Madhuri Dixit to the lush waterfalls and green hills of Arunachal Pradesh's Tawang area to film the '90s high-octane blockbuster Koyla, about the violent misdeeds of a rapacious coal-miner.

Salman Khan's Kurbann (1991) was shot in Meghalaya. Parts of the film were shot in Kendriya Vidyalay, Upper Shillong. Directed by Kalpana Lajmi, Daman was set in the backdrop of Assam. A significant portion of the film was shot in the famous Kamakhya Temple in Guwahati.

Uniqueness of North East India (Untapped by Cinema as yet)

If foreign countries can promote their location and increase tourist arrival like that in Spain, Singapore and recent example of Star Wars awakens new wave of film tourism as its fans seek out locations in Gloucestershire England Why cannot North east unexplored destinations to reach out

- The Northeast India has been identified as one of the world's seven richest biodiversity areas by Myers 2000.
- Almost 70 per cent of the world's orchids are found in India's Northeast.
- The world's largest riverine island, the Majuli, is in the Northeast, Assam
- The language and culture of Northeast is a mix of Tibetan, South-East Asian and East Indian culture.
- Seven of India's major national parks are located in Northern Region of India.
- Around 220 languages are spoken in the states of the North east India
- The Northeast is India's most musically active region.
- The Northeast part of the country is the biggest contributor to tea production in India.
- The Ahom Dynasty of Northeast is the longest unbroken dynasty in India's entire history.
- Mawsynram in Meghalaya holds the Guinness World Record of being the wettest place on Earth.
- The Shungetser Lake in Arunachal Pradesh's Tawang district was unofficially renamed by tour guides as Madhuri Lake after Bollywood actress Madhuri Dixit.
- The Northeast is India's cleanest region.
- Shillong (Meghalaya) as the "Scotland of the East". Its beautiful natural surroundings and divine landscape are sylvan, to say the least.



ASEAN Countries holds great prospects for the Northeast India as a market and vice versa within the ambits of the Indian Act East Policy and the Vision 2020 document, which deals with the international facet of tourism promotion. Also, developing backward tourism connectivity with other parts of India is as important an element of strides in tourism as developing links with ASEAN Countries.

Linking NER (I) - ASEAN Countries



RECOMMENDATIONS

Joint Ventures between NER (I) and ASEAN Countries for Development of Media Entertainment Industry

- Tourism, Culture, Art and Craft has tremendous scope between NER (I) and ASEAN countries, let us organise one annual festival with same to increase trade and business untapped potential between the regions.
- NER (I) has rich repository of biodiversity in terms of Health, Health, Ayurveda, Yoga, Naturopathy, Medicinal Plants, for promoting NER(I) as Niche Tourism Hub for Cinematic Tourism, Herbal Health Tourism, Rural Tourism, Farm tourism, Eco-Tourism etc.
- Joint Film Festival between India and ASEAN countries. Annual event, conference, expo, cinematic, workshops, tourism awards and honours and Media Exchange Programmes between the two regions.
- Organising FAM (Familiarisation Trips) through state tourism departments for production houses, film makers, TV ads films, animation industry to and from India and ASEAN countries.
- NER (I) States tourism departments to identify tourism potential of their respective state and ICSI will help states in designing and developing tourism literature (a separate brochure, other promotional literature material) themed on Cinematic Tourism.
- An online North East Region portal should be designed to bring National and International Media Giants from ASEAN countries under one roof. This will enhance the business opportunities and more interaction with media hubs.
- To provide platform to youth for showcasing their talent, government should organize a roadshow in ASEAN countries and vice-versa.

Act East: Making North East India as a gateway to Vibrant Media Entertainment Market with ASEAN Countries



E-mail : conference@icsi.asia