Media Industries in India: An Emerging Regional Framework

Shanti Kumar¹

University of Texas at Austin

shanti.kumar [AT] austin.utexas.edu

Abstract:

This paper critically evaluates how recent industry reports have explained the rapid growth of regional media in India. In these reports, regionalization is described—often in euphoric terms—as the result of a unique historical conjuncture where the rise of digital technologies of production, distribution, and consumption and the rapid privatization of public infrastructure have created avenues for both big and small media players to expand their reach into regional markets and rural hinterlands. However, a more interesting story is emerging alongside the celebratory narratives of digitization and media conglomeration in India. It is the story of how key players in the industry are turning to regional media to redefine their organizational identities in new ways that are simultaneously national, subnational, and transnational. At the same time, regionalization is also being embraced in the media industries to reimagine audiences in new terms that at once connect national and diasporic audiences with subnational or regional audiences in smaller cities, towns, and villages. In this context, regionalization has emerged as *the* framework for understanding the globalization of media industries and audiences in India.

Keywords: India, Regional Media, Digitization, Conglomeration, Globalization

The digital convergence of hitherto distinct technologies like print, broadcasting, cable, satellite television, film, and online media, along with the privatization of public broadcasting and the telecommunications infrastructure in India, has induced many Indian media companies to radically reshape their organizational structures since the early 2000s. Major players from the telecommunications industry, such as Reliance Industries, have aggressively entered the media production business, and traditional production houses like Network18 (formerly TV18) have expanded operations into online media and created joint ventures with other major national and transnational corporations. By using strategies of conglomeration, many media companies—both traditional production houses in print, radio, television, and film and new

players from the telecommunications industry and the information technology sectors—are seeking to expand their audience share across a range of media platforms and across traditionally defined geographical boundaries of national, subnational, and transnational markets. The rapid growth of regional media within and across a range of industry segments, delivery platforms, and programming practices has been a defining characteristic of this new phase of transformation in the Indian media industries.

In the case of Indian cinema, although Mumbai-based Bollywood is still considered the “national” film industry, it is no longer the predominant center for film production, distribution, and consumption. As the record-breaking box office success of the Bollywood blockbuster [Chennai Express](#) in 2013 reveals, other “regional” film industries, particularly in South India, are becoming not only more integrated with Bollywood but also more integral to the Indian film industry’s attempts to reach more diverse and dispersed audiences in the Indian diaspora and within the regional media markets all across India. *Chennai Express* not only smashed box office records in the traditional box office strongholds for Hindi films in North India and in the Indian diaspora; it also doubled the record for the first-week collections of a Hindi film in South India, where Bollywood is not always very popular among moviegoers.²

Chennai Express is the love story of a north Indian man, Rahul (Shahrukh Khan), and a South Indian woman, Meenalochani (Deepika Padukone), who meet through a chance encounter in a train journey from Mumbai to Chennai. In many ways, *Chennai Express* is a traditional boy-meets-girl Hindi film with nothing much for a discerning viewer or critic to write home about. But it also varies from the conventional formula of Bollywood romantic comedies in some subtle and significant ways. Unlike other Bollywood films about, or partially set in, South India where the actors speak only in Hindi (or where Hindi subtitles are superimposed on the screen), a very large chunk of the dialogue in *Chennai Express* is in Tamil without any Hindi subtitles, with Meenalochani sometimes translating the Tamil dialogues into Hindi for Rahul and, by extension, for the non-Tamil-speaking Hindi film viewer in the cinema hall. (The DVD version of *Chennai Express* has subtitles.) Also, unlike many of Shahrukh Khan’s films from the 1990s and 2000s where the hero meets the heroine in the diasporic settings of London or New York, *Chennai Express* takes Shahrukh Khan’s Rahul deep into the South Indian countryside in a small village near Chennai where Meenalochani’s father is a regional mafia don.

In the case of Indian television, reality television genres such as game shows, quiz shows, home improvement shows, and hidden-camera exposés that were first introduced in India and popularized on Hindi television channels like Zee TV and Star TV have fast become the mainstay of programming in other Indian-language networks like Asianet, ETV, and Sun Network. At the same time, popular Hindi reality television shows with national branding such as *Indian Idol* (2004–), [India’s Dancing Superstar](#) (2013–), and [India’s Got Talent](#) (2009–)—which are only marginally popular among non-Hindi speaking audiences—feature contestants increasingly drawn from both Hindi-speaking and non-Hindi speaking regions of India. Recently, these shows have also attracted contestants from the Indian diaspora and non-Indian contestants from Pakistan, the Middle East, Latin America, and North America. By featuring

pan-Indian and non-Indian contestants in reality shows, media producers are seeking to invite the participation of viewers across linguistic, cultural, and regional divides. The growing desires of television producers to attract the largest possible share of viewers within and beyond the nation are now fueled by the growing potential of integrating the mass appeal of television shows with the interactive technologies of digital and mobile media to generate new forms of revenue. According to industry analysts, reality television shows in India already derive 30 to 40 percent of their revenues from audience participation in activities such as cell-phone voting, SMS texting, and mobile or online interaction.³ In the Indian television industry, regionalism is seen as a major avenue for expanding the revenue streams using new programming strategies.

In order to fully recognize the political, economic, and cultural significance of this shift toward regionalization in the narrative conventions, technological transformations, and distribution logics of the Indian media industries, a brief clarification on the definition of regional media in India would be in order. The term *regional media* in many contexts around the world refers to a transnational or supranational constellation of media industries and cultures related to a shared set of geolinguistic traits. For instance, Will Higbee and Song Hwee Lim, in their survey of transnational cinemas, define regional cinemas of the world in terms of geolinguistic categories such as “supranational Chinese” cinema, “regional Nordic” cinema, or “pan-European” cinema.⁴

In India, however, the term *regional media* is traditionally used to describe an intranational or subnational category of media produced in the many regional languages spoken within India. Media produced in Hindi—particularly in cinema and television—are considered “national” since Hindi is the “national” language. But in other contexts, Hindi media—particularly in print journalism—are considered “regional” in contrast to English media, which circulate predominantly in urban areas and are extremely influential among the political, economic, and cultural elites in the metropolitan centers. Since most states within India are linguistic states, regional media in India are usually defined in relation to the geographic boundaries of the states and the dominant languages within those states.

In his survey of the cinemas of India, Yves Thorval uses the traditional definition of regional cinema to categorize films made in the dominant regional language of each Indian state. For instance, the majority of films in Andhra Pradesh are made in Telugu, which is the dominant regional language in the state. Similarly, Kannada-language films in Karnataka, Malayalam-language films in Kerala, and Tamil-language films in Tamil Nadu constitute the regional cinemas in each of these states. Other regional cinemas in India are similarly indicated in relation to the dominant language of a state. Thus, Bengali cinema is defined as the regional cinema of the state of West Bengal, Gujarati cinema is the regional cinema of the state of Gujarat, Oriya cinema is the regional cinema of the state of Odisha (formerly Orissa), and so on.⁵

In Indian television, regional-language channels were largely absent in the early years of broadcasting in India, following the state-sponsored network Doordarshan's establishment in Delhi in 1959. Although broadcasting services gradually spread across the country in the 1970s and 1980s, regional stations, or *kendras*, were marginal to the imagination of television as a national medium. Regional-language programming was restricted to specific time slots and was generally limited to programming formats like news and film-based shows from regional-language cinemas in India. Occasionally, some of the more established regional television *kendras* such as in Mumbai (then Bombay) and Chennai (then Madras) would produce sitcoms, educational dramas, and religious mythologies in regional languages. The regional broadcasters followed—often grudgingly—Doordarshan's centralized model of “national programming,” where the regional was seen as a subnational category. Moreover, successive governments at the national level sought to minimize the growth of regional television as a way to curtail the growth of regional political parties, particularly in states like Tamil Nadu and Andhra Pradesh.⁶

All that began to change in the early 1990s, with the rise of commercial satellite and cable television channels. The growth of the private television channels was fueled by the rise of the first Indian-language television network, Zee TV. Zee TV's Hindi-language programming was wildly successful, and many other regional television channels quickly replicated the Zee model of providing commercial entertainment programs in Indian languages. Therefore, since the early to mid-1990s, many regional media companies in India—such as the Ramoji Group in Hyderabad, the Sun Group in Chennai, and Zee Entertainment Enterprises in Mumbai, to name a few—have been moving beyond the traditional equation of regional media with regional languages and state boundaries by linking ethnic, linguistic, historical, and geographical elements of identity to material and symbolic mobility of people, products, places, and cultures within India and in the Indian diaspora.⁷

For instance, as Sevanti Ninan insightfully observed in the early 2000s, “When a Ramoji Rao or a Subhash Chandra assesses the market for a Bengali channel, he takes into account both the market in West Bengal as well as in Bangladesh and other parts of the world where Bengalis are.”⁸ Or more recently, as Aswin Punathambekar writes in his book *From Bombay to Bollywood: The Making of a Global Media Industry*, even traditional production companies in India like Rajshri Productions are nowadays aiming to make films that appeal to audiences from “Bihar to Manhattan.”⁹ In other words, the holy grail—or, to Indianize the metaphor, the *akshay patra*—of the Indian media industries is content that is sufficiently regionalized to cater to audiences in a heartland state like Bihar and at the same time globally distributed to target the small but lucrative diasporic audiences abroad. Media industry advocates in India now see catering to audiences from Bihar to Manhattan and everyone in between as something that is close at hand because of strategies like regionalization, digitization, and conglomeration.

In March 2013, the Federation of Indian Chambers of Commerce and Industry (FICCI) held its annual convention of media experts and professionals, FICCI-FRAMES, where it boldly proclaimed that the Indian media industry is on a “tryst with destiny” toward “engaging a billion customers.”¹⁰ Although India's population crossed the one billion mark several years

ago, the FICCI-FRAMES convention resurrected the rhetoric of the “one billion” again in 2013 to announce that the media world’s cherished goal of reaching every single one of the one billion-plus Indians as consumers may now be within reach due to the growing power of regional media coupled with the rapid transformations of digitization and media conglomeration.

Established in 1929, FICCI claims to be the largest and oldest nongovernmental, nonprofit business organization in India. FRAMES, the Entertainment Division of FICCI, was established in 2001 as an interface between private media companies and the government of India to work on the process of granting Indian cinema the status of an “industry.” Since then, FICCI-FRAMES has been holding a “global convention of the business of entertainment” annually. Coinciding with these annual conventions, FICCI-FRAMES releases its *Annual Report on the Media and Entertainment Industry*. Since 2001, FICCI has commissioned several major consultancy firms to produce its annual reports. KPMG prepared the report first in 2003, and again from 2009 to 2013. PricewaterhouseCoopers produced the annual report for FICCI from 2005-2008, while Ernst & Young was commissioned in 2002 and 2004, and Arthur Andersen in 2001. The FICCI-FRAMES annual reports are among the most comprehensive and exhaustive analyses of the media and entertainment industries in India, and their release is extensively covered and reported upon by various newspapers, magazines, and websites.¹¹

Like the FICCI-FRAMES conference, the FICCI-KPMG report for 2013, titled *The Power of a Billion: Realizing the Indian Dream*, also presents regionalization of the media markets along with digitization and media consolidation as three key factors that will enable the media industries in India to reach the magic figure of a billion consumers.¹² Similarly, a report on “India’s entertainment economy” released by Ernst & Young in 2011 outlines “new growth opportunities” for global media enterprises in terms of “India’s favorable regulatory environment” for media consolidation, digitization as a “new inflection point for consumption,” and the diversity of regional markets.¹³ Describing regional media as “huge ‘markets within a market,’” the Ernst & Young report cautions global media companies of the need to recognize that regional media industries in India work differently due to “diverse content preferences and the low price point and high volumes of content consumption.”¹⁴

In their attempts to reach the magical figure of one billion consumers in the diverse and dispersed Indian markets, the media industries have been actively pursuing strategies of conglomeration, digitization, and regionalization for more than a decade now. During this period, media critics have pointed out that the largest corporate houses in India, like Reliance Industries Limited and the Aditya Birla Group, have worked to consolidate their media interests to exploit the growing potential of digital media and regional media.¹⁵ For example, a quick look through the FICCI reports and the FICCI-FRAMES conferences since 2001 and other industry reports from the 1990s and 2000s demonstrates how the three strategies of conglomeration, digitization, and regionalization have been aggressively pursued by key players in Indian media industries.

But what is new in the story is that in the past couple of years, the key players in the Indian media industries have started to rethink their global, national, and local strategies for digitization and consolidation almost entirely through a regional framework. In other words, there is a growing consensus that regionalization is the key to the growth of the media industries in India. In industry reports generated by consulting firms like Ernst & Young and KPMG, and in industry conclaves like FICCI-FRAMES, the main reason given for the need to shift toward regionalization in India is that the four metropolitan centers of Delhi, Mumbai, Chennai, Kolkata, as well as other major cities like Bengaluru and Hyderabad, are beginning to show signs of slowdown in consumption patterns or are approaching market saturation. As a result, the regional market space has emerged as the main target for advertisers who see much higher growth rates of consumption in Tier 2 and Tier 3 cities and towns. The higher consumption pattern in regional markets coupled with lower advertising rates in regional outlets makes the regional spaces more lucrative avenues for advertisers and producers looking to attain their cherished goal of reaching one billion consumers in India. This is particularly evident in print and television, where there have been a spate of regional-market acquisitions and expansion by major players in the Indian media industries. The 2013 FICCI-KPMG report cites examples of consolidation in print, such as Bennet Coleman's launch of the Bengali paper *Ei Shomoy* and the Jagran Group's acquisition of *Nai Duniya*. In the case of the Indian film industry, major film studios Reliance Big Pictures, Disney UTV Motion Pictures, and Eros International are aggressively entering the regional media markets, and Hollywood films are increasingly being dubbed in regional languages such as Tamil and Telugu.

The growth story of regional media in India, as discussed in many industry reports in the 2010s, is indeed impressive. However, a more interesting account that emerges from these industry reports is of the key players in the media industries now imagining the media markets in India almost entirely through a regional framework. Understanding the emergence of regionalization as *the* framework for the business practices of global, national, and local media companies in India is, I argue, a pressing challenge and a critical opportunity for media industry studies.

¹ Shanti Kumar is Associate Professor in the Department of Radio-Television-Film at the University of Texas, Austin. He is the author of *Gandhi Meets Primetime: Globalization and Nationalism in Indian Television* (University of Illinois Press, 2006), and the coeditor of *Global Communication: New Agendas in Communication* (2014), *Television at Large in South Asia* (Routledge, 2012) and *Planet TV: A Global Television Reader* (NYU Press, 2003). He has also published book chapters in edited anthologies and articles in journals such as *BioScope*, *Jump Cut*, *Popular Communication*, *South Asian Popular Culture*, *Quarterly Review of Film and Video*, and *Television and New Media*.

² ["Chennai Express Collections Smash Box Office Records,"](#) *Business Today*, August 13, 2013.

³ Heather Timmons, ["In India Reality Television Catches On with Some Qualms,"](#) *New York Times*, January 9, 2011.

-
- ⁴ Will Higbee and Song H. Lim, "Concepts of Transnational Cinema: Towards a Transnationalism in Film Studies," *Transnational Cinema* 1, no. 1 (2010): 7–21.
 - ⁵ Yves Thoraval, *Cinemas of India (1896–2000)* (Delhi: South Asia Books, 2001).
 - ⁶ Arvind Rajagopal, *Politics after Television: Hindu Nationalism and the Reshaping of the Public in India* (Cambridge: Cambridge University Press, 2001).
 - ⁷ Shanti Kumar, *Gandhi Meets Primetime: Globalization and Nationalism in Indian Television* (Urbana: University of Illinois Press, 2006).
 - ⁸ Sevanti Ninan, "Channel after Channel," *The Hindu*, June 18, 2000.
 - ⁹ Aswin Punathambekar, *From Bombay to Bollywood: The Making of a Global Film Industry* (New York: New York University Press, 2013).
 - ¹⁰ Bharati Dubey, ["14th Edition of FICCI-FRAMES opens in Mumbai,"](#) *Times of India*, March 11, 2013.
 - ¹¹ The FICCI-FRAMES website is online at <http://www.ficci-frames.com/>.
 - ¹² FICCI-KPMG, ["The Power of a Billion: Realizing the Indian Dream,"](#) FICCI-KPMG Media and Entertainment Industry Report 2013.
 - ¹³ ["Spotlight on India's Entertainment Economy: Seizing New Growth Opportunities,"](#) Ernst & Young, October 2011, 3.
 - ¹⁴ Ibid.
 - ¹⁵ Paranjy Guha Thakurta, ["Media Ownership Trends in India,"](#) *The Hoot*, July 3, 2012.

Bibliography

- ["Chennai Express Collections Smash Box Office Records."](#) *Business Today*, August 13, 2013.
- Dubey, Bharati ["14th Edition of FICCI-FRAMES opens in Mumbai,"](#) *Times of India*, March 11, 2013.
- Ernst & Young. ["Spotlight on India's Entertainment Economy: Seizing New Growth Opportunities."](#) October 2011.
- FICCI-KPMG. ["The Power of a Billion: Realizing the Indian Dream."](#) FICCI-KPMG Media and Entertainment Industry Report 2013.
- Guha Thakurta, Paranjy. ["Media Ownership Trends in India."](#) *The Hoot*. July 3, 2012.
- Higbee, Will, and Song H. Lim. "Concepts of Transnational Cinema: Towards a Transnationalism in Film Studies." *Transnational Cinema* 1, no. 1 (2010): 7–21.
- Kumar, Shanti. *Gandhi Meets Primetime: Globalization and Nationalism in Indian Television*. Urbana: University of Illinois Press, 2006.
- Ninan, Sevanti. "Channel after Channel." *The Hindu*, June 18, 2000.
- Punathambekar, Aswin. *From Bombay to Bollywood: The Making of a Global Film Industry*. New York: New York University Press, 2013.
- Rajagopal, Arvind. *Politics after Television: Hindu Nationalism and the Reshaping of the Public in India*. Cambridge: Cambridge University Press, 2001.
- Thoraval, Yves. *Cinemas of India (1896–2000)*. Delhi: South Asia Books, 2001.

Timmons, Heather. ["In India Reality Television Catches on With Some Qualms."](#) *New York Times*, January 9, 2011.

Copyright © 2014 (Shanti Kumar). *Media Industries* is an open-access, peer-reviewed, online academic journal. As such, we aim to participate in the open exchange of information. This work is licensed under a [Creative Commons Attribution Noncommercial No Derivatives \(by-nc-nd\) License](#). Under this license, this work is available for sharing and noncommercial distribution provided the appropriate attribution is given.