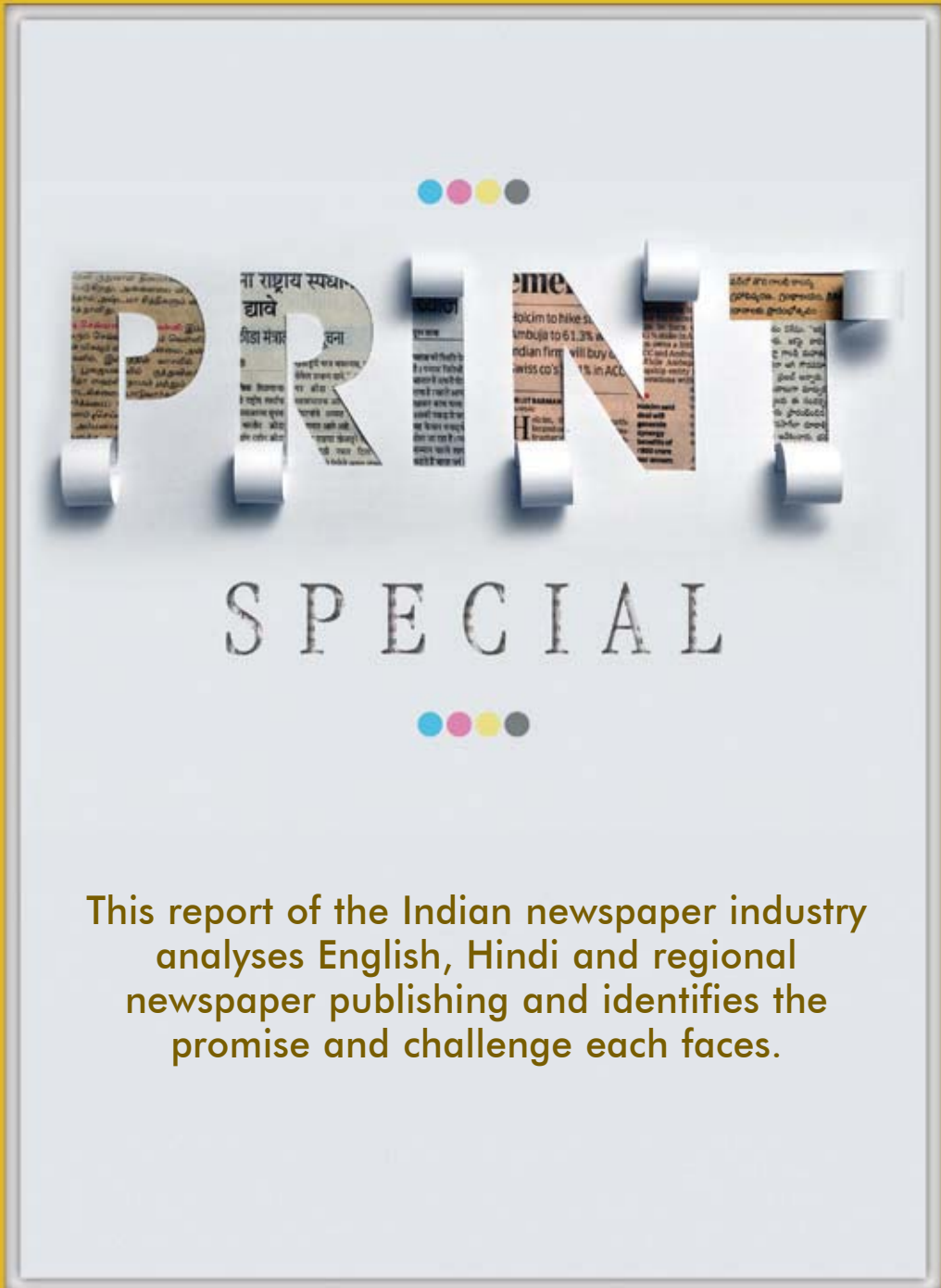


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**THE GREAT
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METAL



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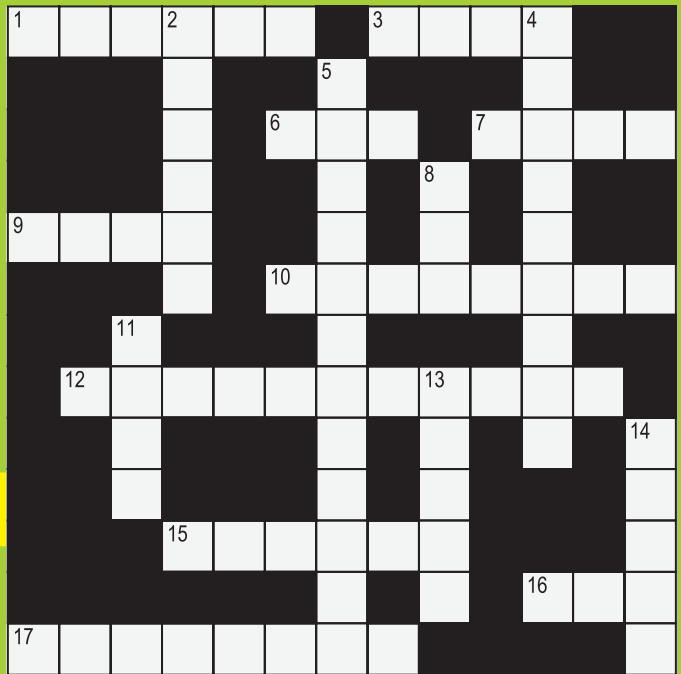
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Use the clues to complete the crossword.

ACROSS [10]

- 1 Mythologically speaking, the capital of Lord Krishna's terrestrial kingdom [6]
- 3 This premier B school has done a case study on Divya Bhaskar's launch strategy [4]
- 6 Number of editions Divya Bhaskar has in Gujarat [3]
- 7 Asia's biggest dairy situated in Gujarat [4]
- 9 This famous car by the Tata group was launched in Sanand [4]
- 10 The top 4 cities of Gujarat – Ahmedabad, Surat, Rajkot and _____ contribute to 55% of Divya Bhaskar's total readership in Gujarat [8]

- 12 The city supplement of Divya Bhaskar that is published everyday [4,7]
- 15 Divya Bhaskar's successful drive put a ban on this cancerous substance in Gujarat [6]
- 16 Divya Bhaskar Ahmedabad is the only Gujarati newspaper with more than _____ lac readership in a city [3]
- 17 This festival is celebrated for 9 days in Gujarat [8]

DOWN [7]

- 2 Mohd. Ali Jinnah was from this city in Gujarat [6]
- 4 The city where Divya Bhaskar has been No.1 since the day it launched [9]
- 5 The Dainik Bhaskar Group broke the language barrier with the launch of _____ in Gujarat, in 2003 [5,7]
- 8 Number of states Divya Bhaskar is published in [3]
- 11 Number of printing centres for Divya Bhaskar [4]
- 13 This is one of the four reporting cities in IRS and is known for diamonds [5]
- 14 One of the largest ship breaking yards of the world is in Gujarat at ____ [5]

METAL

For queries, e-mail us at crossword@dainikbhaskargroup.com

Last date for entries: **Aug 9, 2013**

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PRINT SPECIAL

August, 2013

PRINT SPECIAL

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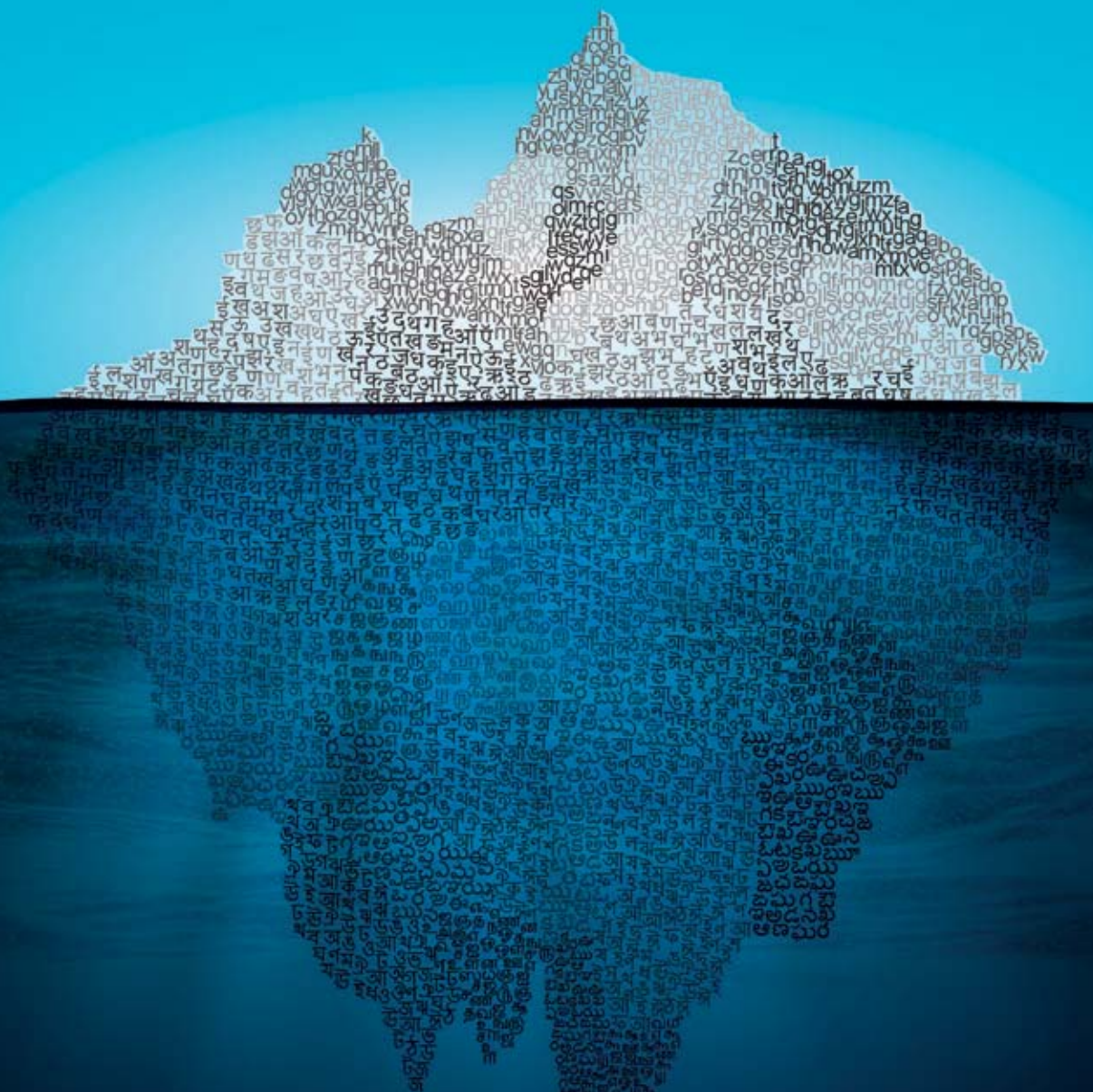
The direction the industry will take depends on how regional media builds on its success.

By
Sumantha Rathore

Cover Illustration
Tiffin Box

Design
Vinay Dominic





ENGLISH HAS TRADITIONALLY BEEN THE MOST PROFITABLE SEGMENT. NOW, LIKE AN ICEBERG EMERGING FROM THE DEEP, HINDI BUSINESS HAVE BUILT SCALE. THE FULL POTENTIAL OF REGIONAL LANGUAGE DAILIES, THOUGH, HAS STILL TO BE SEEN.

EMERGING STILL

While print dailies are struggling in much of the world, they are booming here. There are some peculiarly Indian reasons for this.

It is like the case of the distant cousin who has fallen on bad times. Ought that to become a reflection on the state of one's own finances? Not fair, is it?

That's pretty much what has happened to the Indian newspaper business. For the past decade and more, the international media has been flooded with gloomy prognosis about where print is heading. And quite rightly so, because advertising revenue in print in the US has declined precipitously since 2000. Since Indians are clued into Western trends because of the English connection, it has naturally been assumed by many that the same fate applies here. The most influenced by this have been the young adults from the metros, many of whom do indeed get their news online.

They take their cue from senior digital experts who, with the zeal of the new convert, can be insular and dismiss other media out of hand. To their mind, the fact that online is growing confirms that all other media is dying, especially print. In India, certainly, this is far from being the truth. Unlike the West, in India all media is growing, including print which is, in fact, doing extremely well barring the odd blip.

Over the last five years, advertising in print has been growing at a compounded annual growth rate of about 9 per cent. According to KPMG, an international consultancy, this is the rate that will be maintained for the next five years as well.

One of the reasons why the online



bias exists is simply because of language. The vanguard of the online movement has been led by people comfortable with English and because they see everybody they know online, they assume that this is true for the rest of India. It isn't, not yet.

The vast bulk of the print readers in India, about 90 per cent, in fact, consume their content in Hindi and regional languages. And relatively few of them have gone online for a variety of reasons. Some tech issues plus the relative lack of variety in content compared to English, has inhibited the growth of online.

Votaries of online are apt to wag a finger and underline how the internet-enabled mobile phones will change the game for Hindi and regional newspapers. However, on evidence so far, Indian

ABOUT 90 PER CENT OF PRINT READERS IN INDIA CONSUME CONTENT IN HINDI AND REGIONAL LANGUAGES.

THE POPULARITY OF LOCAL LANGUAGES IS THE REASON WHY PRINT IS LESS AFFECTED BY ONLINE IN INDIA, THAN ELSEWHERE

users depend on their phone to provide them entertainment – video, music – rather than news.

India is not the only country in the world where newspaper readership is growing. Two other such major markets are China and Brazil and both, incidentally, are several years ahead of India on the economic development curve. China’s internet penetration is about four times higher than India’s, which is what makes its affection for print all the more remarkable. This emphasises that India has a thriving newspaper business not just because it is poor.

The popularity of local languages is the first reason why print is less affected by online in India, than elsewhere. There

are two other factors that protect Indian print against the much-anticipated digital onslaught. Neither gets the importance they deserve when futurologists predict the early demise of dailies.

First, newspapers are priced low in India relative to most other countries. This has been true for English dailies for years but less so for regional and Hindi titles, which were priced higher for fewer pages. As the competition has become fierce, non-English dailies have been keeping their prices down, too.

While it is easy to think of online as ‘free’, that’s a misnomer. Content is free but access is not. Certainly when it comes to accessing news and features, a newspaper for ₹100-150 per month is still the most cost-effective way to consume news through the written word. Also, a newspaper is shared in a way a screen can’t be.

The other, equally unappreciated aspect of newspaper logistics is that a newspaper is dropped at a reader’s home at the crack of dawn. This is a privilege not available in many places in the West, because the labour cost of delivering the title is prohibitive. In India, the abundance of hands allows this, although the hawker gets a share of a cover price which is low.

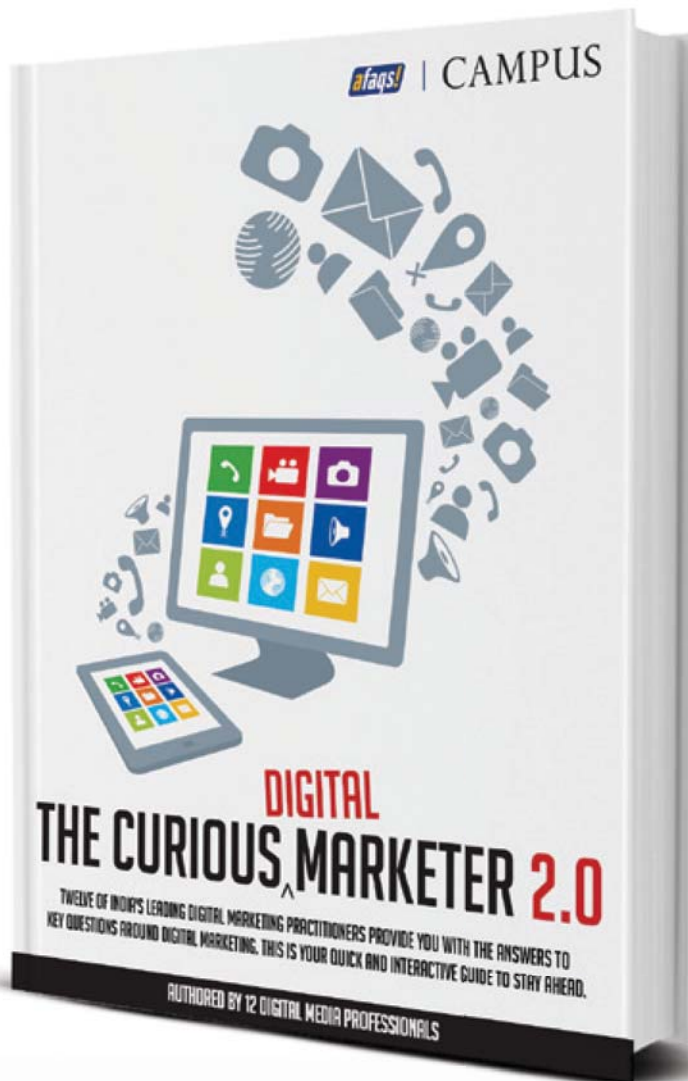
This survey looks at English, Hindi and regional newspaper publishing and identifies the promise and challenge that each faces. ■

SUSHIL KUMAR

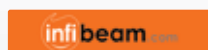


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ENGLISH NEWSPAPERS

MIND THE LANGUAGE. THERE ARE OTHERS

For a long time, English was the only worthwhile game among dailies. Now, as the markets move to smaller towns, publishers have to adapt. And then there is digital to worry about.

What a difference a decade can make. Ten years ago, English was the only place to be in the Indian newspaper business. There were large newspapers in other languages too but they lacked in pages, confidence and profit. They were, in every sense, the English daily's country cousins. The big game was in the metros where the markets and the money lay. No wonder, publishers of other dailies railed against what they believed was the natural bias of western-oriented media planners towards English.

Nothing exemplified the promise of riches better than The Times of India, Mumbai. Within the print business it wasn't considered an edition: it was viewed as a press that printed money for its owner, Bennett Coleman & Co Ltd (BCCL). It was rated as unassailable, which is why, for years, nobody dared challenge its monopoly in Mumbai.

Finally, the temptation got too great. Hindustan Times, from Delhi, set foot in the city. But more dramatically, the Zee group and Dainik Bhaskar formed a joint venture to launch DNA, which tried to take on The Times of India in its lair in 2005. (Bhaskar has since sold its stake in the daily to its partner).

Eight years later, The Times still makes more money from its Mumbai edition than any other paper in India, but everything else has changed. The fascination with both English and metros is past its peak and there are many who wonder if the best of the English press is already behind it.

Ravi Dhariwal, CEO, BCCL, doesn't



English print media still enjoys the same clout. The rate of growth has come down a bit but it has to do with the slow economic growth and not because advertisers prefer other languages or mediums.

RAVI DHARIWAL
CEO, BCCL



ENGLISH DAILIES TEND TO BE HIT HARDER IN A SLOWDOWN, IN PART BECAUSE THEY THRIVE IN THE METROS.

BALANCED COCKTAIL

[Advertising revenue by language over the years, in Rs billion]

	2009	2010	2011	2012	2013*	2014*	2015*	2016*	2017*
English	49	53	57	59	62	66	70	74	79
Hindi	31	37	41	45	49	56	64	73	83
Regional	30	36	42	46	51	57	66	75	85
Total	110	126	140	150	162	179	200	222	247

Source: KPMG in India analysis, Industry discussions conducted by KPMG in India *Provisional

think so. He contends, “The English print media still enjoys the same clout. However, the rate of growth has come down a bit but that has to do with the slow economic growth and not because advertisers prefer other languages or other mediums.”

English dailies tend to be hit harder in a slowdown, in part, because they thrive in the metros which feel the effects of an economic reverse the most. Last year, as the economy slowed down, dailies in other languages continued to grow ad revenue by about 10 per cent – for English, though, the figure was down to 3.5 per cent.

The English press is still remarkably well placed: though it has only about a tenth of the total average issue readership, it takes in about 40 per cent of the advertising revenue that print attracts. It has indeed been a golden age for English newspapers. Will digital come along to spoil the party?

STAYING ALERT

There is no doubt that English newspapers are threatened by the rise of digital more than dailies in any other language. It is the privileged English speakers who have been the first to go online. Equally, it is English that unlocks the vast treasure of content on the internet – though, admittedly, video knows no language. The 125 million Indians online are also the ones most likely to move to mobile devices and gather information there.

There is one major warning sign about English’s apparent inability to grow further. Over the past decade, the combined circulation of English dailies has gone up by over 50 per cent, but readership has grown only in single figures. In other words, people are sharing their dailies less than before – and new converts are harder to find. This suggests that Indians who do pick up the reading habit, stick to the local language in which they are most comfortable, instead of moving on to English.

It is convenient to say that publishers

should ready themselves for the digital era, but, as anyone familiar with the experience of news online knows, this is easier said than done. Advertising online is extremely purchase-intent oriented and people seeking news are generally not in the frame of mind to shop, as they might be on, say, a portal specialising in automobiles. Besides, with Google



More than anything else, the segments themselves have evolved in the last few years. Categories like classified ads have taken a different route altogether.

RS SURIYANARAYANAN
Business Director, LMG

dominating the advertising scene in India in a way it does in few markets elsewhere, ad rates are abysmal.

Debu Mishra, an independent media consultant, says that the threat is in the metros and mini-metros. Digital still has a long way to go, he thinks, but the growing popularity of mobile news apps is what perturbs him. “English dailies have to constantly upgrade their offerings, in terms of content, quality, packaging and sales promotions and make the product more interactive,” he thinks.

There is some consolation, though, that for Indians going online news is not such a priority. According to a survey last year, only about one in three Indians online has ever visited a newspaper site – and only one in 10 visits such a site daily. Clearly, they have other things to do online. Such a low interest in news online would be alarming in the long run but, in the short run, it assures publishers that Indians still depend on print or television to catch the latest.

If the impact of digital on reading habits is one worry, the other is its impact on advertising, especially on classifieds,

OVER THE PAST DECADE, THE COMBINED CIRCULATION OF ENGLISH DAILIES HAS GONE UP BY OVER 50 PER CENT, BUT READERSHIP HAS GROWN ONLY IN SINGLE FIGURES.

IN KEEPING WITH THE MOVEMENT OF CONSUMER MARKETS, ENGLISH DAILIES HAVE BEEN GRADUALLY PUSHING INTO SMALLER TOWNS.

the most lucrative category of them all. Publishers love those little ads, because customers walk in so the cost of sales is low. Second, it ties the local community to the paper. That's changed dramatically in the past decade, especially in the English press.

Two fifths of classifieds have moved online, but the pace of migration is slowing down. If it does, it will provide much needed relief. "More than anything else, the segments themselves have evolved in the last few years. These

(magicbricks.com) and matrimonials (simplymarry.com). Its record has been mixed.

Hindustan Times, meanwhile, has put its considerable backing behind its own job portal, shine.com, recently introducing a social networking aspect to distinguish it from the competition.

The advertising category least affected by the digital boom is government advertising, which has largely limited itself to print. Television and radio are rarely used by this lot of advertisers and turning to online is still a long way off for them.

SUSHIL KUMAR



Digital still has a long way to go. English dailies have to constantly upgrade their offerings—in terms of content, quality, packaging, sales promotions—and make the product more interactive.

DEBU MISHRA
Media Consultant



FOLLOW THE YOUTH

The most worrying segment for publishers of English dailies is young adults, who are most likely to go off print. Several publishers have launched tabloid-format dailies aimed at this demographic, but the young have proved elusive.

THE SILVER LINING

In keeping with the movement of consumer markets, English dailies have been gradually pushing into smaller towns.

The Times of India has entered Tamil Nadu and Kerala, whereas Hindustan Times is fortifying its presence outside Delhi and has launched an edition aimed at Bhopal and Indore. Meanwhile, The Hindu is strengthening its foothold in the North. ■

categories have taken a different route altogether," says RS Suriyanarayanan, business director, LMG.

Many English language print players gauged this imminent shift and started building their own online properties for classifieds. The front runner has been Times Internet, which put its might behind jobs (timesjobs.com), real estate



AMIT RAY



“WORK TOGETHER”

To be in the game, you have to be the game changer. No newspaper can sustain the bad weather by just being there. It has to fight, get hurt, again fight back, reinvent and re-model the business.

Newspapers are not FMCGs but are the voice of the people. While industrywallas can wish the issue away by saying it's a habit, in reality it's much more than that.

When an industry faces strong headwinds, stakeholders unite and fight the crises. Unfortunately, there is no unified thinking amongst newspapers. Though there are platforms for unification, they are used for arbitration and lobbying, not business ideation.

Before independence, newspapers were meant to talk about people and raise issues. But (in today's parlance), while they did deliver content, the words had a strong consumer-to-consumer bonding. You could call it patriotism. I have known a few print owners who strongly believed in the power of raising issues, and trust me, their business is quite healthy. If you short-change on the basic premise, bad times will catch up.

TURBULENT TIMES

Today, no business in India can afford to relax. In a funny way, it's survival by suicide. Look at Colgate: though it dominates the huge “morning ritual” category, it is always on its toes, always restless, never satisfied. Many print owners believe they were born with a golden spoon in their mouth, whereas a lot of

the new age media owners were born against a strong headwind. Some of the print publishers do dare the headwind to win, but, at other times, it's just a case of reinventing the old.

One way of tackling a headwind is to create one's own long-term tailwind. An initiative of this kind should be at an industry level, rather than an organisational level. Let's take the most widely spoken language, Hindi. Between 2003-2012, the population has grown and so has literacy, but the gap between “can read Hindi” and “do read Hindi” has remained the same. There is a need to drive this ratio.

In an analogical sense, Pratham, a UNICEF-promoted organisation with its simple philosophy, ‘learn to read & read to learn’, is changing the school dropout rates in Maharashtra. I am sure that if the Hindi publishing industry had articulated this as a collective problem coming in the way of growth, someone could have attempted a solution.

Digital is one domain which can get newspapers the push. The sooner they embrace it wholeheartedly, the better it will be for everyone. Divya Bhaskar Gujarati is a classic example of this. It has left its competitors behind in the online race. And people who understand the Gujarat landscape will know what it takes to be there.

SINGLE CURRENCY

I have given 14 years of voluntary service to better the IRS. I was the Joint Chairman of MRUC (Market Research Users Council), the body

which created this research.

While the industry does not need an alternative to IRS, what it does need is a more thought-through currency. While it is impossible to replicate TV measurement, which is time-weighted, other options do exist. I would have liked a multi-dimensional value currency and stop the ease of access, which leads to the creation of a scorecard without a context. Let me explain.

Print is a single matrix medium (Average Issue Readership or AIR) and, to top it, it is easily available or calculable as a cross tab. If cross tab is allowed only for Total Readership (the full-blown strength of the medium) and people are made to work to calculate AIR, the perception that print is consistently going down, will reduce significantly. Print owners can also engage agencies and clients in a more meaningful way.

Clients look at only AIR and decide about a publication's inclusion and the price to pay. They never reflect on what a paper does to a reader, first thing in the morning, or the level of engagement that an edit-wrapped environment creates, and not just for a commercial message. If access to AIR is made less easy, a lot of loose comments about print will cease. ■

(Amit Ray is Founder Partner at Media First, a consultancy.)

HINDI NEWSPAPERS

SUSHIL KUMAR



FLEXING THEIR MUSCLES

Hindi dailies have been in a race to expand their network of editions and draw in the national advertiser.

Way back in 1995, Dainik Bhaskar took the bold step of looking beyond its home turf of Madhya Pradesh. The newspaper was the first Hindi daily to launch an edition outside its home state, when it entered Jaipur, Rajasthan, and shook the established order.

Today, Hindi dailies moving out of their comfort zone and taking the



Over the past few years, we have seen significant growth in the Indian regional print media industry, which has long surpassed the growth of English news dailies.

GIRISH AGARWAL
Promoter Director, Dainik Bhaskar



SPLIT RUN

[Average issue readership vs revenue, in per cent]

LANGUAGE	2012	
	AIR SPLIT	REVENUE SPLIT
English	10	39
Hindi	36	30
Regional	54	31

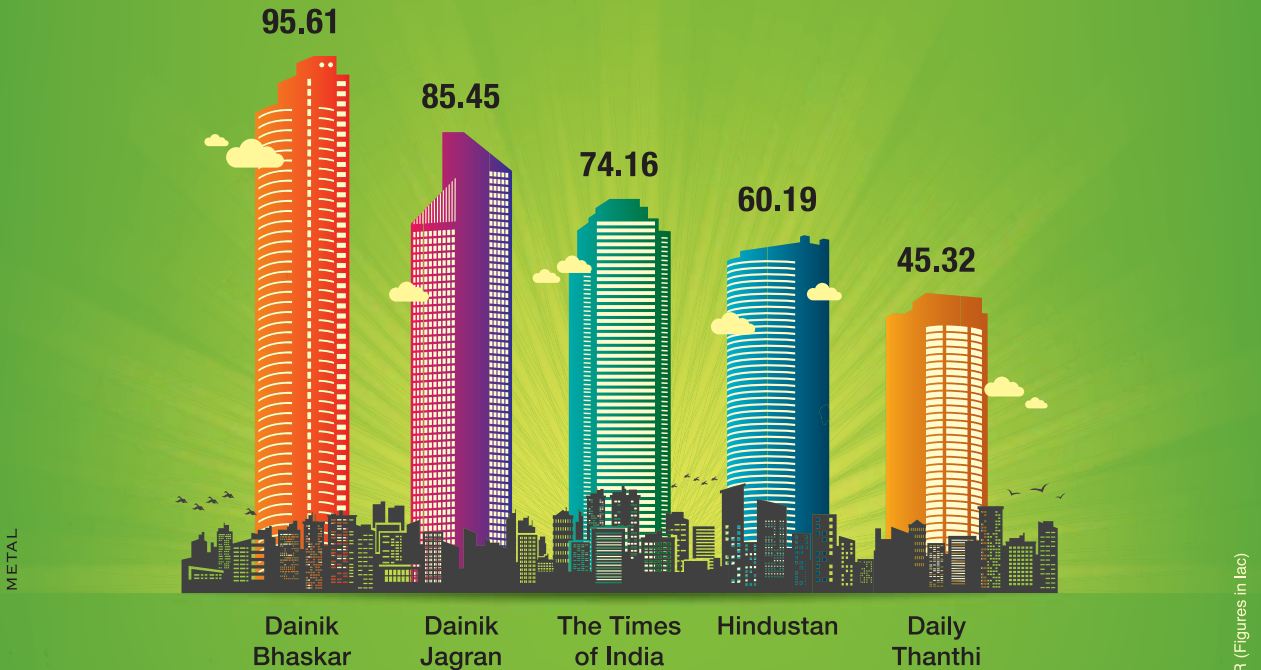
Source: IRS Q3, KPMG in India analysis

competition head-on elsewhere is an old story. But all that aggression has been fantastic for the Hindi press. It has forced innovation that was unimaginable two decades ago and has opened up a business that was family-owned and inward looking.

The expansion with new editions – Dainik Jagran, for example, has 37 main editions and Dainik Bhaskar has 36 (and both have many more sub-editions) – is a slow, painful process, even more so now, since everyone has the same thing in mind. This is what makes acquisitions tempting. Already we have seen Jagran Prakashan acquiring Nai Dunia in Madhya Pradesh for an undisclosed amount last year. More recently, Amar Ujala was in the news when Essel Group

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Source: IRS Q4 12, AIR (Figures in lac)



“Consolidation (in the form of strategic alliances, JVs, takeovers, minority stakes) is the way ahead for the industry to grow and face competition from digital and electronic media.”

KK GOENKA
General Manager, Prabhat Khabar

(Zee) and Dainik Jagran both expressed interest in buying a stake. Dainik Bhaskar Group had acquired Suarashtra Samachar Newspaper in Gujarat in the year 2006. In the South, in a cross-media deal, the Sun TV Network acquired the Tamil daily Dinakaran, in 2005.

It seems inevitable that a small number of brands will rule the Hindi belt. KK Goenka, general manager of Prabhat Khabar says, “For any industry there is room for two to three players for profitable growth, which is sustainable over a long period of time. In today’s capital intensive and price sensitive print market, consolidation (may be in the form of strategic alliances, joint ventures, takeovers, minority stakes) is the way ahead for the industry to grow and face the competition from digital and electronic media.” He thinks regional players like Prabhat Khabar could share resources by tying up with other independent regional players elsewhere in the country. There hasn’t been much progress on this, though.

WITH THE RISE IN SPENDING POWER OF THE POPULATION IN SMALLER CITIES, THE GAME IS SHIFTING. THIS HAS INCREASED THE DEMAND FOR REGIONAL CONTENT.



“There is no doubt that big is beautiful nowadays. That’s why Patrika expanded its reach in the Hindi heartland and to non-Hindi states. But we didn’t want to do it by buying a media house.”

ARVIND KALIA
Marketing Head, Patrika Group

Mergers and acquisitions have been fewer than one would have imagined. For many, running a newspaper is a family business and one which gives the owners their identity and local clout. What would they do without it? In other cases, deals haven’t happened because the seller has unreasonable expectations on valuation. Dodgy accounts are another issue.

There are dissenting voices on the value of mergers. Says Arvind Kalia, marketing head of Patrika Group, “No doubt that big is beautiful nowadays. That’s why Patrika expanded its reach in the Hindi heartland, as well as to non-Hindi states. We did look at buying a media house, but later abandoned the idea because the value of a newspaper house can’t be enhanced by taking over a less successful business.”

THE GROWTH STORY

How large the Hindi game is becomes quickly evident on looking at the list of the most widely read dailies: the top three, Dainik Jagran, Dainik Bhaskar and Hindustan, come from here.

As Mandir Tendolkar, vice president, Lokmat Media, says, “It works just like Bollywood movies. Although films are being produced in other languages, Hindi movies are the first choice of the audience. Emerging rural markets are playing an important role in the growth of Hindi print, where a newspaper is not only a source of information, but leads to a lot of discussion as well.”

Lokmat Media’s Hindi newspaper, Lokmat Samachar, has been busy over the last two years spreading its reach in the hardcore Marathi regions of Kolhapur, Jalgaon, Pune and Aurangabad. The newspaper, on July 12, entered the Hindi speaking belt of Madhya Pradesh with a separate edition in Chhindwara.

“All the language dailies have a specific region to boast of,” points out Debu Mishra, a consultant, adding, “but Hindi has the entire north, central and a majority of the east to penetrate.” It

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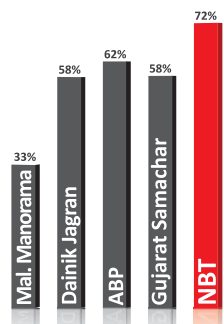
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Source: AIR-IRS 2012 Q4, All India

is harder for a regional player to defend territory, because the Hindi game has got very large – and local.

In the past, growth in media consumption was driven by the metros where English was predominantly the leader, but with the increase in spending power of the population in smaller cities, the game is shifting. This has increased the demand for regional content.

As Hindi titles have increased their penetration of small town India, their blanket presence has made them attractive to national advertisers who need reach. And the more centres they cover, the more irresistible they get.



Emerging rural markets are playing an important role in the growth of Hindi print, where a newspaper is not only a source of information, but leads to a lot of discussion as well.

MANDIR TENDOLKAR
Vice President, Lokmat Media



A HIGHER CIRCULATION OR PAY REVENUE IS A REASSURING FACTOR WHEN THE ECONOMY – AND THEREFORE ADVERTISING – SLOWS DOWN.

AD RACE

Education, which was by far the largest advertising category by volume in 2008, ceded the top spot to automobiles in 2012. Following close behind was a category associated strongly with television, but rarely with print – fast moving consumer goods. The biggest spenders of all, FMCG brands, have been tempted by Hindi dailies because while the reach is vast, a message can also be sharply targeted via the plethora of editions. And, of course, it is affordable.

The next level of growth, according to the industry experts, is expected to be driven by financial services. “The aspirations, coupled with available funds, is driving the consumption in smaller towns, and this is where the opportunity lies,” says a senior media planner.

It is the competition to get national

advertisers that has set Hindi dailies racing to dot the Hindi belt with editions. However, this has had other consequences.

Investors like the fact that, unlike English, Hindi dailies have had a healthy cover price for a relatively smaller number of pages. Traditionally, circulation revenue has accounted for about 40 per cent of their revenue, more than twice the ratio for English dailies. Because advertising was relatively weak, publishers had the mindset that demanded readers pay. Since local competition was weak, readers went along.

That has changed. The dailies may be much larger than before, but the competition is more intense too. To find acceptance in new markets, dropping the cover price is the obvious ploy. Raising them is never easy. Gradually, the share of circulation revenue in the total revenue is declining. Perhaps there is no solution, but a higher circulation or pay revenue is a reassuring factor when the economy – and therefore advertising – slows down. Still, north Indian states, the traditional economic laggards, have been performing well in recent years and that creates a huge upside for Hindi newspapers.

Between now and 2017, according to KPMG, advertising revenue in Hindi will grow at a CAGR of over 13 per cent, while circulation revenue will go up at less than 6 per cent per year. What this means is that the share of circulation revenue will drop from 35 per cent in 2011 to 27 per cent by 2017. (It has painted a similar picture for regional language dailies while, in the case of English, it foresees 6 per cent annual growth in advertising and only 2 per cent in circulation during this period.)

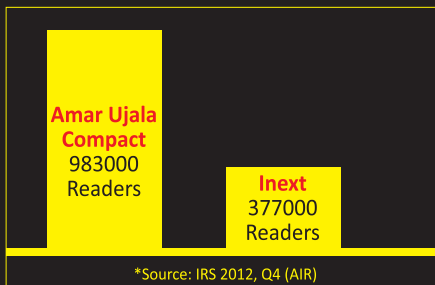
“Over the past few years, we have seen significant growth in the Indian regional print media industry, which has long surpassed the growth of English news dailies,” says Girish Agarwal, promoter director of Dainik Bhaskar Corp Ltd, adding, “With increasing literacy and a

अमरउजाला
कॉम्पैक्ट
कॉम्पैक्ट साइज़, सम्पूर्ण अख़बार



**Yes, we are
at the top.
But it's
not lonely.**

Amar Ujala Compact has acquired the top spot* in Hindi Tabloid Readership in Uttar Pradesh. And we are not alone. Giving us some profitable company is our ever-growing number of readers who have helped us beat the closest competition hands down.



HINDI PUBLISHERS HAVE PUT THEIR MONEY WHERE THEIR MOUTH IS AND TRANSFORMED THE LANDSCAPE, AS ALSO THEIR REPUTATION.

rapid growth in the aspirations of mid-income households in Tier 2 and 3 towns and cities, advertisers are keen to capture their attention and mind space. Although this has resulted in a spurt in demand for most regional language newspapers, Hindi continues to be a preference and is well poised for tremendous growth.”

It is the recognition of the power of Hindi that both BCCL and HT Media have thrown their clout behind Navbharat Times and Hindustan respectively. Navbharat Times re-launched its Lucknow edition earlier this year, after closing it in 1985. It is expected to soon introduce editions from other districts in Uttar Pradesh, as well as restart its old editions from Kolkata, Patna and Jaipur. Hindustan Media Ventures Ltd's (HMVL) Hindi daily, Hindustan, is also planning to start more editions in its core markets of Uttarakhand, Bihar and Uttar Pradesh.

Apart from increasing the penetration of its flagship brand, Dainik Jagran, the company is trying another avenue to woo young readers. Inext, the group's bi-lingual daily, covers 12 cities in four states. And its English city-centric paper, CityPlus, is extending its presence across the country. As of now, the newspaper has 31 editions targeting premium geographic localities.

Hindi publishers have put their money where their mouth is and transformed the landscape, as also their reputation. There was an economic wave to ride and they recognised that.

They have also worked hard at changing the perception about the affluence of their readers, with both marketers and agencies. It shows in the narrowing ad rates between English and Hindi dailies. Now non-Hindi dailies have the same battle to fight in the coming decade. ■

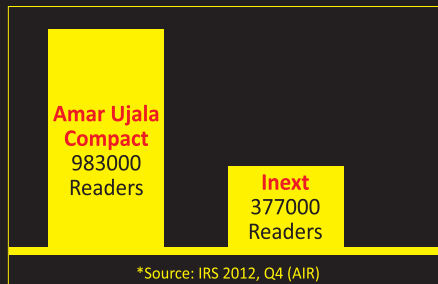




अमर उजाला
कॉम्पैक्ट
कॉम्पैक्ट साइज़, सम्पूर्ण अख़बार

***It's easy to
get noticed
when you are
at the top.***

Amar Ujala Compact has acquired the top spot* in Hindi Tabloid Readership in Uttar Pradesh and because it's right up there, of course it gets seen by the maximum number of people! That's why, advertising with us is the best way to get seen by everyone and take your brand to the top.



REGIONAL NEWSPAPERS

COMING OF AGE

What direction the Indian newspaper industry will take in future depends a lot on how the regional language newspapers can draw people to the daily reading habit.

To understand why regional newspapers have done so remarkably well in the last few years, it is instructive to read a report released last year by research agency Nielsen, titled 'Demand Spotting: The rise of the Indian Small Town'. Referring to consumer demand, it says: 'The charge is led by the tier II and tier III towns. The metros have carried India for the last decade; now smaller towns have taken on the demand baton.'

cheese (up 58 per cent in same store sales), prickly heat powder (48 per cent) and pre-post wash products (44 per cent). In towns under one lakh, it was cheese again on top with 103 per cent, followed by prickly heat powder (53 per cent) and packaged rice (47 per cent).

Consumers from these towns are simply more willing to spend. When they asked residents of the four sample towns, the price of the most expensive mobile handset at home, the figure was ₹8,610. In comparison, the answer in Pune was ₹6,512. Again, when they asked small towners whether they intended to upgrade their TV sets over the next two years, four out of five said they would – as compared to only three of five in Pune.

This story of figures tells us that consumers in towns with a population of less than 10 lakh are eager to spend. What is more, the report says, 'there is a noticeable increase in the willingness to partake in categories and price segments, that were, until now, not associated with small town India.'

Brands across categories, from FMCG to automobiles and everything in between, are rushing for the small town, the new Mecca of consumption. Growth is coming from same-store sales, of course, but brands are strengthening their distribution too, setting off an additional surge of demand.

To cater to this new found focus of marketers, newspapers are also moving into these markets with alacrity. Rising literacy rates are providing the additional boost.



The regional press has always been growing, especially in the last one decade. It captures newer markets and penetrates deeper into the regions than any other medium.

VARGHESE CHANDU
CGM, Malayala Manorama Group

BRANDS ACROSS CATEGORIES ARE RUSHING FOR THE SMALL TOWN, THE NEW MECCA OF CONSUMPTION. NEWSPAPERS ARE FOLLOWING WITH ALACRITY.

Based on a survey of four towns across India with a population of between 1-10 lakh (Bhatinda, Jhansi, Nanded and Anantpur), the research firm found that in 42 out of 83 FMCG product categories, same-store sales had grown by at least 10 per cent in Q4 2011, over Q1 of the same year. And in towns with a population of less than one lakh residents, growth had exceeded 10 per cent, within three quarters in 53 categories.

The fastest growing categories were a revelation too. In middle India towns (1-10 lakh), the fastest growing were

DIVYA BHASKAR, THE BEST WAY TO CONNECT WITH URBAN GUJARAT.

73% of Divya Bhaskar's urban readers are from Ahmedabad, Vadodara, Surat and Rajkot.

Out of these urban readers, **79%** read only Divya Bhaskar.



Divya Bhaskar Gujarat: 37.2 lac readers (AIR)

Divya Bhaskar editions:

- Ahmedabad • Bhavnagar • Bhuj • Rajkot
- Surat • Vadodara • Mumbai



Map not to scale. | Source: IRS Q4 12 | Divya Bhaskar includes Saurashtra Samachar.

METAL



The regional press is a better representation of the local milieu and is mostly the first point of reference for most of the population.

KRP REDDY
Vice President, Marketing,
Sakshi



WINDOW TO THE WORLD

A newspaper is still regarded as a guide to information and personal development in small towns. With each household wanting to do better, education is getting a big thrust. Reading in any form is encouraged, as it is considered a window to the world. In India, there cannot be a more economical way of staying informed about the happenings of the world, than through a newspaper.

Varghese Chandy, chief general manager, Malayala Manorama Group, says, "The regional press has always been growing, especially in the last one decade. It captures newer markets and penetrates deeper into the regions than any other medium." Speaking of his own daily, Malayala Manorama, he says, that it has a reach of 34 per cent in Kerala. "Compare this with The Times of India in Mumbai which has a reach of just 9 per cent. No English newspaper in any market can better our reach," he states.

Because of the opportunities present in the smaller towns, not only are we

seeing already established regional dailies strengthening their presence and new players entering the market, but owners of English dailies are taking the plunge too.

The BCCL group announced the launch of Ei Shamay, a Bengali newspaper for West Bengal. Similarly, The Hindu Group announced its plans of coming up with a Tamil daily. Up north, Dainik Bhaskar Group launched Divya Marathi in Maharashtra, following up on the launch of its Gujarati daily, Divya Bhaskar, in 2003.

Tendolkar of Lokmat Media, points out, "Look at the way publishers are entering new markets, creating district editions. All this is happening because of the tremendous potential. The regional newspaper is the first touch point for a household. Even if an adult buys it, the child feels something for the paper, because it is being read by his parents whom he idolizes." Lokmat has 68 district editions of its Marathi daily.

Seconding her, KRP Reddy, vice president, marketing, at the Telugu daily Sakshi, says that the regional press is a better representation of the local milieu and is mostly the first point of reference for most of the population. Talking specifically about the Telugu language press, he adds that the local language press is growing rapidly, because much of Andhra Pradesh is semi-urban. The average literacy rate of the state is 68 per cent.

Monica Nayyar Patnaik, managing director, Eastern Media, publisher of the Oriya daily, Sambad, adds, "The regional press cannot survive by just being a pure language daily, you have to be future ready. You cannot ignore the readers who are into English as well. We need a product that is colloquial in nature." Eastern Media has two weeklies, a bilingual publication Yuva Sambad, as well as a tabloid for children, both targeting youngsters who speak in Oriya, but don't read the language.



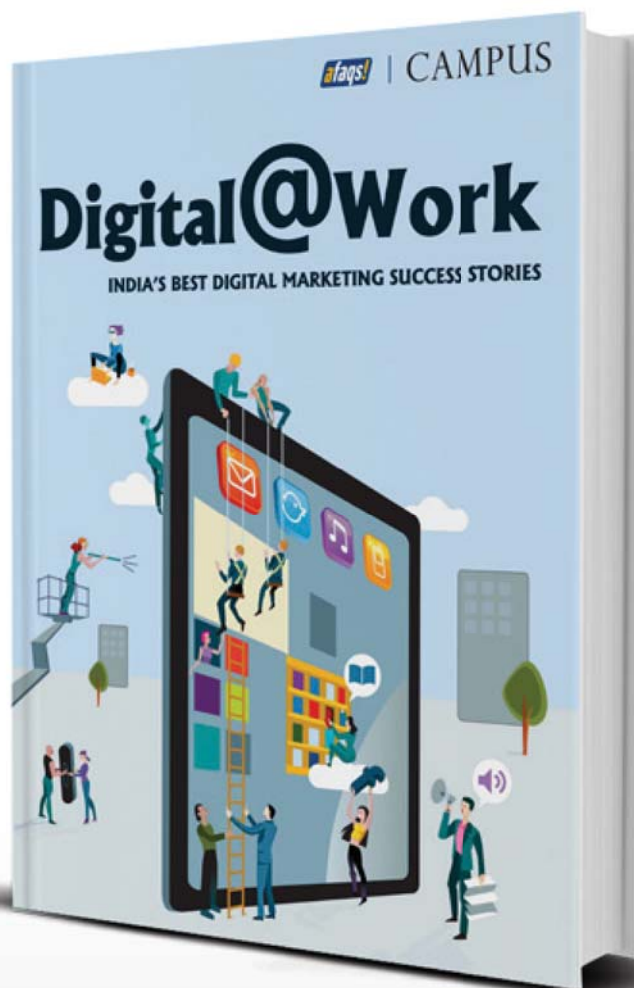
The regional press cannot survive by just being a pure language daily. You have to be future ready. You cannot ignore the readers who are into English as well. We need a product that is colloquial.

MONICA NAYYAR PATNAIK
Managing Director, Eastern Media



COMING SOON

afaqs! Campus brings to you 'Digital@Work',
one of its kind compilation of India's best
digital marketing campaigns.



LOCAL TRANSFORMATION

Regional dailies across languages have been transformed over the past decade. Better printing technology, improved paper quality and peppy designs have ensured that the regional title of today



Industry players need to take a pragmatic approach. The Tamil newspaper industry is evolving and will continue to develop over the next few years with new players and fresh challenges.

NARESH ALAMBARA
COO, Daily Thanthi



SINCE HINDI AND REGIONAL LANGUAGE DAILIES ARE THE FIRST NEWSPAPER FOR MANY INDIANS, IT IS THEIR ABILITY TO DRAW THEM THAT WILL DETERMINE THE FUTURE OF THE INDIAN PRESS.

seems to have no connection with the limp black and white paper of the past.

This has created its own challenges, however. Naresh Alambara, chief operating officer at the Tamil Daily Thanthi, is of the view that since the print industry as a whole is undergoing a transformation, there is pressure on revenues on one hand and spiralling costs on the other. “Industry players need to take a pragmatic approach to containing the problem and addressing the issue of continued growth. The Tamil newspaper industry per say, is still evolving and will continue to develop over the next few years, with new players and fresh challenges.” There are more than 25 Tamil newspapers (morning and evening) catering to the needs of Tamil speaking audiences, across Tamil Nadu and parts of Mumbai and Bangalore.

Though digital does not threaten the

regional press, as it does the English dailies, some of the publishers have begun experimenting online, manoramaonline.com being among the most striking of them. Mobile apps are also beginning to make their appearance.

For now, the popularity of local dailies rests on their ability to reach deep within the community and deliver targeted messages, whether for local advertisers or national ones.

Media players have taken to brand activation in a big way, providing integrated solutions to advertisers. Due to its local nature, the regional press understands the pulse of the city well and is preferred by brands for promotions, launches, awareness campaigns and consumer connect initiatives. By way of example, Sakshi regularly conducts education and career counselling fairs, as well as real estate fairs.

Both Hindi and regional language dailies have a special responsibility: since they are the first newspaper for the overwhelming bulk of Indians, it is their ability to draw them that will determine the future of the Indian press. The fact is that, across India, a large percentage of people who can read, don’t, in fact, read a newspaper. In eight states, more than half the literate population does not turn the pages of a daily.

This could be because many of them cannot afford a newspaper. Or it could be that they have better ways in which to spend their money or their time. Whatever the reason, it is how publishers tackle the gap between the two figures which will determine the direction of the Indian newspaper business. ■



“UNMISSABLE!”

— ◆ —
THE FUTURE
IS CLEAR.
THE FUTURE
IS YOUNG.
— ◆ —

*How tomorrow's media plans
talk to today's youth.*

Once again, Vijay Karnataka is the No.1 daily (Kannada and English) in Karnataka with an impressive average issue readership of 33.53 lakhs and the largest number of readers from 20 to 29 years, students too. Nothing like some youthful energy to invigorate your media plan, right?

VK's readership features the highest no. of:
MHI > 10,000 | Graduates | SEP/OEB | 20-29 years
Students: 20-29 years

THE NO.1 DAILY IN
VIJAY KARNATAKA

Source: AIR - 33.53 lakh, Age 20-29 - 10.42 lakh (IRS Q4'12)

SOUTH INDIA

THE SOUTH SIDE STORY

With some of the most dominant players in specific markets and each language having separate leaders, South India is bound to attract much more attention from 'national' players in the years to come.

With some major groups like DB Corp and Jagran Prakashan taking the IPO route to fund their growth plans, attention has admittedly been focused more intensely on the prospects for the languages they have a presence in. Leaving relatively less of the spotlight on South India, a region that could actually end up surprising on not just the languages front, but also for English language dailies.

The overall print industry in South India is estimated to be ₹6,265 crore in FY 2012 of which the regional print industry is estimated to be ₹2,970 crore. Kerala contributes 37 per cent while Andhra Pradesh and Tamil Nadu contribute 26 per cent and 23 per cent respectively to the total regional print market in South India. To start with, even The Hindu, among the region's most respected and

have a very high penetration, is equally gung ho about the future. "Regional newspapers will have a healthy growth provided they start getting higher rates than what English newspapers get in metros like Mumbai, Delhi, Bangalore and so on. Research is showing that regional newspapers deliver better in all SEC segments. India's growth has moved towards the non-metros," says Jayant Mammen Mathew, deputy editor and director, Malayala Manorama.

As a group, most of South India has the added momentum of faster growth rates than the rest of the country as well as a superior educational infrastructure in place. Ensuring the benefits of better literacy and faster spread of English language make a bigger impact here. Categories like Auto, Banking, Education and Aviation have already been major users of print in the region. Perhaps the only category they would still wish to see more of is FMCG, which, as Arun Anant, CEO, Kasturi & Sons (publishers of The Hindu) describes it, could certainly hasten the process of using print more.

On the digital front too, the southern stars have been moving quietly to make their presence felt. While Malayala Manorama group has tied up with Yahoo to create a Malayalam news portal, key leaders across states have established a digital presence with an aim to monetise them effectively. The advantage of a strong Indian expats audience in the middle east and other regions is an advantage allowing better realisations for online inventory. ■

ON THE DIGITAL FRONT TOO, THE SOUTHERN STARS HAVE BEEN MOVING QUIETLY TO MAKE THEIR PRESENCE FELT.



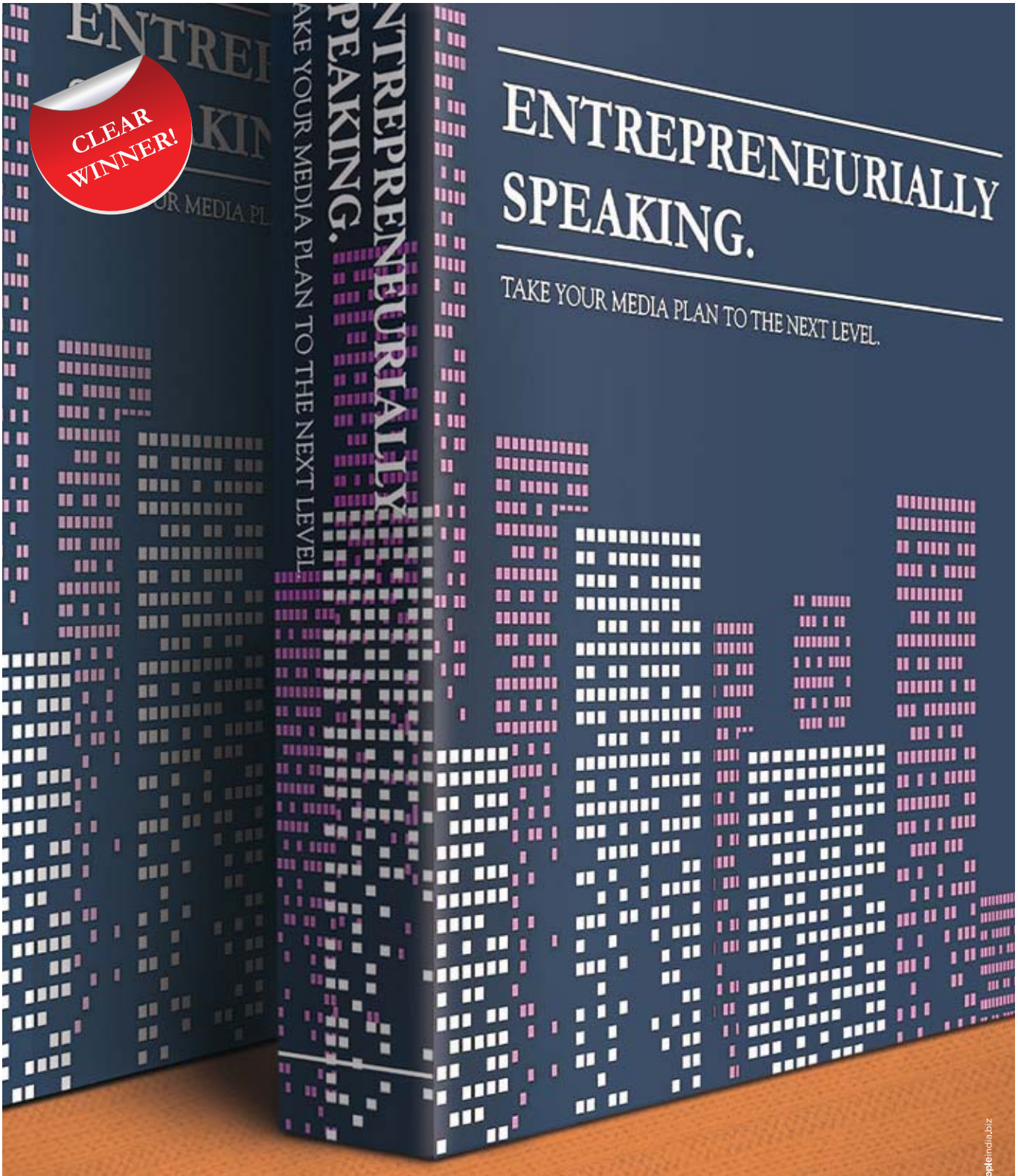
“Regional newspapers will have a healthy growth provided they start getting higher rates than what English newspapers get in metros.”
JAYANT MAMMEN MATHEW
 Deputy Editor and Director,
 Malayala Manorama

Source:
 Deloitte Touche
 Tohmatsu India's
 Media & Entertainment
 in East India- Bengal,
 A vibrant way forward.

established groups has made its intention clear to launch a Tamil daily soon.

Another strong regional leader, the Malayala Manorama group in Kerala, where the Malayalam language dailies

CLEAR
WINNER!



Vijay Karnataka, expectedly, is the No.1 daily (Kannada and English) in Karnataka again with an average issue readership of 33.53 lakhs and boasting the highest percentage of self-employed professionals. See why VK in your media plan is a surefire step to success?

VK's readership features the highest no. of:
MHI > 10,000 | Graduates | SEP/OEB | 20-29 years
Students: 20-29 years

THE NO.1 DAILY IN
VIJAY KARNATAKA

Source: AIR - 33.53 lakh, SEP/OEB - 1.83 lakh (IRS Q4'12)

www.peopleandbiz

DAILIES IN BENGAL

SHAKEN AND STIRRED IN BENGAL

The West Bengal market, like Kerela is dominated by language dailies, and the prognosis is more of the same. While recent political events have made it a volatile market for some, at its core, this remains one of the strongest print markets in the country.

West Bengal has for long been a regional daily stronghold. Not only have they shaped the thinking of the general population but, like Kerela, also become an integral part of all classes of the society. Newspaper consumption is a matter of pride for most Bengalis, putting the better print players in that market on a very secure footing.

In such a steady market, the biggest change recently has been the attempt to shift focus towards the youth readership, which has emerged as a large and crucial segment for growth as well as advertising support. The perception that only a small fraction of the readers between the age brackets of 15 to 35 years can read Bengali has led to innovations around content and packaging. Both ABP and The Times Group have launched youth focused Bengali dailies, E Bela and Ei Samay respectively in the past two years. Currently, the penetration of Bengali dailies amongst the SEC A population aged less than 30 years is higher than that of English dailies in West Bengal. This disparity is evident even in the population aged above 30 years.

In past few years, and especially after the Times of India's entry into Kolkata in 2000, readers have gradually been exposed

to English at many levels and English language newspapers have managed to be a second newspaper in households, especially in Kolkata. However, West Bengal remains one of the few markets where English dailies do not command a premium over language publications, especially the leading ones from ABP Group.

The print media in West Bengal is estimated to be ₹980 crore out of which, the regional print has a share of ₹600 crore (annual growth rate of 10 per cent). However, the English print media stands at about ₹380 crore (annual growth rate of 9 per cent). The total print market in West Bengal is expected to cross ₹1,450 crore by 2016.

Even luxury brands, which have long avoided the regional media, have realised its exceptional reach in their target segments and have started using it to communicate with their potential customers. Unlike most regional dailies who get majority of their advertising revenue from local brands, Bengali dailies get larger chunks of advertising from national brands than the local brands. A large amount of advertisements in regional language dailies is come financial institutions. ■

BOTH ABP AND THE TIMES GROUP HAVE LAUNCHED YOUTH FOCUSED BENGALI DAILIES, E BELA AND EI SAMAY RESPECTIVELY IN THE PAST TWO YEARS.

Source:

Deloitte Touche Tohmatsu India's Media & Entertainment in South India, Promising signs ahead.



“EI SAMAY IS WHERE
THE ACTION IS
IN KOLKATA TODAY.”

Suman Mukhopadhyay
Director



Since its inception, Ei Samay has been the preferred social media destination for Bengalis. Today the newspaper has a facebook community of 1,56,039* making it one of the most popular and engaging Bengali facebook pages. Daily cover picture contributions by readers, engaging posts, round-the-clock breaking news and

impactful themes have made the Ei Samay facebook page the platform of choice for lakhs of Bengali netizens. That explains its daily people engagement of 1,31,863* and a weekly virality of 28,29,497*. Endorsed by prominent Bengalis like film director Suman Mukhopadhyay, Ei Samay is where the action is in Kolkata today.



To book your ads call 033 66391716 | email: rehan.bux@timesgroup.com | www.eisamay.com | www.facebook.com/eisamay.com

*Source: Facebook

BATTLEGROUND MAHARASHTRA

GROWTH YEARS

The market for Marathi dailies is an active battleground for the major players. With a slew of new editions and launches, it is set to enter a period of sustained growth. **By Kajal Malik**

THE BIG DEBUTANTS

	LAUNCH	EDITIONS (IN ORDER OF LAUNCH)
Maharashtra Times (beyond Mumbai)	Jan-11	Pune, Nasik, Aurangabad, Nagpur, Kohlapur (launching in Nagar and Jalgaon soon)
Divya Marathi	May-11	Aurangabad, Nasik, Jalgaon, Nagar, Solapur, Akola (launching in Amravati soon)

Maharashtra has always been a P1 market for a large set of advertisers with an interest in Mumbai as well as Rest Of Maharashtra (ROM). However what makes it a delight is the opening up of this market with newer and bigger opportunities through the large print groups in this market.

NEW

Two of the largest print titles Maharashtra Times and Divya Marathi are expanding in the state and soon shall offer the key markets coverage. Within a span of two years, both have gained a strong entry with Divya Marathi

expanding the market in its key launch editions and Maharashtra Times making a strong success in Pune market. Their entry seems to have clearly impacted the leader - Lokmat where a significant drop in readers is visible. Sakal on the other hand continues to grow while closing the gap in circulation with Lokmat.

BIGGER

Maharashtra print pie is almost the largest amongst the other regions (English and Marathi) and within regional print pie, it continues to attract higher revenue shares. With two national players entering and TOI expanding into newer regions (Kohlapur being this year), the pie should see some increase in an already strong market. This coupled with the fact that some of the larger print groups have embarked on large initiatives in Maharashtra, it should evoke higher interest from the market and advertisers. ■



KAJAL MALIK
Media Consultant

MARATHI DAILIES – IRS SNAPSHOT

	2012 Q2	2012 Q3	2012 Q4	ABSOLUTE CHANGE (Q3 VS Q4)	% CHANGE (Q3 VS Q4)
Daily Deshdoot	126000	113000	124000	11000	9.7
Daily Sakal	4437000	4403000	4469000	66000	1.5
Deshonatti	741000	736000	713000	-23000	-3.1
Divya Marathi	695000	924000	1024000	100000	10.8
Lokmat	7505000	7409000	7313000	-96000	-1.3
Loksatta	956000	955000	912000	-43000	-4.5
Maharashtra Times	1499000	1597000	1711000	114000	7.1
Pudhari	2604000	2477000	2374000	-103000	-4.2
Punya Nagari	1772000	1740000	1681000	-59000	-3.4
Tarun Bharat	873000	818000	750000	-68000	-8.3

All Readers: Maharashtra, Source: IRS 2012 Q4

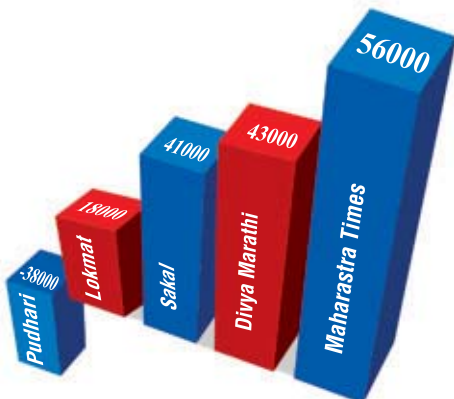


Maharashtra's Time

...is now. To build on its leadership and soar. And that is exactly what the young, vibrant and upwardly mobile Maharashtra is doing in its top 6 cities. **Mumbai, Pune, Nashik, Aurangabad, Nagpur** and **Kolhapur**. Giving this buzzing, upmarket Maharashtra its voice, its choice and its dreams is the state's rapidly growing premium Marathi daily...

Maharashtra Times !

Riding on its popularity amongst the upmarket urban readers, Maharashtra Times has added **56,000** readers in SEC AB Category, growing by 30% more than its nearest competitor across Maharashtra.



महाराष्ट्र टाइम्स

Mumbai • Pune • Nashik • Aurangabad • Nagpur • Kolhapur

*Source: IRS 2012 Q3 to Q4 • Readership Figures (All Maharashtra)

EXPERTSPEAK

“

Regional papers will continue to outpace English in the foreseeable future. However, as a Group, we are language-agnostic and have launched highly successful publications in Gujarati & Marathi as well. ”

PRADEEP DWIVEDI
Chief Corporate Sales &
Marketing Officer,
Dainik Bhaskar Group



“

Regional dailies do definitely have a lot of potential. But they are unclear as to how to tap it. ”



MURALIDHARAN
Director, HAMMER

“

In Bengal, people cannot be seen without an Anandabazar Patrika, for example. In other markets, the readership trend will continue to be what it is or reduce because of media fragmentation and little time to read. ”



ANILKUMAR SATHIRAJU
AVP & Head South,
DDBMudra Max

“

The main growth driver for print in our region can be real estate, education, electronics and – because of the coming elections – political advertising. But I see a problem in consumer durables and auto advertising, as they are affected by the depreciating value of the rupee and changes in the RBI policies. ”



ARUN ANANT
CEO, Kasturi & Sons

“

Languages have had a good run over the last decade or so, as the market was driven by rising urbanisation, literacy on one hand and by the creation of better products, wider distribution, localisation of content, aggressive marketing, on the other. ”



BASANT RATHORE
VP - Strategy, Business Development & Brand,
Jagran Prakashan Ltd

5 years...

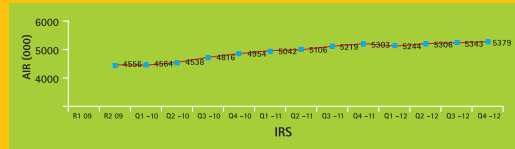
of 'bringing about a change'

of 'making a difference'

of 'leading the way'

of 'setting a new benchmark'

of 'consistent growth'



KARNATAKA
**BEST
SELLER**

*all
you need
is a deep
breath of*
A.I.R.

Techniques to keep your media plan well-oxygenated.

Vijay Karnataka is the undisputed No.1 daily (Kannada and English) in Karnataka. And with an impressive Average Issue Readership of 33.53 lakhs, it's quite simply the shot of oxygen your media plan needs.

VK's readership features the highest no. of:
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THE NO.1 DAILY IN
VIJAY KARNATAKA

Source: AIR - 33.53 lakh (IRS Q4'12)