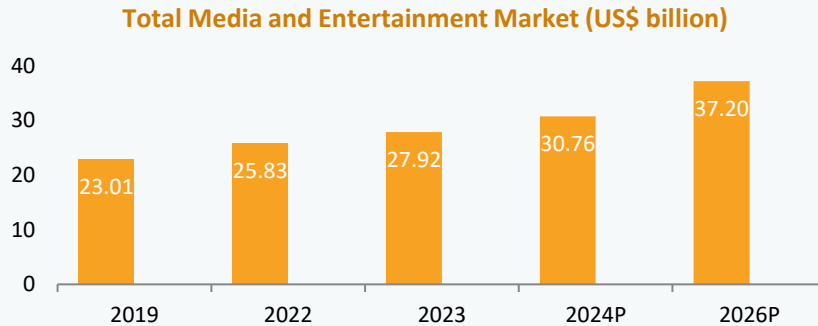


MEDIA AND ENTERTAINMENT



MARKET SIZE

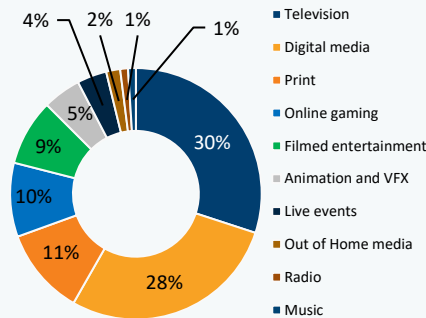


Note: P-Projected

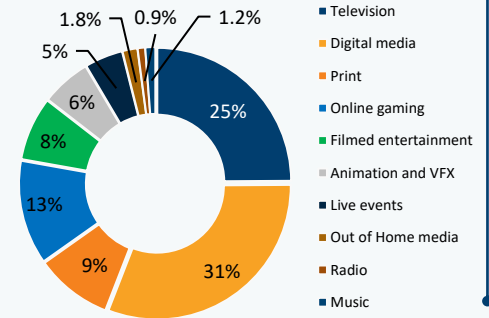


SECTOR COMPOSITION

Share of Major Industry Segments 2023



Share of Major Industry Segments 2026P

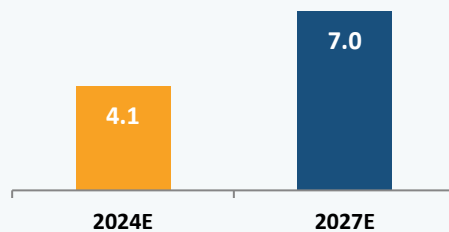


Note: P-Projected



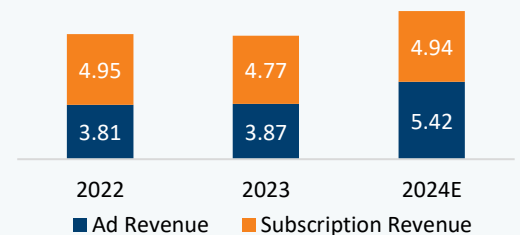
KEY TRENDS

India OTT Video Services (Video-on-Demand and Live) Market (US\$ billion)

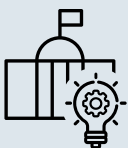


Note: E- Estimated

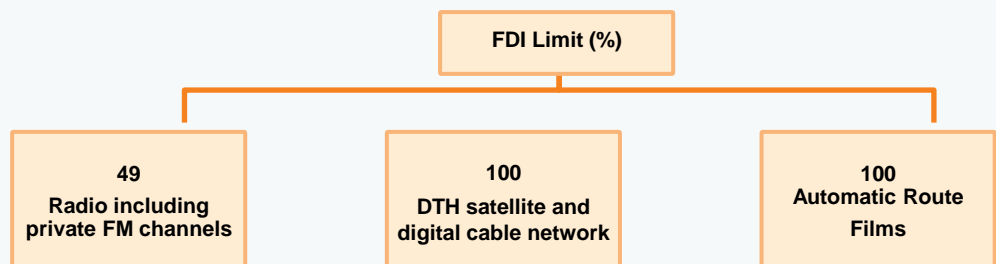
Advertising Revenue (US\$ billion)



■ Ad Revenue ■ Subscription Revenue



GOVERNMENT INITIATIVES



ADVANTAGE INDIA

- Robust demand:** According to a FICCI-EY report, the advertising to GDP ratio is expected to reach 0.4% by 2025 from 0.38% in 2019. The country's entertainment and media industry is expected to see a growth of 9.7% annually in revenues to reach US\$ 73.6 billion by 2027.
- Higher Investments:** FDI inflows in the information and broadcasting sector (including print media) stood at US\$ 10.99 billion between April 2000-March 2024. In the Interim budget of 2024-25 the Ministry of Information and broadcasting was allocated Rs. 4,342.55 crore (US\$ 523.20 million). The Indian gaming sector has raised a total of US\$ 2.8 billion from domestic and global investors, over the last five years.
- Policy support:** On February 25, 2021, the government outlined the Information Technology (Intermediary Guidelines and Digital Media Ethics Code) Rules 2021. In February 2024, the Union Cabinet approved the auction of 10,523.15 megahertz (MHz) of spectrum across bands at a reserve price of Rs 96,317.65 crores (US\$ 11.60 billion).
- Attractive opportunities:** The Indian media and entertainment industry is anticipated to reach US\$ 24-100 billion by 2030. The Indian mobile gaming market is poised to reach US\$ 7 billion, in value, by 2025.