

# DECODING INDIA 2024-25



## WINNING THE WEST: NAVIGATING INDIA'S ECONOMIC FRONTIER

**WEST INDIA:** GUJARAT, MAHARASHTRA, GOA, MADHYA PRADESH, DADRA & NAGAR HAVELI AND DAMAN & DIU



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# INTRODUCTION

Regional language PR in India is a game-changer. It taps into the heart of local cultures, making messages resonate deeply and authentically. In speaking directly to diverse communities in their languages, brands and organisations build trust and foster genuine connections. It's the secret ingredient for a vibrant, inclusive, and impactful communication strategy.

In Tier-II and Tier-III Indian cities, online and e-commerce users, hyper-local shoppers and influencers who resonate largely with local communication and regional languages are booming. Global giants like Amazon, Facebook and Google offer customised products and services to cater to this demographic. In line with this drift, we are publishing a four-part series on exploring and acing Regional PR in India, of which this is the second part.

In this whitepaper, we focus on the West Zone, which for the sake of this study comprises the states of Gujarat, Maharashtra, Goa, Madhya Pradesh, Dadra & Nagar Haveli and Daman & Diu.

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# FOREWORD



**MUKESH  
KHARBANDA**  
MANAGING DIRECTOR, FUZION PR

In an era where digital media and local influencers are gaining prominence, integrating Regional PR into broader communication strategies is not just beneficial, but also imperative. Investing in Regional PR capabilities—through talent development, collaboration with local experts, and leveraging emerging media trends—ensures that messages are relevant, impactful, and resonate with the diverse audiences of India.

The second of a four-part series on an in-depth analysis of Regional PR, Fuzion PR Pvt Ltd, in collaboration with SCoRe Insights, analyses best practices in navigating Growth and Challenges in the Regional PR space. This edition zeroes in on the Western zone's landscape, economics, consumer behaviour and unique regional characteristics.

As businesses venture into Western India's diverse markets, it is essential for PR and communications strategies to evolve in tandem. While metropolitan areas benefit from established media networks, regional markets present distinct challenges and opportunities. Smaller, hyperlocal publications wield significant influence, and their role cannot be overlooked. This whitepaper explores how brands can harness Regional PR to effectively navigate the economic frontier of Western India, emphasizing the importance of local expertise, cultural sensitivity, and the strategic use of regional language media.

This whitepaper "Winning the West: Navigating India's Economic Frontier" delves into the significance of Regional PR in bridging the communication gap between organizations and local communities.

Investing in Regional PR is essential for unlocking the vast potential of regional markets and building meaningful connections with the evolving consumer base. In this whitepaper, let us look at how to win the West.

# PREFACE

It is with great delight that I introduce this whitepaper, “Winning the West: Navigating India’s Economic Frontier,” a collaboration between Fuzion PR and SCoRe Insights. This document explores Western India—a region brimming with economic promise, cultural richness, and a rapidly evolving media environment.

We are in an age where the success and failure of PR strategy are incumbent on understanding the shifting landscape of consumer behaviour and global trends. This whitepaper provides an insightful look into the dynamic consumer market of Western India, forecasting the key changes that will shape its future.

The process of conducting this study has been both enlightening and inspiring, revealing how Regional PR can harness local insights to develop impactful narratives and strategies in the Western part of India. The findings highlight the importance of grasping regional economic drivers, cultural subtleties, and emerging media trends in the Western part of India, all of which are crucial for effective communication and engagement.

We are confident that our findings and analysis offer valuable insights into the trends and preferences that will influence the market. By leveraging these insights, businesses can better position themselves to cater to the needs of a new generation of consumers, ensuring they stay ahead in Western India’s vibrant economic landscape.



**HEMANT GAULE**  
DEAN, SCHOOL OF  
COMMUNICATIONS & REPUTATION

The Public Relations (PR) landscape in India has been through a systematic churn owing to various factors ranging from cheap internet to a digital-led market in regional media consumption that is giving birth to digital-native media outlets. The Media-On-Demand model has given rise to a new consumer who now dictates the terms of viewership, from regional language-exclusive OTT platforms to YouTube news channels and social media influencers. The Regional PR establishments too have been playing their part in this circle of reviving regional media and culture. Suburban and rural India is emerging as a robust growth centre of economic and commercial activity, with a steady increase in income levels. This has further impetus from strong wealth generation and rising incomes of sub-urban and rural India – geographies that have consistently posted positive figures year-on-year. India outshone its economic cohort<sup>1</sup> to remain one of the fastest-growing economies post-pandemic, and is projected to become the third-largest consumer economy by 2027.<sup>2</sup> India's demographic dividend presents a strong case for a bullish consumption pattern. Now is the golden moment to set the right tone for PR messaging, given the demand for regional messaging, and customised experiences from the average Indian consumer. The supply should follow demand making it crucial to integrate regional language, culture, and customised messaging into the digital PR strategies.

Successful Regional PR calls for a nuanced understanding of the multitude of cultures and grassroots-level presence. Now, more than ever, PR professionals must craft authentic messaging that echoes widely across hyper-local cultural multitudes. In the second editing of the four-part series highlighting the importance of Regional PR, Fuzion PR looks at Western India, covering Gujarat, Maharashtra, Goa, Madhya Pradesh, Diu, Daman and Dadra & Nagar Haveli, analysing trends, decoding both, media and consumers, and understanding how best to service clientele in the region.

The Western zone is home to 21% of India's population, who speak Marathi, Gujarati, Konkani, Hindi, Bundeli, Malvi, Nimari, and among the various indigenous and minority dialects and languages. They hold significant cultural influence in India, facilitated by their historic maritime trade links with the West. The economy of the Western zone is powered by Gujarat and Maharashtra – the dual engines of industry and finance. The agricultural and tourist hubs of Madhya Pradesh, Goa, Diu, and Dadra & Nagar Haveli further support it and contribute a sizeable cumulative 26% to India's Gross Domestic Product.<sup>3</sup>

1. <https://datahelpdesk.worldbank.org/knowledgebase/articles/906519>

2. <https://www.bloomberg.com/news/articles/2024-02-22/india-market-value-to-reach-10-trillion-by-2030-jefferies-says>

3. Data as of 2022-23. Source: <https://www.rbi.org.in/Scripts/PublicationsView.aspx?id=22091>

# ECONOMIC DRIVERS AND OUTLOOK

The western zone of India boasts a long coastline, with over 80 major and minor ports, and 42 airports. The extensive road network with major national highways (15,808 km) state highways (79,453 km)<sup>4</sup>, and railway infrastructure (28,179 km<sup>5</sup>) supports the region's economic activities, facilitating the movement of people and goods.

4. [https://en.wikipedia.org/wiki/List\\_of\\_states\\_and\\_union\\_territories\\_of\\_India\\_by\\_transport\\_network](https://en.wikipedia.org/wiki/List_of_states_and_union_territories_of_India_by_transport_network)

5. [https://indianrailways.gov.in/railwayboard/uploads/directorate/stat\\_econ/IRSP\\_2015-16/Year\\_Book\\_Eng/9.pdf](https://indianrailways.gov.in/railwayboard/uploads/directorate/stat_econ/IRSP_2015-16/Year_Book_Eng/9.pdf)

# DADRA & NAGAR HAVELI AND DAMAN & DIU

Dadra & Nagar Haveli and Daman & Diu were merged into a single Union Territory (UT) in January 2020, the relatively small economic regions, with agriculture, fishing, small-scale industries and tourism as their mainstay. A growing economy, it accounts for 80% of India's textured yarn and 28% of India's plastic sheets & film production. It ranks 34, amongst states and union territories on the overall export preparedness ranking,<sup>6</sup> placing it second in the growth and orientation pillar amongst its peer states and UTs. The UT scored above the national average, with a net export value of \$ 4.6 billion in 2021-22, with a whopping 58% increase in the number of exporters. It has also recorded \$ 175 million in foreign direct investment (FDI) in FY 2023.<sup>7</sup>

The administrative policy points to a push towards increasing manufacturing, services and exports, with 39 industrial estates in Daman, and 140 acres of land near Surangi allotted exclusively for greenfield projects<sup>8</sup>. It falls under the Delhi-Mumbai Business corridor and has encouraging policies for electronic systems, health care, oil & gas, and pharmaceutical industries<sup>9</sup>. The UT is home to several well-known names like Reliance Industries Ltd, Hindustan-Unilever, Sun Pharma, Welspun, Suzlon Energy, Panasonic, and Gini & Jony.



6. <https://static.investindia.gov.in/s3fs-public/2024-01/Export%20Preparedness%20Index%202022%200.pdf>  
7. <https://www.investindia.gov.in/state/dadra-and-nagar-haveli-and-daman-and-diu>  
8. [https://en.wikipedia.org/wiki/Greenfield\\_project](https://en.wikipedia.org/wiki/Greenfield_project)  
9. <https://indbiz.gov.in/state/dadra-and-nagar-haveli-daman-diu/>



# GUJARAT

Gujarat has doubled its Gross State Domestic Product (GSDP) over the past decade, posting a growth of 13% year-on-year, at 8.3% of India's GDP.<sup>10</sup> Gujarat is a star performer state, leading the country in industry, with a strong manufacturing base in petrochemicals, textiles, and pharmaceuticals. It is a trendsetter in many categories: with the world's largest petroleum refining hub in Jamnagar, the world's largest of its kind renewable energy park in Kutch, the world's largest milk producer cooperative, a cumulative 40% of India's cargo handling, and is ranked first with 33.5% of India's total exports.<sup>11</sup> Gujarat is a logistics paradise with its 49 minor and major ports, 19 operational airports, 13 national highways spanning 3245 km, 300 state highways spanning 19,761 km, and 5,017 km of railway network.

Major industrial infrastructure projects the DREAM City (Diamond Research and Mercantile City) in Surat, GIFT City (Gujarat International Financial Tec-City) in Ahmedabad, 8 Special Investment Regions (SIR), 21 Special Economic Zones (SEZ), and 224 industrial estates under the Gujarat Industrial Development Corporation (GIDC) across the state.<sup>12</sup> Gujarat offers a fertile environment for businesses across all parameters, ranking number 1 on DPIIT's (Department for Promotion of Industry and Internal Trade) startup scale,<sup>13</sup> a framework that gauges operational ease, and enables policies of states specifically for startups.

The state is also agile in its policy formulation, with custom incentives for Biotechnology, Drone Promotion, Heritage Tourism, Waste Management, and shipbuilding amongst many other sectors. It ranks number 4 on the Export Preparedness Index and recorded \$ 37.7 billion in FDI.



10. <https://prsindia.org/budgets/states/gujarat-budget-analysis-2023-24>

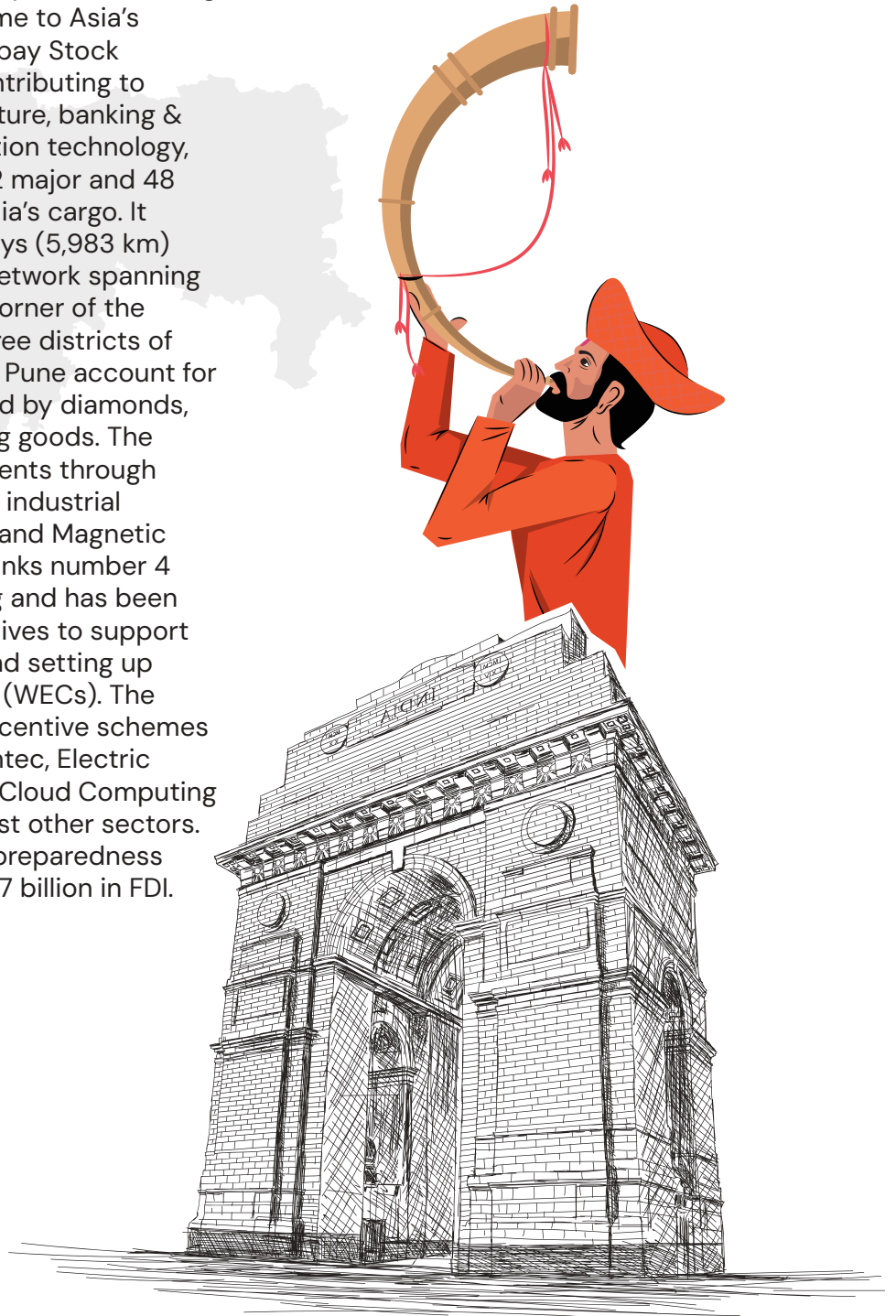
11. <https://www.investindia.gov.in/state/gujarat>

12. <https://gidc.gujarat.gov.in/>

13. [https://www.startupindia.gov.in/srf/images/SRF\\_2022\\_Result\\_page/National\\_Report\\_14\\_01\\_2024.pdf](https://www.startupindia.gov.in/srf/images/SRF_2022_Result_page/National_Report_14_01_2024.pdf)

# MAHARASHTRA

Maharashtra is India's financial capital, accounting for 14% of India's GDP, and is home to Asia's oldest stock exchange, the Bombay Stock Exchange (BSE). Key sectors contributing to the state's GSDP include agriculture, banking & finance, manufacturing, information technology, biotech & pharmaceuticals. Its 2 major and 48 minor ports facilitate 20% of India's cargo. It also has a vast network of railways (5,983 km) and the country's largest road network spanning 2,67,452 km, connecting every corner of the state to the rest of India. The three districts of Mumbai, Mumbai Suburban, and Pune account for 10% of India's exports, dominated by diamonds, precious metals, and engineering goods. The state is attracting more investments through initiatives like the Mumbai-Pune industrial corridor, Samruddhi Mahamarg, and Magnetic Maharashtra 2.0. Maharashtra ranks number 4 nationally on the startup ranking and has been recognised for developing initiatives to support startups in disruptive sectors and setting up women's entrepreneurship cells (WECs). The state has special incentivised incentive schemes for businesses venturing into Fintec, Electric Vehicles, Aerospace & Defence, Cloud Computing and, Agricultural Exports amongst other sectors. It ranks number 2 in the export preparedness index,<sup>15</sup> and has recorded \$ 66.07 billion in FDI.



14. [https://www.ibef.org/download/Maharashtra\\_271211.pdf](https://www.ibef.org/download/Maharashtra_271211.pdf)

15. <https://static.investindia.gov.in/s3fs-public/2024-01/Export%20Preparedness%20Index%202022%200.pdf>

# GOA

The economy of Goa, though heavily dependent on tourism, fisheries, agriculture and mining, is opening up sectors like pharmaceuticals and shipbuilding. It has consistently posted a robust GSDP, growing at 8.99% year-on-year in 2023 and an FDI inflow of \$ 149.11 million. Goa is home to one of India's most urbanised and literate populations, paving the way for knowledge-based industries, particularly electronics and biotechnology. Home to a world-class Electronics Manufacturing cluster in Tuem, and major mineral reserves of Bauxite, Iron Ore and Manganese, India's favourite holiday destination is looking to expand its horizons beyond tourism. Goa is a key exporter of pharmaceutical products, accounting for over 10% of India's pharma exports. Niche tourism, green & white category industries (clean, zero polluting industries), high-end hospitality, logistics & warehousing are natural focus sectors.<sup>16</sup>

16. <https://www.goaipb.goa.gov.in/green-and-white-category-industries/#>

# MADHYA PRADESH

Madhya Pradesh (MP) is a relatively less industrialised state, with agriculture being a major contributor to its economy. It has a geographical advantage, sitting at the centre of both the North-South and the East-West corridors. It has a unique platter to offer, with the largest single-site solar power plants in Rewa, India's number 1 greenfield SEZ in Pithampur, and an ecosystem for defence and ordnance manufacturing across the state. With a GSDP of \$ 153 billion, Madhya Pradesh grew at 7.06% year-on-year in 2023.<sup>17</sup> The state may be landlocked but it is home to 6 major inland container depots. MP also ranks second on the export preparedness index, with firm policies and dedicated export promotion zones. MP offers a land bank of over 1.25 lakh hectares for industrial growth and is placed third under the leader category on the startup ranking. It is well connected through a dense network of national and state highways (3 lakh km) and has 5 airports. The state recorded over \$ 7.8 billion in exports and \$ 532 million in FDI inflows. The state has special-incentive policies for industries looking to foray into biofuel & ethanol, defence production promotion, analogue semiconductor fabrication, and film tourism.



17. [https://static.investindia.gov.in/s3fs-public/2023-04/MPES%202022-23\\_English.pdf](https://static.investindia.gov.in/s3fs-public/2023-04/MPES%202022-23_English.pdf)

# CONSUMER INSIGHTS

The India of today is an interesting consumer landscape, that is home to more than a Billion first timers, with their domestic consumption accounting for 60% of India's GDP.<sup>18</sup>

The new-age consumer has transformed from absorbing information that was handed over to him, to a seeker, looking for products, researching the market, comparing reviews and understanding what best fits his wants and needs. This can be broadly attributed to the changing lifestyles of a large demographic that has higher disposable incomes, is upwardly mobile, is building aspirational shopping baskets, and technologies redefining the shopping journey for the individual.

Madhya Pradesh has a relatively younger age demographic with a larger proportion of children and youth, while Maharashtra has a slightly older population with a higher working-age group. Gujarat falls in between these two states in terms of age distribution. Daman & Diu also has a notable working-age population, but specific age group breakdowns are not available in the provided sources for Dadra & Nagar Haveli.<sup>19</sup>

18. <https://www.goldmansachs.com/intelligence/pages/how-india-could-rise-to-the-worlds-second-biggest-economy.html>

19. [https://censusindia.gov.in/census.website/data/data-visualizations/Age-Gender-Ratio\\_Pyramid-Chart](https://censusindia.gov.in/census.website/data/data-visualizations/Age-Gender-Ratio_Pyramid-Chart)

**GUJARAT**



70,413,000



29.9 YEARS



62.28



₹1,763

**DADRA & NAGAR HAVELI  
AND DAMAN & DIU**



796,000



N/A



N/A



N/A

**GOA**



1,613,000



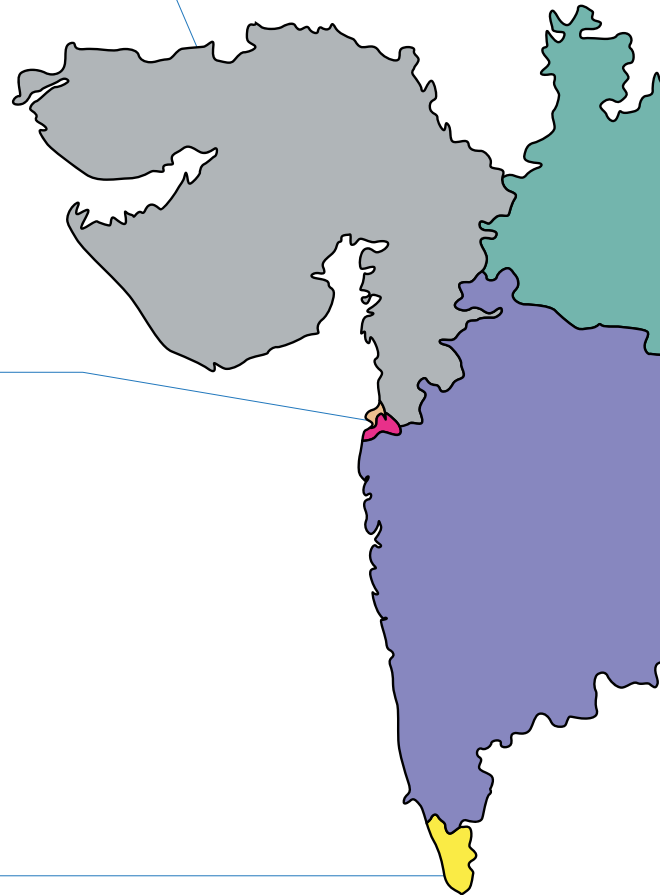
N/A

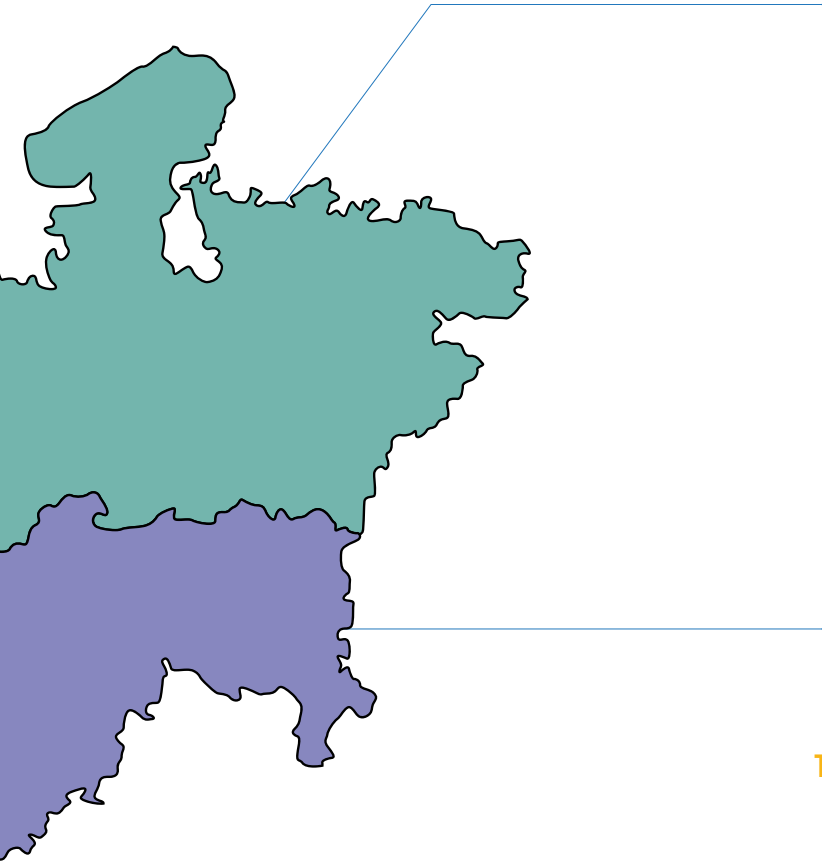


72.87

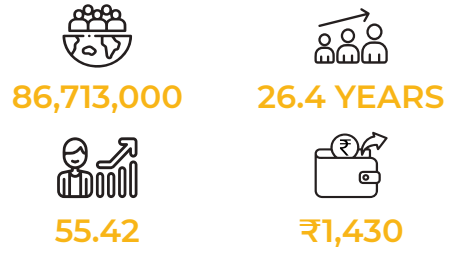


₹3,242

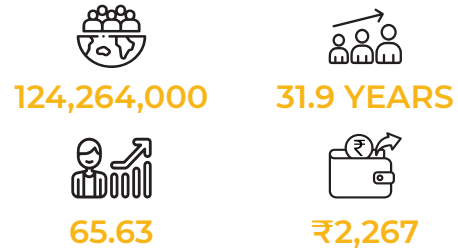




**MADHYA PRADESH**



**MAHARASHTRA**



## WHAT WEST ZONE IS SPENDING ON



*“My personal view is that e-commerce played a great deal in making this digital adoption happen, as customers every year trusted large e-commerce players buying everything under the sun including mobiles, laptops, washing machines and not just clothes. Grocery (especially packaged food) and household items that are consumed every day and may not require one to invest too much time and trust, picked up as the market saw more players’ participation. Subscription service from players in the Q-commerce market will further push the adoption”, points out Sheetal Singh, Director External Communications-External Affairs, Flipkart.*

The western zone is home to 22% of the GenZ and Millennial population collectively.<sup>20</sup> The average Monthly Per capita expenditure (MPCE) for the zone is Rs. 3,820 (rural) and Rs.9,067 (urban), spending more on what they want than what they need.<sup>21</sup>

Estimates show that the urban Indian will command higher spending power over the next decade.<sup>22</sup> The household consumption expenditure survey indicates the higher spending power of urban consumers compared to rural consumers across states of the west zone, with Gujarat exhibiting the highest rural-urban disparity. Maharashtra appears to have relatively higher spending capacity among both urban and rural consumers, while Madhya Pradesh lags in terms of overall consumption expenditure levels.<sup>23</sup>

Dadra & Nagar Haveli and Daman & Diu are highly urbanized with an urbanization rate of around 63% as per the 2011 census, implying a predominantly urban consumer base. Despite being a limited consumer market size compared to larger states, it is influenced by nearby metropolitan areas and its proximity to major urban centres like Mumbai and Surat. Gujarat has a relatively young population, with around 75% above the age of 15 as of 2020.<sup>24</sup> The state has an urbanization rate of 42.6%, indicating a sizable urban consumer base. Gujarat ranks among the top states in India in terms of per capita income, suggesting higher purchasing power among consumers. This upward tick with a significant disposable income component, with the demographic dividend has led to an emergence of niche consumer segments in food, health, wellness and travel.<sup>25</sup>

20. [https://main.mohfw.gov.in/sites/default/files/Population%20Projection%20Report%202011-2036%20-%20Upload\\_compressed\\_0.pdf](https://main.mohfw.gov.in/sites/default/files/Population%20Projection%20Report%202011-2036%20-%20Upload_compressed_0.pdf)

21. HCES: 2022-23 Fact sheet - [https://www.mospi.gov.in/sites/default/files/publication\\_reports/Factsheet\\_HCES\\_2022-23.pdf?download=1](https://www.mospi.gov.in/sites/default/files/publication_reports/Factsheet_HCES_2022-23.pdf?download=1)

22. [https://www2.deloitte.com/content/dam/Deloitte/in/Documents/consumer-business/KNOW%20your%20consumer\\_webCompressedImages.pdf](https://www2.deloitte.com/content/dam/Deloitte/in/Documents/consumer-business/KNOW%20your%20consumer_webCompressedImages.pdf)

23. [https://www.mospi.gov.in/sites/default/files/publication\\_reports/Factsheet\\_HCES\\_2022-23.pdf?download=1](https://www.mospi.gov.in/sites/default/files/publication_reports/Factsheet_HCES_2022-23.pdf?download=1)

24. [https://nhsrcindia.org/sites/default/files/practice\\_image/HealthDossier2021/Gujarat.pdf](https://nhsrcindia.org/sites/default/files/practice_image/HealthDossier2021/Gujarat.pdf)

25. [https://www3.weforum.org/docs/WEF\\_Future\\_of\\_Consumption\\_Fast-Growth\\_Consumers\\_markets\\_India\\_report\\_2019.pdf](https://www3.weforum.org/docs/WEF_Future_of_Consumption_Fast-Growth_Consumers_markets_India_report_2019.pdf)



Maharashtra has the highest urbanization rate among Indian states at around 45%, translating into a large urban consumer market. The state has a relatively higher proportion of the working-age population (15–59 years) at around 65%,<sup>26</sup> indicating a substantial consumer base with disposable incomes. Mumbai, the capital city, is a major consumer hub with a cosmopolitan population and high purchasing power. The consumer segments in Maharashtra range from the affluent and elite to the value-conscious mass market.

“My personal view is that e-commerce played a great deal in making this digital adoption happen, as customers every year trusted large e-commerce players buying everything under the sun including mobiles, laptops, washing machines and not just clothes. Grocery (especially packaged food) and household items that are consumed every day and may not require one to invest too much time and trust, picked up as the market saw more players’ participation. Subscription service from players in the Q-commerce market will further push the adoption”, points out Singh.

72% of Madhya Pradesh is made up of rural households. The Monthly Per Capita Expenditure (MPCE) in Madhya Pradesh was lower than the national average, both in rural and urban areas. It is also home to a relatively young population – approximately 62.2% of the population is projected to be within the age group of 15–60. This indicates a sizable active consumer segment that could make up for lower per capita expenditure with its consumption volumes.<sup>27</sup>



*Any PR and Communication plan today is designed as a collaborative effort with the digital platforms. The written word and visual identity are unique to each platform, but they ultimately funnel down to the core messaging. So, today’s PR & Communication plans customise information for traditional media as well as new-age media. Think both – long format & pocket-size communication”, adds Pooja Trehan, Head-Communications and PR, Jio World Drive.*

26. [https://main.mohfw.gov.in/sites/default/files/Population%20Projection%20Report%202011-2036%20-%20upload\\_compressed\\_0.pdf](https://main.mohfw.gov.in/sites/default/files/Population%20Projection%20Report%202011-2036%20-%20upload_compressed_0.pdf).

27. [https://main.mohfw.gov.in/sites/default/files/Population%20Projection%20Report%202011-2036%20-%20upload\\_compressed\\_0.pdf](https://main.mohfw.gov.in/sites/default/files/Population%20Projection%20Report%202011-2036%20-%20upload_compressed_0.pdf)

The gap between aspirational lifestyle consumption in urban and rural areas has narrowed considerably, owing to the free flow of information through Internet and mobile penetration. Today, it is not uncommon to come across women in the hinterlands enjoying Korean dramas and K-pop, dubbed and subtitled in regional languages.<sup>28</sup>

Adds Pooja Trehan, Head-Communications and PR, Jio World Drive, "Mobile penetration and far more accessible telecom pricing has made it easier for consumers to delve into the digital world, whether from a city, or the hinterlands. In addition, if there is content being consumed, then there is enough and more content being produced - by the consumers - which are today market agnostic. Any PR and Communication plan today is designed as a collaborative effort with the digital platforms. The written word and visual identity are unique to each platform, but they ultimately funnel down to the core messaging. This augments the campaign's effort, ensuring all mediums and platforms showcase the core messaging. So, today's PR & Communication plans customise information for traditional media as well as new-age media. Think both - long format & pocket-size communication."

The diverse consumer market of the Western Zone calls for layered tribetailing<sup>29</sup> that serves as consumer outreach posts at different cohorts of age, income category, geographical location, language, shopping behaviours and culture. For instance, a FMCG company could cater to the luxury market in Mumbai, and identify a market for mass consumption in Madhya Pradesh.

<sup>28</sup> <https://www.fortuneindia.com/opinion/what-drives-indias-k-drama-economy/115733>  
<sup>29</sup> The retail tactic of providing a tailored offering to a group of (tribe) consumers.



# MEDIA LANDSCAPE & OUTLOOK

Over the last decade, India's media landscape has expanded beyond social media, AV streaming, and online gaming steadily backing print, television, and the movie-going experience into a corner. Even traditional media conglomerates now have 'diversified' their content portfolio to match, and perhaps, monopolize the digital attention and consumer market.<sup>30</sup> This has led to big broadcasters diversifying their portfolio through investments in new-age digital media ventures as they acquire regional satellite television channels, and major print players following strategic promotion of hyper-localised content in regional languages.<sup>31</sup>

30. [https://assets.ey.com/content/dam/ey-sites/ey-com/en\\_in/news/2024/03/ey-in-india-s-media-entertainment-sector-is-innovating-for-the-future-03-2024.pdf](https://assets.ey.com/content/dam/ey-sites/ey-com/en_in/news/2024/03/ey-in-india-s-media-entertainment-sector-is-innovating-for-the-future-03-2024.pdf)

31. CRISIL Research and industry interactions

However, given India’s diverse landscape, while there is content available to cater to every audience segment and language group, the cost of acquisition of a consumer is rising. This has given rise to aggregated platforms with curated content libraries, innovation through media start-ups, strategic subscription video-on-demand (SVOD) and advertising-supported video-on-demand (AVOD) marketing mixes. In 2023, SVOD accounted for 78% of OTT revenue, and AVOD was 15% of OTT revenue.<sup>32</sup>

Start-ups in the media & entertainment (M&E) sector centred around emerging technologies show promise, with over 1300 DPIIT-recognized M&E entities<sup>33</sup> in fields like augmented reality and virtual reality (AR & VR) aided animation, Artificial Intelligence in video editing, drone filming, and VFX. Quidich, a Mumbai-based start-up offers niche services like CopterQam + Spatio services for interactive cricket coverage, and Pocket Aces, creators behind Filter Copy, Gobble, and Dice Media who engage the audience through short-form content that create a sense of community are such new-age start-ups.<sup>34</sup> Apart from technology disruptors, regional broadcasters and customised viewing experiences have gained traction, with an estimated 40-45% of consumption across OTT (over-the-top) platforms being regional content.<sup>35</sup>

“Regional media provide localized content that resonates with the cultural, economic, and social realities of the southern states. This makes them particularly effective in addressing the specific needs and interests of IT professionals and

aspirants in areas where the local sentiment runs strong”, explains Renuka BL- APAC Communications Leader, Altimetrik.

West India has been a pioneer and something of a trendsetter in the media industry, dating back to the colonial era when the Bombay Presidency was a major centre for publishing and journalism. Mumbai, being home to Bollywood, the world’s largest film industry, also attracts the country’s best and brightest media minds.

while Hindi might be the primary language of Bollywood, Gujarati, Marathi and Hindi are three of the top five languages with the largest circulated publications in India, directly corresponding to newspapers leading the charge and continuing to grow in Tier II and Tier III cities of the West Zone.<sup>36</sup> Regional media now demands advertising pricing on par with Hindi and is priced only slightly lower than English newsprint in non-metro regions.<sup>37</sup> Gujarat and Maharashtra alone contribute to 38% of India’s advertising revenue across all segments.<sup>38</sup>

Mumbai, Pune and Ahmedabad are amongst the growing centres that cater to the global animation market, owing to their cost efficiency, large English-speaking population, infrastructure and production quality.<sup>39</sup> BARC’s proposal to demarcate kids’ content would give advertisers clarity on targeting, apart from a boost to the animation industry.

32. <https://www.pwc.in/assets/pdfs/industries/entertainment-and-media/global-entertainment-and-media-outlook-2023-2027-india-perspective-v1.pdf>

33. <https://www.investindia.gov.in/team-india-blogs/celebrating-indian-media-and-entertainment-landscape>

34. <https://www.startupindia.gov.in/content/sih/en/bloglist/blogs/emerging-media.html#:~:text=Startups%20like%20Pocket%20Aces%20Pictures,monthx>

35. <https://assets.kpmg.com/content/dam/kpmg/in/pdf/2019/08/india-media-entertainment-report-2019.pdf>

36. <https://assets.kpmg.com/content/dam/kpmg/in/pdf/2019/08/india-media-entertainment-report-2019.pdf>

37. <https://assets.kpmg.com/content/dam/kpmg/in/pdf/2019/08/india-media-entertainment-report-2019.pdf>

38. [https://assets.ey.com/content/dam/ey-sites/ey-com/en\\_in/news/2024/03/ey-in-india-s-media-entertainment-sector-is-innovating-for-the-future-03-2024.pdf](https://assets.ey.com/content/dam/ey-sites/ey-com/en_in/news/2024/03/ey-in-india-s-media-entertainment-sector-is-innovating-for-the-future-03-2024.pdf)

39. [http://www.nasscom.org/download/animation\\_fact.pdf](http://www.nasscom.org/download/animation_fact.pdf)

# LANGUAGE

Gujarati, spoken in Gujarat, Diu and large parts of Daman, Dadra & Nagar Haveli is spoken by 55 million people domestically and has a significant global presence due to a large diaspora in the United States, United Kingdom and several African nations. In print, newspapers like Gujarat Samachar, Divya Bhaskar, and Sandesh have a wide readership and have successfully transitioned into the digital space since the early 2000s. In 2023, online hyperlocal news witnessed the highest consumption in Gujarati among other regional languages.<sup>40</sup> These publications have expanded their reach to the large Gujarati diaspora nationally and globally. Television channels like GTPL, VTV Gujarati, and TV9 Gujarati, OTT platforms like ShemarooMe and Gujarati-language content on major streaming services are gaining traction.

The shift towards regional digital media and OTT platforms has impacted media buying and communication approaches favourably, especially in terms of regional language content. "Regional OTT platforms have enhanced consumer buckets and made it far more nuanced to understand how each platform influences consumer choice. Consumers are far more educated and aware and can't be bluffed with incorrect information (leaving fake

news out of the window for now). In the era of digital media and OTT, consumers prefer customised communication. This is a unique skill to sharpen, because teams have to plan an outreach towards a diverse target audience, yet staying strong to the core message. As one understands the mediums and their impact, the role of regional markets becomes pertinent. Consumers are becoming visible across markets that were not expected to be part of the media mix. This is where regional market integration in the Communication plan holds value. For us, all campaigns are a combination of English & Regional media, ensuring these are engaged at the varied (stages of the) lifecycle of the campaign," says Pooja Trehan, Head of Communications & PR at Jio World Centre.

Social media platforms have seen a surge in Gujarati language content, which has led to a renaissance of sorts for Gujarati literature and culture in the digital space.

Maharashtra's official language is Marathi, India's third most widely spoken language. It is also spoken in and enjoys official status in the union territories of Daman & Diu, Dadra & Nagar Haveli (additional to Gujarati). It has a robust television industry, with channels like Colours Marathi, Zee

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40. [https://assets.ey.com/content/dam/ey-sites/ey-com/en\\_in/news/2024/03/ey-in-india-s-media-entertainment-sector-is-innovating-for-the-future-03-2024.pdf](https://assets.ey.com/content/dam/ey-sites/ey-com/en_in/news/2024/03/ey-in-india-s-media-entertainment-sector-is-innovating-for-the-future-03-2024.pdf)

Marathi and Star Pravah. In print media, newspapers like Lokmat, Loksatta, Sakal and Maharashtra Times enjoy wide circulation. OTT platforms like Planet-Marathi and Ultra Jhakaas are gaining viewership in addition to Marathi content on multi-lingual platforms like Zee5, Jio Cinema and SonyLiv.

Konkani is the official language of Goa with approximately 2.25 million native speakers. Despite its relatively small speaker base, Konkani has a diverse media presence. Print publications like Sunaparant and Vauraddeancho lxtt cater to different script preferences, while television channels such as Prudent Media and HCN offer news and entertainment content. The Konkani film industry, though small, has produced critically acclaimed works like 'Nachom-ia Kumpasar'. Digital platforms, including websites and social media, are increasingly featuring Konkani content, reflecting the language's adaptation to modern media consumption habits. Cultural institutions like the Goa Konkani Akademi actively promote Konkani literature and arts.

Madhya Pradesh, located in central India, has a rich linguistic and cultural heritage. Hindi is the official and most widely spoken language, with several regional dialects like Malvi, Bundeli, and Bagheli. Major newspapers like Dainik Bhaskar, Nai Duniya, and Patrika enjoy a large readership base and television channels like Sahara Samay MP/CG and IBC24 cater to local tastes. While national OTT platforms like Prime Video, Hotstar and Netflix are popular, there's a growing interest in content in dialects as well.



# CULTURAL TRENDS

Regional communication is more than the translation of a message in a regional language, having to blend cultural nuances unique to each region. Consider the liveliness of Garba during Navratri, the sweetness of the 'modak' during Ganapati Puja, 'feni' from Goa and the intricate Navara architecture of Khajuraho in Madhya Pradesh – all important aspects in crafting a communication strategy.

For example, a public health campaign might be more successful using street theatre in rural Madhya Pradesh, while a social media challenge could be more effective in urban Pune. Understanding the local context allows for more impactful messaging. A water conservation initiative might resonate strongly when linked to the traditional step wells of Gujarat, while a tourism campaign would immediately resonate when connected with the Goan Carnival. These culturally relevant touchpoints can significantly enhance the relatability and effectiveness of any communication.

Further, regions perceive time and social hierarchies differently. A fast-paced, direct approach might work well in metropolitan Mumbai, while a more measured, relationship-building strategy could be more appropriate in smaller towns of Madhya Pradesh.

"Every state has a code and one should learn that code if one wants to function smoothly and wants people to respond favourably. The biggest pitfall in India is communication. Speaking a language and writing an email is often considered as being able to communicate but actually, communicators are nuanced professionals with a larger view of the business and political ecosystem that helps them

deconstruct and reconstruct a strategy", said the late Sushant Balsekar – Head of India Corporate Communications, Daimler Truck Asia Global Communications.

Gujarat's culture presents a colourful tapestry of traditions, customs, and societal norms characterized by vibrant festivals, food and folk art. Gujarat has the unique distinction of being home to several silent films based on Gujarati and Parsi culture. Gujarat's artistic heritage is exemplified through its rich traditions in handicrafts, folk music, and dance forms like Garba and Dandiya. The state's cultural identity is further shaped by its religious diversity, Hinduism, Jainism, Zoroastrianism and Islam. Diwali, followed by the Gujarati New Year is a time when Gujaratis spend the most, followed by the festivals of Navratri and Uttarayan. Gujarat's entrepreneurial ethos and historical trade practices have played a crucial role in moulding its societal structures and cultural expressions. Community-based businesses flourish in different centres of Gujarat, with a common cultural thread running through them. 60% of the world's diamond business today is controlled by Gujarati Jains from in and around Palanpur.<sup>41</sup> Gujarati food, predominantly vegetarian, is unique in its use of spices, seasonal vegetables, and chickpea flour.

Diu is a cultural extension of Gujarat, following similar customs and traditions. Daman has a Maharashtrian influence owing to erstwhile Koli rule. Dadra & Nagar Haveli is sandwiched between Gujarat and Maharashtra, with 62% of its population comprising tribal groups. Each tribe has its unique language, customs and culture but largely speaks Marathi and Gujarati.

41. <https://economictimes.indiatimes.com/industry/cons-products/fashion-/cosmetics-/jewellery/how-palanpuri-jains-captured-global-diamond-trade/articleshw/99238053.cms?from=mdr>

Maharashtra's culture is a mosaic of diverse festivals, rich cuisine, and a thriving arts and culture scene. The state is the birthplace of Indian cinema and the Marathi film industry. The 'Warkari sampradaya' and its associated practices, such as the annual Pandharpur Wari pilgrimage attract millions of devotees and have a significant economic impact. It boosts tourism, generates employment and has also inspired social movements like the 'Nirmal Wari' sanitation project. Maharashtra's artistic heritage includes classical music traditions like Natya Sangeet, folk arts such as Tamasha and Lavani, and the iconic Ganesh Chaturthi celebrations. The state's cuisine, known for its distinct flavours, ranges from Mumbai's spicy street food to vegetarian dishes like vada pav and puran poli aside from Kolhapuri, Malvani, and eastern Maharashtrian fare. Cities like Mumbai and Pune are cultural melting pots, with the rest of Maharashtra largely homogeneous. It would be remiss to mention Nashik's growing reputation as India's wine capital, given its burgeoning affiliation with viticulture. A juxtaposition is its equally pious and cosmopolitan nature with the largest spending in the state occurring around the festival of Ganesh Chaturthi— the economic activity in Mumbai alone estimated at USD 12 billion<sup>42</sup> and Gudi Padwa, the Maharashtrian new year. Goan culture has a significant Portuguese influence having been its territory for 450 years. Natak, Perni Jagor — an ancient mask dance, and Gauda Jagor — a social impressionist folk

dance-drama, and Tiatr are popular Goan theatre forms. Goan art forms like Koli dance, Dekhni, Fugdi, Mando, and Dulpod are popular. Goan food, whose staple is fish and rice, is known for its elaborate cooking techniques and generous usage of coconut. Goan architecture is a combination of Dravidian, Hemadpanti, Ottoman and Portuguese influences. The Goan Carnival and Shigmo are very popular in addition to the Goan Sunburn Festival, Asia's largest dance and music festival that attracts over 150,000 people from all across the country.<sup>43</sup>

Madhya Pradesh, the heart of India, boasts of a rich cultural heritage marked by vibrant festivals, diverse dance forms, and traditional music. It is home to festivals like the Lokrang Festival, Akhil Bhartiya Kalidas Samaroh, and Khajuraho Dance Festival, each showcasing the state's folk arts and crafts. Kumbh Mela in Ujjain, a month-long festival that takes place once every 12 years, is one of the largest congregations of people in the country, attracting millions from all over the country. Gaur, Saila, Sugga and Karma are popular dance forms. Madhya Pradesh is also home to various tribes, each with unique customs, music, and dance. The state's cuisine varies regionally, featuring both vegetarian and non-vegetarian dishes, with specialities like kusli, kebabs, and biryani.

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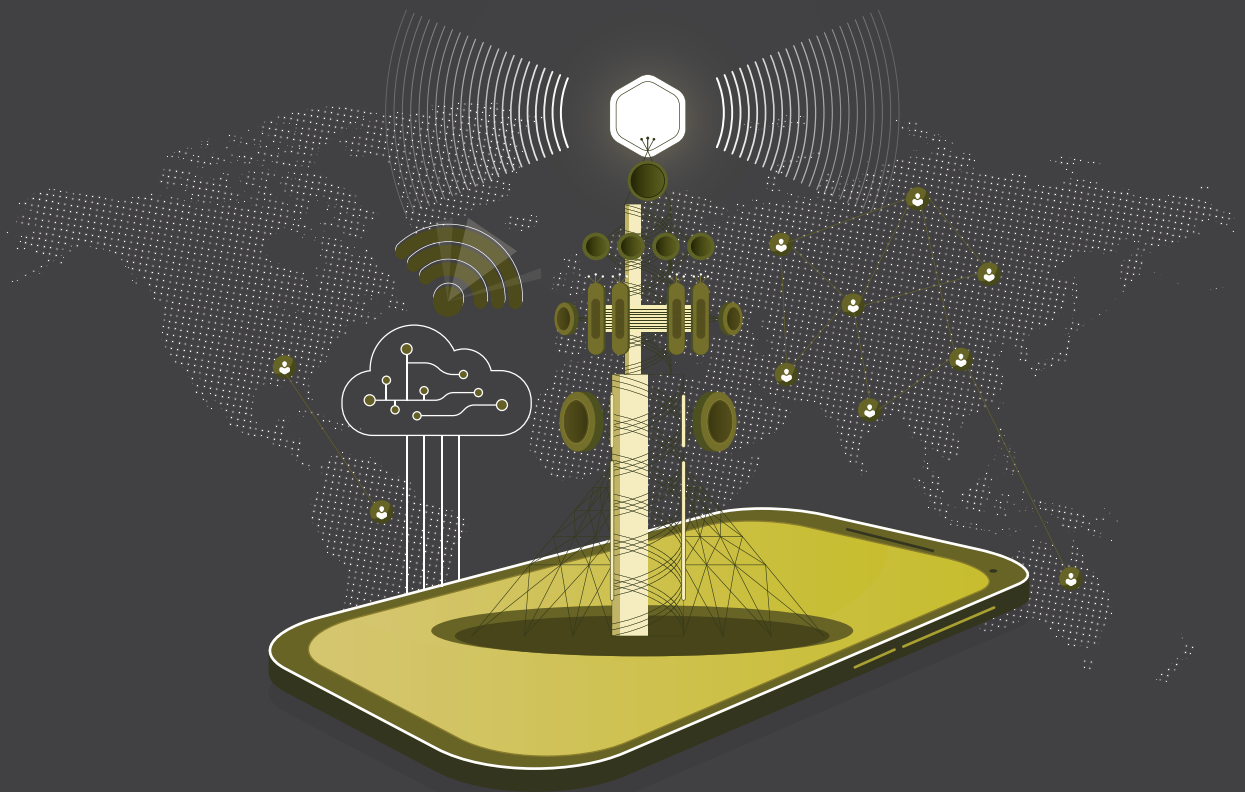
42. <https://www.moneycontrol.com/news/trends/features/the-economics-of-ganesh-chaturthi-festival-in-mumbai-11414021.html>

43. <https://everythingexperiential.com/article/sunburn-festival-2023-attracts-over-15-lakh-audience-504414>



# THE WAY AHEAD

While future disruptors in the PR industry would still be technology-driven like the 5G rollout making high-definition content mainstream, AI-based content delivery networks and digital labour, an immediate task now is to cater to India's growing digital demography and content demands. Early digital and internet consumers were largely English-speaking and homogenous, but new digital consumers hail from diverse sets. With India's demography moving towards a transactional media economy, streams such as animation, VFX, gaming, streaming and music industries are emerging as the outperformers of the M&E sector. India's digital behaviour, especially in its West Zone, particularly favours localisation, prefers regional content, and is fuelled by a desire to connect and learn.<sup>44</sup>



44. <https://www.moneycontrol.com/news/trends/features/the-economics-of-ganesh-chaturthi-festival-in-mumbai-11414021.html>







[www.fuzionpr.co.in](http://www.fuzionpr.co.in)

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