

SPARK

An AnimationXpress.com [KAM Summit & ANN Awards Special Issue](#)

August 2019

DIVING INTO THE KIDS ECOSYSTEM

Animation
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KIDS,
ANIMATION
& MORE

- How Indian kids consume TV
- The rise of local animation IPs, brands and L&M
- Agenda

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Ache**



Daaduji

**Gattu
Battu**



Rudra



Golmaal Jr.

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VISCOM

Oh not another summit?

That's a cry we did not hear this time from anyone in industry when we at AnimationXpress.com decided to put together the Kids, Animation & More (KAM) Summit as well as the ANN Awards. Almost everyone right from business heads to technical professionals and studios welcomed it with open arms. Make it different from last year's ATF Kids Summit which was held in Hyderabad and keep the awards pure and pristine, was all we were told. Which is what we have endeavoured to do.

The KAM Summit first. It is positioned very differently. The focus has been on bringing together platforms – including OTT and broadcast, brands, ad and media agencies, animation studios, and licensing and merchandising firms. The purpose: give them an opportunity to listen and understand each others' perspective on a neutral platform put together by AnimationXpress.com. Almost every major stakeholder got on board to help fund the daylong initiative.

While broadcasters say that the kids genre is underindexed in terms of ad rates compared to the viewership it draws, brand marketers and agencies are loathe to buy into it, proffering that they are already paying too much for the air time. There's probably truth to what both are claiming. But the fact is that the FCT rates could definitely be pushed up a notch or two following the order that has come into TV distribution courtesy the New Tariff Order.

Also, are there any other ways that they could help

each other out? Brand integration, AFPs, native content, licensing and merchandising could be some of the partnerships they could forge. Some of this is happening already, but a greater concerted effort by all could help inject some much needed creativity, and moolah into channels' veins as well as innovative communications solutions for brands beyond the 30 second spot. Hopefully, the panel discussions, throughout the day will help spark some interest in all the players concerned.

Now on to the ANN Awards. We took feedback from many in the industry before drawing up the category and the entry fees we should charge. We got a good response from the industry: more than 200 entries in year one is nothing to sniff at. We put together a jury consisting of eminent local animation and international professionals. And they worked hard to help us shortlist the nominees and the winners through an online portal.

Industry is learning as are we on how to enter the awards and how to award the winners. The first year for any awards is crucial and I believe we have crossed the rubicon in creating an excellence recognising platform which has got the respect of all. We thank the industry for that and look forward to feedback to make the ANN Awards better in year two.

The magazine that you are holding commemorates the KAM Summit. A kids sector analysis by BARC will provide you some data, while the story on how the kids genre is engaging with content and brands and consumer outreach will give you some insights which you will value.



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HOW INDIAN KIDS CONSUME TV

India's kids are a TV glued lot. According to data collated by the Broadcast Audience Research Council (BARC) specifically on the occasion of AnimationXpress.com's Kids, Animation & More (KAM) Summit, one out of every four TV viewers in India is a child aged between two and 14 years, giving a cumulative total of 211 million viewers. What's even more important is that this group of very young Indians accounts for one fifth or 20 per cent of all TV viewership.



The OTT onslaught does not seem to have daunted their maw to guzzle TV fare. Their TV consumption in 2019 is up six per cent to 1:18:54 seconds from 1:14:26 seconds in 2018. Indian kids spend 12 per cent of their time watching kids channels and they seem to be gorging on movies and general entertainment channels to the tune of

OVERVIEW OF THE KIDS AUDIENCE



Source: BARC India Data | Wk 01-31 2019 | TG: All India 2-14 yrs | Viewership share basis Impressions

24 per cent and 47 per cent respectively.

For marketers what's crucial to note is that the viewership of kids channels is not restricted to the little ones alone. 39 per cent of viewership on kids TV is accounted for by 2-14 year olds. The remainder 61 per cent is accounted for by older age groups. Yes, it's adults who guzzle kids TV more than the tiny folks. 21 per cent of kids TV viewing is by 41 plus year olds; 18 per cent by 31-40 year olds and 13 per cent by 22-30 year olds, and 10 per cent by 15-21 year

KIDS ENGAGE HEAVILY WITH TV

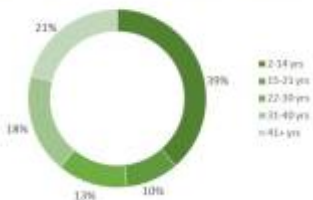
Daily Time Spent Watching Kids Channels



Source: BARC India Data | ATS | Wk 01-31 2018/2019 | TG: All India 2-14 yrs | National Kids Channels

LIKEWISE, KIDS CONTENT IS NOT VIEWED ONLY BY THE KIDS

~60% of viewership on Kids channels comes from other age groups as well



Source: BARC India Data | Wk 01-31 2019 | TG: All India, All Age Groups | National Kids channels | Share basis Impressions

The skew on kids TV channels is because adults normally keep their fingers on the remote while the youngsters are watching, explaining to them or filtering what's showing up on the screen.

Needless to say, 60 per cent of kids TV viewing comes mainly from urban India while the remainder is rural. This compared to the 54:46 split between urban-rural for total TV viewing reveals

WHO IS WATCHING MORE TV?



Source: BARC India Data | Wk 01-31 2019 | TG: All India 2-14 yrs | National Kids channels | Share basis Impressions

WHO IS WATCHING MORE TV?



Source: Broadcast India Survey 2018 + BARC India Newsletter titled: Impact of Co-Viewing on TV Viewership

that kids probably don't watch as much TV as you move into the hinterlands. Do they appreciate the Sinchans and the Doraemons? Is there opportunity here for more localised Indian originating masala animated shows for the broadcasters?

And guess who is watching most with the kids? Well, it's the Indian mom. Juggling her career either as a home maker or in a job along with her household chores, she also finds the time to sit down with her little one as he or she goes goggle eyed over the animated characters on the idiot box. As the kid grows older and more demanding about what he/she, wants moms are there by his/her side. 30 per cent of co-viewing with kids is by mothers who are 31-40 years; the figure is 22 per cent for 21-30 year old moms.

THIS HAPPENS DUE TO CO-VIEWING!

98% OF INDIA STILL OWNS SINGLE TV

CO-VIEWING DURATION IS THE HIGHEST BETWEEN KIDS & THEIR MOTHERS

30%

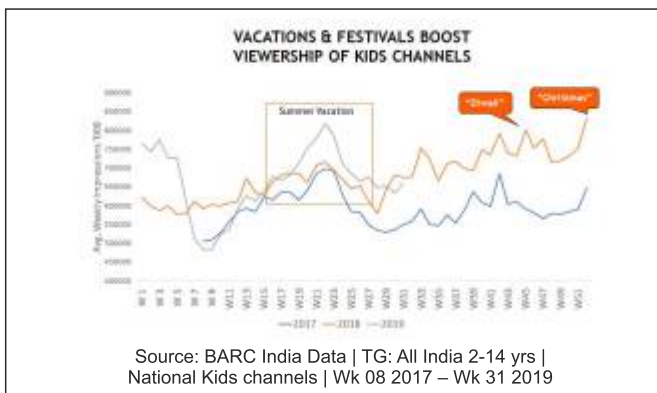
FEMALES AGED 31-40 YRS LIKES TO SPEND MORE TIME WITH KIDS

Females aged 31-40 years spend the maximum time watching TV with kids. While Females aged 31-40 spend 30% of the co-viewing time with their kids, Females aged 21-30 year spend 22% of their time watching TV with their kids.

Co-Viewing Duration of Kids



Source: BARC India Data | TG: All India 2-14 yrs | National Kids channels | Wk 08 2017 – Wk 31 2019

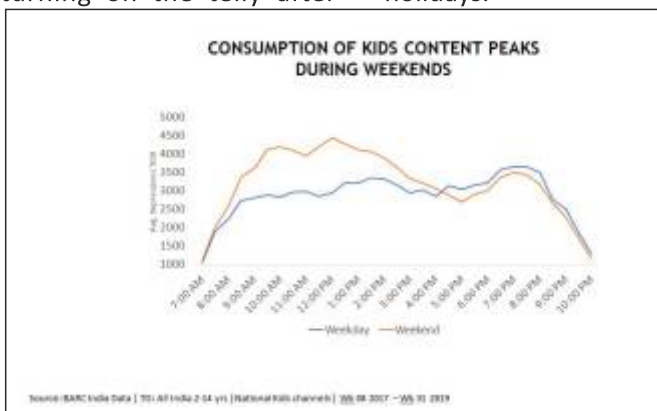


Additionally, another trend that BARC has revealed is that girls consume less of kids TV than boys, whereas the figure for all TV is much higher. The split for kids television is 60 per cent boys- 40 per cent girls, whereas it is 52-48 in the case of total TV. Could it be that young girls' requirements in terms of entertainment need to be addressed better by kids TV programmers?

Kids tend to consume TV throughout the day. But it peaks between 5 pm and 8 pm in the evening and in the noon between 1 pm and 3 pm. A phenomenon which can be explained by them turning on the telly after

returning from morning primary school followed by them completing their playtime in the evening and once again snuggling up on the floor or the couch with the family.

Cramming and tuitions go on throughout the year to pass the rigorous examinations that the Indian education system has drawn up for Indian kids. But come the long summer vacation and the little guys and girls go berserk as their TV viewing bumps up by anywhere between 30-40 per cent. Of course, there are bigger spikes during the shorter Diwali and Christmas holidays.



The big spenders on kids TV

Top 20 Brands & Advertisers on National Kids Channels

TOP 20 ADVERTISERS	No. of Insertions
RECKITT BENCKISER (INDIA) LTD	116729
HINDUSTAN LEVER LTD	56007
ITC LTD	50342
HEINZ	43159
BRITANNIA INDUSTRIES LTD	39141
PERFETTI VAN MELLE IND PVT LTD	34133
COLGATE PALMOLIVE INDIA LTD	33611
HERSHEY INDIA PVT LTD	30980
SMITHKLINE BEECHAM	29611
UNICHARM INDIA	24916
GLAXO SMITHKLINE CONSU HEALTH	23471
PRATAAP SNACKS LIMITED	23441
PROCTER & GAMBLE	22685
FLAVOUR FOODS	21781
KELLOGGS	19711
GODREJ CONSUMER PRODUCTS LTD	19324
AMAZON ONLINE INDIA PVT LTD	16099
S C JOHNSON PRODUCTS & SONS	15571
PARLE PRODUCTS PVT LTD	15281
HASBRO INDIA LLP	14301

TOP 20 BRANDS	No. of Insertions
UNICHARM MAMY POKO PANTS	24916
YELLOW DIAMOND RINGS	22339
BOOST	21567
COLGATE DENTAL CREAM	21098
KELLOGGS CHOCOS	17935
KWLTY WLS CADBURY GEMS BURST	17639
LIZOL	17128
PARLE MAGIX	13479
HORLICKS	12556
PEDIASURE COMPLETE	12181
CRAX CORN RINGS	12000
COMPLAN	11619
HORLICKS CHOCOLATE	11338
HARPIC 10/10	10854
JOLLY RANCHER LOLLIPOPS	10691
DETTOL LIQUID SOAP	10627
HARPIC BATHROOM CLEANER	10459
SUNFEAST YIPPEE NOODLES	10402
GLUCON D	10213
VANISH OXI ACTION	10094

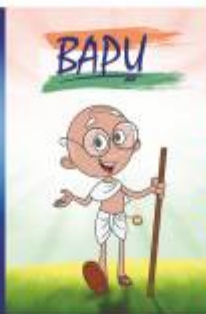
Source: BARC India Data | Wk 01-32 2019

Top 20 Brands & Advertisers on Regional Kids Channels

TOP 20 ADVERTISERS	No. of Insertions
RECKITT BENCKISER (INDIA) LTD	123545
HINDUSTAN LEVER LTD	77547
ITC LTD	32956
GLAXO SMITHKLINE CONSU HEALTH	31959
GODREJ CONSUMER PRODUCTS LTD	21451
SMITHKLINE BEECHAM	17164
BROOKE BOND LIPTON INDIA LTD	15737
PROCTER & GAMBLE	15625
PERFETTI VAN MELLE IND PVT LTD	15143
BRITANNIA INDUSTRIES LTD	13968
HATSUN AGRO PRODUCT LTD	13325
PROCTER & GAMBLE HOME PRODUCTS	13096
COLGATE PALMOLIVE INDIA LTD	11809
WIPRO LTD	9551
LALITHA JEWELLERY	8514
PRATAAP SNACKS LIMITED	7991
PARLE PRODUCTS PVT LTD	7351
ABBOTT HEALTH CARE PVT LTD	7183
UNICHARM INDIA	6584
PONDS INDIA	5836

TOP 20 BRANDS	No. of Insertions
BOOST	27914
LIZOL	19627
HARPIC 10/10	13467
DETTOL LIQUID SOAP	13026
HORLICKS	12061
COLGATE DENTAL CREAM	10836
LALITHA JEWELLERY	8514
DETTOL COOL SOAP	8402
HARPIC BATHROOM CLEANER	8330
GOODKNIGHT POWER ACTIV PLUS	7938
DETTOL ANTISEPTIC LIQUID	7795
HARPIC	7727
YELLOW DIAMOND RINGS	7586
VANISH OXI ACTION	7554
PEDIASURE COMPLETE	7183
LIZOL KITCHEN POWER CLEANER	6595
UNICHARM MAMY POKO PANTS	6584
DETTOL ALOE VERA	6392
PARLE MAGIX	6193
SUNFEAST YIPPEE NOODLES	6026

Source: BARC India Data | Wk 01-32 2019 | Channels: Kushi TV, Kochu TV, Chintu TV, Chutti TV



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The rise of local animation IPs, brands and L&M

Sharminidra Paul

The past year has been an exceptionally good one for the Indian animated kids ecosystem. The upward spurt in viewership in the kids category in 2018 was due to the rush of original local IPs which enabled viewership numbers to rise from an average 499 GRPs to 550 for the genre.

Eight months into 2019, the genre has reflected a potential to grow beyond expectations. Industry experts believe that this is just the beginning: homegrown IPs from broadcasters like Sony YAY!, Discovery Kids, Nickelodeon, Cartoon Network, Sonic, and Disney are only going to increase, boosting the category further.

Animation production for domestic broadcasting is growing at a healthy

rate of around 30 per cent. TV comprises 65 per cent of all animation in India followed by film and digital. Kids' entertainment channels prosper on the dominance of flagship shows. 70 per cent of airtime and 80 per cent of GRPs for leading channels in India come from one leading show.

According to this year's FICCI EY report, the kids and animation segment in the country is estimated to reach Rs 24.4 billion by 2021. This number will continue to increase as the broadcasters are now focusing on commissioning original animated shows and building their own library rather than licensing content.

At least 12-14 Indian originating shows are produced each week creating a healthy assembly line of production, reiterating the fact that to build and maintain a long-term relationship with young audiences, it is important to create local toon characters, around whom shows, merchandise, and digital engagement can be mounted.

Besides the likes of ongoing popular animated shows - *Chhota Bheem*, *Little Singham*, *KickO* and *Super Speedo*, *Honey Bunny Ka Jholmaal*, *Rudra-Boom*



Chik Chik Boom, *Roll No. 21*, new shows like *Kalari Kids* on POGO, *Golmaal Jr* on SONIC deserve special mention.

Explains Viacom18 Hindi Mass Entertainment & the Kids TV head Nina Elavia Jaipuria: “From the market share perspective, we are the leaders, not just in viewership share, but also in revenues. So the effort is to sustain Nick’s number one position and grow Sonic. We are not just looking at it from the viewership perspective but also from the monetisation standpoint. With the launch of *Golmaal Jr*, 2019 will see further scaling up of our content library with 200 plus hours of content which is expected to add shows as well as television movies.”

The launch of *Golmaal Jr*. was supported by a dynamic 360 degree marketing and communication plan that included an aggressive TV outreach, within and outside the Viacom18 network.

On the other hand, Nickelodeon recently collaborated with Allwyn Bikes to launch Shiva Bicycles extending the Shiva brand.

Similarly, after its successful three-season stint with Amazon Prime Video



India, *Kalari Kids*, from the house of Green Gold Animation was taken up by POGO. *Kalari Kids* combines an old-world charm and warmth of India with new-age fun. The animation style is unique and has a raw, tribal feeling which is something new for the kids to experience.

Green Gold Animation founder & CEO Rajiv Chilaka explains, “As of today, the reach of linear TV is much higher than OTT platforms. This show was loved by the kids on Amazon Prime Video and with POGO, the series will have a much wider and bigger audience. I feel both TV and OTT will continue to grow and our job is to give our children nice and interesting content.”

When it comes to Green Gold Animation, one cannot do away without mentioning *Chhota Bheem* and its phenomenal journey through the decade. Till today, it enjoys a massive and an enviable fan following and love. Lately its spin-off series *Mighty Little Bheem* has gone on to become the largest launch of any preschool original and the second-largest launch of any kids’ original animated series on Netflix. Such has been its craze that the streaming giant has renewed it for a second season starting this August.

In fact, it's supposedly the only animated IP to have maximum number of brand collaborations, licensing and merchandising deals. It has partnered with Dettol, Savlon, McDonald's, Parle G, Dabur Gluco Plus C, Big Bazaar, Knorr Soup, Lifebuoy Handwash, Camlin Flora Pencils, Yippee Noodles, Crocs, Pepsodent, Max Fashion and many more.

Like Bheem, the old hits have still remained gold. Brand new episodes and different marketing strategies have enabled them to be in the race and that too in a good position.

Sony YAY! too had exciting plans for kids. A few months ago, the kids channel announced a massive 124 city van activation to amplify its on-ground engagement with kids. The van activation promised a fun-filled time for young ones with exciting show themed games and a host of other activities across Maharashtra, Uttar Pradesh, Gujarat, Rajasthan, Andhra Pradesh, Punjab, Tamil Nadu and West Bengal. Lately, its popular toon Honey in a 'Back to School campaign' went to different households to promote child rights and right to education for kids.

Sony YAY! business head Leena Lele Dutta noted, "This year we are not coming out with any new IP but we are doing a lot of activities with our existing ones. We have our van activation across

almost over 100 cities and towns through the length and breadth of the country. That's a big big initiative. So, we're trying to make sure our characters' presence is widespread rather than launching another IP and focusing on that. This entire year it's about making our IPs popular through our BTL activities and this we plan to take the entire summer season on ground. We have mall activations, bookshops, fun fares and all of that where kids are associated. You'll find our association with Imagica and more. And we'll make sure that our existing characters popularising Honey Bunny and KickO will reflect what our on ground strategy also."

Turner is also no exception in this regard. Its fan-first strategy focuses on a 360 degree approach to engage fans beyond the TV to digital, social media, apps, games and events. Turner's successful 'School Contact Programme' directly connects with over one million kids pan-India.



First launched 14 years ago, this trendsetting property gave young viewers an opportunity to directly engage with their favourite cartoons from various IPs such as *Ben 10*, *Roll No.21* and *Chhota Bheem*. The school contact programme has cultivated a solid reputation as a perfect fan engagement avenue, strengthening the bond between kids and their brands Cartoon Network and Pogo – both of which have become household names today.

Turner set up an immersive 360-degree AR video photo booth in multiple malls for *Kalari Kids* and also conducted a programme ‘Chhota Bheem ki Eco-Pathshala’ at shopping malls to engage and entertain kids.

Says Turner India managing director Siddharth Jain, “Our marketing efforts are designed to build both the Cartoon

Network and Pogo brands as well as their respective franchises and IPs on a ‘fan-first strategy.’ It’s a strategy that focuses on the dynamic on- and off-screen demands of fans. With an audience that has evolved with us since the time we pioneered the kids’ entertainment space and which today thrives on immersion, new experiences and engagement, we have moved towards greater experiential brand-building enabling our fans to embrace our brands, franchises and characters in very part of their everyday life beyond the TV screen.”

Little Singham too has been making noises since its inception. Lately, it became the first animated IP to perform at the Wagah Border. Says Discovery Kids business head Uttam Pal Singh: “We followed a bold approach and to take a contrarian view on all aspects of the product reinvention – consumer

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t e a m .

Basically, we did things differently and we did it at scale – we made moves which are not the norm in the industry. I am happy that the strategy worked in our favour.”





Little Singham had also whipped up huge advertiser interest with its growing popularity including FMCG brands like Dabur Red Paste, Britannia Cakes, Dettol, Flipkart, and Heinz-Glucon D and B.

Leveraging strong brand equity and reach, Reliance Animation launched this series in collaboration with Discovery Kids and Rohit Shetty Picturez into the consumer space through its licensing & merchandising program. Asserted Reliance Animation COO Tejonidhi Bhandare at ILE, “Going beyond mythological characters, we thought of coming up with a character that could relate with kids. As of now we are building this in a bigger way to unfold the brand into the consumer product space and roll out an extensive merchandise range for the same.”

This brings our focus to licensing and merchandising (L&M) deals these biggies get into, to establish their IPs

and themselves as a bigger brand in a better way. L&M has always been a crucial part of the growth and flourishing of IPs and brands across the globe. According to The World Trademark Review’s, *The rise of licensing in India*, retail licensing in the country is estimated at \$1.26 billion of which, entertainment licensing is valued at \$406 million.

Aided by L&M, marketing strategies and brand collaborations, the kids ecosystem in India is gradually becoming ‘mainstream’ from the periphery with amazing work being done.

“The evolution that we are witnessing is unparalleled,” says a media observer. “India is like no other market—thanks to its many languages and local cultures. On the one hand, TV channels are upping the game. On the other, OTT platforms have started throwing their hats into the ring. I expect a further acceleration, and the boom times to only grow for the platforms and content creators. National and regional cartoon heroes are waiting to be created. FMCG brand marketers who recognise the importance local cartoon characters have in their audience’s hearts, and ride their popularity will stand to benefit greatly in terms of building relationships with consumers. It’s the beginning of the golden age of partnerships between brands and Indian animation.”

Marketing to kids equals responsible marketing

The discussion around this article started when we at Mondelez International were asked to describe what exactly the 'Marketing to Kids' policy at Mondelēz International is, what it stands for and how it is executed in real business situations. The first words that came to my mind when I reflected on this self-regulated policy was 'responsible marketing.'

As global media consumption grew and became nearly universal in the seventies and eighties, worldwide studies were initiated to understand the impact of media consumption on kids. Kids, in particularly the younger lot, are not only the most enthusiastic aficionados of their favourite brands but are also the most vulnerable segment simply because they tend to trust more easily and are likely have not learned to understand the difference between a story and an advertisement. They love to support their favourite brands and tend not to question any motives if popular characters tell them to buy a particular product.

In this context, the 'Marketing to Kids' policy for us was the way in which we raised our hands to commit ourselves to responsible marketing. Through this policy, we hold ourselves accountable for the way in which our

communication, media and products interact with consumers and we recognise the need to give consumers, particularly parents, the right to choose what they consider the best options for their kids. Given that kids are an important consumption segment, we knew from the beginning that taking on this commitment would impact us in multiple ways. There would be short term dips in consumption as we went off air from kids-oriented channels and there would be an effort and education needed to rewire the entire system to adhere to this approach.

We realised that this was an endeavour that we were prepared to undertake. And the serendipity of it was that during our journey, we encountered several like-minded partners, agencies and even competitors. In real business situations, the Marketing to Kids policy comes to life through a three-pronged approach – the right tonality for our communication (universal, family, adult or teen in orientation),

Suparna Madan
Licensing Head, India,
MEA - Mondelez



right choices in media (no direct communication to kids below 12 years of age) and high quality products (focus on better ingredients and a continuous endeavour to make products that meet nutritional guidelines and portion control).

We are clear that we cannot create communication which is directed towards kids below 12 years of age. Media choices which till a decade ago focused on kids and cartoon channels are not part of our mix today. We have a protocol against any promotion and activation at schools and we continuously endeavour to deliver the right snack for the right moment through intensive work streams on nutrition guidelines.

The Marketing to Kids policy has been a journey which has led us to discover ideas and opportunities for product design, recipe improvements and ultimately, greater choice for parents of young kids.

There have been times when we have discarded potentially strong marketing ideas, interesting recipes and promotion opportunities if they violated the spirit of this commitment. In this journey, we have fielded questions from teams responsible for business delivery on why we choose to not take the obvious and perhaps easier route and boost revenue. We have re-

worked our systems and our procurement methods to make safer bundles for children. We have invested in stringent quality measures and safety standards for products and premiums and taken the time to percolate this philosophy across the whole system from manufacturing to sales, communication, media and even our agency partners.



Today, the level of education of the policy is so high in the system that across departments, we are able to check each other and enable

decision making to support the policy. If marketing comes up with an idea, the legal, media and procurement teams first check if it is compliant with the policy before things proceed. We work with each other to find the right opportunities and hold each other accountable to stay within the guardrails we have created for ourselves.

For Mondelez International, Marketing to Kids is not just a policy to benefit our consumers, it is our promise to offer them the right to choose what they believe is best for themselves and their children.

■ Suparna Madan

The author is currently the licensing head – India, MEA, Mondelez International. In her previous roles, she has had extensive experience in the marketing to kids policy and its execution in business situation.

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The Indian kids' channels growth story

Back in the early nineties, the audience's options when it came to consuming content on a kid's channel were extremely limited with little or practically no variety. In a one-size-fits all approach, international offerings along with a few domestic shows entered households across the country, not focusing on what tastes, likes and dislikes and consumption patterns were. As major entertainment giants entered the market, over time, we have witnessed a staggering transformation from foreign-produced content to more local IPs that continue to score high on relatability and appeal. This has proved to be a masterstroke as kids' channels are diversifying and offering localised content which helps increase their reach and time spent on the genre.

With there being a growing chorus amongst the Indian audience demanding localization, content on these channels evolved from being dubbed entities. This meant that more Indian content was created, and more impetus given to local characters and their regional stories. This progression led to the offering being more authentic and relatable. Not only has it proved to be viable owing to its long-term sustainability, but it has allowed content owners to extend a franchise

beyond just video and to develop deeper engagement with fans through merchandise, games, events and location-based entertainment.

Understanding Indian Audiences

The reason for these major players managing to not just foray, but also cement their position in the ever-changing media landscape has been because they are staying true to their roots. Keeping the audience at the very core of their brand ethos, these players have perfectly understood Indian tastes and preferences, the likes and dislikes of the viewer, the many cultural nuances and have tweaked themselves accordingly to appeal to a specific demographic in India.



Willing to build a bond with their viewers, these channels have realized how important it is to create content, and strong characters that the audience can better relate to. This eventually led to more investment in Indian content.

Having created content around strong localized characters, with deep-rooted storylines and showcasing strong values, these channels are also providing role models for the younger generation. This, in turn, allows them to produce hours of original content that can be played for a longer time and leave a lasting impression.

Keeping it vernacular silly

Children in India, over the years, have been watching foreign shows due to a dearth of content in their native language. The country's mobile and data revolutions have given the masses a great opportunity. Building on this, kids' channels in the country are changing the landscape of the Indian animation industry by serving home-grown animated content to Indian viewers in their own native languages.

Within the kids genre, according to BARC 2018 report titled '*What India Watched in 2018?*' Hindi, claimed the biggest viewership share, with 71 per cent, followed by English that captured 21 per cent of the market. The remaining came from Bangla, Marathi, Telugu, Tamil, Malayalam and Kannada.

Sony YAY! is also drawing heavily from home-grown content. It has locally produced content including animated shows such as *Guru Aur Bhole*, *Honey Bunny ka Jholmaal* and *KickO and*



SuperSpeedo.

Sony YAY! witnessed a staggering regional growth in market share in Maharashtra (4.5 per cent in 2017 to 12.4 per cent in 2018), Kerala (2.1 per cent in 2017 to 21.1 per cent in 2018) and West Bengal (6.3 per cent in 2017 to 14.8 per cent in 2018) just on the back of creating regional content for Telugu, Malayalam and Tamil speaking markets.

Building multiple touch-points beyond ratings

Like any other digital consumer of content today, children too are spoilt for choice. For them to stay loyal to characters and shows they watch, they must be engaged constantly and consistently in a meaningful way, not just on air but also through multiple other avenues. More than the message or the channel, it is important to create



an interactive and engaging experience that establishes a deeper brand connection.

Television isn't the only medium through which brands reach out to consumers and build a relationship. We constantly need to explore innovative avenues to reach out to consumers. As different platforms come with their own strengths and reach, brands and marketers need to integrate strategies and touch points to engage with kids on TV, digital platforms, as well as offline mediums.

Relevant platforms like children's magazines and on-ground activations, where children can interact and engage with their favourite characters that they have watched or liked on TV are great ways to build consumer connects. Other out-of-the box methods also include curating a movie for characters, mobile games and merchandise via official toys.

Building Brands = Building Relationships

Kids' channels in India seek to strengthen connections with children and families in each market they're in by developing local creative content that represent and reflects the lives of kids there. With the industry being on the brink of further expansion and increasing investments being made in this sector, the best is yet to come for

the kids' entertainment industry. With localised content working seamlessly alongside foreign-sourced material, we shall witness a 360-degree growth on all fronts. The world belongs to the children of today who will become responsible individuals tomorrow. They belong to the generation which has maximum exposure to all kinds of media. They are the main demographic in terms of consumption for both entertainment as well as learning.

With a high priority being placed on knowing and engaging the audience in the best way possible, production houses, designers and animators will need to contribute to be able to narrate great stories to shape impressionable minds while also meeting bottom-line requirements. And the key to successfully capturing and retaining a child's attention is to engage their imagination and nurture their curiosity to discover more about the world around them!

■ **Leena Lele Dutta**

The author is the business head for Sony YAY!



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What is KAM?

DIVING INTO THE KIDS' ECOSYSTEM

As the kids content ecosystem strives to reach new heights, the players are faced with successes, challenges, growth prospects and much more. Our intention with "Kids, Animation & More" is to explore multiple major sub sectors in the industry and how they are assisting in shaping up the fresh face of the kids' ecosystem in the country.

Brands are increasingly interspersing their marketing strategies with character-based plans which seems to be working well for them. As the push for more of such initiatives continue, the top brands will be looking to get further into the kids' ecosystem.

Our mission is to delve deep inside the happenings of the kids ecosystem through knowledge sharing sessions, fireside chats and honouring the best in the business with India's premiere full-scale animation awards.



AGENDA

9.15 - 10.15 **Registration**

10.15 - 10.30 **Welcome Note**

10.30 - 10.50 **Fireside Chat : Building the challenger brand**

Leena Lele Dutta, Business Head, Sony YAY! and Anil Wanvari, Founder, CEO, Editor-in-Chief, Indian Television Dot Com Group

10.50 - 11.50 **Panel discussion : Building on 200 million eyeballs**

Panelists: Sivakumar Balakrishnan (Head of Marketing, Hamleys India), Samyukta Ganesh Iyer (Head of Marketing, Baskin Robbins India), Kartik Subramanian (Category Head - Consumer Products Division, Pidilite Industries), Tarandeep Singh Sekhon (Marketing Director, KidZania India), Krishnarao S. Buddha (Sr. Category Head - Marketing, Parle Products), Permendra Singh (Head - Consumer Products, Mattel Toys)

Moderator: Srijia Chatterjee (Managing Director, Publicis Worldwide)

11.50 - 12.00 **Special Presentation**

12.00 - 12.15 **TEA BREAK**

12.15 - 12.35 **How Indian kids consume TV?**

Presentation by Elbert D'Silva | Head- Product Leadership & Excellence | BARC India

12.35 - 12.55 **In conversation with : The men who saw tomorrow**

Sunjoy Waddhwa (Founder, Sphereorigins Multivision), Anish Patel (Business Head, HopMotion Animation) and Anil Wanvari (Founder, CEO, Editor-in-Chief, Indian Television Dot Com Group)

12.55 - 13.15 **Reaching out to the kids' audience**

Presentation by Suparna Madan, Licensing Head - India, MEA | Mondelēz International

13.15 - 14.00 **LUNCH**

14.00 - 14.20	What went into the making of Netflix's Trollhunters? Presentation by 88 Pictures by Manish Kumar (Head of animation, 88 Pictures) and Rakesh Patil (Head of production, 88 Pictures)
14.20 - 15.00	Panel: Animation 2020 Panelists: Rajiv Chilaka (Founder and CEO, Green Gold Animation), Ronojoy Chakroborty (Programming head, Sony YAY!), Manoj Mishra (COO, DQ Entertainment), Anu Sikka (Programming Head, Nickelodeon), Tejonidhi Bhandare (COO, Reliance Animation), Ketan Mehta (Managing Director, Cosmos Maya) Moderator : Ashish Kulkarni
15.00 - 15.20	Fireside Chat Nandini Dias (CEO - Lodestar UM) and Anil Wanvari (Founder, CEO, Editor-in-Chief, Indian Television Dot Com Group)
15.20 - 16.05	Panel discussion : The boutique Studios: Tomorrow's Giants Panelists : Aashish Mall (Creative Director, Paperboat Animation Studios), Kumar Deb Sinha (EVP, Dentsu Story Lab), Vaibhav More (Founder, Vaibhav More Films), Anand Bhanushali (Managing Director, PhilmCGI) Moderator : Krishna Desai (Industry veteran)
16.05 - 16.20	HIGH TEA
16.20 - 16.50	Presentation by Cosmos Maya
16.50 - 17.25	Panel Discussion : Digital Native Kids Panelists : Rangarao T M (Chief Strategy Operations, Videogyaan), Smita Maroo (SVP, Shemaroo), Vidhyalakshmi T. A (Senior manager, Sun NXT), Vivek Bhutiyan (Co-founder and CEO, Lattu Kids), Moderator: Pranab Punj (CMO, Kinsane Entertainment)
17.25 - 17.45	In conversation : Making off screen animated hits! Jiggy George (Founder & CEO, Dream Theatre) and Srinivas Chilakalapudi (Chief Strategy Officer, Green Gold Animation)

17.45 - 18.25 **Panel Discussion : Creating an Impact for Kids Audience**

Panelists : Vanita Keswani (Chief Operating Officer, Madison), Arun Raman (National Planning Director, Grey India), Monaz Todywala (Managing Partner, Wavemaker), Lalit Agarwal (Head of India- West, OMD).

Moderator : TBA

18.25 - 18.30 Closing remarks

19.15 onwards **ANN Awards**
Followed by networking dinner.

KAM SUMMIT SPEAKERS

(Listing in no particular order)



Anu Sikka

Programming Head,
Nickelodeon



Kartik S.

Category Head,
Consumer Product Division
Pidilite Industries



Ketan Mehta

Managing Director,
Cosmos Maya



reddot design award
winner 2019



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Anil Wanvari

Founder, CEO, Editor-in-Chief,
Indiantelevision Dot Com Group



Devdatta Potnis

SVP Revenue & Corporate Strategy,
Cosmos Maya



Aashish Mall

Creative Director,
Paperboat Animation Studios



Jiggy George

Founder & CEO,
Dream Theatre



Leena Lele Dutta

Business Head,
Sony YAY!



Krishnarao S Buddha

Senior Category Head,
Parle Products



Nandini Dias

CEO,
Lodestar UM



Munjal Shroff

COO,
Graphiti Multimedia



Anand Bhanushali

Managing Director,
PhilmCGI



Suparna Madan

Licensing Head, India,
MEA - Mondelez



Samyukta Iyer

Head of Marketing,
Baskin Robbins India



Ashish Kulkarni

Founder,
Punnaryug Artvision



Ronojoy Chakraborty

Head Programming,
Sony YAY!



Srinivas Chilakalapudi

Chief Strategy Officer,
Green Gold Animation



Sivaraman B

Head of Marketing,
Hamleys India



Srima Chatterji

Managing Director,
Publicis Worldwide



Tejonidhi Bhandare

COO,
Reliance Animation India



Krishna Desai
Industry Veteran



Monaz Todywalla
Vice President,
Wavemaker



Vaibhav More
Founder,
Vaibhav More Films



Kumar Deb Sinha
EVP,
Dentsu Story Lab



Manoj Mishra
COO,
DQ Entertainment



Rajiv Chilaka
Founder and CEO,
Green Gold Animation



Tarandeep Singh Sekhon
Marketing Director,
Kidzania India



Permendra Singh
Head-Consumer Products,
Mattel Toys



Rangarao T M
Chief Strategy Operations,
Videogyaan



Smita Maroo

SVP, Animation, Kids Digital, L&M
Shemaroo Entertainment



Sunjoy Waddhwa

Founder & Promoter,
Sphereorigins Multivision



Anish Patel

Business Head,
Hopmotion Animation, a division
of Sphereorigins Multivision



Vanita Keswani

CEO,
Madison Media Sigma



Lalit Agarwal

Head India-West,
OMD



Arun Raman

National Planning Director,
Grey India



Pranab Punj

Chief Marketing Officer,
Kinsane Entertainment



Vivek Bhutiyaani

Co-founder & CEO,
Lattu Kids



Vidhyalakshmi T. A.

Senior Manager,
Sun NXT



HopMotion Animation

is a full service, digital 2D animation studio focused on producing broadcast quality animation for television and digital platforms. The state of the art studio facility in Mumbai & Hyderabad is powered by Toon Boom Harmony and Storyboard Pro.

RS

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What is Ann?

The animation industry in India is striving to create world-class content. The tag of the ecosystem being a service destination is being swiftly taken over by IP creation. The broadcasters, studios, OTT players and everyone else in the game are bucking up for the next big thing. This is the perfect time to honour the names behind the amazing animated content that is being produced and to bring the industry under one roof. Ann awards intends on bringing recognition and set a bar for the Indian animated industry and all its aspects.



Animation *Xpress*.com

Ann

A W A R D S

CATEGORIES

Programming - Kids' shows that shine the brightest

Media Advertising & Marketing -Highlighting the strongest marketing game in the kids' space

Technical - Honouring professionals behind the scenes

Personalities - Dedicated to animated aspects making the biggest waves.

L & M - Animated character or series that finds the same resonance off-screen.

Students - Recognising the artistry of students in the field of animation.

ANN AWARDS JURY

We received more than 200 entries from across the industry in just our first year of the AnimationXpress ANN Awards. A jury consisting of senior animation industry professionals from both the country and overseas helped us arrive at the nominees and winners. The judging process was completely online though an application specifically curated for this purpose.

We thank our jury members for their inputs!



Chris Higgins

Higgins has a bachelors of business and a masters in advertising. He is the chief analytics officer at Insite Digital and IdeateLabs and oversees digital strategy and advertising for companies across India and the Middle East from the telecom, manufacturing, industrial, real estate, education, fashion, and retail industries. Previously, Higgins was the president of AISFM, a filmmaking, animation and liberal arts college in Hyderabad, India. He was also a member of the founding team at Whistling Woods International.



Abhijeet Kini

Founder of Abhijeet Kini Studios, he is an illustrator, animator and independent comics publisher, known for his comic series *Angry Maushi* and *Fanboys*. Along with cartooning for magazines and newspapers like Times Group, Hindustan Times, Timeout Mumbai/ Delhi, Khaleej Times, National Geographic Traveller, Verve and others for almost two decades, Kini is a regular illustrator with Tinkle comics since 2004. Along with art, he also runs a merchandise line featuring his artworks.

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Gayatri Rao

Founder- director of Animagic, Rao has done her B.F.A. from the College of Arts, Delhi and Masters in Design (M.Des.) in Visual Communication, from IDC, IIT-Mumbai. She has won the National Award from the President of India A.P.J. Abdul Kalam as the best animation filmmaker in 2005. She has also steered films like *Chakachak*, *MAAA-AAA* and two features including *Tripura* and *Swami Ayyappan* as creative producer.



Koji Yamamura

Yamamura is a member of the Academy of Motion Picture Arts and Sciences, and a professor of the Tokyo University of the Arts. His animated short, *Mt. Head* was nominated for an Oscar and films like *The Old Crocodile* (2005), *Franz Kafka's A Country Doctor* (2007) and *Muybridge's Strings* (2011) gained him a place among the world's top animation filmmakers. He has worked for international jury and held many retrospective screenings around the world.



Shilpa Ranade

Ranade is a designer, animator, illustrator, filmmaker and academician. She has been a faculty at Industrial Design Centre in Mumbai. Ranade has directed animated short films for Channel 4, UK. The award-winning animation movie *Goopi Gawaiya Bagha Bajaiya* was her latest full-length feature which world premiered at the Toronto International Film Festival. Her other films are *Naja* *Goes to School* and *Mani's Dying*.



Ashish Kulkarni

Kulkarni is the founder of Punarnayug Artvision and was heading Reliance Animation and Reliance AIMS as CEO. Known for his unique creation of shows and characters like *Little Krishna*, *Big Bees*, *Krishna Aur Kans*, *Shaktimaan* to name a few, he is the chairman of FICCI Animation and Gaming Forum and Chairman of MCCA Animation & Gaming committee and has been a final jury member on Emmys, Kid's iEmmys, VES, 24 FPS, FICCI BAF, New York Film Festival, Banff Awards.



K-tech

ABAI, An Association for Animation, VFX, Gaming & Comics sector supported by Govt. of Karnataka has become the torch bearer of revolutionising the AVGC sector in Karnataka. The unparalleled list of initiatives taken by ABAI are focused on skill development, enabling infrastructure, encouraging startups and MSMEs, develop market and ecosystem.

Centre of Excellence for Animation, Gaming and Visual effects is now operational in Whitefield, Bengaluru.



Available Facilities:

Performance Capture | AR-VR Lab | VFX Camera System | Di-Color Correction Suites | Render Farm | Incubation Centre | Film Scanner | Location & Body Scanner | R&D and workshop

Most of the facilities are available on Pay-per-use basis.

Other ABAI initiatives include -

Bengaluru GAFX:

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Digital Art Centres:

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Vaibhav More

An alumni of Sir J.J. Institute of Applied Art, More has an experience of over 17 years in the field of animation and graphics. He is the founder and director of Vaibhav More Films and has worked for brands like YFilms, Cadbury, Domex, Harley Davidson, Pidilite and many more. More has also worked as animation producer-director with brands like MTV India, MTV Middle East, VH1 and has created numerous projects for Disney TV, Star Sports, Viacom Group, Sony PIX, Zee TV, Sony TV, Nickelodeon and others.



Vivek Lath

He is the founder and CEO of GoQuest Media Ventures. Lath is also the co-founding partner in Golden Pen (a joint venture between renowned author Hussian Zaidi and producer Jaspinder Kang) and Lattu Kids (an edutainment platform for preschoolers). He has wide range of experiences in Entertainment, DTH, Tech and FMCG retail. He is also an active angel investor with a portfolio of 8+ startups in various industries.



Mayur Puri

Puri is a professional storyteller, screenwriter, lyricist & filmmaker working for over 19 years now. He has written over a 100 songs, and scripts of tens of movies, written Hindi dialogues for several Disney, Marvel and Pixar movies. In 2010, he co-founded #StoryCircus - an institution dedicated to foster the art of Storytelling, which now functions as a full fledged Theater Group. He's currently working on making his debut feature film and developing different shows for Netflix, Hotstar and Zee5.



Kailash Parmar

With an experience in game development for more than 14 years, Parmar is currently working as an art manager at Ubisoft India. He is responsible for building, managing and mentoring art team for AAA Game development.



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Vivek Ram

As Senapati of Vaanarsena Studios, Vivek has a vast experience of over 20 years in the 3D and 2D animation space. He has worked with Rhythm and Hues Studios and Dreamworks Animation, on Hollywood features like *Superman Returns*, *Fast and the Furious: Tokyo Drift*, *The Incredible Hulk*, *Madagascar*, *Penguins of Madagascar* to name a few. Currently Vivek is a creative consultant and film director, helping various companies and brands improve existing content visually, and develop new content for both digital and broadcast media.



Anil Wanvari

Wanvari, is the founder of Indiantelevision Dot Com Group, of which AnimationXpress India Pvt. Ltd. is a part.

He is a mentor to many animation studios and works closely with them, helping them syndicate their content and get into co-productions.



Ashwini Kamat

An MBA from Jamnalal Bajaj, Kamat has been with MediaCom since 2009 in various capacities and currently manages the retail business there.

With 20 years of experience that includes high exposure to diverse categories like modern retail, FMCG, financial services, automobiles, insurance, online lotteries, liquor she has an excellent understanding of diverse target segments like the rural consumer, up market professionals, working women, youth, housewives and children.



Yoshiya Ayugai

Ayugai is a writer, producer and development consultant for kids and family content working across the Asia Pacific region. Originally from Japan, Yoshiya has occupied development and production executive positions at Disney, Cartoon Network and Netflix. Yoshiya works with the most dynamic animation studios in the Asia Pacific region to produce locally-inspired content that entertains and delights young viewers all over the world.

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