



KEY MEDIA ENTITIES FROM ZEE GROUP

SOME OF THE KEY MEDIA ENTITIES FROM THE ESSEL GROUP OF COMPANIES INCLUDE

1. Zee Entertainment Enterprises Limited (ZEEL) is a listed Indian mass media company with:

- 1.3 Bn viewers
- Presence in 170+ countries
- 35+ International Channels and 35+ Domestic Channels
- 4,800 Movie Titles
- More than 260K Hours of Television Content

2. Zee Media Corporation Limited (ZMCL), a listed entity, is one of India's foremost media companies that touches the lives of millions of Indians with its strong presence in the News genre. Apart from News Channels, ZMCL operates an English daily News Paper 'DNA'. ZMCL, the news network comprises of 14 news channels in different languages including:

ZEENEWS
India's first Hindi News Channel

ZEEBUSINESS
Hindi Business News Channel

ZEE हिन्दुस्तान
Hindi Rural News Channel

India 24x7
24x7 Free to Air News Channel

DNA
Indian Broadsheet Newspaper, published in English in Mumbai, Delhi, Jaipur & Ahmedabad

WION
International Channel
WION – World Is One Network

OTHER GROUP ENTITIES INCLUDE

essel
EXTRAORDINARY PACKAGING
With 2,600+ employees in 12 countries working through 25 state-of-the-art facilities, Essel is the largest global specialty packaging company in the world, offering preferred solutions to leading brands.

Essel Infra
Essel Infraprojects Ltd. has diversified interests in infrastructure projects with 45BUs & 10 business verticals comprising of an order book value of ~USD 5 Billion.

SITI
One of India's largest Multi System Operator (MSO) with 15 digital head ends and a network of 33,000+ Kms of optical fibre and coaxial cable, providing its cable services in ~580 locations, reaching out to more than 11 Million digital customers.

Essel Finance
One of India's leading private sector financial services company, with a customer base of ~1.5 lakhs & 70+ branches, offering diverse range of products & services across corporate finance and retail segments.

dishtv
Redefining the meaning of television for its customers with its exceptional digital quality, DishTV has revolutionized the digital entertainment in India and is the largest DTH provider with over 10 Crore happy viewers.

Zee Learn

About Zee Learn:

Zee Learn is India's leading company in education segment with the fastest growing chain of K-12 schools – Mount Litera Zee School and India's widely present preschool chain network – Kidzee in its portfolio. Another offering from the company, Zee Institute of Creative Art (ZICA) is the nation's first full-fledged Classical and Digital Animation Training Academy that trains youth in classical 2D, modern 3D animation and VFX is present Across the Country.



Journey so far...



Innovation in Animation, VFX,
Gaming, and Graphics since 1995

PAN India Presence



Inception in 2003

2000+ centres in 750+ cities across India
Home to 1 million happy children



A tutorial for grades 8, 9, and 10
established in 1988

51 centres across Mumbai



An expert in coaching
grades 11, 12, and CA
foundation since 2003

27 centres across
India



A preparatory coaching
for Medical and
Engineering entrance
exams

Established in 2006



India's fastest growing
chains of K-12 schools
since 2006

130+ schools in 110+ cities
across India



An Institute for Media and
Filmmaking established in 2004

Centres located in Mumbai and
Jaipur



Mount Utera School
INTERNATIONAL

Established in 2014, a future-ready IB
Continuum School located at BKC,
Mumbai

Excellent infrastructure, IB-trained
academic team, and innovative
teaching methodologies

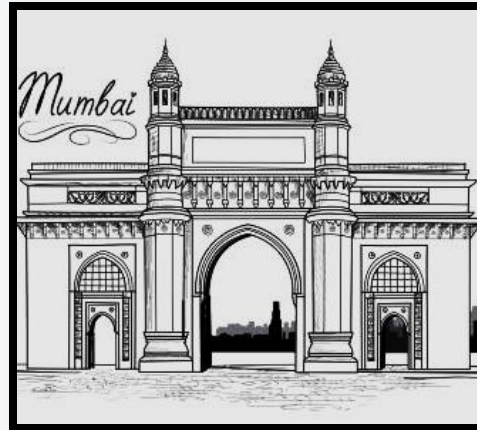
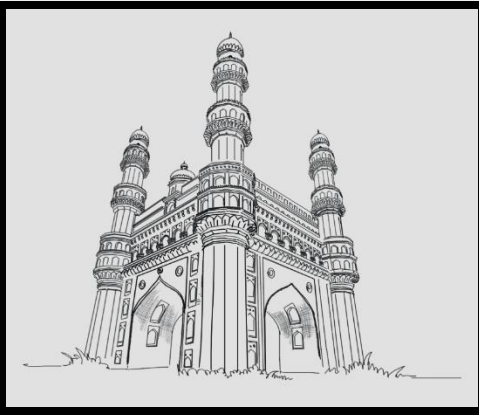


Online learning app for
grades 8 - 12, Science,
and Commerce

Inception in 2016



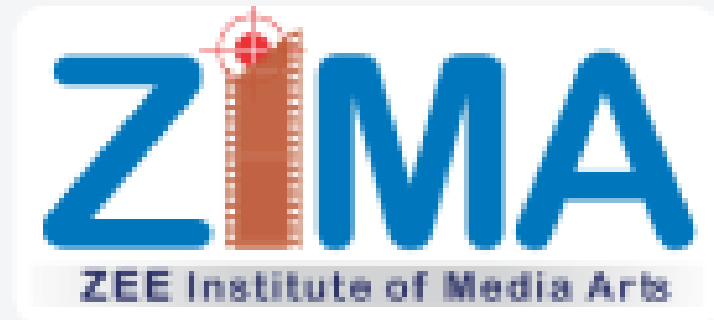
1995



1998



2006



2004



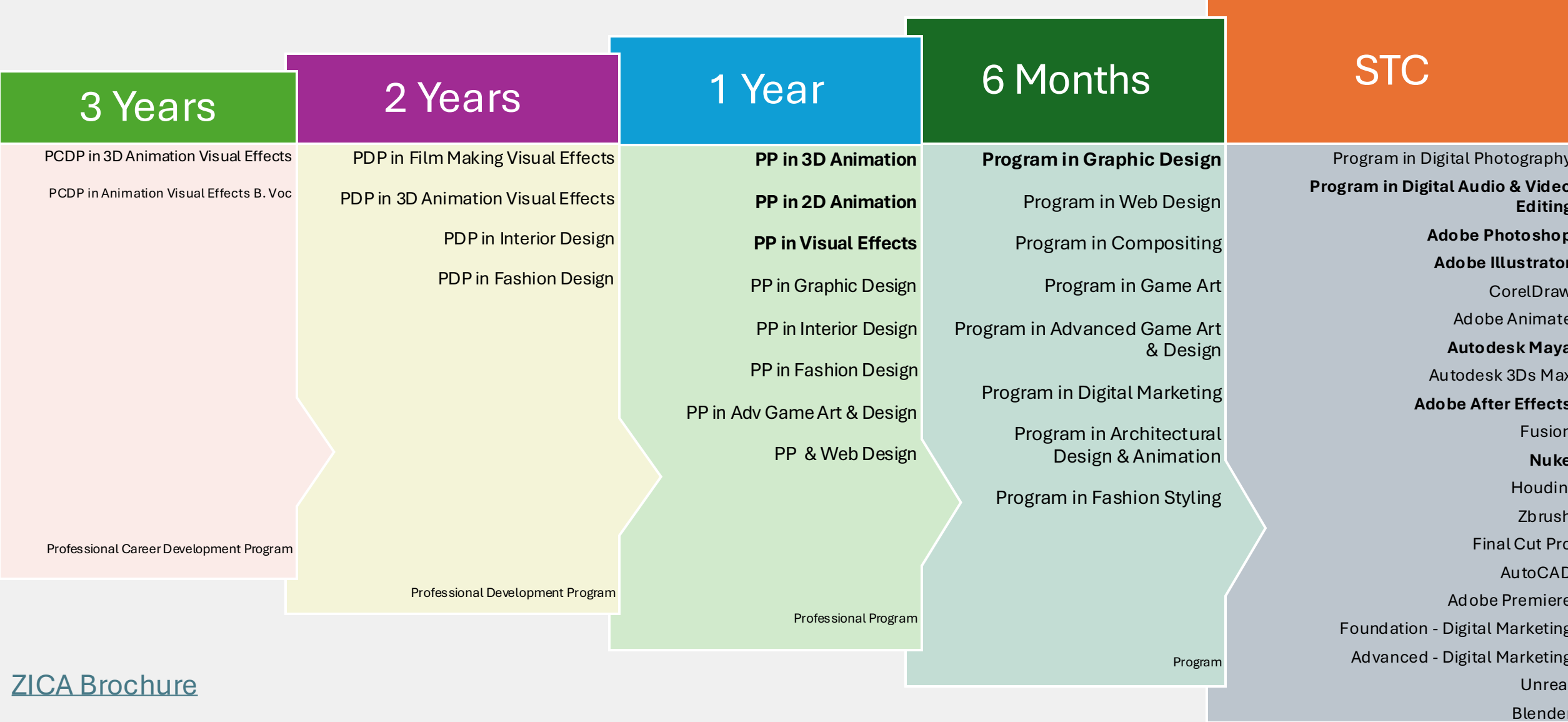
2009

ZICA Franchising



- ZICA Is India's First Full-fledged Animation, VFX, Game And Design Training Academy.
- Trained Over Thousands Of Students.
- Successfully Operational From 1995 With Pan India Presence
- ZICA Offers A Programs To Make You Job-ready Careers. Courses Offered M&E Segments Are :
 - Animation
 - VFX
 - Gaming
 - Graphics & Web
 - Digital Marketing
 - Fashion
 - Interior
 - UI/UX

Products Range...



Fees Range...

Tier- 1 Fees (2024 - 25)

- Rs 14,000/- to Rs. 3,80,000/-

Tier- 2 Fees (2024 - 25)

- Rs 12,000/- to Rs. 3,42,000/-

Tier- 3 Fees (2024 - 25)

- Rs 10,000/- to Rs. 3,07,000/-

* Exclusive of GST: currently 18%

Our Stakeholders...



Industry



Educational
Institution



Faculties



Partners



Parents



Students



Counsellors

Placement support...

The Placement team is dedicated to finding suitable job opportunities for trained students. They conduct job-oriented training sessions for students, organize placement drives in collaboration with various companies, and provide training programs for center placement executives.

Centers need to report the details of passing out students to the HO Placement Team atleast three months in advance. The HO Placement Team will then conduct sessions on grooming, portfolio development, and mentoring, as well as schedule interviews.



Lead Generation...

Direct
Website & SEO
Google AdWords
WhatsApp/ FB & Insta Page
Landing page Creation and promotion
Theatre Activities Movie Tickets distribution
Institution Tie up
Seminar/Webinar in Schools/colleges/Coaching
Data Base Collection and Calling
JD+Shiksha+Sulekha+local lead provider
influential Marketing
Participation in Education
Agency / Agent Engagement
Canopy /Road Show/Society
Exam Day/Best Of Luck

In-Direct
No Parking
Hoarding
Pole Board / Direction
Mall Activities
Van/Rickshaw/Bus/Train
Theatre Activities: Theatre Screen
Local News Paper Ad
News Paper Articles/editorials/inserts
Human Branding

Lead Nurturing...



Tele Calling & Walkin Generation...

OPENING / INTRODUCTION: Good morning this is ----- calling from ZeeLearn – ZICA. Am I speaking to -----? Hi---- how are you, (name) (follow up response)

REASON FOR CALL: Firstly, we would like to thank you for showing your interest in ZICA & **invite** you to attend a **Career Counseling Seminar on Jobs in Animation** industries to enlighten you about your career opportunities where you could easily earn **upto Rs15-30thousand per month** which means more than **Rs2-4 lakhs per year**.

CHECK ELIGIBILITY: To avail this benefit we need to take some confirmation. Can u please confirm your **Date of Birth and Qualification (With Stream)?**

May I know your Career Plans?

Where did you put up (inform as per center update)? Check the total distance taken to reach that centre.

Thank you for providing me the information.

CREATE A NEED: You must have read in newspaper that **Animation** industry is **booming** and **lacs of jobs are expected** in these industries in the coming years.

This is the only career where you can earn more money as well as lots of opportunities with just Graduate pass qualification.

So, just to tell you everything about the career in this highly paid and growing industry. I would like to invite you for a career counseling seminar at our centre. This is **TOTALLY FREE OF COST**.

CONFIRMATION: Would tomorrow be ok with you? (Yes / No If yes,) which timings would you prefer morning 11:00 or evening 4:00 pm? **(wait for student response)**

We have limited seat for seminar out of that, I am going to reserve the seat for you. Are you sure that you will attend the seminar tomorrow then I can reserve the seat for you? (Take 100% confirmation for student) **(Wait for him/her to say something...yes or no).**

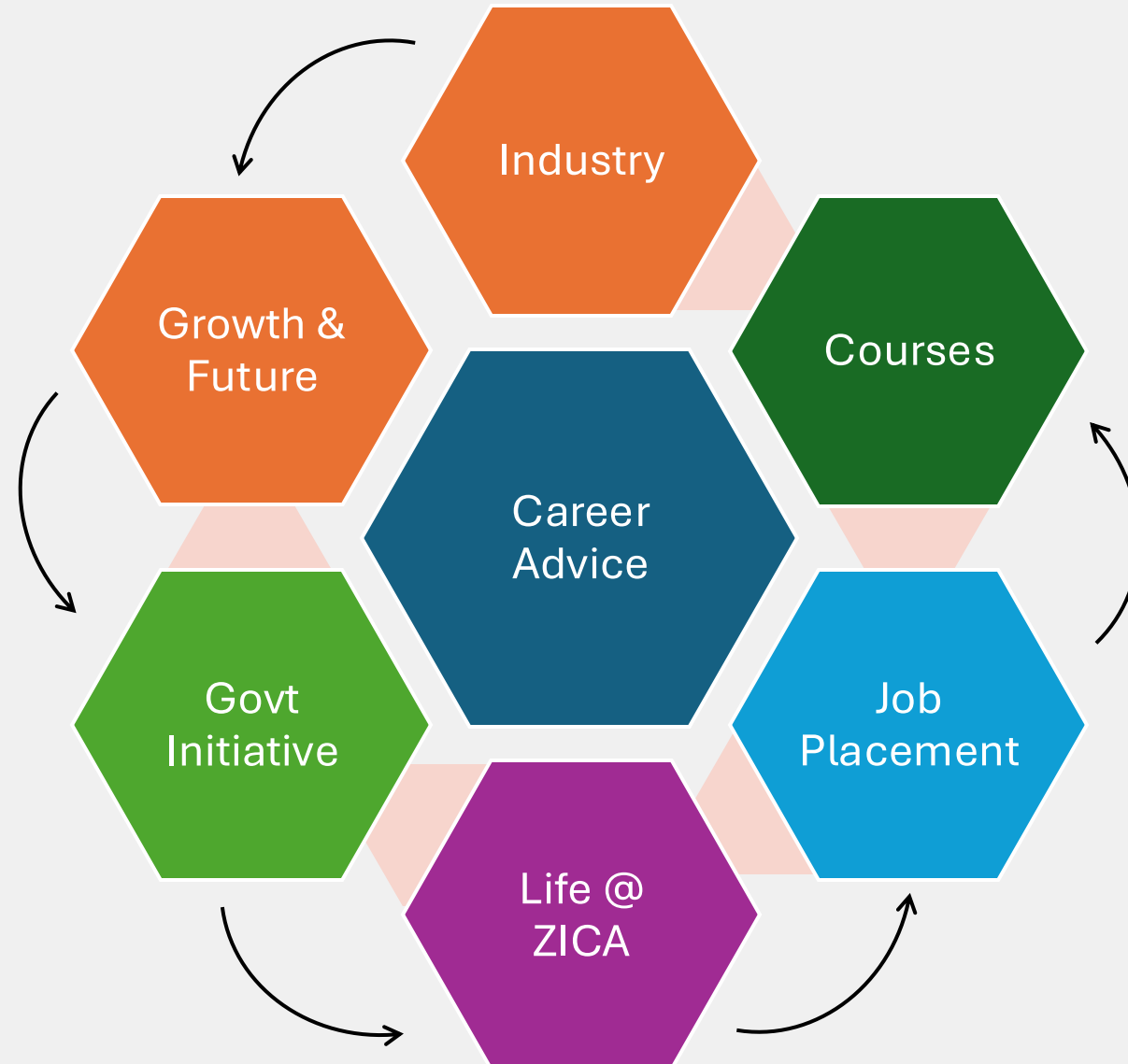
IF YES: So, I am reserving a seat for you on (date) at (time) in the career seminar. OK? (Yes)

(Name) please note down our centre address and Appointment no.

Please note your Appointment no & centre address & for your convenience, I have also SMS you the Appointment number and the center address on the same number. You are requested to visit the center by 10:45 am /15:45 pm to avoid any delay, as the seminar would start sharp at 11:00 am and 04:00 pm.

(Closing): Thank you for your time & support (Students Name), you were talking to (Your Name) from ZICA and have a lovely day or Have a nice day.

Career Advice...



PROFILING OF WALK-INS...

EDUCATION	AFFORDABILITY	INTEREST	Ind. AWARENESS
10+2	Career	Design	Not Aware
In College	Professional	Motion Graphics	Half Aware
Graduate	Modular	Animation	Fully Aware
Working Professional		Visual Effects	
		Gaming	

Industry...

INDIAN M&E INDUSTRY

SIZE OF INDIAN M&E INDUSTRY

The Media and Entertainment (M&E) sector in India is projected to exceed Rs. 4 lakh crore (US\$ 53.64 billion) by 2025 and estimated to grow at a CAGR of 10.75% in the next four years (until 2025) and AVGC is a prime contributor to this sector.



The number of connected smart televisions are expected to reach 40-50 million by 2025. 30% of the content viewed on these screens will be gaming, social media and short video.



India OTT Revenue is expected to grow to USD 13-15 Bn. by 2030, growing at a CAGR of 22-25% over the next decade.



In 2020 Indians had the highest online video consumption/week in the world. As of 2020, India registered 1803 million online video viewers, including streaming services and videos on free platforms such as YouTube.



In 2020, Indians downloaded 9.2 billion games. The Indian gaming industry stood at US\$ 930 million in 2020 and is expected to reach US\$ 3.8 billion by 2024.



The Animation & VFX segment is expected to grow to INR129 billion by 2023. Indian VFX studios have worked on several critically-acclaimed international projects like Dune, No Time to Die, Joker, The Witcher etc.

INDIAN M&E INDUSTRY

INSIGHT TO M&E SUB-SECTORS



For more information, scan the QR code



ADVERTISING & OOH

Advertising is facing the dawn of a new era; online ads are proliferating and attracting more and more of the advertising budget.

In 2020, the Indian advertising industry was valued at over 644 billion Indian rupees, and it was projected to reach up to 700 billion rupees by 2022.



ANIMATION & VFX

The animation and VFX (Visual Effects) has been one of the fastest growing sub-sectors in recent years, growing at 18% in 2018 and 20% in 2019.

In 2024, the human resource supply-demand gap will be highest because of excess training volume especially in vocational courses.



ART & CULTURE

India has immense history of art and cultures, one of the largest collections of cultural heritage which includes songs, music, dance, theatre, painting, performing arts, etc.

The visual art industry which encompasses paintings, sculptures, photography etc. was assessed at 1,703 Crore in 2019.



DIGITAL MEDIA & OTT

The adoption of digital technology into our day-to-day life, from work to entertainment, education to social events, every activity has been shifted to online medium as the offline alternatives were not available or were severely curtailed.

The size of Indian digital media industry in 2019 was INR 20,162 Crore and by 2020 it reached INR 25,814 Crore.



RADIO

The radio industry in India has seen low to negative growth rate in the past couple of years. The revenue has decreased from INR 2,422 Crore to INR 2,814 Crore during the last two years. Prior to 2019, the industry had seen a CAGR of 1.1% during 2016-2019, but the slowdown in the past 2 years has posed the industry back.



FILMS

Indian film industry is the largest producer of films in the world and the number of movies produced has grown significantly in the last decade, increasing from 1,200+ movies in 2009 to 2,400+ in 2019. With films produced in 20+ languages, one can gauge the diverse nature of the industry in the country.

INDIAN M&E INDUSTRY

INSIGHT TO M&E SUB-SECTORS



For more information, scan the QR code



GAMING

The online gaming sub-sector is growing at a rapid rate for the past few years, witnessing a growth of 140%. The growth trends were sustained during Pandemic, with the revenue share increasing to INR 6,977 Crore in 2020. The major platforms for online games are personal computer (PC), mobile and console.



PRINT

Print Media, one of the oldest modes of public communication in India, primarily comprises of newspaper and periodicals publishing, with revenue generated through advertising and circulation. In 2018, there were 11 lakh subscriptions with Registrar of Newspapers for India which included 17,573 newspapers and approximately 1 lakh periodicals across the country.



EVENTS & LIVE PERFORMANCE

In 2019, the Live Events market in India was valued at INR 8,300 Crore. According to the EEMA report, the events and activations sub-sector in India was expected to cross INR 10,000 Crore by 2020-2021 but due to COVID, the industry saw a fall.

On the adverse side, people started adopting Digital events.



SOUND & MUSIC

Indian Sound & Music sub-sector has been growing steadily over the last few years and has reached annual revenue of INR 1,516 Crore in 2019, with a growth rate of 12.4 percent from FY 2018 surpassing the previous year's growth of 8.5 percent.



TELEVISION

Television is the largest sub-sector in Indian M&E landscape and one of the dominant mode of media consumption. The size of Indian television sub-sector reached INR 75,800 crore in 2019 CAGR of 19.8% for the period 2016-19. The revenue for television industry is largely generated from two major streams - broadcasting subscription and advertisement.



THEME & AMUSEMENT PARKS

The Indian theme park and amusement park sub-sector is still in its nascent stage though it started in the 1980s and is at INR 11,475 Crore in FY 2019. Currently, there are more than 150 theme and amusement parks spread all over India across major cities including Tier-2 and Tier-3 cities.

Industry...

Overview of Global AVGC Sector

The **global animation and visual effects market** size was estimated at USD 168 billion in 2021 and is projected to grow to USD 290 Bn by 2024 at a CAGR of 10.94% between 2020 and 2026 .

One of the main factors leading to the development of the VFX market worldwide is the introduction of augmented reality (AR).

The increasing demand for digital content has created a need for innovation in visual effects for new experiences like AR.

The global gaming market was valued at USD 198.4 Bn in 2020 and is expected to reach USD 314.4 billion by 2026, growing at a CAGR of 9.64% between 2021 and 2026. ⁵

As per estimates for 2021, there are 2.7 billion gamers across the world with China, Japan, US, and UK combined representing 47% of all gamers globally and 64% of all direct consumer spend on gaming. ⁶

Asia-Pacific is anticipated to hold the largest market share in the gaming industry, with India, Japan, China, and South Korea showing high potential for market growth. ⁸

The **global Comic Book market size** is projected to reach US\$ 19.5 billion by 2028, from US\$ 11.8 billion in 2021, at a CAGR of 7.1% during 2022-2028. ⁹

The movie RRR had over 2800 VFX shots. All the animal scenes were synchronized using radio-controlled cars, programed to operate at specific speed.



GOVT Initiative...

Budget 2022



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Animation, Visual Effects, Gaming and Comics (AVGC) task force will be set up as these areas hold a lot of potential to employ the youth.

- **Nirmala Sitharaman** | Union Finance Minister, India



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AVCG-XR sector can provide immense employment opportunities to the youth who can serve the global market and the Indian talent can lead the way in this sector.

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SHRI NARENDRA MODI
Hon'ble Prime Minister of India

Life @ ZICA...



Academic
delivery report



Student
Feedback



FDP (Faculty
Development Program)



Masterclasses
(Weekly Activity)



Artist of
the month



Aesthetics
(Yearly Activity)



Student reference
material (e-Studio)



Video Tutorials
(ZICA app)



Centre Visit
(as per the need)



Training on
portfolio development



Resumé building
and interview etiquette



Students
certification

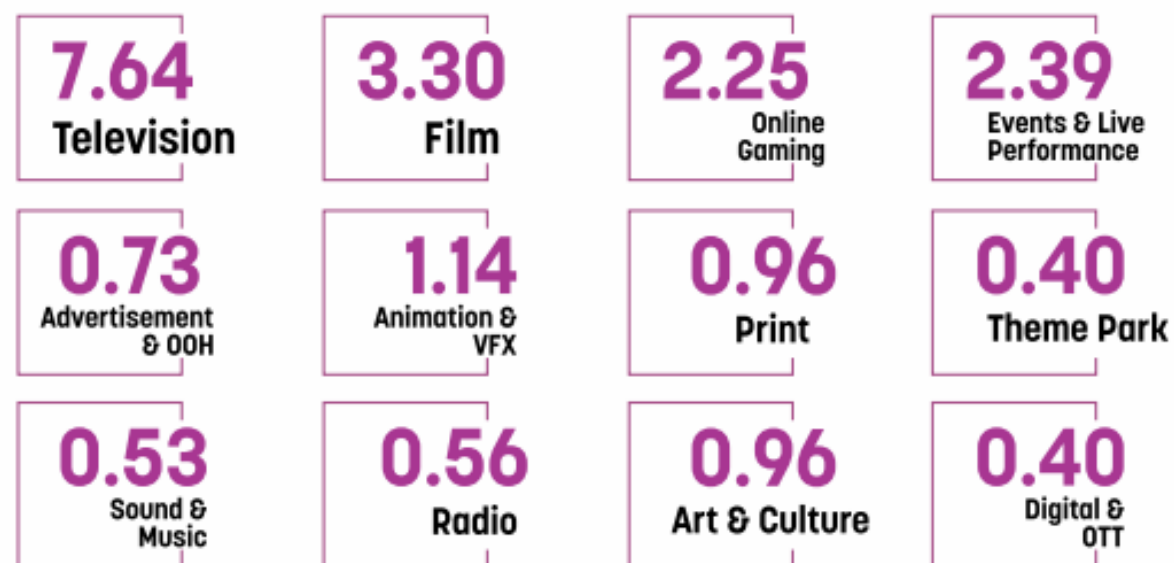


Placement
assistance

Job & Placement...

INDIAN M&E INDUSTRY EMPLOYMENT PROJECTION

- + By 2025, the number of connected smart televisions are expected to reach 340-50 million. 30% of the content viewed on these screens will be gaming, social media, short video and content items produced exclusively for this audience by television, print and radio brands.
- + OTT video services market (video-on-demand and live) in India is likely to post a CAGR of 29.52% to reach US\$ 5.12 billion by FY26, driven by rapid developments in online platforms and increased demand for quality content among users.



Employment Projection in Media & Entertainment Sector in FY 2025 (In Lakhs)

Life @ ZICA...



Master Classes

Expert Session Conducted by Industry personals for Students



Artist of the Month

Monthly student competition on diverse categories
The competition provides a platform to showcase artistic skills and talents



Aesthetics

Aesthetics is Zee Learn & ZICA's Animation, VFX and Film Making annual conclave of professionals, students and corporates in the related fields. It gives a common platform to the students where the students participate from all corners of the country, exhibit their creative talent and win awards.

ZICA Courses...



Thank You