Industry Attractiveness Of Indian Comic Industry

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INTRODUCTION

The Corporate strategy of diversified companies (as different from business level strategy) has two major tasks: (i) the selection of the mix of businesses (i.e. the decision on the diversification strategy) and (ii) the value enhancing management of this mix of businesses based on appropriate organisational structures, systems and resource policies. There are two basic descriptive dimensions of corporate strategy - how diversified and how vertically integrated an organization is. It may be helpful to think of both of these dimensions as a continuum.

Diversification occurs when a firm enters a new industry or market. A well diversified firm can be determined by portion of its sales derived from different markets. The larger a percentage of sales are derived from different markets/industries, the more diversified the firm can be said to be. Most of the large firms engage in some diversification.

Today, many companies in all industries continuously monitor the emerging technologies and investigate the likely future of themes in the economy. A market opportunity assessment is a summary overview of the size and nature of demand in a potential market, as well as the vendor ecosystem (competitors and channel participants) that exist to serve that market. The goal is to develop a clear understanding of the "big picture" - how the industry is operating, and what are the key trends.

The objective of the paper is to research the industry attractiveness of comic industry in India, the essence being cricket. This study provides quotients for cricket comics as a potent market with immense potential. Firms aiming at growth through expansion and diversification can gain significantly from this qualitative research that has been conducted extensively.

The key questions revolving around the mentioned grand strategy are:

1. What emerging factors are likely to affect and shape the industry?
2. What implications do they pose for formulating the strategy of the firm?
3. How can emerging trends, potentially able to reshape an industry, be identified?
4. How can their implications for business strategy be drawn?
5. How should the investigation be carried out in order to provide really useful information for decision makers?

LITERATURE REVIEW

Strategy is a set of relevant and largely irreversible decisions, taken with the aim of governing the development and growth of a firm in the medium and long term, by strengthening its position in the industry/industries where it competes (Porter, 1980; Porter, 1985; Hamel and Prahalad, 1990). The formulation of the strategy basically consists of deciding the scope of a company, that is, in which industries it has to compete (corporate strategy), and where it has to be positioned within an industry, i.e. what kind of competitive advantage it has to pursue and by what means (business strategy; Grant, 2002). Therefore, strategy is strictly intertwined and linked with the analysis of the likely future evolution of the industry, i.e. "foresight", which aims at foreseeing the opportunities to be exploited and the threats to be faced.

Strategies may be developed around existing assets or distinctive competences by matching them with environmental opportunities (Pearce II and Robinson 1994). Alternatively, they may identify new competences that will be acquired, developed and supported. Growth strategies such as product expansion, market expansion, and diversification often require that competences be extended and enhanced to meet environmental opportunities (Aaker 2001).

It becomes imperative for a firm to define and investigate its business environment. The basic definition of a business area takes into account three dimensions: *customer needs, customer groups, and technology* (Abell, 1980). In this way, an industry can be identified by its products, that is by the specific needs they are meant to fulfil and the specific technology used to make these products. The automotive industry satisfies the need of mobility through the basic

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technology of fuel engine, and the PC industry satisfies the need of data processing through the basic technologies of microelectronics and software.

The business micro environment of a firm is made up by all the companies which operate for fulfilling the same specific customer needs by means of the same specific technology, by their suppliers, by the consumers and by the providers of complementary goods. In some cases, a further relevant element is made up by the regulations that public authorities conceive in order to govern the industry operations. This set of players and their forces provides the essential framework for detecting the emerging industry trends.

The selection of target markets represents a critical strategic decision in planning. Despite this importance, the appropriate nature and usage of evaluative selection criteria has been neglected in the literature and some researchers have argued that a considerable theory practice gap exists in this area of segmentation research. Despite the strategic importance of target market selection, Simkim and Dibb (1998) observed that there was little consistency and guidance in the literature. They noted the need for an extensive research agenda to guide more effective decision making in this area. This included research for better identification of the criteria used by organisations, the relationship between these criteria and how short and long term considerations might be balanced.

Frank (1972) did not effectively distinguish between the qualifying and selection stages but specified the criteria as segment size, stability, the degree of heterogeneity between segments, the level of competition in segments and some organizational factors, including the 'fit' between segments and company strengths. Wind and Cadozo (1974) treated the target identification stage more simply as an analysis of the profitability of differentiating the marketing program.

According to Green (2005), insights about socio-cultural, technological, market and business related trends are exchanged and made coherent so that a common informative basis is defined, that allows identifying new business values and opportunities for new products and services.

A central goal for most of the companies is to develop clear market and customer focus. This can be challenging. There may be many potential markets for your products and services. Mine Group, an innovation strategy firm specializing in market traction for new products, technologies and lines of business developed a simple but powerful model for market definition that comprises of three steps:

I. *Identify and evaluate a range of market options:* The first step is to assess the size, nature of demand and vendor ecosystem (competitors and channel participants) in a range of potential markets. The goal is to develop a clear understanding of the attractiveness of each market as a basis for a priority ranking of the firm's possible market options. It can also be summed as Market opportunity assessment, which should include:

• A definition of what is and what is not included in the market.

• Market size and growth rate.

• Primary customer segments and a short profile on each.

• Overview of the vendor eco-system (the key players at each stage of the supply chain) with a short profile on each vendor category.

• A summary of :

i. Best target customer segment/s

ii. Likely competitor categories

iii. Possible channel partner categories.

II. *Understand customer needs in the target market:* The next step is to develop an in-depth understanding of customer needs within the best market option. This can be clubbed in customer research. Having identified best target customer segment, firms need to develop an in-depth understanding of these target customers, their needs and options. The first step is clarifying exactly who is the customer. The smaller a business, the easier it is to identify and define the customer. Whereas in large businesses, a number of people are involved who play different roles. In either case, there is a need to identify the typical profile and motivations of these different players to tailor marketing and sales approach accordingly.

Next is developing a deep understanding of the needs the firm is addressing. Customer needs can be analyzed in two primary categories:

• **Core Needs:** These are the functional needs customers have that a firm addresses, normally driven by increasing revenue, reducing costs and / or managing risks.

• **Buying Needs-** These needs are to do with the customer's ability to buy - what must happen from both a process and budget point of view to get to a purchase commitment.

Both these sets of needs must be clearly understood and addressed in order to secure a purchase order from the customer!

A firm must also understand the options from the customer's perspective. While information on customer needs maybe gathered from online research, nothing beats talking directly to prospective customers. This should be one of the earliest market development activities a firm undertakes, and it should never end. The fundamental requirement for winning customers is to talk to them on an ongoing basis, and to continuously refine every aspect of market development model, until the formula is perfected for unleashing the market's potential.

To understand customers more rigorously, it is useful to think in terms of both qualitative and quantitative research. Start with qualitative research, typically conducted through one-to-one telephone or face-to-face interviews, or focus groups (talking to a small group of customers).Qualitative research is about rich conversations with customers, using discussion guides to get customers talking in-depth about their needs and options. It often doesn't take more than five or ten in-depth interviews to uncover and begin to see the patterns in customer needs within a specific market.

Having developed a reasonable understanding of the range of customers, needs and options from the qualitative research, quantitative research (surveys, typically done online) maybe used to assess their applicability across the market. This ensures that a firm's understanding reflects the actual market, and is not biased by a particularly vocal interviewee.

III. *Understand customer options-competitors*: Finally, there is a need to understand customer options from the customer's perspective. A firm should identify and analyze at least half a dozen or so direct competitors, so that a firm can refine its offering and positioning to clearly present against each competitor.

The key elements to focus on understanding for each competitor include:

• Who is the competitor's primary target customer?

• What are the key benefits of the competitor's offering when compared with the customer's core needs?

• What key benefits does the competitor offer to meet the customer's buying needs? What are the total costs and risks of the competitor's offering?

• To what extent is the competitor able or likely to respond to your offering? What are they likely to do?

Industry trend means a change either in customer needs or in the technology used to match them, which requires, at least potentially, new patterns in the way products are designed, manufactured, delivered, used, dismissed and recycled. For the purpose of the study, Indian comic industry has been chosen as it is no longer a laughing matter. It is expected to grow into a $1.3 trillion global industry by 2016, and India has begun to fineprint. India has traditionally been the store house of mythological characters and the world is beginning to feel that there's great talent here for story-telling and the art associated with it. Its seen to be a matter of creating the characters, telling the story the way world wants it, and marketing it the way the West does.

RESEARCH METHODOLOGY

The paper focuses on industry attractiveness factor as a part of corporate strategy of growth. Market opportunity assessment has been conducted, which is a crucial success factor when a company is evaluating its position in the market or entering a new market. Indian comic industry has been chosen as a subject, strongly flavored with cricket as the theme. Cricket as a theme has been assessed to be more potent than elections and it binds people, not only just children across the country.

Eight mini group discussions (of 5-6 respondents) and one full focus group discussion (of 10 respondents) in an upmarket South Delhi Club was organized. The period of the research was February-April 2009. The target group chosen had the following profile:

8 MGDs:

• Kids in 3 age groups: 8-10 years, 12-14 years, 15-16 years.
• Boys and Girls, with a 'male' skew (due to cricket).
• Sec A, B.

1 FGD:

- Youngsters in the 21-24 year age band.
- Boys
- SEC A

The sample spread was as follows:

|	Sec A	Sec B
8-10 years	2 (G, B)	1 (B)
12-14 years	1 (B)	2 (G, B)
15-16 years	1 (B)	1 (B)
21-24 years	1 (B)	0

It was ensured that the respondents have the following prerequisites:

- Should get a newspaper at home.
- Must read a newspaper at least thrice in a week, either at school or at home.
- Interested in reading comics.
- Interested in playing/watching cricket.

RESULTS AND INTERPRETATIONS

The respondent's profile (Annexure 1) ranking indicates that in their spare time, respondents indulge in:

1. 'Sleeping' after coming back from school, a common phenomenon amongst many kids.
2. In the evening and on weekends/holidays, they engage in a mix of outdoor and indoor activities.

- Ludo, Carom, Chess, Table Tennis, Cards.
- Play computer games and even use the internet.
- Outdoors games - cricket, badminton, basketball and football.
- Played usually in the neighborhood park, more frequently during holidays/weekends.

3. In the 21-24 year old category, youngsters are interested in discs, pubbing, cars/bikes, movies and watching cricket. Shift in interests vis-a-vis younger age group is apparent.
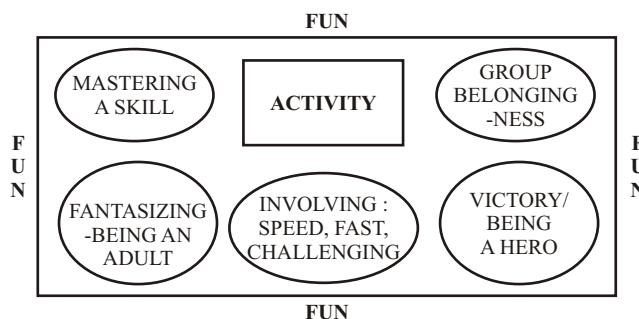
Outside play retains its sheen, while time spent may have declined.
- Scores high on their definition of FUN.
- Meets their natural urge for activity.

THE FOLLOWING OBSERVATIONS WERE MADE REGARDING TELEVISION VIEWING

- Television viewing preferences vary with age band.
- Younger kids are more enthusiastic and react with zeal when we start talking about TV; older kids give a matter-of-fact/lukewarm response.
- As the age increases, there is no fixed time for watching TV and viewer ship is 'mood' dependent…but higher on holidays/weekends.
- Increased parent resistance in the younger age group (of 8-10 years) towards watching TV; decreases with age.
- Older age band no longer keen on 'cartoons'-see them as juvenile, 'not for me'. Regularly follow the reality shows and musical bonanzas.

CERTAIN GENDER DIFFERENCES CAME FORWARD (ANNEXURE 1 AND 2), WHICH WERE

- Boys expressed interest in watching various types of Sports including WWF, Tennis, Soccer, Hockey apart from Cricket.
- Girls, on the contrary, were watching Music and Soap channels, and within Sports, at best Cricket but did not speak about / follow any other sport.

TECHNOLOGY BASED OBSERVATIONS MADE DURING THE GROUP DISCUSSIONS WERE

- Kids want access to latest technology.
- **Communication**: Cell phones, Computer, Internet.
- **Automation**: Cars, Bikes.
- Both for closer social connections, and to be a part of all that technology stands for.
- Familiarity & knowledge reflects an unstated attitude.
- In fact, kids look down on others not familiar with the usage.
- A feeling of being 'left behind'.

Infact, it was strongly felt that netting is fast catching up and is the "in" thing for kids.

- Net exposure high, especially in SEC A; boys>>girls-less exposure of net in girls.
- Internet has become a part of their lives, especially in case of 15 years + age band.
- Frequently visited sites: Google, Yahoo, Orkut, Santa Banta.com, Hi5, Limewise, Ariel, Cool Toad, FM 11.
- Mailing, chatting, downloading songs, playing games favorite activities for these netizens.

Project work/ Needs are primarily information led. Sometimes for games → Mainly for entertainment / time-pass (mails, chatting, games)

Younger age band 8-10 years → Older age band 21-24 years

It has also been found that:

1. Both parents and teachers encourage interaction with technology.

2. Parents feel proud of a confident, 'savvy' kid.

3. Schools give homework that can be done with the help of a Computer/ Internet.

4. Use of the Internet seen as enhancing the social life and academic work of children.

5. Parents object to watching TV but not so much to the use of Internet.

6. Home access of Internet common in SEC A, not so much in SEC B (who would use the café to access internet) ; schools give computer access but do not give access to the internet.

DISCUSSIONS WERE DONE AS PER THE RESPONDENTS' INTERESTS IN READING NEWSPAPERS, BOOKS, MAGAZINES, COMICS ETC. AND THE FOLLOWING OBSERVATIONS WERE MADE

(Annexure 3)**:**

1. Newspapers are regularly read by older age group, 2-3 times in a week by the younger kids, which seemed to be a forced formation of habit rather 'look forward to' reading.

2. While the 21-24 year olds read the newspaper regularly, they do not read storybooks or comics at all. Book reading hardly accounts for any fun or time-pass in their lives.

Certain associations were found with comics (Annexure4):

Visuals/drawings, Short stories, For fun/time-pass, Games and Puzzles, Easy to read/not time-consuming, for young kids, Funny and Humorous, and Casual reading. It was also found that comics that the kids like to read are Chanda Maama, Noddy, Harry Potter, Panchtantra, Tin Tin, Avengers, Teenage Mutant, Turtles, Nagraj, Chacha Chowdhury,

Pokeman, Spiderman, Batman, Hanuman, Disney, Mickey and Donald, Mowgli, Snoopy, and Pirates.

INTERPRETATIONS AS TO THE READERSHIP OF COMICS WERE THE FOLLOWING

1. Language preference quite obvious, with SEC B preferring to read Hindi comics/books whereas SEC A showing English language inclination.

2. The key motive for reading comics was casual enjoyment or time-pass.

3. Majority like to read after doing their homework or during holidays and weekends.

4. Boys enjoying the action oriented comics and superheroes; Girls enjoyed reading magical stuff and 'slap-stick' humor.

5. A comic is seen as interesting if it has eye catching visuals as well as games and puzzles in between for greater fun.

The kind of stories the kids would like to read are:
- That titillates their fantasies/imagination.
- Easy and short storyline.
- Smart and interesting characters.
- Detailing of the story.
- Empathy with the characters creates greater interest.
- A mix of adventure and action.

-Mystery stories of kidnapping/theft:

-Heroes (the victory of good over evil) like Superman, Batman, Super heroes.

-Ghosts, skeletons and dragons as well as adventure land.

- None of them have ever read/heard of a sports comic and were quite enthused with the idea/concept. Then the last part of the discussion was around interest in cricket across both the socio-economics.
- All were cricket freaks, especially the boys who spoke about the topic with a lot of zest and energy; clearly, they were very involved with the game.
- Girls, despite the fact that they were recruited for being avid cricket viewers, were not-so strong in their enthusiasm for cricket as boys. They dwindled in their choices and watched it because father/elder brother/someone in the family was doing so.
- All boys were playing cricket as well as following it on their TV screens. The active drivers fuelling cricket passion were peer pressure, fathers' influence, media hype.

CONCLUSION

Opportunity-focused firms start with the customer and the market in mind. They analyze the market to determine industry issues, market structure, market size, growth rate, market capacity, attainable market share, cost structure, the core economics, exit strategy issues, time to breakeven, opportunity costs, and barriers to entry. The opportunity sought could be related or unrelated diversification. The results of the study point out to the huge potential lying in Indian comic industry.

The Indian comic book industry was about Rs100 crore in 2007 but it is expected to swell into a Rs 400 crore industry in a decade's time. Before long, an Indian comic character would be doing multi-million dollar business globally, just the way Batman and Pokemon are doing today. India is home to sale of 5 million English comic books annually, and together with all the vernacular languages, the figure would cross 30 million. According to estimates, 70% of comic book sales will emanate from Asia in the next one decade, and majority of the sales will be from India and China.

The comic industry in India currently comprises of four major publications-Gotham Comics, Diamond Comics, Raj Comics and India Book House (Tinkle Comics and Amar Chitra Katha). The common factors about all these comic makers are that they publish monthlies on almost same quality A6 size papers, which generally have advertisement about their own products. All of them are published at least in English and most are also printed in Hindi.

This study would act as a guide to those firms which are looking for opportunities to do business in comic industry in India. Corporate growth strategy of a firm must ensure making the right investment to have an optimal product

portfolio. Therefore, the baseline for a growth strategy should be to better understand the potential in new markets or market segments.

The focus group discussions conclude:

1. There is greater inclination and interest towards reading comics in the younger age band i.e.; 8-10 year old and 12-14 year old kids.

2. Being able to identify characters with real heroes makes the experience come alive. When the kids are able to bond well with the characters, it gives a kick to their imagination/fantasy.

3. While the girls claimed to like watching the cricket matches at home with their parents, in reality, they were not so interested in reading about it in comics. This reflects their being not-so-involved with cricket per se.

4. The language issue-whether to use Hindi or English-is not so relevant. In the older age band, there was an inclination for using Hinglish (mix of Hindi and English)-that's the language they feel most youngsters and kids speak today, would be very relevant and well understood.

Robustness of a corporate strategy can be truly felt only when an organization is able to match its own strengths and objectives with the potential market/industry. This paper is exhaustive on account of market assessment factor but ignores other analysis such as competitor's analysis, company's SWOT etc. Research in the future might, therefore, further investigate the usage and importance of various target market selection criteria. As a key decision area and one that may allow some "law-like" generalizations to be established, it represents a rich opportunity for theorists to help guide better practice.

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ANNEXURE 1: Profile of The Respondents

Profile	Segment 1 SEC A/8-10 years/boys	Segment 2 SEC B/8-10 years/boys	Segment 3 SEC A/8-10 years/girls	Segment 4 SEC A/12-14 years/boys	Segment 5 SEC B/12-14 years/boys	Segment 6 SEC B/12-14 years/girls	Segment 7 SEC A/15-18 years/boys	Segment 8 SEC B/15-16 years/boys	Segment 9 SEC A/21-24 years/boys
Total	*5*	*5*	*5*	*5*	*5*	*5*	*5*	*5*	*10*
Activities in free time									
Play with friends	5	5	5	5	5	5	5	5	10
Go to relatives house	3	1	2	1	0	2	5	3	10
Sleep	4	1	3	5	3	4	4	2	10
Read books	5	5	5	5	5	5	5	5	5
Do homework	5	5	5	5	5	5	5	5	0
Favorite time pass [ranking 1-5], 1-most fav and 5-least									
Play with friends	2	1	3	3	1	4	1	1	Not ranked
Go to relatives' house	4	5	5	5	Not ranked	5	4	5	2
Sleep	1	4	4	2	3	3	5	4	1
Read books	3	3	2	4	2	2	2	2	Not ranked
Do homework	Not ranked	2	1	1	4	1	3	3	Not ranked
Indoor vs.Outdoor games									
Outdoor games	5	5	5	5	5	4	5	5	10
Indoor games	5	5	5	5	4	5	5	4	10
Like to play cricket	5	5	1	5	5	0	5	5	10
Like to watch cricket	5	5	5	5	5	5	5	5	10

Profile	Segment 1 SEC A/8-10 years/boys	Segment 2 SEC B/8-10 years/boys	Segment 3 SEC A/8-10 years/girls	Segment 4 SEC A/12-14 years/boys	Segment 5 SEC B/12-14 years/boys	Segment 6 SEC B/12-14 years/girls	Segment 7 SEC A/15-18 years/boys	Segment 8 SEC B/15-16 years/boys	Segment 9 SEC A/21-24 years/boys
Total	*5*	*5*	*5*	*5*	*5*	*5*	*5*	*5*	*10*
Go through newspaper daily	5	5	5	5	5	5	5	5	10
Name of newspaper									
TOI	1	0	3	0	3	3	0	1	4
HT	2	1	4	3	5	3	5	5	5
Panjab Kesari	2	0	0	1	0	1	0	0	0
NBT	0	3	0	2	1	0	0	0	0
Section/Page read									
Sports	5	3	4	4	4	1	1	4	0
Cartoon	0	0	0	0	1	1	0	1	0
Puzzles	0	1	0	1	0	2	0	0	0
Magazine/DT/HT City	0	0	0	0	1	0	2	0	0
All	0	1	5	1	1	1	3	1	10

Annexure 2: Favorite Channel For Watching Cricket Matches

Profile	Segment 1 SEC B/ 15-16 Yrs/ Boys	Segment 2 SEC B/ 8-9 Yrs/ Boys	Segment 3 SEC B/ 12-14 Yrs/ Girls	Segment 4 SEC B/ 12-14 Yrs/ Boys	Segment 5 SEC A/ 8-10 Yrs/Boys	Segment 6 SEC A/ 8-10 Yrs/ Girls	Segment 7 SEC A/ 15-18 Yrs/ Boys	Segment 8 SEC A/ 12-14 Yrs/ Boys	Segment 9 SECA/ 21-24 Yrs/boys	TOTAL
Total	5	5	5	5	5	5	5	5	10	50
Favorite channel for watching cricket										
Star Sports	0	1	2	1	1	1	1	1	2	10
ESPN Sports	1	1	0	0	0	1	2	1	5	11
DD Sports	0	2	0	0	0	0	1	0	0	3
TEN Sports	2	0	0	0	1	1	1	1	3	9
Star Cricket	1	1	3	3	3	1	0	2	2	16
No answer	0	0	0	1	0	1	0	0	0	2

Annexure 3: Usage of Internet

Profile	Segment 1 SEC B/ 15-16 Yrs/Boys	Segment 2 SEC B/ 8-9 Yrs/Boys	Segment 3 SEC B/12-14 Yrs/Girls	Segment 4 SEC B/12-14 Yrs/Boys	Segment 5 SEC A/ 8-10 Yrs/Boys	Segment 6 SEC A/ 8-10 Yrs/Girls	Segment 7 SEC A/15-18 Yrs/Boys	Segment 8 SEC A/ 12-14 Yrs/Boys	Segment 9 SEC A 21-24 Yrs/boys	TOTAL
Total	5	5	5	5	5	5	5	5	10	50
Access to internet										
Yes	3	3	5	4	5	2	5	5	9	41
No	2	2	0	1	0	3	0	0	1	9
Availability of internet access										
Home	1	2	2	0	2	2	1	3	9	22
School	1	1	1	0	1	0	0	2	2	8
Cyber café	1	0	2	4	2	1	4	1	1	16
Any other	1	0	0	0	0	0	0	0	1	2

Annexure 4: Newspaper Reading Habit

Profile	Segment 1 SEC B/ 15-16 Yrs/Boys	Segment 2 SEC B/ 8-9 Yrs/Boys	Segment 3 SEC B/12-14 Yrs/Girls	Segment 4 SEC B/12-14 Yrs/Boys	Segment 5 SEC A/ 8-10 Yrs/Boys	Segment 6 SEC A/ 810 Yrs/Girls	Segment 7 SEC A/15-18 Yrs/Boys	Segment 8 SEC A/12-14 Yrs/Boys	Segment 9 SEC A/21-24 Yrs/boys	TOTAL
Total	5	5	5	5	5	5	5	5	10	50
Newspaper Read										
The Times of India	3	0	0	1	1	2	1	4	2	14
Hindustan Times	2	0	5	2	4	3	5	3	8	32
Indian Express	0	0	0	0	0	0	0	0	0	0
Any other	2	5	0	2	0	0	0	1	0	10
Frequency of reading newspapers										
Every day	4	2	5	4	4	3	2	4	8	36
Several times a week	0	1	0	1	1	0	1	0	2	6
Once a week	0	1	0	0	0	2	2	0	0	5
Rarely	0	1	0	0	0	0	0	1	0	2