

A grayscale background image showing several hands holding and interacting with smartphones, suggesting a focus on mobile technology and news consumption.

Google

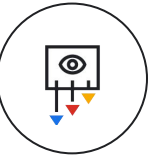
KANTAR

# The Indian News Consumer: Willingness to Pay and Key Drivers

—

A study by Kantar India, supported by Google

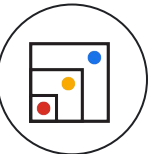
# The **Starting Point** Of The Research



Ad fatigue



Rising reader expectations



...necessitate **diversification**  
of revenue streams

# Therefore, The **Goal...**

Uncover from...

## Subscribers

What got them to pay and what would motivate them to stay?

## Non-subscribers

(but users of publisher websites/apps)

What prevents them from paying?  
How open are they to different models  
(at a stated level) and what would justify the cost?

# Research Design In Detail...

## Qualitative Exploration

30 IDIs + 20 FGDs across  
10 markets

## Quantitative Validation

**300** online interviews  
with **Subscribers**

sampled from 4 zones across 12 urban cities

**2000+** offline interviews  
with **Non-subscribers**

sampled from 11 states across 24 urban cities

## Subscribers

Paid for subscription in the last two years, visit at least bi-weekly

## Non-subscribers

Visit the publisher news website/app at least once per week. Mix of:

- **Paid user of other online content**  
*(paid for OTT/ online games in the last six months)*
- **Free user of other online content**  
*(not paid for any OTT/ online games in the last one year)*

Mix of **English** and **Local Language** users

The **8** Indian languages

English

Hindi

Bengali

Marathi

Gujarati

Kannada

Telugu

Tamil

Malayalam

# The Questions We Will Answer Today:

## Subscribers

- 1 What **compelled** them to pay?
- 2 How did they **discover** subscriptions?
- 3 What **challenges** did they face?
- 4 What **brand** and **price differentiators** **influenced** their choices?
- 5 What **experiences** would up their **engagement**?
- 6 What incentives would encourage them to **maintain** their **subscriptions**?

## Non-subscribers

- 1 What's **stopping** them from paying?
- 2 How **open** are they to **different revenue models**?
- 3 **Ads vs. subscription fee**: What wins?
- 4 Which **tangible benefits** deliver the greatest perceived value, **justifying payment**?
- 5 What drives **brand choice**?
- 6 What are their **payment-related preferences**?



# Starting With Subscribers

# Subscribers Are Serious News Hunters

So, High-quality Content Drives Conversion



## Role in Their Lives

Be the forward thinkers, demonstrate intellectual curiosity



## Reasons for Consuming News

Be the first one to get and share news



## Reasons for Shift to Digital News

Cuts the noise, no sensationalism

Uninterrupted reading

## Top 3 Triggers (in %)

67%

Quality, reliability of news content

58%

Depth & insights

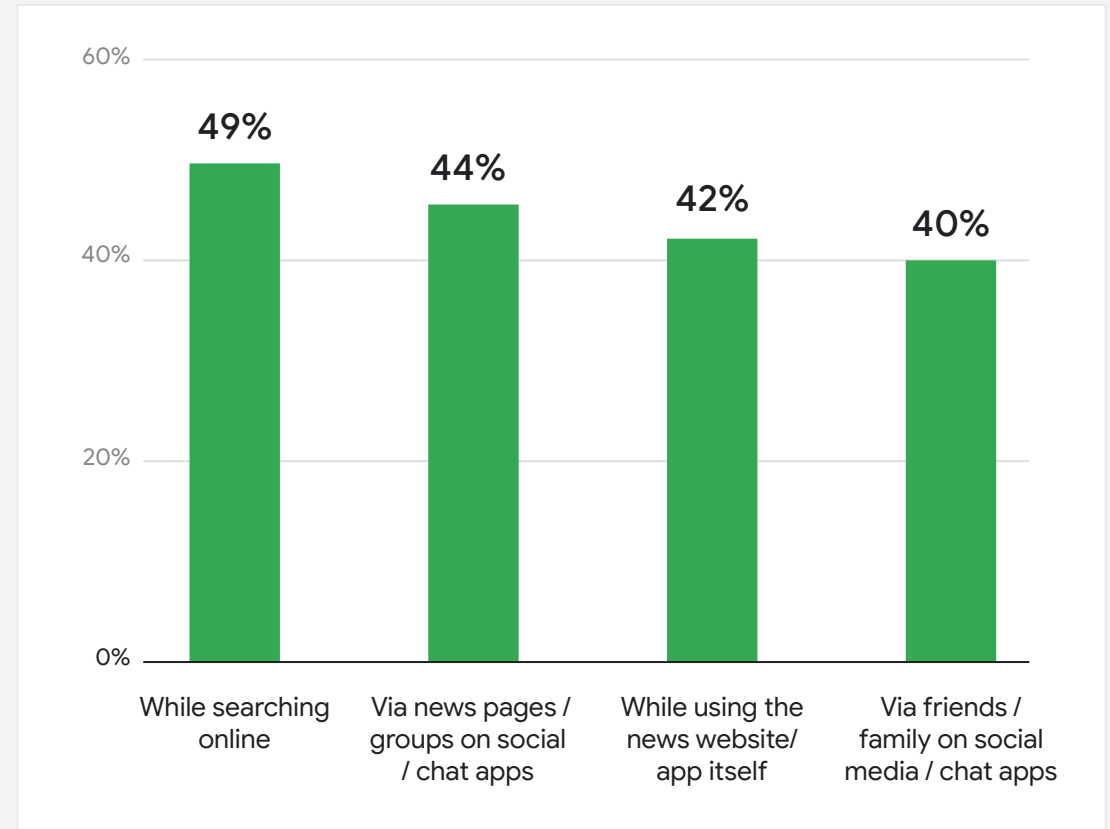
51%

Specialised content  
(e.g. education, stocks)

Search, Social, And The News Website/App  
Itself Serve As Primary Channels Through Which They Find Subscriptions



### Top 4 touchpoints that enable discovery of subscriptions (in %)

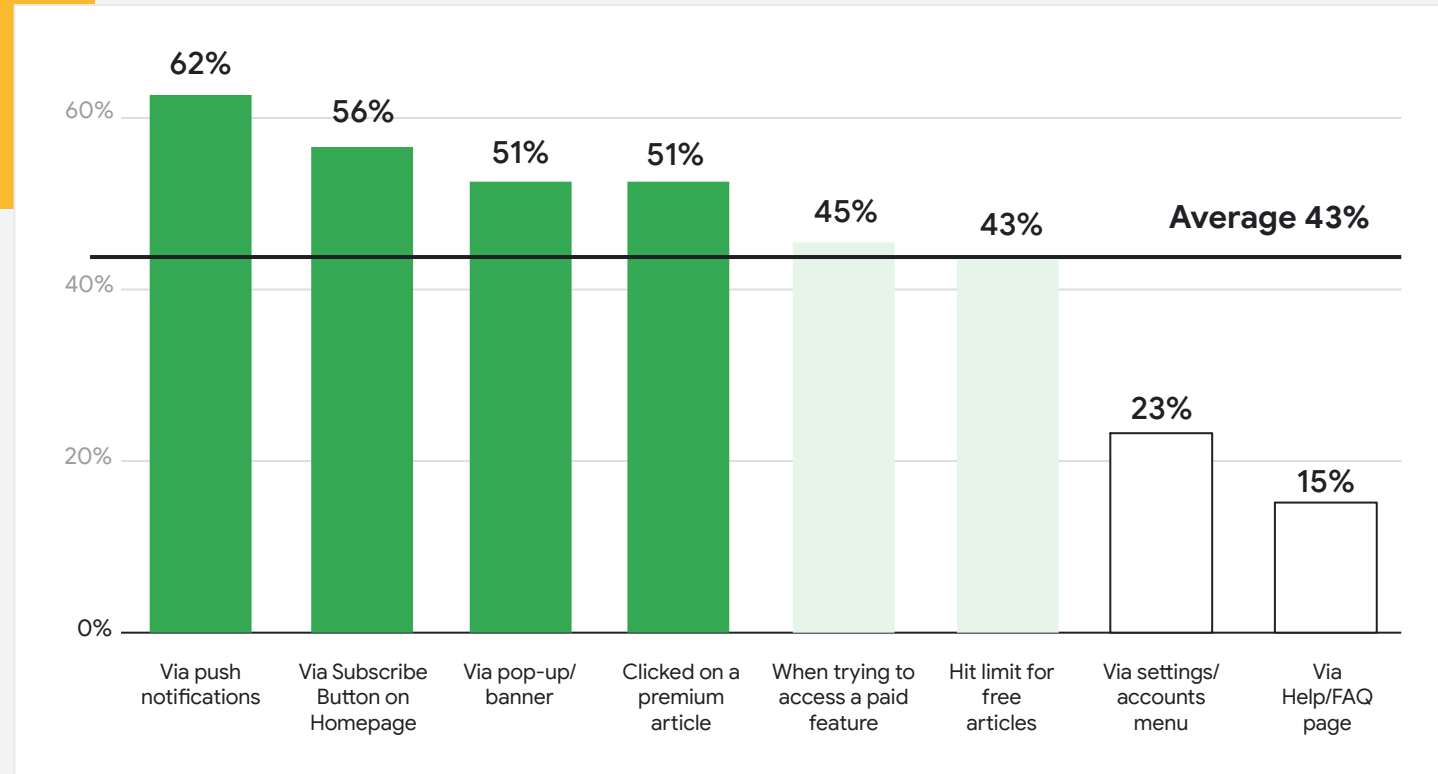


Combined Reach of

90%

On The News Website/App Itself, Proactive, Highly Visible Prompts Are More Impactful

Subscription Discovery Touchpoints On Website / App Itself (in %)



“I saw the option to subscribe on website/app. There was some blocked material that you could only read after subscribing, and a prominent banner. So, I clicked on that, and it took me to the subscription page.”

Male, 30, Mumbai



# Many Feel Their Need For A **Transparent And Low-Friction Sign-Up** Is Not Sufficiently **Met**

**92%** Faced At Least One Issue While Researching

## Top 4 Pain Points When Doing Research (in %)

**52%**

Excessive Personal Data Requirements (e.g. credit card info)

**49%**

Lack of user reviews or ratings to help assess quality

**45%**

Too many subscription tiers with confusing/vague differences

**45%**

Limited or lack of free previews or samples of paid content

# A Clear, Strong Value Proposition And Reputation Are Cornerstones Of Subscriber Growth

Top 3 Stated Brand-Related Drivers That Drew Subscribers In (in %)

60%

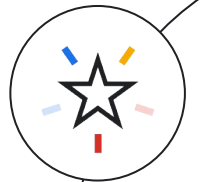
Strong, well-defined value proposition

52%

Known for high-quality exclusive content for subscribers

50%

Strong brand identity: Is a well-known / popular publication



# From A Pricing Perspective, Choice And Flexibility Are The Biggest Draws

## Stated Price-Related Drivers That Drew Subscribers In (in %)

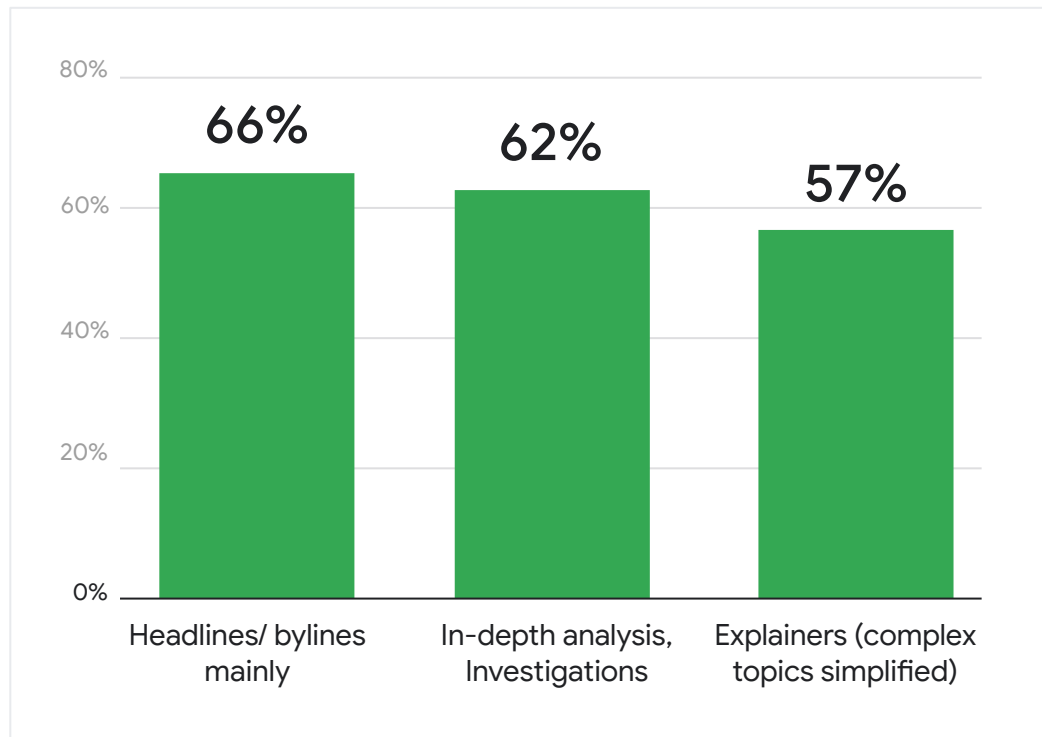
56%	Tiered Plans	43%	Flexible Billing Cycles
53%	Free Trial Available	38%	Value Bundles
48%	Flexible Payment Options (e.g. credit cards, UPIs)	27%	Shopping Vouchers / Free Merchandise
46%	Family Plans Available	18%	Option to Gift Subscriptions to Others
45%	Easy Cancellation	13%	Flat Rate Pricing
44%	Introductory / Renewal Price Discounts		

“It was offering me access for 3 months or 6 months. But I choose monthly because I don’t have to pay a lot in one go. even though the 6 months option was more economical in the long run. Plus, it gives me option to pay through PhonePe, and to try for Rupee 1 as opposed to paying the monthly fee of Rs. 69. It also let me redeem vouchers”

Male, 44, Bareilly

# Diverse Content Formats Are Essential For Engagement

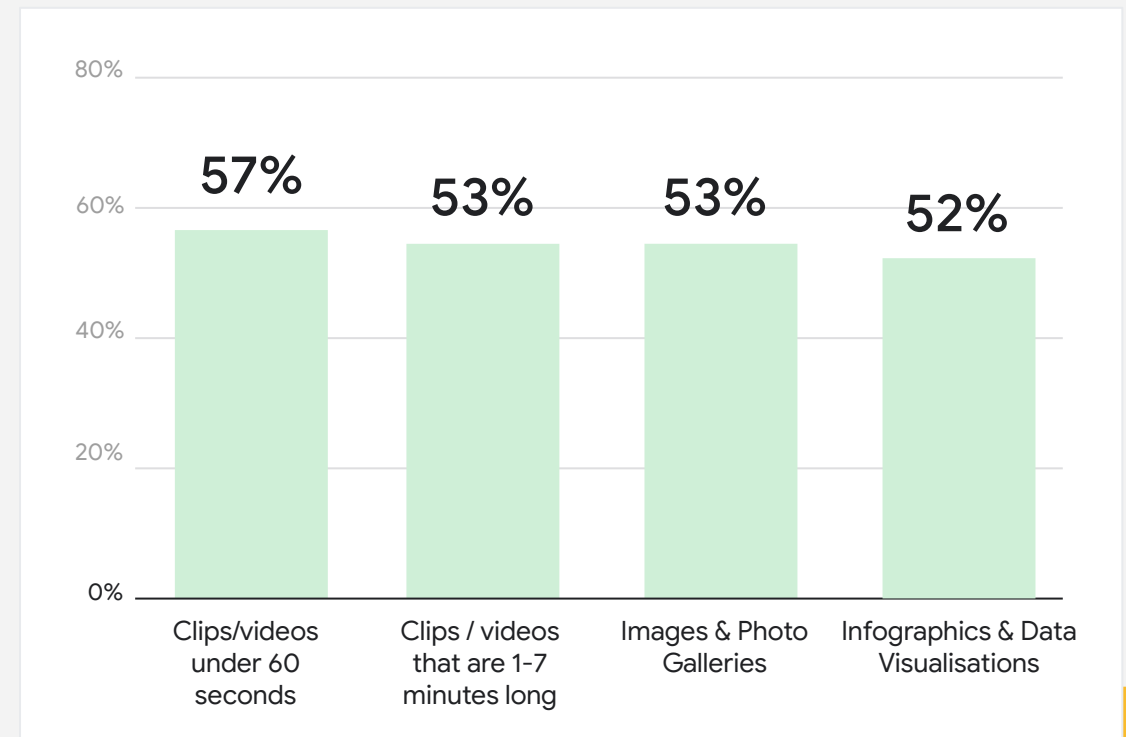
## Top Text-Based Content Formats Currently Engaging With (in %)



“Give me a headline that covers everything and a picture or short video that gives me the basics. For news I care about, I want to have the option to read more detailed investigations.”

Male, 45, Hyderabad

## Top Non-Text Based Content Formats Currently Engaging With (In %)



# Additionally, Subscribers Seek Content That Offers Clarity Over Complexity And Fresh Perspectives

Top Content-Related 'Engagement Drivers' (in%)

50%

Premium opinion  
pieces and columns

49%

Exclusive Explainers,  
Analysis

44%

Dedicated sections for  
niche / specialised content,  
links in one place

44%

Understand complex data  
through interactive charts,  
graphs, and maps



# And Desire **Features** That Enable An **Interactive** And **Immersive** Experience

## Top Features/Benefits-Related 'Engagement Drivers' (in %)

- 44%** Distraction-free reading experience without ads
- 42%** News Feed tailored to specific interests and preferences
- 38%** Highlight articles / save excerpts / quotes for use or sharing
- 34%** In-built dictionary  
(no need to switch to search / go elsewhere)
- 33%** Interactive features  
(e.g. quizzes, polls, games, simulations)

## Top Gamification Elements Based On Appeal (in %)

**58%**Themed challenges /  
quests encouraging  
exploration of  
specific topics**56%**Points / badges  
for reading /  
quizzes**56%**Listening mode  
(text-to-speech)**52%**Estimated Read /  
Listen / Watch  
Time

# Providing Subscribers **With Flexible, Budget-Friendly Options** Is Key To Retention

## Subscription Retention Marketing Motivators - Top 2 (in%)

41%

Bundles (e.g. access to music, video, news & more in a single subscription)

34%

Build your own plan with a low base fee and add-ons for desired content / feature

33%

Budget-friendly plans: Plans with essential features, lower price

23%

Price discount for renewal

21%

Free gifts / merchandise with purchase

17%

Extended free trial periods

16%

Ability to pause subscription

16%

Shared account / family plan

“Give me access to platforms like Zee 5 and Alt Balaji. I want more than just this. Even shops give you vouchers for loyalty!”

Female, 45, Mumbai

# Moving On To Non-Subscribers Now...





# The Questions We Will Answer Today:

## Subscribers

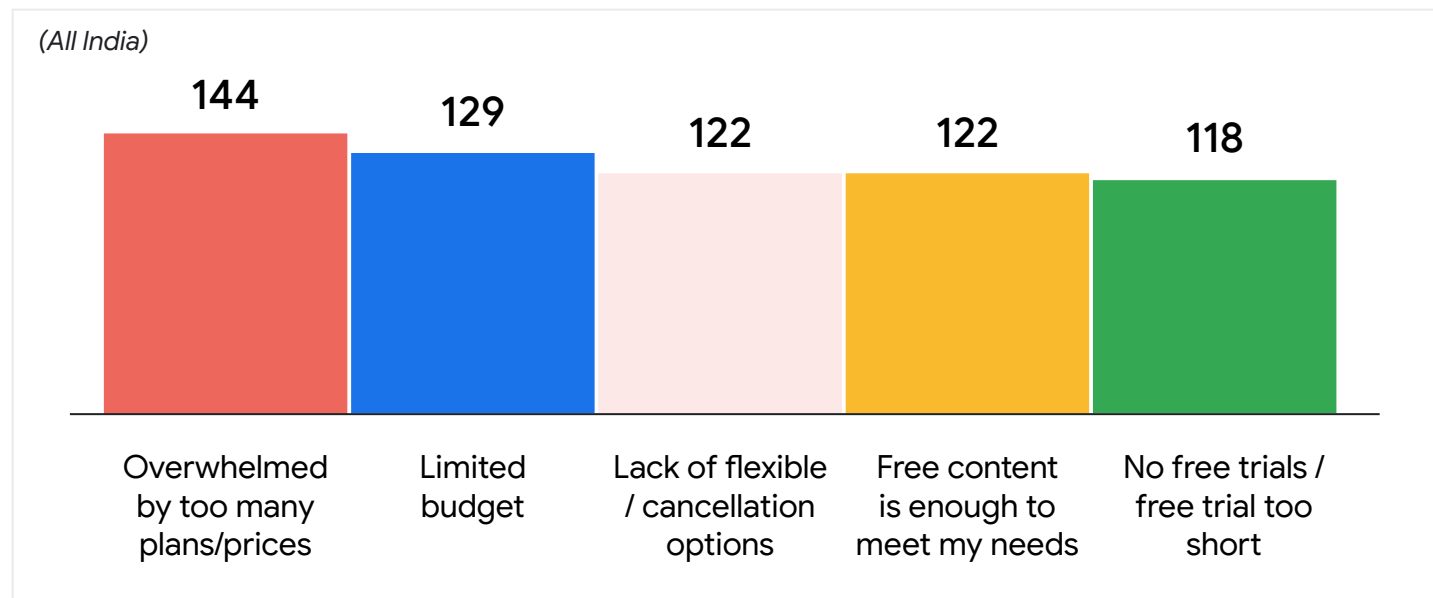
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# Users Are Deterred By **Complex Pricing Plans**, **Budget Limitations**, **Payment Inflexibility**, **Limited Trials**, And Perceived Sufficiency of Free Content

Top 5 Reasons Why They Have Not Paid For News Online Yet (in %)



Indexed to Average Endorsement across statements. Average Endorsement = 100

## Language-led nuances

English and Hindi users worry about **complexity of managing multiple subscriptions**

Kannada users are more likely to be discouraged by **frictions** such as complicated sign-up process, inadequate content samples

**Media skepticism** is prevalent among **Malayalam** users, who question the credibility of individual news sources and find it difficult to determine the most trustworthy news app

# Overall, A Lack Of Clear And Compelling Value Proposition Hinders Adoption



Without any exposure to premium features or content, subscription feels like a **frivolous expense** rather than a necessity.

The **call to subscribe is often faint**: many cited having a hard time spotting subscribe buttons on the website / app.

“We feel why should I pay money for the same content. I am not sure what exclusivity I will get, didn't understand the benefit of it.”

Male, 29, Bangalore, English

“There should be a free trial so we could learn about the plan benefits.”

Male, 35, Hyderabad, Telugu

“I don't have a subscription because I wasn't aware of it. OTT platforms are always being marketed, but news platforms don't market themselves like that”

Male, 27, Mumbai, Hindi

# We Took Stated Willingness To 7 Different Reader-Centric Models

## 1 Pay per content

Pay a one-time fee to unlock just the article / podcast / explainer you want to see right now (**micro transaction**)

## 2 Mini Pass

Get a temporary pass (daily or weekly) for a fixed price to access the content you're interested in (**micro transaction**)

## 3 Subscription

Pay a fixed, regular fee for unlimited access to all premium articles, podcasts, explainers, and features

## 4 Watch ad to unlock content

Watch an ad for a few seconds to unlock a single article / podcast episode / video explainer you want to see right now (**ad-supported model**)

## 5 Register

Register with your name, phone number, and email to access some premium content. (**First-party data - ad-supported model**)

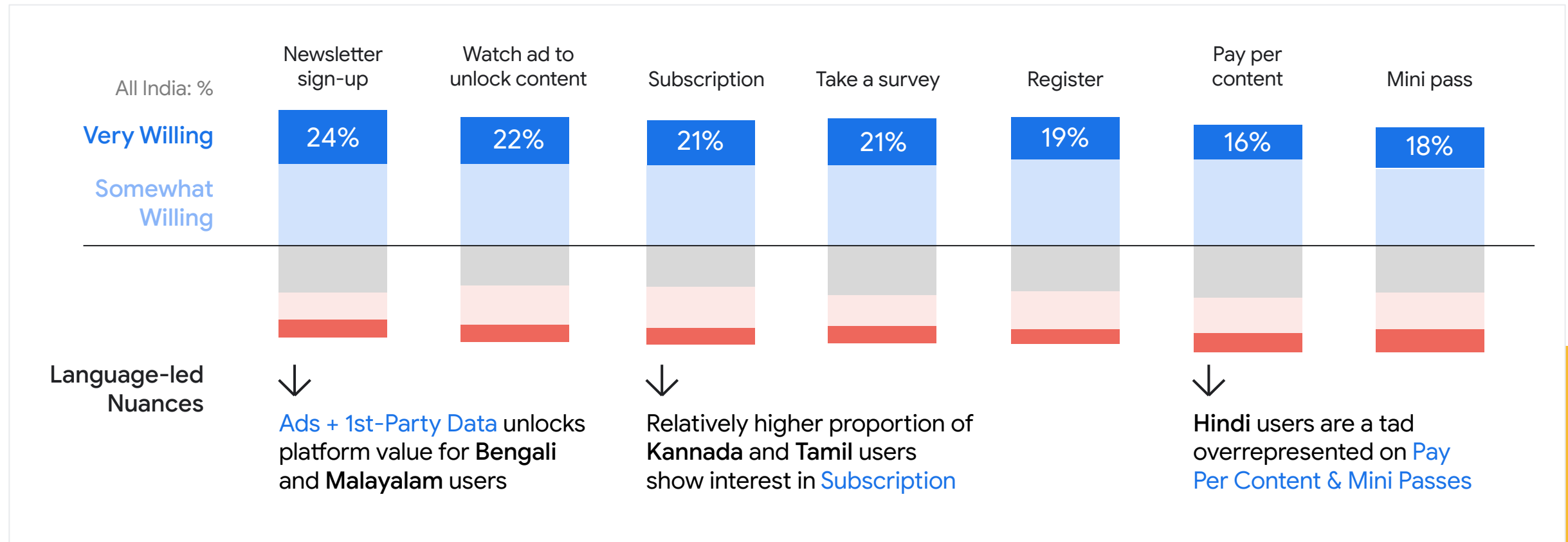
## 6 Newsletter sign-up

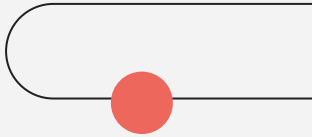
Sign up to receive free newsletters in your inbox (**First-party data - ad-supported model**)

## 7 Take a survey

Take a survey about your interests, preferences, hobbies to unlock premium content (**First-party data - ad-supported model**)

# If Allowed To Mitigate Risks, Users Are Open To **Sharing First-Party Data, Ad-Based Content Unlocking And Subscription**





# While Many Are Motivated To Subscribe For Ad-Free Environment, **Affordability** Trumps Ad Avoidance

## 6 to 10

Share Of Respondents Motivated To Pay For Ad-free Environment  
(All India: %)

### Share of Respondents Who Prefer: (All India: %)

45%

News website / app with a **small monthly / annual fee and a few ads**

30%

News website / app with **lots of ads / frequent ads and no fee**

26%

News website / app with **high monthly / annual fee but zero ads**

# Users Perceive More Value In A News Platform That Caters To **Diversity** And **Efficiency** In Terms Of **Content Delivery**

## Top Content-Related Elements Worth Paying For (in %)

63%	News In Preferred Language
48%	Priority Access (breaking news, tech updates)
44%	Daily / Weekly Summary
42%	News in Various Formats

### Language-Led Nuances

**Hindi** users see **curated newsletters** as a value-add

**Bengali** users distinctly prefer **deep dives**

**Kannada** users seek **visualisation** of complex data, **quizzes / games**

# And Which Empowers Them With Features That Offer Greater Control Over Their News Consumption Experience

Top Feature-Related Elements Worth Paying For (in %)

52%

Options To Save Article

“Offline access is good. When we have saved articles, we can download and read them. When we are on a journey, we can read too.”

Male, 36, Hyderabad, Telugu

49%

Filter Out Topics

“Sometimes I want to avoid news like about murder and accidents and all of that, I want to stop those updates.” I'd love to be able to filter out stories about topics I'm not interested in”

Male, 40, Chennai, Tamil

48%

Toggle Languages

“Language switch option should be there; I would want to read news in Kannada.”

Male, 34, Bangalore, Kannada

40%

Offline Reading Mode







# They Also Respond Better To Promotional Offers With Immediate Value

## Promotional Offers Appeal (in %)

**53%** Free trial period

**51%** Discounted introductory period

**49%** Free gifts

**39%** Shared account / family plan

**36%** Student / organisational discount code

**36%** Bundles in Top 3 for Marathi, Kannada, Telugu, Tamil users

**32%** Refer a friend

**31%** Loyalty rewards

**30%** Store-specific rewards

**24%** Donation to charity

“I believe if the annual subscription is available at a discounted rate I will definitely subscribe to it.”

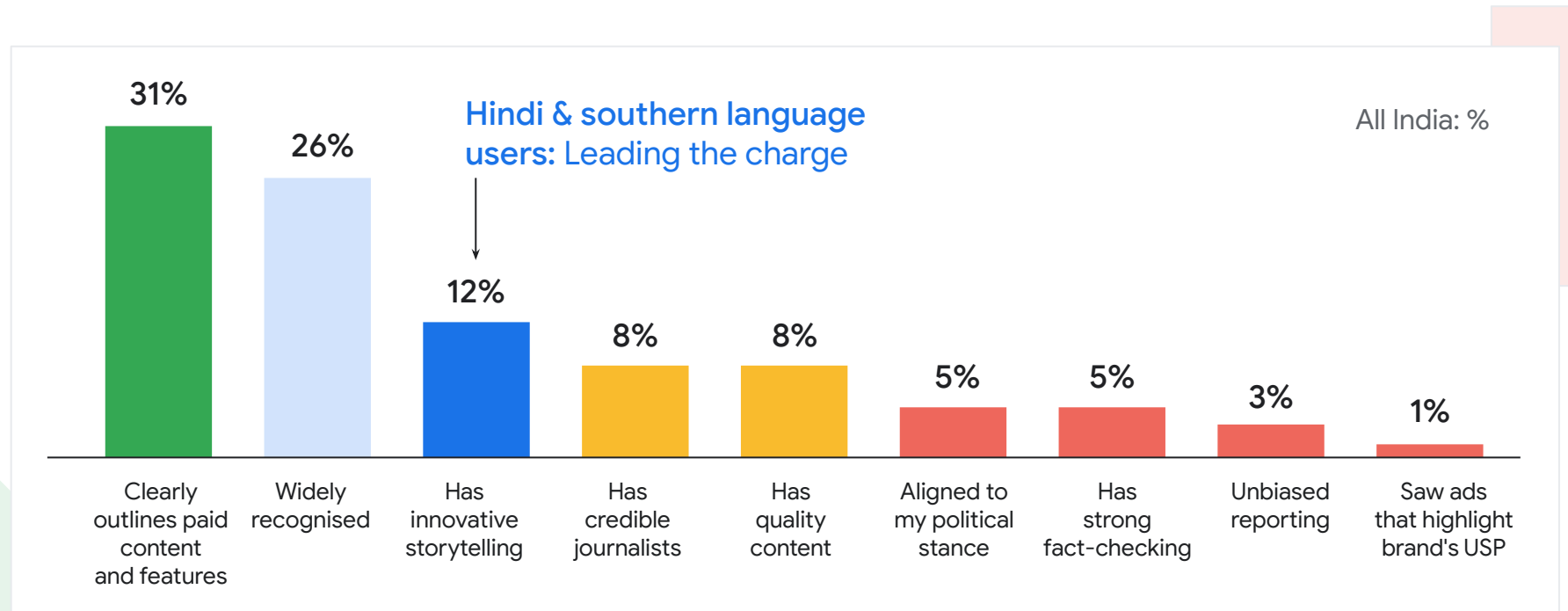
Male, 33, Mumbai, Marathi

“If one goes for a quarterly plan be there could be small offers, it could be free deliveries; offers for spas, etc. It will keep people coming back for more.”

Female, 36, Bangalore, Kannada

# Like Subscribers, When Choosing A Brand, They Strongly Lean Towards One With A **Clear Value Proposition, Strong Reputation**

## Brand Drivers – Why Free Users Would Pick One Over The Other? Top Rank (in %)



“I'm interested in subscribing, but I'd like a clearer understanding of the benefits before I commit. What value would a subscription offer me? I'd go for an app that's not only known but also states the kind of content and features I'll get clearly over one that's known but doesn't make things clear.”

Male, 45-55, Bangalore, English

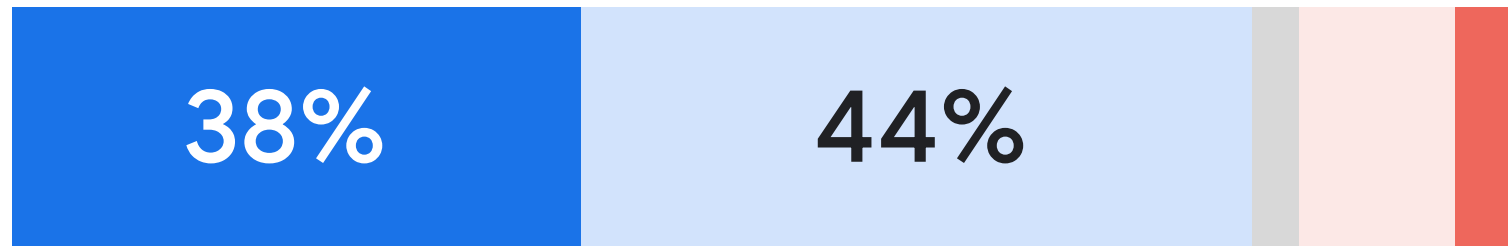
All India: %

# Being Able To Choose Payment Periodicity Would Bring Value To Many

I want to be able to choose my billing frequency when subscribing...

82% Agree

Disagree



● Strongly Agree ● Agree ● No Opinion ● Disagree ● Strongly Disagree

“I want options other than just annual. It’s a very big commitment. I might not have time for news on some days, I might want to switch publishers. I anyway use more than 1 news app. Right now, my choices are very limited.”

Male, 45, Chennai, Tamil

All India: %

# Shorter Durations Plans Win Out As They Allow Users Latitude To Experiment And Change Their Minds

Payment Cycle Preference: Aggregate Rank 1+2+3 (in %)

**83%** Pay a fixed amount every 3 months

**40%** Pay a fixed amount every week

**77%** Pay a fixed amount every 6 months

**37%** Pay a fixed amount every year or once every two years

**64%** Pay a fixed amount every month

All India: %

Why?  
Qualitative Nuance

Seen as **easier on the pocket** vis-à-vis a larger upfront payment

**Maintains Flexibility**

See if the service truly delivers value before committing to a longer period

Allows for cancellation / brand switching as per needs

# The **Big** Themes Therefore

1

**Make clear** how the experience changes post payment, not just content but feature wise too!

2

**Market** your **differentiated offering** and have a clear call to action on your properties online

3

**Simplify** tiers / pricing plans, sign-up process

4

Showcase **flexibility** in payment and cancellation options. Shorter duration plans allow users more wiggle room

5

**Be more relevant.** Personalization is not limited to choosing genre but also specifics (ability to select, deselect), formats and news in preferred language

