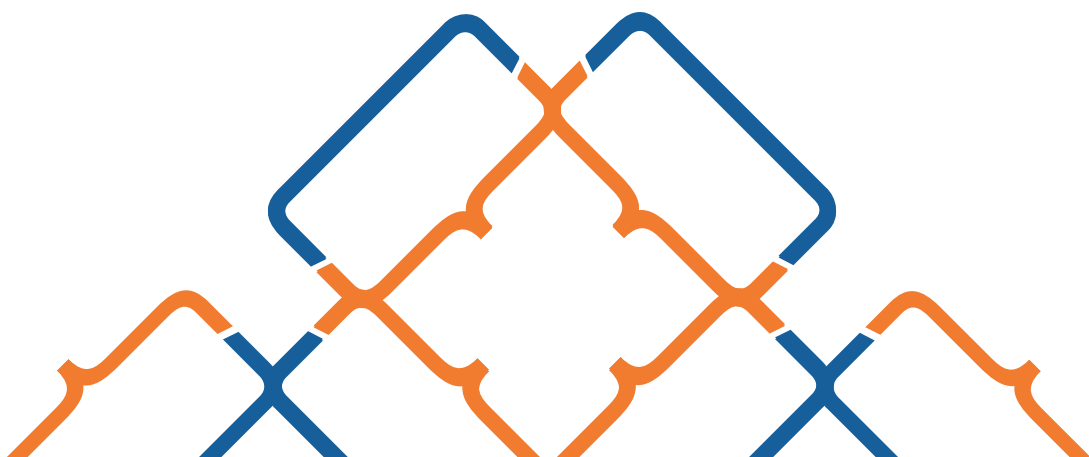




# TRENDS REPORT 2018

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## What is AIYD?

The Australia India Youth Dialogue (AIYD) is a youth-led dialogue between the young and emerging leaders of Australia and India. In brief, the AIYD hosts 15 of the best and brightest young minds from each country at an annual conference, held in India and Australia in alternate years.

The aim is to enable a rich exchange of ideas and perspectives, and encourage our emerging young leaders to think creatively about how the Australia-India relationship may be strengthened through their own work and efforts.

Ultimately, the AIYD aims to complement the strategic partnership between the two countries by:

- Cultivating and fostering the relationship between Australian and Indian youth in a meaningful manner.
- Providing a deeper cultural insight and understanding of the similarities and differences between the respective nations.
- Providing support to deal with problems and trends in the relationship and potentially providing solutions for those problems.

More specific information on AIYD impacts can be read here: <http://aiyd.org/aiyd-outcomes/>



## Purpose of AIYD Trends Report

The 2018 Alumni trends report is the first publication on what we hope will become a regular publication. The purpose of the trends report is to offer valuable insights for policy makers, diplomats, researchers and business people interested in the bilateral relationship on what young leaders believe are:

- Areas of the relationship we've progressed
- Issues that need resolving or addressing - in particular as they relate to the themes of AIYD 2018
- Areas of future opportunity

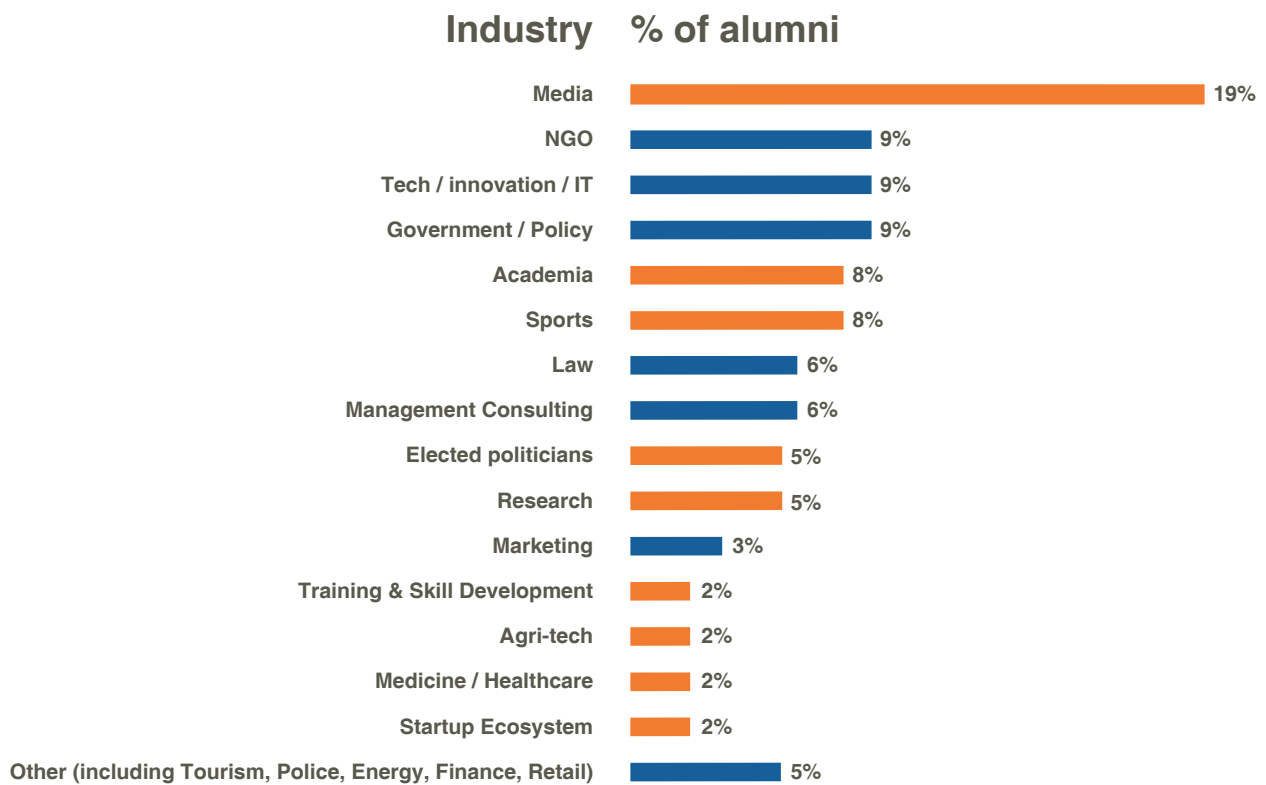
The reason the opinion of our alumni matters is captured in the "Meet the AIYD alumni" section below - this represents the opinion of some of the leading young entrepreneurs, politicians, bureaucrats, journalists, corporate and NGO leaders and sports people across both countries who have an interest and investment in the bilateral relationship.

Given the alignment to the theme of "Digital Disruption" in AIYD 2018, we've also included three long form articles written by our distinguished alumni on the opportunities presented by the Future of Media, work, democracy and culture.



# Meet the AIYD Alumni

The AIYD boasts an impressive alumni list, numbering 180 young leaders from both India and Australia. The alumni group consists of young executives, journalists, politicians, sportspersons, NGO leaders, entrepreneurs, amongst a whole host of professions. The diverse professional breakdown of our alumni is shown in the graphic below.



Our alumni are leaders in their fields, this is demonstrated via the fact that:

- 25% of our alumni have the title CEO/Founder/Chair
- Two of our alumni are current sitting leaders of the opposition in Australian state governments and half a dozen are other elected officials in both India and Australia
- Our alumni group includes 5 News anchors, more than a dozen journalists, including 2 who have won Walkley awards
- Our alumni have collectively played 69 Rugby Tests for the Wallabies, 240 One Day internationals for both countries and we've had 3 Olympians with a combined 3 Olympic gold medals
- Finally our alumni have a collective 1.8M twitter followers, an average of ~13,000 per member of the alumni group

# Dialogue Themes for 2018

## Digital Disruption

In 2018, 30 delegates from Australia and India will converge in Mumbai and New Delhi from the 21st to 24th January to discuss, debate, ideate and collaborate on how digital disruption is shaping our democracy, media and the future of the workplace.

Australia and India are two vibrant and thriving democracies in the world today. The delegates will discuss how digital disruption is shaping our democracy, and how digital technologies are shaping youth and civic engagement to better connect young people with the issues both our countries are grappling with.

Secondly, during AIYD delegates will explore digital disruption in media and how it impacts the future of information, both in terms of production of information and protection of information. We take a look at the new media landscape we live in, the emergence of blockchain technology and the importance of cybersecurity and how technology plays a role in this.

Thirdly, we will be looking at the future of workplace with particular focus on the sharing economy and how it is affecting both countries and their labour forces.

Our theme this year is very important as the theme of innovation is high on agenda of both countries, as made evident by Prime Minister Modi and Prime Minister Turnbull.

It is also very important as the senior leaders across the world are looking at youth leaders to provide them with guidance as they shape policies and decide how our economy and democracies are shaped, as a result of digital disruption.



# Alumni Perspective: Future of Media

## Television versus Digital News : Who wins this round ?

Let's start as always, with the facts. In November 2017, The New York Times Company continued its march toward a digital future. Digital advertising revenue in the quarter rose 11%, to \$49 million. The company also added 105,000 net digital-only subscriptions for its news product, helping to push digital subscription revenue to \$86 million. To put it into perspective, that's a 46% increase compared with the same period a year ago.

More stories that the numbers tell for themselves - Television viewing in technology advanced markets such as the US and the UK has been suffering a steady decline since 2012, with a 16% and 10% decrease respectively. But despite televised news losing audience, entertainment programmes such as sporting events and movies are getting more viewers than they used to in the past.

So, is news content dead for the general audience? Not really.

In 2017, what was a more fledgling argument about Digital vs Television - and often digital was dismissed as a passing fad, has changed to a more structured overview of both industries. Neither are headed to oblivion but the template of journalism has certainly changed. Digital is now a major force in the journalistic world, locally & globally. In the last 2 years, all major media organisations have seriously upped their digital game. Equally, several digital only news platforms have made a mark for themselves, shouldered by extremely talented & solid journalists-many of whom quit the TV industry, disillusioned by the lack of honest debate and discussion, that was once the USP of Television News.

Today, many stories of local and national importance are often broken on digital platforms and then followed up on by TV outfits.

The other key part of the story is the viewer. Ask yourself when you last switched on the TV to watch the 9pm bulletin. For millennials and perhaps even generations before them, the answer may range from never to a really long time back. Appointment viewing as we knew it, is over. As Former head of news at BBC, Richard Sambrook said, "With internet-connected TV as a mass consumer proposition, how many are willing to wait for the bulletin?"

Television news is now like a well oiled, albeit depreciating machine. The medium is older, systems & processes are in place, there are well established news channels and a greater connect with news anchors as "faces".

Digital is a young, evolving medium. Sanjay Ray Chaudhry (Co-Founder of Network 18 & Arré), a friend and colleague who's been an influencer in both mediums, puts it into perspective, "Digital is where TV was a decade back, right now there's a bit of a scramble to figure the medium out and how to monetise popularity. It will take a few years for metrics to settle down."

But the big make or break, as always, remains where the money flows. More numbers then; According to the December 2017 edition of Zenith's Advertising Expenditure Forecasts report, by 2020, the internet will account for over 15% of total ad spend in India, and TV will have a 36% share.

Simply put, Digital as a medium and digital news in particular, still has a long way to go before it can garner a larger piece of the ad expenditure pie, make consistent profits and remain financially sustainable.

Finally, the ethics of it all. Whichever medium you choose to report the news in, some ground rules remain constant. The most prominent challenges for news reporters today are to stay authentic and ethical in their reportage as they present and interpret the news to a wider audience. The race to break the news 'first' often leads to misreporting, so timeliness cannot be a reason to not double and triple check your news sources and to ensure that information you put out is correct, relevant and fair in its statement of facts.

### **Mitali Mukherjee**

Co-founder & Editor at The MoneyMile

AIYD 2017 Alumnus





# Alumni Perspective: Future of Work

It's often said that today's rate of technological change and change in the global economy is unlike anything we have experienced previously. The rise of automation, globalisation and the "gig economy" being the primary drivers behind the speed of change.

Due to this rapid change, the nature and types of jobs emerging in the new economy are changing just as fast. Permanent positions are morphing into "gigs" or short-term engagements, offering people more flexibility in their work but with higher risk. Studies show this casualisation of the workforce disproportionately affects lower skilled occupations, which are often manned by the lowest educated in our society. But it's not just the type of work being disrupted due to technological advancements; the disruption can also be the way in which entire industries carry out their core business.

Governments around the world are now looking for ways to modernise their industries to meet digital changes while balancing concerns about a perceived loss of manufacturing jobs and the effects on their workforce due to automation advancements. They are looking at how their sectors can be regulated or where government intervention can support businesses to take up new technologies. Current solutions seem to be centred on the provision of telecommunications and broadband as well as building start-up ecosystems in capital cities.

But it could be that the Governments are missing the point.

High socio-economic groups and large-scale businesses are already seeking ways to manage the effects of digital disruption. Innovation is flourishing in cities with modern infrastructure where ideas are flowing through high-speed internet connections. Government investment into these gentrified cities provides access to technology, education, and opportunity where these three boons already exist. However, the people most affected by the technological changes are instead those with lower level education and skillsets. For developing nations, a majority of the population are living in rural locations where they struggle with inconsistent physical and telecom infrastructure, and this is the area where automation will hit the hardest.

While automation and technological advancements can be seen to replace human labour, some critics would challenge that notion. Given that these processes are increasingly in need of management, oversight, and implementation, a new demand has risen for workers with the flexibility and technological abilities to match the pace of change in the sector. For individuals to maintain currency during the digital age and ensure a semblance of stability in their work, it is becoming increasingly important for people to enhance their skills and grow more competitive in the job market.

This growth should not only take the form of learning new skills but also being in command of a more diverse set of skills. Skill development and a conscientious government agenda towards the development of healthy skills ecosystems will allow workers to enhance their skills and in turn, enhance the national capability to manage the effects of digital disruption.

## **Sam Freeman**

Lead - India at Queensland Skills and Education Consortium

AIYD 2016 Alumnus

# Alumni Perspective: Future of Democracy

Australia and India have witnessed significant political developments in the Information and Communications space, be it the National Broadband Network or Digital India initiative. Today, more than ever, the fundamentals of democracy are being enhanced by digital technologies. Social media has made politics more accountable, transparent and representative. For instance, town halls can be held by leveraging technology effectively. Digital media has made political communications better targeted. Advocacy campaigns such as those for Marriage Equality have utilised social media platforms to mobilise widespread support. Such online campaigns have significantly influenced policymaking.

Start-ups promising crowd-sourced constituent data are emerging across the political landscape. Geo-targeting voters, collating behavioural data and analysing insights have become an integral part of political offices. Every cohort of the voting population is being tracked and studied to provide instantaneous feedback to political aides and campaign managers to help fine-tune stump speeches. Thanks to technology, political communications are as much about rhetorical flourish as it is about real-time data.

As of July 2017, there are 462 million Indian internet users. 314 million of these are between the ages of 15 and 34 years. In the last three years, younger voter cohorts have swayed elections. With 214 million Facebook users, India is only 4 million behind the world leader - United States of America. The 2014 general elections, where Narendra Modi swept into power, had close to 150 million first time voters between the ages of 18 and 23 years. The information that is available online is helping shape political perspectives. The future of elections is, therefore, firmly tethered to digital media.

Nevertheless, governance has not seen enough digital disruptions. A country like India must address questions of stark poverty, social disparities, and endemic corruption. Beyond certain announcements, the governments have lacked the will to leverage technology to overcome systemic problems of governance. In a collaboration between Vaagai Advisory (India) and OurSay (Australia), a citizen-led civic engagement campaign for participatory governance was run in Chennai. In two days, the campaign received around 3000 calls from citizens compiling a list of civic issues. A citizen-led report informed the authorities that 40% of callers raised the issue of roads and traffic. Nevertheless, in subsequent budgets placed by the City Corporation as well as the State Government, there has been no significant increase in the allocation towards improving roads or managing traffic.

The space of governance is screaming for innovation. Without robust digital intervention, civic and governance issues continue to be dominated by out-of-touch policy wonks or old-fashioned bureaucrats. For a complete rejig of the space, more start-ups need to be incentivised to solve urban civic and rural governance problems. Cross-national alliances, an adaptation of “western” models and technology-exchange are areas which can provide excellent opportunities for young Indians and Australians. Digital collaborations are the way forward.

## **Manuraj Shunmugasundaram**

Lawyer and Media Spokesperson for the Dravida Munnetra Kazhagam party

AIYD 2014 Alumnus

# Alumni Perspective: Future of Culture & Arts

India is witnessing digital disruption in the creative industry, arts and cultural sector at a speed and scale that allows our Australian counterpart to see this as a significant opportunity to collaborate.

The Indian animation & gaming industry is one of the fastest growing among its competitors in the global market of talent and projects. India's design, apparel, and craft sectors have witnessed large-scale technology adoption and a digital media explosion in consumer markets, aided by the start-up sector booming across metro and tier 1 cities in India.

The world's largest youth population is rapidly consuming mainstream entertainment and culture that hinges on local and international content through the smartphone wave. Arts and cultural sector is smaller in business revenues, direct employment, and scale but is a flourishing sector with India's rich diversity of arts and heritage. Australian art and cultural sector's continued engagement with Indian arts has been steadily growing. It can further contribute to the digitisation efforts in India to more practitioner-driven organisations, academic and training institutions that still lack skills, infrastructure, and exposure to global digital best practices in arts and culture sector.

There have been Indian federal and state government initiatives and private enterprises making an effort in digital documentation, archiving, public digital exhibitions and events yet there are specific technical and transversal skills that Australia can contribute.

## **Achyutha Sharma**

Founder, Brand Lab India

AIYD 2014 Alumnus & Steering Committee member

The digital shift has, like most industries, completely changed the way we ask questions about audience engagement in the contemporary art industry. Connection and collaboration are now arguably more accessible than ever before with online engagement which is an exciting new frontier for us all.

The State Library of Queensland (SLQ) is throughout 2017 exploring the theme Digital Futures. They say: Technology has given us new tools through which to question, understand, imagine, re-imagine and improve the world in which we live. Not only is technology substantially changing our economy but also our leisure activities, our political processes, and how we communicate with each other. Digital literacy has opened up new frontiers for collaboration, connection, and sharing.

We are witnessing a change in the nature of work, people are living longer and healthier lives, and new kinds of activism and internationalism are emerging. As we venture deeper into the digital age and amass huge amounts of data, the implications to our freedoms, rights, privacy, security and responsibilities and how we respect, protect and connect with each other must be considered. Who will own the digital future? What values will we strive to maintain?

## **Tess Maunder**

Editor at Absolute Humidity

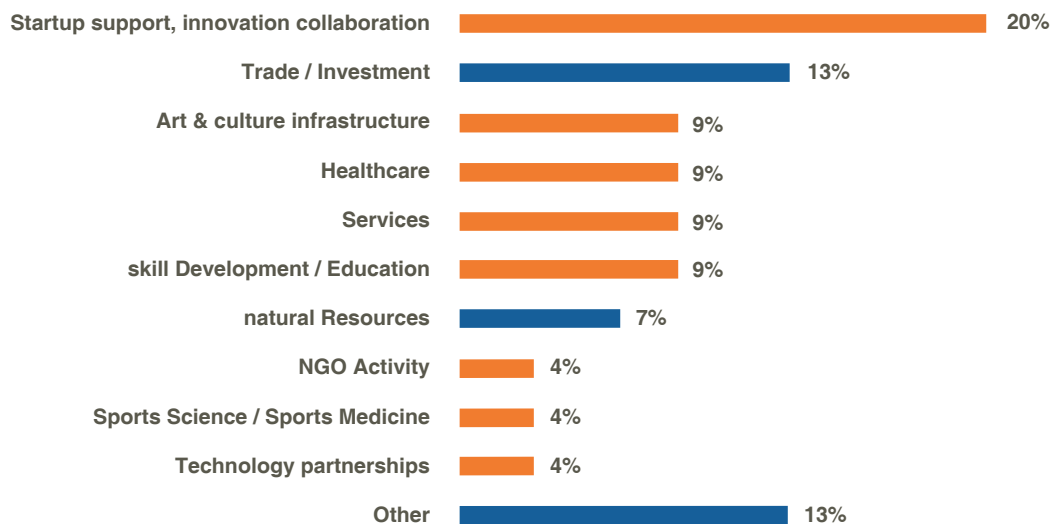
AIYD 2016 Alumnus

# Alumni Trends Survey

The diverse profiles and depth of experience across our alumni body provides AIYD with a unique level of insight into the Australia-India relationship. Our first Alumni Trends Survey sought to compile a snapshot of the current bilateral relationship, capturing recent developments, levels of cultural engagement, and opportunities for future growth.

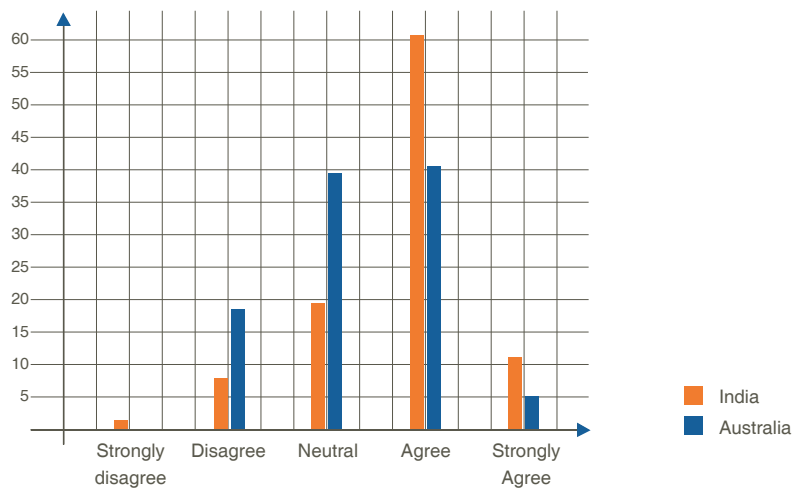
## The Innovation Dilemma

We began by asking the alumni to identify areas that are currently under-emphasised in the economic relationship between Australia and India. The open answer responses were grouped together into related areas. The area with the most mentions related to support for innovation between the two countries, and support for the startup ecosystem.



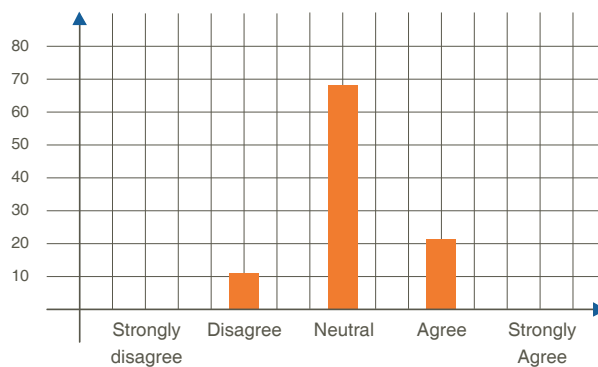
We next asked alumni to provide their level of agreement to the statements “Australia has a strong culture of innovation” and “India has a strong culture of innovation”. The responses indicated that both countries are perceived to have cultures of innovation, however India was a clear winner with 72% of respondents agreeing or strongly agreeing, compared to 45% of respondents for Australia, which received more neutral responses.

Australia / India have a strong culture of innovation



Despite the significant potential that exists, our alumni do not see meaningful recent growth in bilateral partnerships in the area of innovation. We expect to see continued interest in this area as we explore the topics of digital disruption at AIYD 2018.

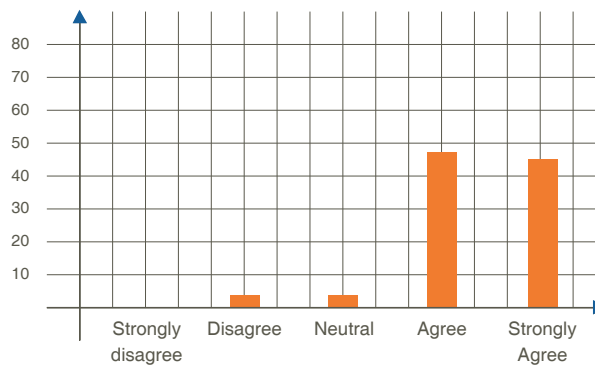
Australia and India have improved the way they partner on Innovation over the past 12 months



### Success in Youth Engagement

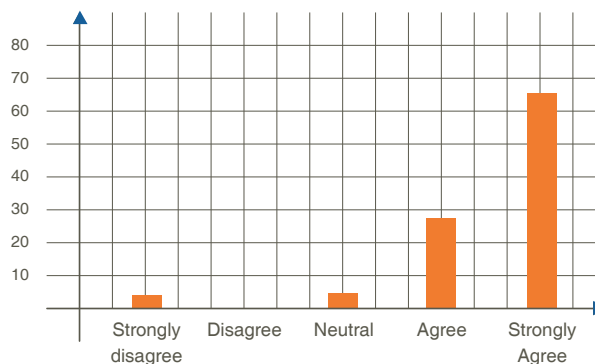
Our alumni view the bilateral relationship through multiple lenses. While trade, services and diplomacy all require continued focus, an important issue emerged from the survey: cultural understanding. Respondents overwhelmingly agreed or strongly agreed that increasing the level of cultural understanding on both sides of the relationship was a key to developing closer ties.

Increasing understanding of Australian culture in India, and Indian culture in Australia is important to develop closer ties between Australia and India

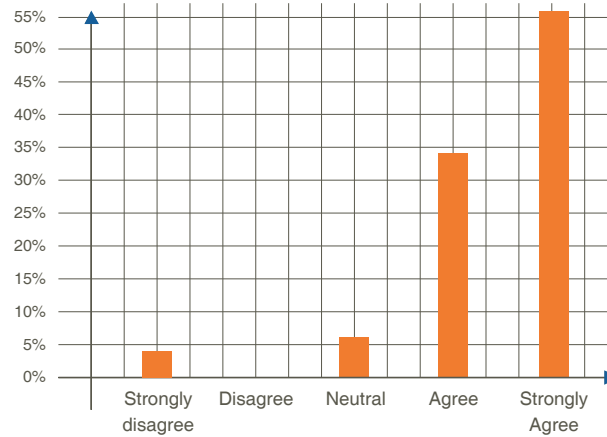


The alumni also strongly agreed that youth engagement is also a crucial part in building the bilateral relationship and in solving common challenges.

Engagement between the youth of Australia and India is crucial to building a closer bilateral relationship



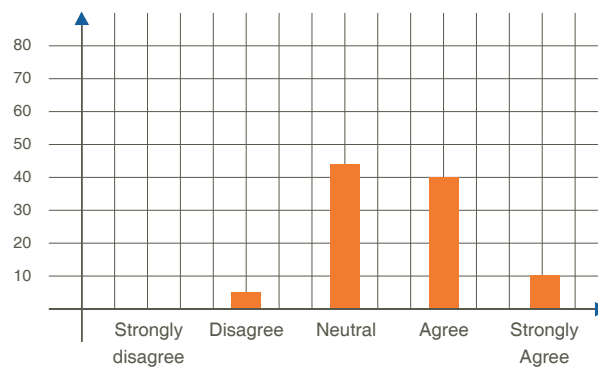
Collaboration between young people in Australia has improved in the past 12 months



2016 and 2017 saw a number of significant Australia-India events, which have helped to grow the relationship on various levels. These included the 2017 visits to India by Prime Minister Turnbull and Foreign Minister Bishop. Other events included the Australia India Leadership Dialogue, The Australia Business Week in India, Confluence - Festival of India in Australia, and the India-Australia Bilateral Dialogue on Global Cyber Issues.

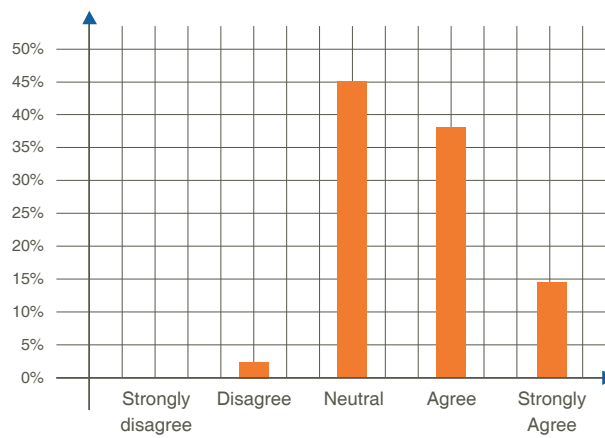
These and other activities may have contributed to the generally positive response from our alumni regarding improving cultural relationships between the two countries.

In the past 12 months, there have been improvements in cultural relationships between India and Australia



Similarly, most alumni agree or strongly agree that collaboration between young people in India and Australia has improved over the last year. Possible drivers include organisation such as AIYD, the growth of student exchanges under the New Colombo Plan, and even efforts to establish AFL as a sporting opportunity for Indian youth.

Collaboration between young people in Australia has improved in the past 12 months





## Our alumni set challenges for AIYD 2018

The great opportunity of each year's Dialogue is for diverse minds to tackle bilateral problems from a new perspective. In preparation for AIYD 2018, we asked our alumni to present some of the challenges that will need solutions in the near future:

“Startups are driving innovation, productivity and profits by leverage high technology inputs and low labour inputs. But how can Australia and India ensure that the digitally oriented economy generates enough jobs for India's demographic dividend and reduces Australia's rising youth unemployment.”

“Assuming that automation replaces 50 percent of India's low skill jobs in the next 25 years (construction, retail, logistics, etc). how can this low skill labour be reskilled for high skill occupations? where will these occupations come from?”

“How can India and Australia tackle the economic cyber-espionage that is undermining the return on investment for R&D/innovations in the two countries”

“Culture is always fluid and multifaceted, yet sometimes the way we think about and portray culture is quite rigid, unimaginative and limiting. In the digital age, how do we ethically and creatively engage with culture in a way that speaks to the multiplicity of voices in both contemporary India and contemporary Australia?”

“Sports viewership is falling on 'traditional' TV networks while increasing on non traditional online platforms. With a common love of cricket how do India and Australia exploit this trend to lead the development of sports broadcasting.”

“How do we keep politicians accountable for their promises after they have been elected - using technology to increase transparency, eliminate corruption, reduce the power of elites and vested interests.”





[www.aiyd.org](http://www.aiyd.org)