KERALA
GOD’S OWN COUNTRY

- 31M Mobile phone users
- 36M Aadhaar card holders
- 1000 panchayats enabled with e-governance
- 12.3M internet connections
- Facilitated by 2300+ akshaya computer centers
- 15 Mn certificates were transacted through e-administration
Our Story: Malayala Manorama

Our Founder
Kandathil Varghese Mapillai
March 14, 1888

1888
The Name
Kerala Varma Valiyakoyithampuran

The Emblem

The Royal Coat of Arms

1938
Small Treadle press
Hopkinson & Cope: 800 characters typecasted

1947
The first issue of Malayala Manorama: The voice of human dignity

1968
Price for freedom of expression

1996
Global Malayali

2018

1888
Established 1888

m4marry.com
where malayalees marry

horizon
Learning made simple

Quickkerala.com

Helloaddress.com
462 Mn
Overall internet users in India

84 Bn
Online video minutes per month by 2021

300 Mn
Mobile Internet users in India

US $1,708 Mn
Revenue from video advertising in 2022

Source: IAB, Statista.com, VNI Report
CHANGING FACE OF VIDEO ECOSYSTEM

Video Type
- Long form video
- Short form video
- Original digital video
- UGC
- Vertical video
- 360 video
- Virtual reality
- Live video

Distribution Mechanism
- Over the air
- Broadcast
- Cable
- Satellite
- Digital
- IP-based

Viewing Device / Platform
- Desktop
- Mobile
- Digital OOH
- OTT
- Connected TV
- Social Media
- Messaging App

Ad Unit
- In-stream
- Overlay
- Out-stream

Source: IAB Video Landscape Report - Nov 2017
The **ANNOUNCEMENT** that changed the dynamics of India's Data Usage
A NEW BATTLE GROUND EVOLVED
PUBLISHERS EMBRACED THE CHANGE & CAME UP WITH INNOVATIVE PLATFORMS
Average data consumption per user per month*

Src: India Mobile Video Report by Digital media network Culture Machine and Kantar IMRB, June 2017
Indian language digital entertainment user base to reach 392 million by 2021

Percentage of users that stated limited content availability[^19]

![Bar chart showing the percentage of users that stated limited content availability for different languages.](chart)
Bengali, Kannada, & Malayalam represent the fastest growing Indian language base of digital entertainment.

Source: Study by KPMG in India and Google on Indian Languages Defining India’s Internet, April 2017
WHAT NEXT?

- Content
- Platform
- Distribution
- Viewers

REVENUE
Gap between the rise in consumption of digital videos and advertisers investing on digital video ads.
How to leverage this premium inventory, which can assure 100% eyeballs?
#1 CONTENT IS STILL THE KING

180,000,000 VIDEO VIEWS ON YOUTUBE

Aim Sustainable Growth
Be Creative,
Be Innovative
& Deliver Quality Content
MONETISE!
BRANDED CONTENT!

Endorsements
Opinions
Thought Sharing
#2 STRUCTURED CONTENT

★ Organise your content
★ Explorability of videos is the key
★ Define the Meta Data for advertiser / agencies & DSPs to categorise content to feature ads.
★ Enable ad / video widgets for targeting.
★ Create long tail Video Playlists with potential advertiser relevance
MONETISE!
SELL
RELEVANCE & RELATION

- Companion Ads
- Overlay Ads
- Click to Action Ads
- Sponsored Widgets
- Audience Segments
#3 DATA IS THE NEW OIL
MONETISE!
CHARGE SUPER PREMIUM!
WITH PERSONALISED ADS

$5 CPV

$11 CPV

$15 CPV

$18 CPV
#4 NEVER STOP EXPERIMENTING

50% visitors see variation A

Variation A

23% conversion

50% visitors see variation B

Variation B

11% conversion
MONETISE!

AD PLACEMENTS & FORMATS

PRE-ROLL  mid-roll  POST-ROLL

In Read / In Article
#5 PROGRAMMATIC WILL EVOLVE

84% DISPLAY
60% MOBILE
58% VIDEO
32% SOCIAL
26% SEARCH
8% TV

PERCENTAGE OF BRANDS & AGENCIES PURCHASING PROGRAMMATICALLY IN VARIOUS MEDIA CHANNELS (US)

Source: eMarketer US Programmatic Report, 2016-17
MONETISE!

HEADER BIDDING & DYNAMIC AD INSERTION

- Player load starts
- Request bids
- Determine highest bid
- Serve winning ad
#6 KEEP AN EYE ON SOCIAL VIDEO

Which Type of Posts Get the Most Engagement for Brands

<table>
<thead>
<tr>
<th>Platform</th>
<th>Photos</th>
<th>Videos</th>
<th>Links</th>
<th>Just text</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>132</td>
<td>366</td>
<td>179</td>
<td>93.5</td>
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<tr>
<td>Twitter</td>
<td>113</td>
<td>41</td>
<td>42</td>
<td>89</td>
</tr>
</tbody>
</table>
MONETISE!

SELL SOCIAL BIG TEXT VIDEOS
#7 VIRTUAL REALITY & AUGMENTED REALITY VIDEOS ARE NOT DONE YET!
#8 SVOD IS STILL FARSIGHTED BUT NOT A MYTH ANYMORE!

<table>
<thead>
<tr>
<th>Player</th>
<th>Revenue Model</th>
<th>Monthly active subscribers (in million)</th>
<th>Parent Firm</th>
<th>Subscription Cost (US$ per month, approx.)</th>
<th>% of paying subscribers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotstar</td>
<td>Hybrid</td>
<td>75</td>
<td>Star India</td>
<td>US$3</td>
<td>3-5%</td>
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<tr>
<td>Voot</td>
<td>Advertisement</td>
<td>22</td>
<td>Viacom 18</td>
<td>Free</td>
<td>Not Applicable</td>
</tr>
<tr>
<td>Amazon</td>
<td>Subscription</td>
<td>11</td>
<td>Amazon</td>
<td>**&lt;US$1</td>
<td>100%</td>
</tr>
<tr>
<td>Sony LIV</td>
<td>Hybrid</td>
<td>5</td>
<td>Sony</td>
<td>**&lt;US$1</td>
<td>0-1%</td>
</tr>
<tr>
<td>Netflix</td>
<td>Subscription</td>
<td>5</td>
<td>Netflix</td>
<td>***US$7.8</td>
<td>6-8%</td>
</tr>
</tbody>
</table>

*Figures represent estimated app-only ‘Monthly Active Subscribers’ as on December 2017.
**Effective cost per month, as SonyLIV charges US$0.8 (INR 49) per month for premium content only.
***Effective cost of base package, two more packages with monthly subscription cost of US$10.2 (INR 650) and US$12.5 (INR 800) are available.
CONSUMPTION OF VIDEO BECOMING A PRIME MOBILE USE CASE

Share of Mobile video ads consumed over Wi-Fi v/s Mobile Data in INDIA

Wifi 39%  Mobile Data 61%

Source: inMobi Network Data | Video ads consumed refers to the share of video ad impressions, 2017
PREFERRED TIME / DAY FOR MOBILE VIDEO PLAYS!

6:30 AM - 9:30 AM

Source: inMobi Network Data | Video ads consumed refers to the share of video ad impressions, 2017
MONETISE!
SELL BRANDED CONTENT / SPONSORSHIP OVER VERTICAL VIDEOS
How do you define your strategy?
QUESTIONS?