Exploring the New Media Landscape

Presented By:
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OUT WITH THE OLD, IN WITH THE NEW
April 1973: Motorola was the first company to mass produce the first handheld mobile phone. These early mobile phones are often referred to as 0G mobile phones, or Zero Generation mobile phones. Most phones today rely on 4G mobile technology and 5G in the near future.
INTERNET HISTORY TIMELINE

1960s: ARPANET
The 1960's saw the development of the first wide-area computer network.

1970s: ETHERNET + USENET
Development of protocol for linking multiple networks together.

1980s: DIAL-UP
The First domain was registered in the 1980's.

1990s: WWW

2000s: SEARCH ENGINES
Rise and Burst of the Dotcom bubble. Rise + proliferation of Wi-Fi.
In the most recently reported period, almost 110 million U.S. households had fixed broadband internet access, up from close to 80 million in 2009.
• Connected television is any device which is designed to support multimedia and connect to the Internet (internet-capable TV set, video game consoles such as Xbox, PlayStation, Blu-ray Disk Player or streaming video device).

• Compared to traditional TV, which is primarily focused on media broadcasting, these new-generation devices are all about online interactive media, internet TV, over-the-top content and on-demand streaming media. These that can be accessed through software applications or web widgets.
A LOOK INTO THE DENVER DIGITAL CONSUMER
DENVER MARKET HIGHLIGHTS

<table>
<thead>
<tr>
<th>21%</th>
<th>Denver DMA’s Hispanic population</th>
</tr>
</thead>
<tbody>
<tr>
<td>$19.1B</td>
<td>Denver Hispanic total consumer spending in 2017</td>
</tr>
<tr>
<td>27%</td>
<td>Consumer spending by Hispanics has grown 27% since 2012, vs only 20% for non-Hispanics</td>
</tr>
</tbody>
</table>

• By 2022 consumer spending by Hispanics is expected to grow an additional 29%, vs 27% for non-Hispanics

Source: 2019 Claritas & 2018 IHS Hispanic Market Monitor
HISPANICS IN DENVER: DEVICE OWNERSHIP

% OF HISPANIC A18+ IN DENVER: TYPES OF DEVICES OWNED


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- Desktop computer
- Laptop or notebook computer
- Smartphone (iPhone, Galaxy, etc.)
- Tablet (iPad, Galaxy Tab, Kindle Fire, etc.)

HISPANICS IN DENVER: ONLINE BEHAVIOR

% OF HISPANIC A18+ IN DENVER: INTERNET/APPS USAGE IN THE PAST MONTH

- Social networking (Facebook, Twitter, LinkedIn, etc.): 83%
- Maps/GPS (Google Maps, MapQuest, etc.): 67%
- Banking: 64%
- Weather: 60%
- Watch TV programs using online subscription: 57%
- Listening to music/services: 50%
- Shopping: 47%
- Restaurant information (reviews, reservations, etc.): 44%
- Video clips (YouTube, etc.): 44%
- Listen to radio (local or internet radio): 41%
- Traffic: 39%
- Coupons: 38%
- Travel reservations (airline, hotel, gas, retail, etc.): 38%
- Local news: 38%
- Mobile travel or download: 37%
HISPANICS IN DENVER: E-COMMERCE SPENDING

HISPANIC A18+ IN DENVER: AMOUNT SPENT ON PURCHASES VIA THE INTERNET YOY


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OVER THE TOP VIEWING DEFINED

Over the top (OTT) refers to content provided via a high-speed Internet connection instead of delivered via traditional paid or broadcast Television.

OTT VIEWING CAN TAKE PLACE ON SEVERAL PLATFORMS:

- CONNECTED TVs (Smart TV or Enabled Device)
- COMPUTERS (Laptop or Desktop)
- TABLET
- SMARTPHONE
- GAME CONSOLE (Xbox & PlayStation)
Premium video remains multi-screen, but as of Q4 2018, Connected TVs and STB VOD (the big screen) together comprised 58% of the market.

AD VIEW COMPOSITION AND GROWTH, BY DEVICE, U.S.
Q4 2014 — Q4 2018
U.S. HISPANICS AND STREAMING VIDEO

Items/services household currently has (HHLD):
Smart TV or Streaming Media Player (Apple TV, Roku, etc.)
Hispanic A18+ in Denver

Streaming services visited/apps used past 30 days
Hispanic A18+ in Denver

FEP VS. LIVE VIEWING VS. CLIPS

CONTENT FORMAT COMPOSITION (Q4 2018)

Live: Pass-Thru from broadcast stream for all programming except sports

Full Episode Player (FEP): Dynamic Ad Insertion (DAI), mid-roll in between content

Clips: Dynamic Ad Insertion (DAI), pre-roll before content

Source: Freewheel Growth & Convergence: The Evolution of Premium Video in 2018; Q4 2018 with year-end insights
THE NEW NBCU OTS PORTFOLIO

THREE STATION GROUPS DELIVERING MULTIPLATFORM PROGRAMMING

NBC OWNED TV STATIONS
Local News, Entertainment, Sports Programming Covering the General Market

TELEMUNDO STATION GROUP
Local News, Entertainment, Sports Programming Covering the Hispanic Market

NBC SPORTS REGIONAL NETWORKS
Entertainment, Sports, and News Programming Covering Local Pro Sports

ALONG WITH DISTRIBUTION PARTNERSHIPS ACROSS NBCU
ONE COHESIVE MESSAGE UTILIZING ALL OF NBCU’S ASSETS

Targeted Placement on Linear & Non-linear Platforms
Television, Desktop & Mobile, Streaming opportunities in the most relevant markets across the country

Out-of-Home
Location based, geo-targeting content extension with massive reach

Content Production & Integration Opportunities

Social Media Extensions
Custom content production and amplification to reach additional audiences

CONNECTING DENVER TO THE RIGHT AUDIENCE
VISITOR PROFILE & TRAFFIC

TELEMUNDO STATION GROUP SITES

With 30 owned stations across the US & Puerto Rico,
Telemando station group websites keep the Hispanic communities they serve up-to-date on the latest news, entertainment, sports, & weather stories that matter.

VISITOR PROFILE

63.0% women
Avg. Age 39 y.o.

37.0% men
Avg. HH Income $51k

DENVER SITE METRICS (Monthly Avg)

<table>
<thead>
<tr>
<th>Metric</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page Views</td>
<td>541K</td>
</tr>
<tr>
<td>Unique Visitors</td>
<td>178K</td>
</tr>
<tr>
<td>Video Views</td>
<td>169K</td>
</tr>
<tr>
<td>Social Followers</td>
<td>108K</td>
</tr>
</tbody>
</table>
DENVER’S COMPLETE ADVERTISING SOLUTION

NBCU OTS websites deliver your message alongside brand-safe content through effective ad placements.

- PREMIUM VIDEO
- NATIVE CONTENT
- AUDIENCE TARGETING
- HIGH IMPACT TAKEOVERS
- MOBILE EXTENSIONS
PREMIUM VIDEO

Full Episode Player
Network programming – anytime, anywhere!
- No ad-skipping
- :15 / :30 mid-roll
- Digital ad insertion with click-through functionality

Live Streaming
Stream ALL NBCU ON programming LIVE!
- Digital ad insertion in Pre / In-Game / Post SPORTS Programs with companion banner ads
- Pass-through ads from broadcast feed for ALL OTHER PROGRAMS

Video on Demand
Align with NBC programming on-demand.
- Local and National Scale
- NBC Prime & Late Night = brand safe, quality environment
- 100% viewability

Pre-Roll
Speak to an engaged audience.
- :15 video with companion banner ad placement (where applicable)
In Telemundo DMAs:
- **29.5 Million Minutes** Watched (+42% MoM and +163% YoY)
- Average of 179.1 Minutes per viewer

Platform by Minutes Consumed Last 6 Months:
- 48% from OTT
- 48% from Mobile App
- 4% from Desktop.

Denver DMA:
- **306K Minutes Watched** (+52% MoM and +124% YoY)
- Average of 147.5 Minutes per viewer

Platform by Minutes Consumed Last 6 Months:
- 52% from OTT
- 42% from Mobile App
- 6% from Desktop.

Source: Adobe Analytics, TVE Production/TVE Mobile App, March 2018 – March 2019
THREE WAYS VIEWERS CAN ACCESS NBC CONTENT ON CONNECTED DEVICES:

**ON-DOMAIN: NBC TVE**
- NBC Network Apps & Sites
- NBC Sports / Telemundo Deportes App & Site
- NBC OTS Local Station Website & Apps

**MVPD**
Multichannel Video Programming Distributors (MVPD) are traditional cable or satellite providers, many of whom have extended offerings by creating OTT experiences for subscribers through their site / app.

**dMVPD**
Digital Multichannel Video Programming Distributors (dMVPD – also referred to as vMVPD) aggregate live / on-demand television and deliver the content over the internet.

Most streaming services support live / on-demand viewing through connected TVs, computers, tablets, smartphones, and game consoles*.
TELEMUNDODENVER.COM USER TRAFFIC DETAILS

APRIL 2019

<table>
<thead>
<tr>
<th>Mobile</th>
<th>Desktop</th>
<th>App</th>
</tr>
</thead>
<tbody>
<tr>
<td>541,820</td>
<td>178,429</td>
<td>107,885</td>
</tr>
<tr>
<td>169,368</td>
<td>107,645</td>
<td>178,429</td>
</tr>
</tbody>
</table>

Page Views | Unique Visitors | Video Views | Likes | Followers

USERS SPEND 0.9 MIN AND VIEW 1.6 PAGES PER VISIT
TELEMUNDO FEP VIDEO ON DEMAND USERS SPEND ON AVERAGE OF 107 MINUTES

User Base Metrics: April 2019 | Source: Adobe Analytics & Facebook
TELEMUNDO DENVER TVE MONTHLY – APRIL 2019

DEN - FEP - VOD Minutes Watched

Last Month's Total: 515,679

MoM: +68%
YoY: +268%

DEN - TLMD.COM+Owned Station - Linear Minutes Watched

Last Month's Total: 32,888

MoM: +15%
YoY: +851%

DEN - FEP - VOD Viewers

Last Month's Total: 4,837

MoM: +133%
YoY: +595%

DEN - TLMD.COM+Owned Station - Linear Viewers

Last Month's Total: 199

MoM: +22%
YoY: +206%

Average Minutes Viewed in April 19: 107

Average Minutes Viewed in April 19: 165

User Base Metrics: April 2019 | Source: Adobe Analytics

Metrics: FEP - VOD Minutes Watched: # of digital video content minutes watched ON-DEMAND, FEP - VOD Viewer: # of unique digital devices who watched ON-DEMAND
Linear Minutes Watched: # of digital video content minutes watched LIVE, Linear Viewer: # of unique digital devices who watched LIVE
Content Types: FEP (Full Episode Player): On-demand full episode programming watched on the NBC.COM or TLMD.COM website or app, NBC.COM/TLMD.COM Linear: Live digital viewing watched on the NBC.COM or TLMD.COM website or app, Owned Station Linear: Live digital viewing watched on the Local website or app (i.e. NBC New York/Telemundo 47)
DRIVE ROI WITH NBCU OTS

Premium publishers, like NBCU OTS, are more effective at driving results!

COMSCORE STUDY SHOWS PREMIUM PUBLISHERS DELIVER

- **67%** Higher Brand Lift
- **51%** Higher Effectiveness
- **3x** more effective in driving key metrics (favorability, consideration & intent to recommend)

...due in large part to the ‘halo effect’ of the contextual environment in which ads are seen.

BENEFITS OF CROSS PLATFORM ADVERTISING

Investing across platforms (TV, Digital Video, Social) with a single premium publisher improves advertising effectiveness!

+ 28% BRAND LIFT
+ 16% SALES LIFT

Source: NBCUniversal in a partnership with Accenture: “Quantifying the connection: premium video & brand building”; Cross-platform advantage vs. siloed planning
CASE STUDY
RIVIANA

CLIENT GOALS:
• Increase brand awareness and sales in (4) key markets (LA, HOU, NY, MI) for Riviana’s rice brands and rice varieties: Mahatma and Carolina Rice.
• Convey the idea that food brings families together and Mahatma & Carolina Rice provides consumers a feeling of home and authenticity when cooking with these products.
• Reach both Spanish and English speaking audiences with one cohesive message that drives engagement across all platforms: broadcast, digital and social.

SOLUTION:
• The ground-breaking synergy campaign, “KitchenCore” for NBC and “Nuestro Comedor” for Telemundo celebrated the power of food to preserve and share our most treasured family traditions.
• Creative was produced to drive digital engagement through long-form documentary style segments.
• NBCU Skycastle cast bilingual food personality Bricia Lopez as the brand ambassador.
• NBC & Telemundo custom content included:
  • :15 and :30 brand spots with drivers to digital segments hosted on the NBC/Telemundo station sites
  • 2-minute “mini-doc” segments
  • :06 teasers for social takeovers
  • Dedicated digital and social campaign

RESULTS:
• Broadcast over delivery in LA, HOU & NY
• Digital Highlights
  • Telemundo: 4% brand penetration and 5% lift on purchase intent
    • 200% total delivery
    • 9% Pre-roll CTR
    • Social: 95K total video views/ 84K unique video views
  • NBC: 2% brand penetration with Carolina rice having greater brand awareness and purchase intent vs. competitor rice brand
    • 116% total delivery
    • 15.6% Pre-Roll CTR
    • Social: 309K total video views/ 276K unique video views
THANK YOU!
Household penetration of Connected TVs has been growing

- TV (Smart TV) is by far the leading device consumers own that can be controlled by the internet – 52%. Multi-room speakers/wireless speakers is second at 23%.
- In 2018, a projected 182.6 Million Connected TV Users, or 55.5% of the US Population.
- 80% of ad campaigns served by Videology included a connected TV component; overall, 98% of its campaigns ran across multiple screens.
- From 2016 to 2017, the number of advertisers running connected TV ads through the Innovid platform increased by 30%.
- Among Innovid’s broadcast clients, more than half of all ad impressions are served to connected TV devices, and the company noted an increase in the distribution of impressions to broadcasters from platforms and aggregators.
- The biggest subcategory of connected TV users is smart TV users, which will reach 119 million by 2021. Other top device categories are Roku, connected video game consoles and Amazon Fire TV.

### US Connected TV Users, by Device, 2017-2022

<table>
<thead>
<tr>
<th>Device</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smart TV</td>
<td>81.6</td>
<td>94.8</td>
<td>103.7</td>
<td>110.8</td>
<td>116.3</td>
<td>119.0</td>
</tr>
<tr>
<td>Connected game console</td>
<td>62.2</td>
<td>65.4</td>
<td>68.0</td>
<td>69.8</td>
<td>71.3</td>
<td>72.6</td>
</tr>
<tr>
<td>Roku</td>
<td>47.3</td>
<td>59.2</td>
<td>70.1</td>
<td>79.0</td>
<td>87.1</td>
<td>93.4</td>
</tr>
<tr>
<td>Amazon Fire TV</td>
<td>40.0</td>
<td>48.6</td>
<td>55.7</td>
<td>60.8</td>
<td>65.9</td>
<td>69.7</td>
</tr>
<tr>
<td>Google Chromecast</td>
<td>29.1</td>
<td>30.6</td>
<td>31.6</td>
<td>32.5</td>
<td>33.1</td>
<td>33.7</td>
</tr>
<tr>
<td>Blu-ray player</td>
<td>28.5</td>
<td>28.0</td>
<td>27.4</td>
<td>26.7</td>
<td>25.9</td>
<td>25.1</td>
</tr>
<tr>
<td>Apple TV</td>
<td>22.4</td>
<td>24.1</td>
<td>25.1</td>
<td>25.7</td>
<td>26.3</td>
<td>26.7</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>168.9</strong></td>
<td><strong>182.6</strong></td>
<td><strong>190.0</strong></td>
<td><strong>195.9</strong></td>
<td><strong>200.4</strong></td>
<td><strong>204.1</strong></td>
</tr>
</tbody>
</table>

*Note: individuals of any age who use the internet through a connected TV at least once per month.*
*Source: eMarketer, July 2018*
TELEMUNDO DENVER HOLDS A SIGNIFICANT
SHARE OF SPANISH-LANGUAGE VIEWING

Source: Nielsen, NSI (Live+SD) May 2019 VIP, Denver DMA. Share of Viewing Based on Average Impressions, Adults 25-54
Spanish-Language Stations KDEN-TEL, KCEC-UNI, KTFD-UMA, KZCO-AZA & KETD-ETV

May 2019
Telemundo Denver Share of Viewing Among Spanish-Language Stations