



Exploring the New Media Landscape

Presented By:

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NBCUniversal
Owned Television Stations

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OVERVIEW OF PRESENTATION

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2 THE DENVER
CONSUMER

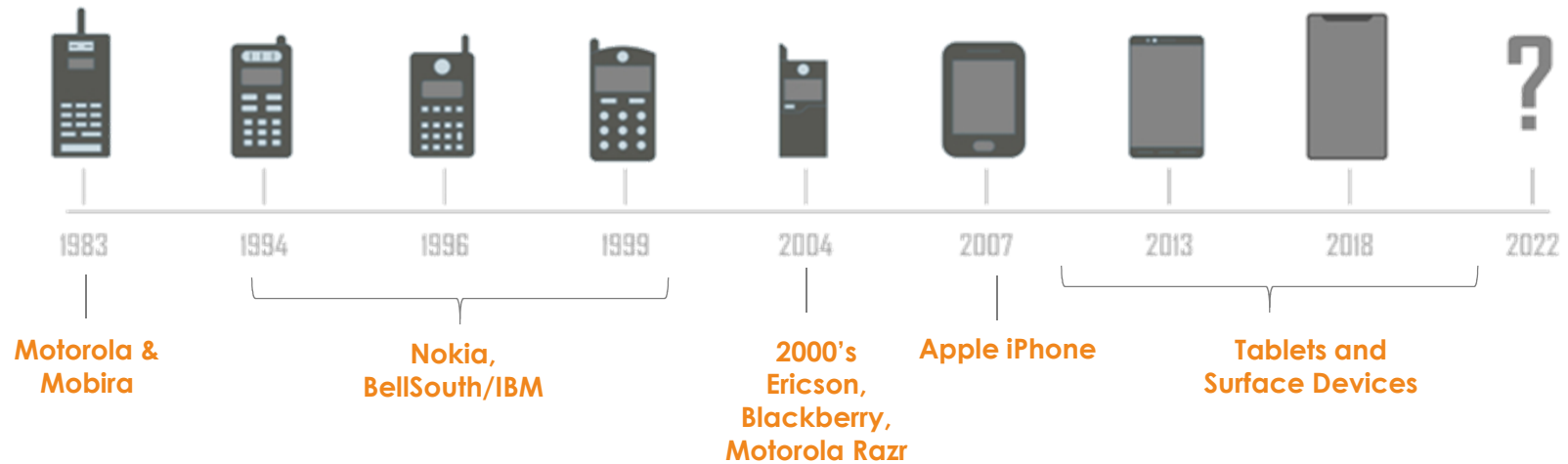
3 THE FUTURE
OF TV IS
NOW

4 NBCU &
TELEMUNDO
DENVER



OUT WITH THE OLD, IN WITH THE NEW

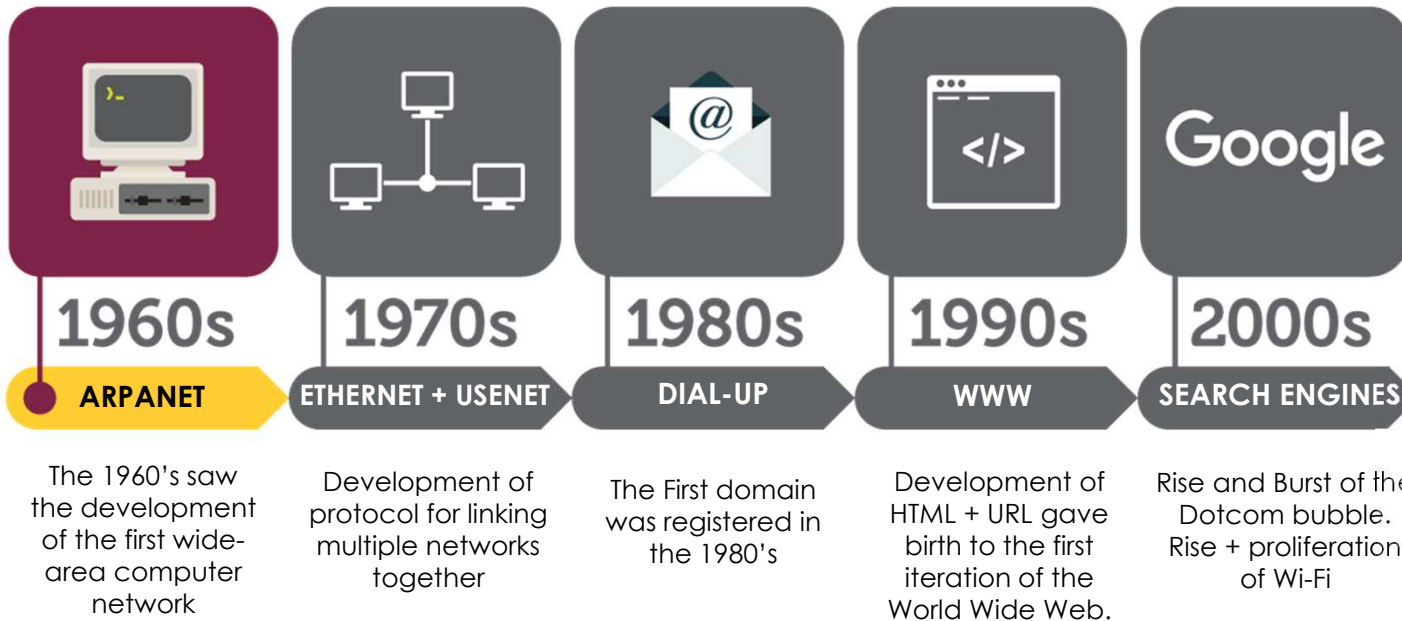
EVOLUTION OF MOBILE DEVICES



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.

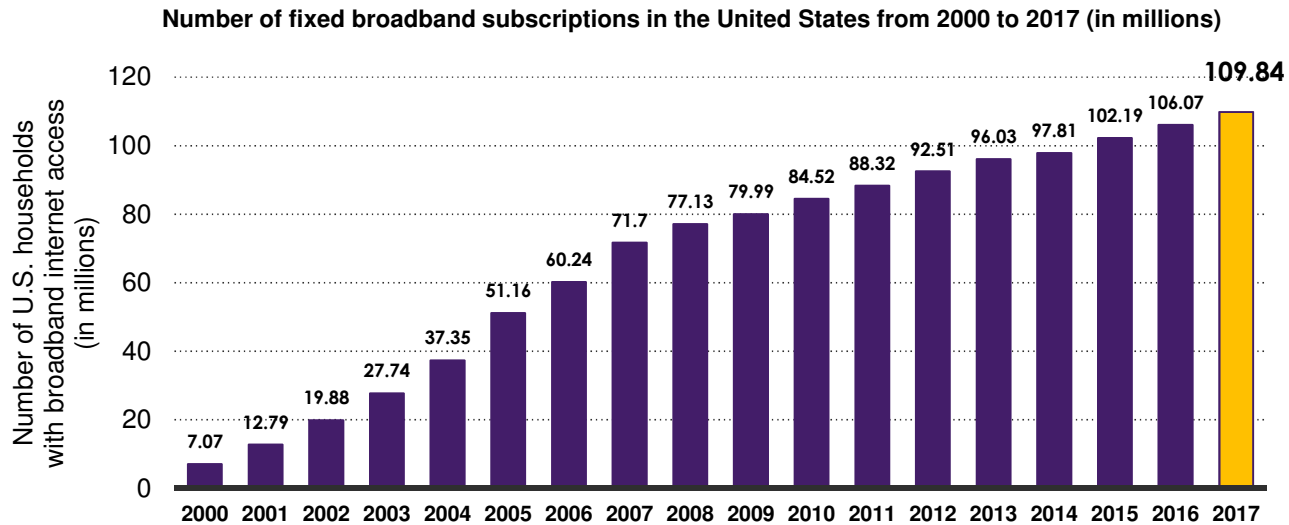
INTERNET HISTORY TIMELINE



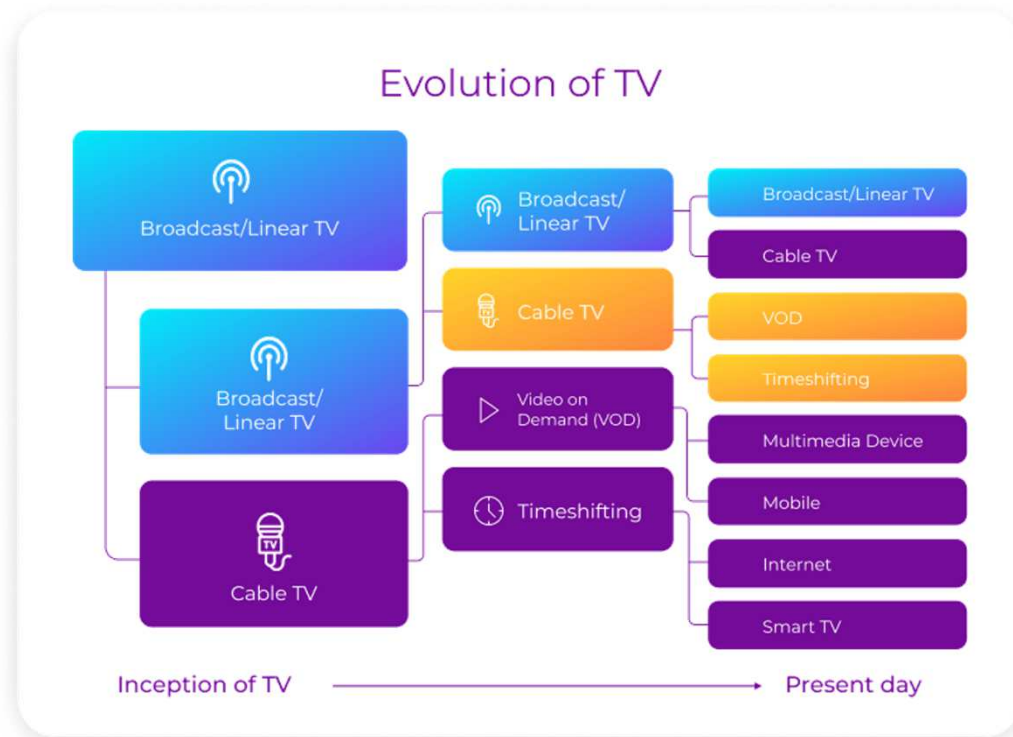
U.S. BROADBAND INTERNET TREND

NUMBER OF U.S. HOUSEHOLDS WITH BROADBAND INTERNET ACCESS 2000-2017

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**.



TV IS NOT DEAD, IT'S JUST DIFFERENT



- **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

21%

Denver DMA's Hispanic population

\$19.1B

Denver Hispanic total consumer spending in 2017

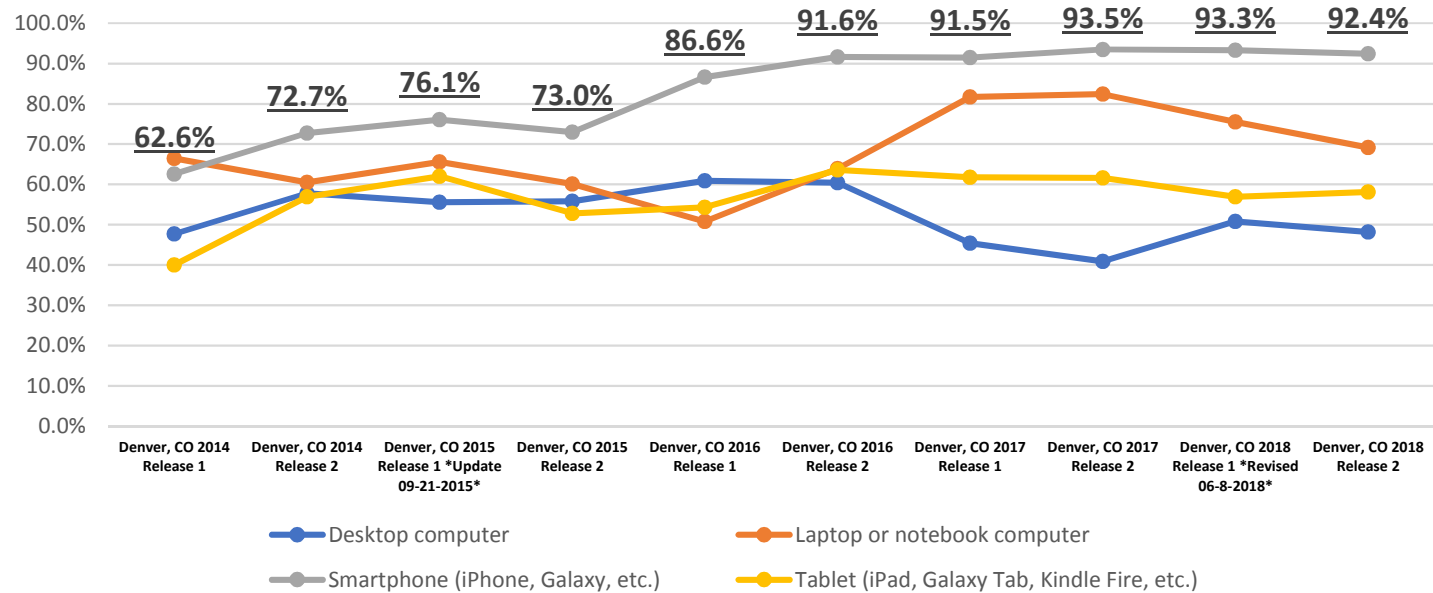
27%

Consumer spending by Hispanics has grown 27% since 2012, vs only 20% for non-Hispanics

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

HISPANICS IN DENVER: DEVICE OWNERSHIP

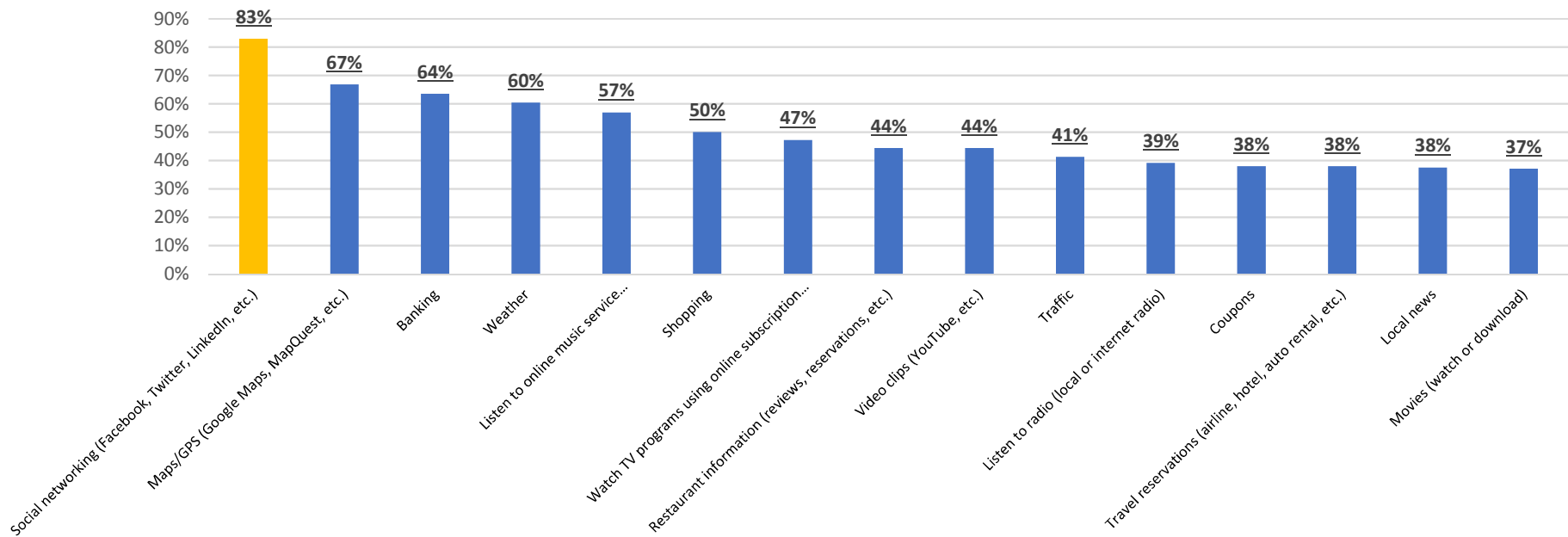
% OF HISPANIC A18+ IN DENVER: TYPES OF DEVICES OWNED



*source: Nielsen, Scarborough Research, Market/Release: Denver, CO 2018 Release 2 Total (Aug 2017 - Aug 2018) - Adults 18+ AND Spanish/Hispanic Origin: Yes

HISPANICS IN DENVER: ONLINE BEHAVIOR

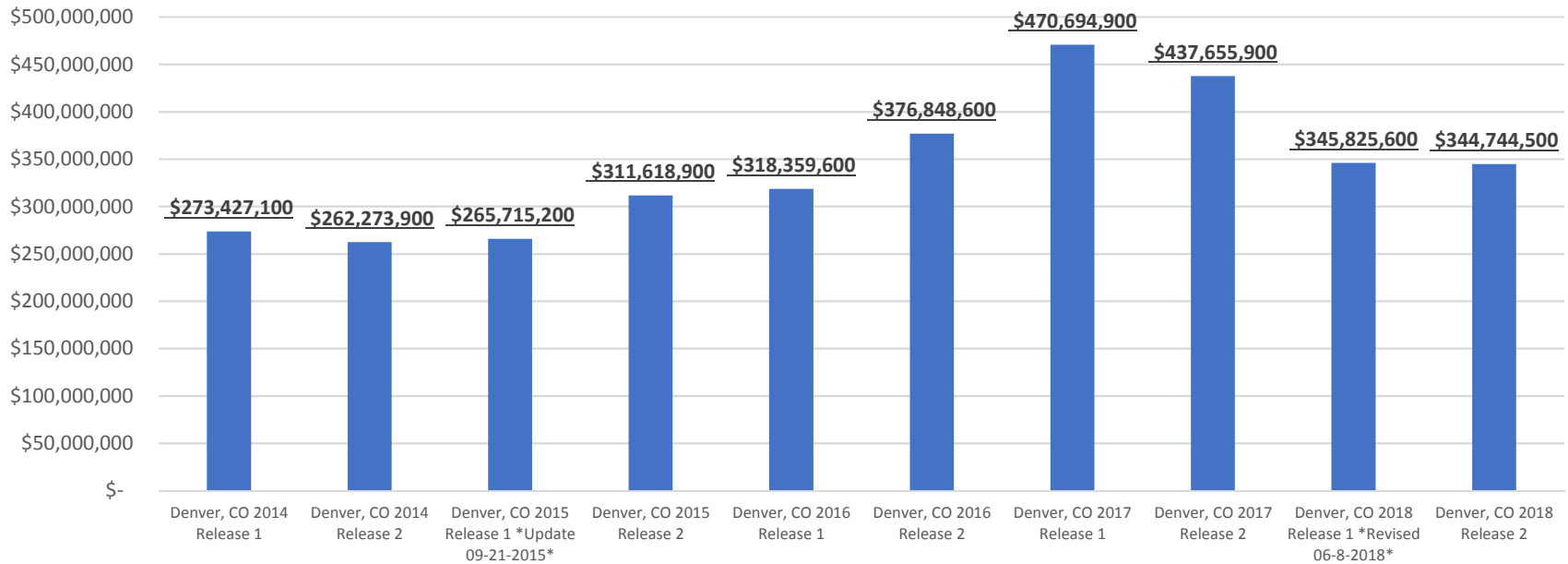
% OF HISPANIC A18+ IN DENVER: INTERNET/APPS USAGE IN THE PAST MONTH



*source: Nielsen, Scarborough Research, Market/Release: Denver, CO 2018 Release 2 Total (Aug 2017 - Aug 2018) - Adults 18+ AND Spanish/Hispanic Origin: Yes

HISPANICS IN DENVER: E-COMMERCE SPENDING

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



*source: Nielsen, Scarborough Research, Market/Release: Denver, CO 2018 Release 2 Total (Aug 2017 - Aug 2018) - Adults 18+ AND Spanish/Hispanic Origin: Yes

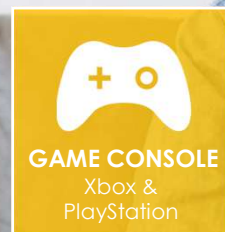
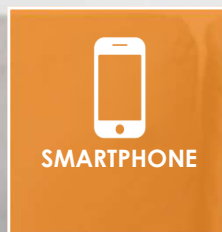
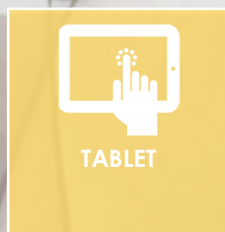


ADVANCED TV

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.

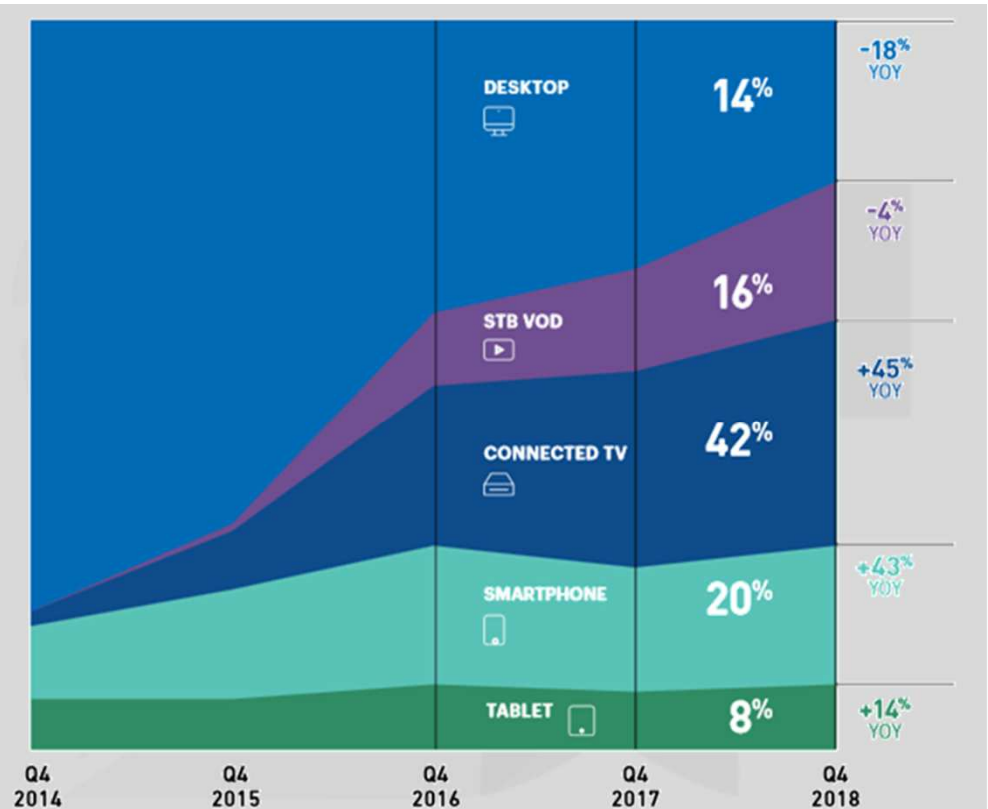
OTT VIEWING CAN TAKE PLACE ON SEVERAL PLATFORMS:



FRAGMENTATION OF OTT VIEWERSHIP

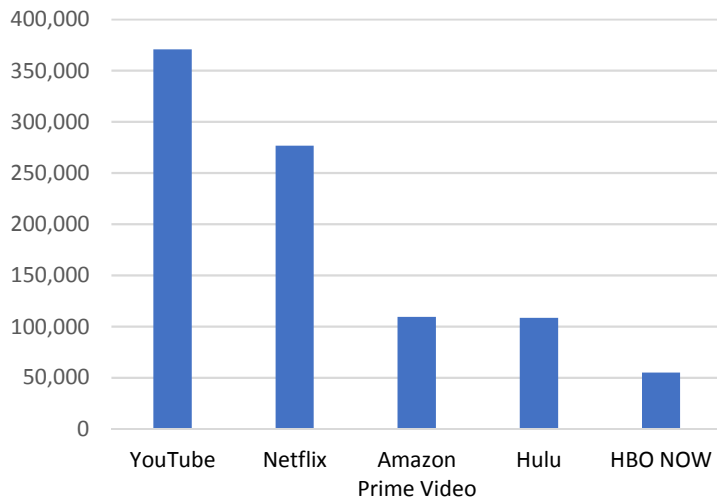
Premium video remains multi-screen, but as of Q4 2018, **Connected TVs and STB VOD (the big screen) together comprised 58%** of the market.

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

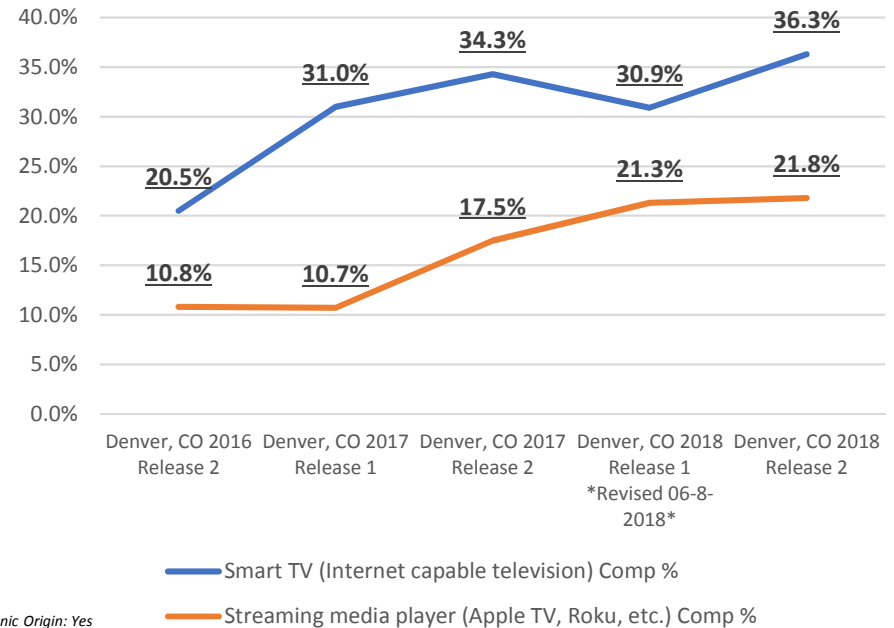


U.S. HISPANICS AND STREAMING VIDEO

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



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



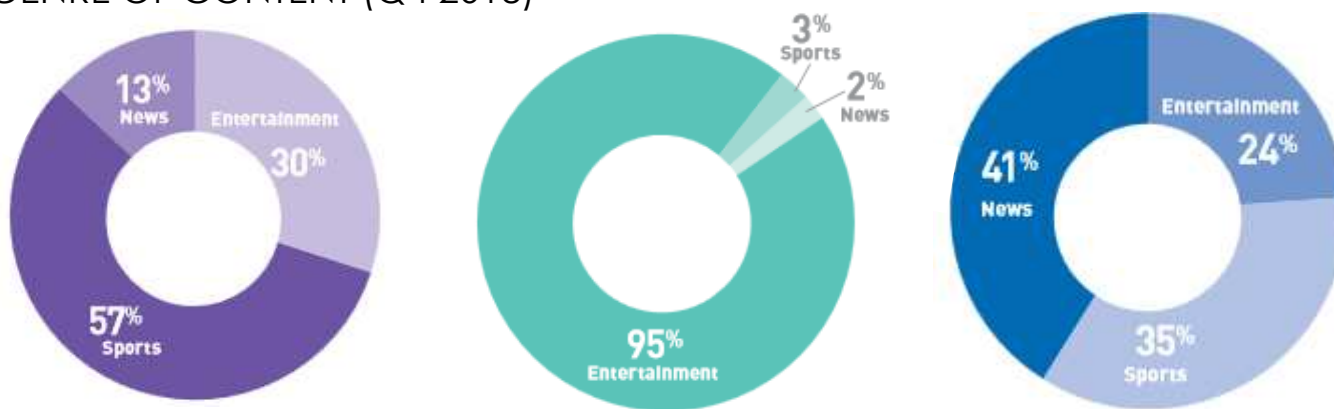
*source: Nielsen, Scarborough Research, Market/Release: Denver, CO 2018 Release 2 Total (Aug 2017 - Aug 2018) – Adults 18+ AND Spanish/Hispanic Origin: Yes

FEP VS. LIVE VIEWING VS. CLIPS

CONTENT FORMAT COMPOSITION (Q4 2018)



GENRE OF CONTENT (Q4 2018)



NBCU OTS AD DELIVERY BY CONTENT FORMAT

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



NBCU & TELEMUNDO DENVER

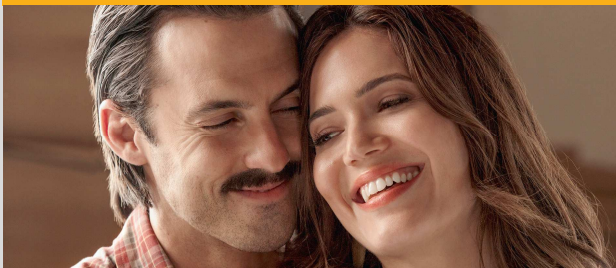


THE NEW NBCU OTS PORTFOLIO

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



REACH INFLUENTIAL MARKETS



11 NBC Stations,
+ New England Cable News

32MM TV households,
28% of U.S., eight of the top 10
markets

182MM Page Views / Mo



30 Telemundo Stations

19 of the top 20 Hispanic markets

94MM Page Views / Mo



7 Regional Sports Nets

Aligned with 25 premier sports
franchises

40MM Page Views / Mo

COZI

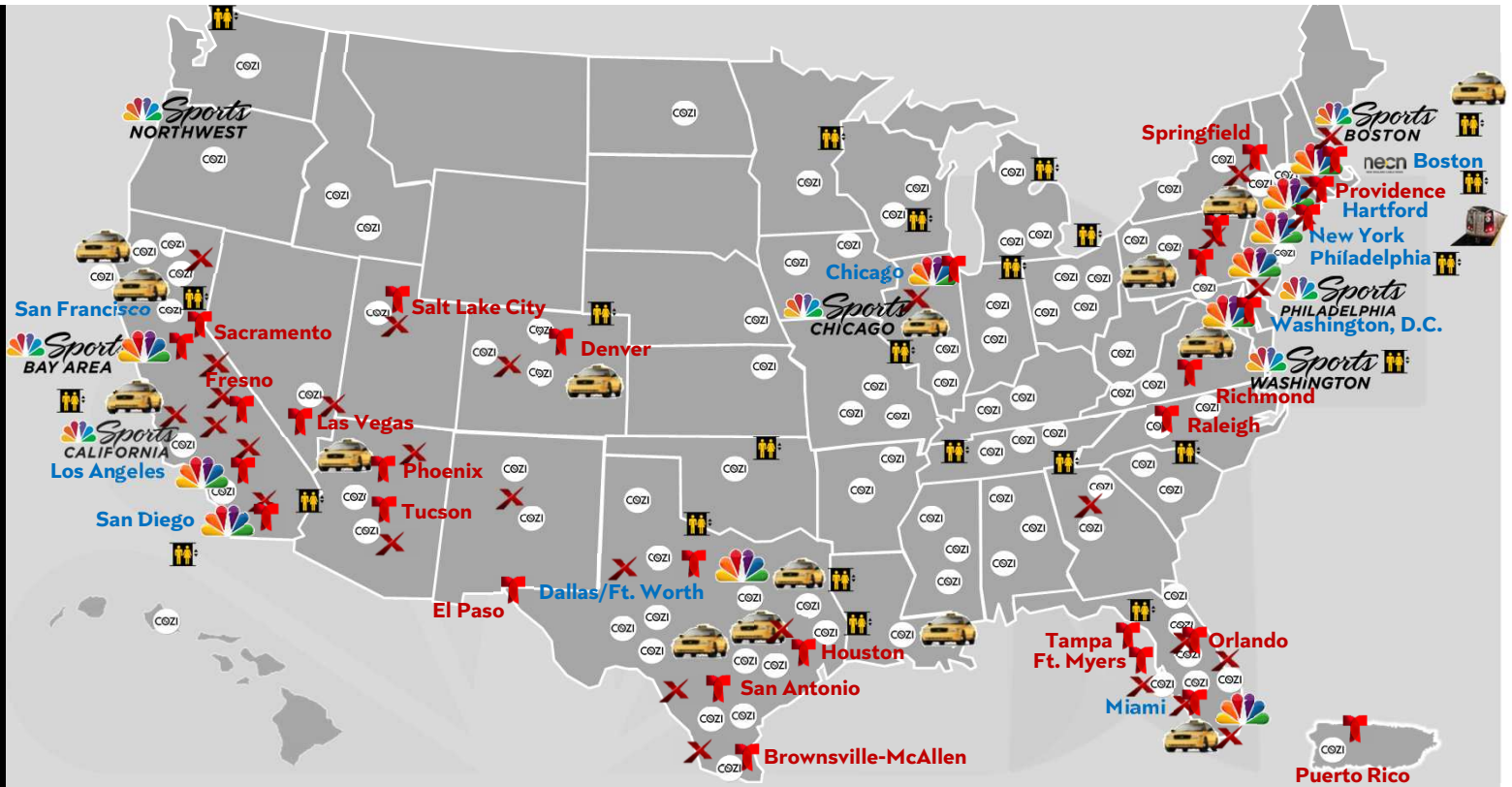
Telemundo

120+ Markets
90MM HHs
82% U.S. Coverage

30 Markets
6.4MM U.S.
Hispanic TV HHs



Elevators: 80.3MM Imps
Taxis: 20.8MM Imps
PATH: 6.1MM Imps



CONNECTING DENVER TO THE RIGHT AUDIENCE



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

ONE COHESIVE MESSAGE UTILIZING ALL OF NBCU'S ASSETS



Content Production & Integration Opportunities



Social Media Extensions

Custom content production and amplification to reach additional audiences

VISITOR PROFILE & TRAFFIC

TELEMUNDO STATION GROUP SITES

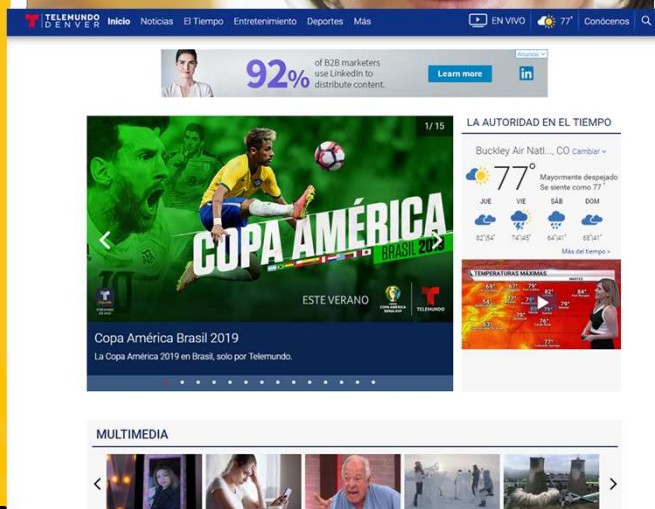
With 30 owned stations across the US & Puerto Rico,

Telemundo 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 **39 y.o.** Avg. Age

 **37.0%** men **\$51k** Avg. HH Income



DENVER SITE METRICS (Monthly Avg)

Page Views	541K
Unique Visitors	178K
Video Views	169K
Social Followers 	108K

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



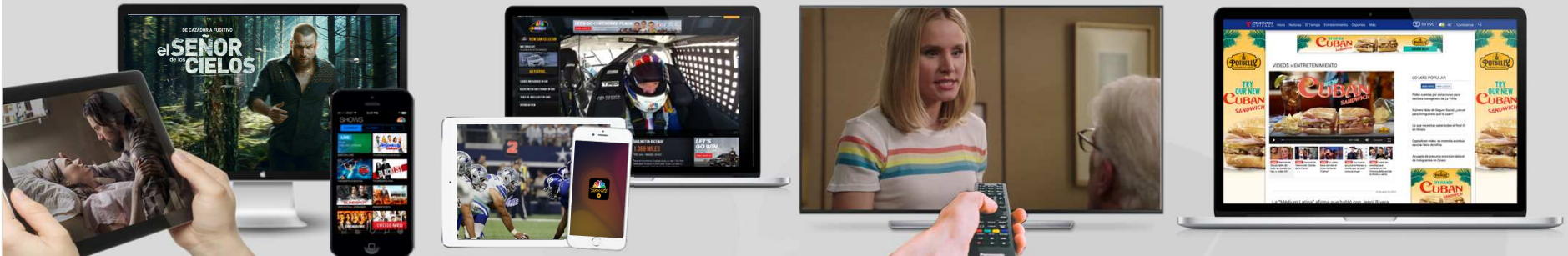
HIGH IMPACT
TAKEOVERS



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 OTS 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)

TELEMUNDO FULL EPISODE PLAYER OVERVIEW

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:

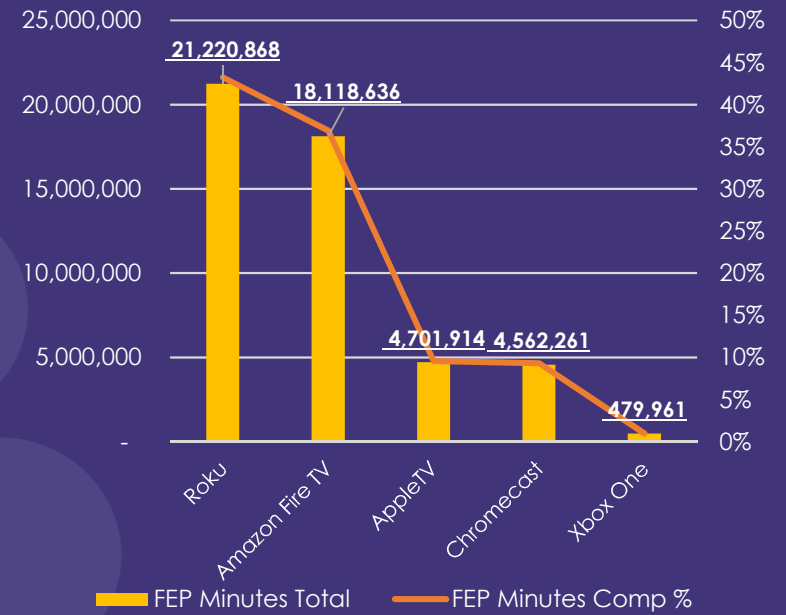
- 306K Minutes Watched (+52% MoM and +124% YoY)
- Average of 147.5 Minutes per viewer

Platform by Minutes Consumed Last 6 Months:

A52% from OTT | 42% from Mobile App | 6% from Desktop.



Telemundo FEP - OTT Minutes by Platform Last 6 Months (Oct-18 to Mar-19)



APPS FOUND IN STREAMING DEVICES

THREE WAYS VIEWERS CAN ACCESS NBC CONTENT ON CONNECTED DEVICES:

ON-DOMAIN: NBC TVE



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.



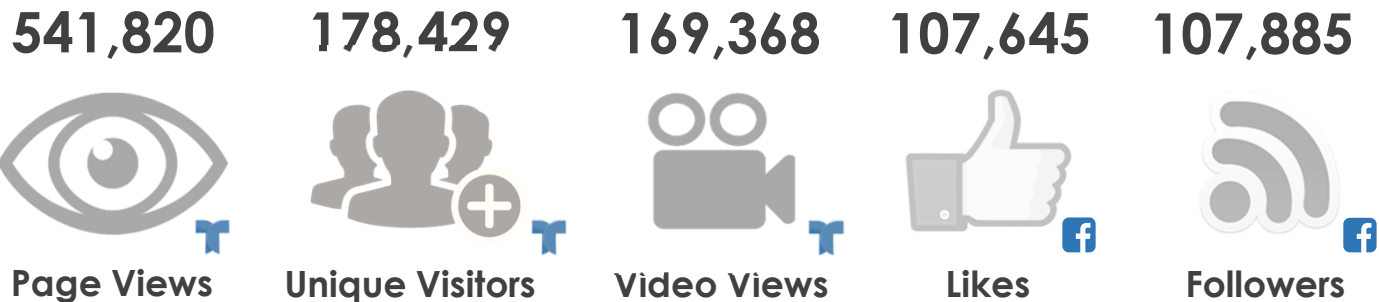
dMVPD

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



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

TELEMUNDODENVER.COM USER TRAFFIC DETAILS

APRIL 2019



Mobile



Page Views
300,327



Unique Visitors
138,040



Video Views
128,269

USERS SPEND 0.6 MIN AND
VIEW 1.3 PAGES PER VISIT



Desktop



Page Views
71,592



Unique Visitors
37,123



Video Views
14,050

USERS SPEND 1.8 MIN AND
VIEW 1.8 PAGES PER VISIT



App



Page Views
169,901



Unique Visitors
3,235



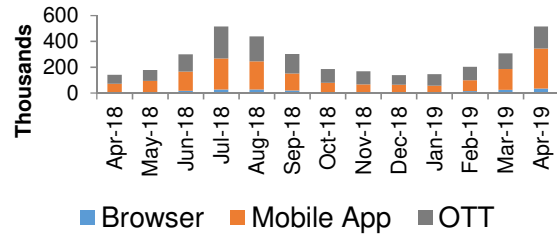
Video Views
26,629

USERS SPEND 1.8 MIN AND
VIEW 2.8 PAGES PER VISIT



TELEMUNDO DENVER TVE MONTHLY – APRIL 2019

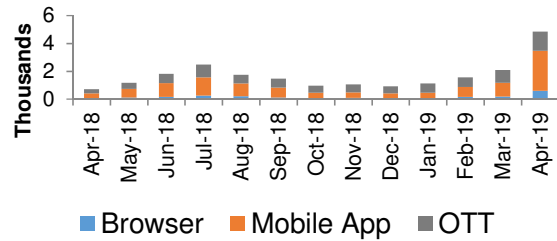
DEN - FEP - VOD Minutes Watched



Last Month's Total: 515,679

MoM:	+68%
YoY:	+268%

DEN - FEP - VOD Viewers

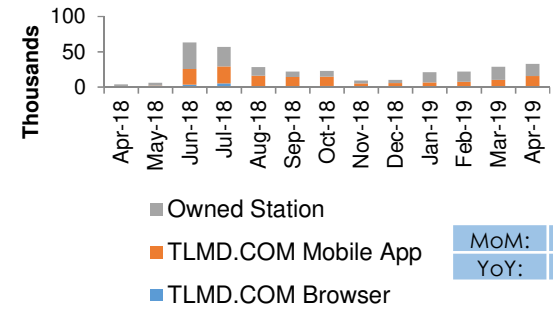


Last Month's Total: 4,837

MoM:	+133%
YoY:	+595%

Average Minutes Viewed in April 19: 107

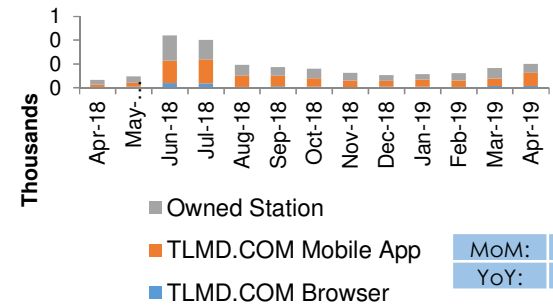
DEN - TLMD.COM+Owned Station - Linear Minutes Watched



Last Month's Total: 32,888

MoM:	+15%
YoY:	+851%

DEN - TLMD.COM+Owned Station - Linear Viewers



Last Month's Total: 199

MoM:	+22%
YoY:	+206%

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.

Sources: comScore Study – The Halo Effect: How Advertising on Premium Publishers Drives Higher Ad Effectiveness | July 2016

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.



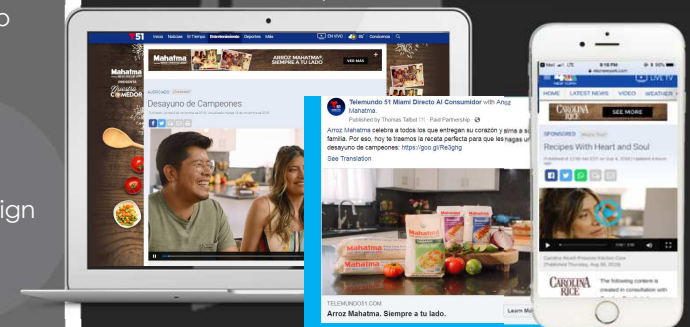
Click to play Recap Video

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
 - F5.6% Pre-Roll CTR
 - Social: 309K total video views/ 276K unique video views





THANK YOU!



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THE FUTURE OF TV: OTT BY TYPE OF DEVICE

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.**

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

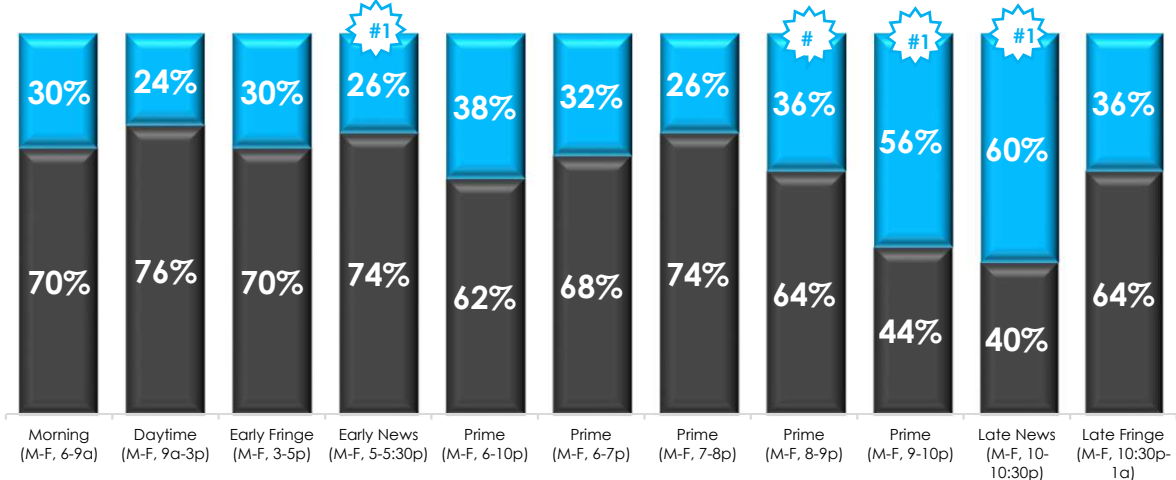
Note: individuals of any age who use the internet through a connected TV at least once per month
Source: eMarketer, July 2018

240200 www.eMarketer.com

*source: Consumer Technology Association, United States; Consumer Technology Association; 2011 to 2017
*source: Statista Survey, United States; August 9 to 23, 2017; 1,761 respondents; 18 to 59 years
*source: Videology, US TV & Video Market at a Glance
*source: Innovid, Global Video Benchmarks 2018
*source: eMarketer, July 2018

A25-54

TELEMUNDO DENVER HOLDS A SIGNIFICANT SHARE OF SPANISH-LANGUAGE VIEWING



Spanish-Language TV

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



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 & KE1D-ETV

