



NBCUniversal

The Top 3 Ways to Win in the New Video World

An NBCU perspective on how marketers and their agencies
can get ahead in this changing landscape.

JUNE 2020

The video landscape is changing
at an accelerated pace.

As an industry we need to update the media mix
to reflect consumption patterns.

Streaming is Driving the Biggest Shift in Consumption Patterns

Today,

80%

of US Households Stream
Some Type of Content

... in 2028

98%

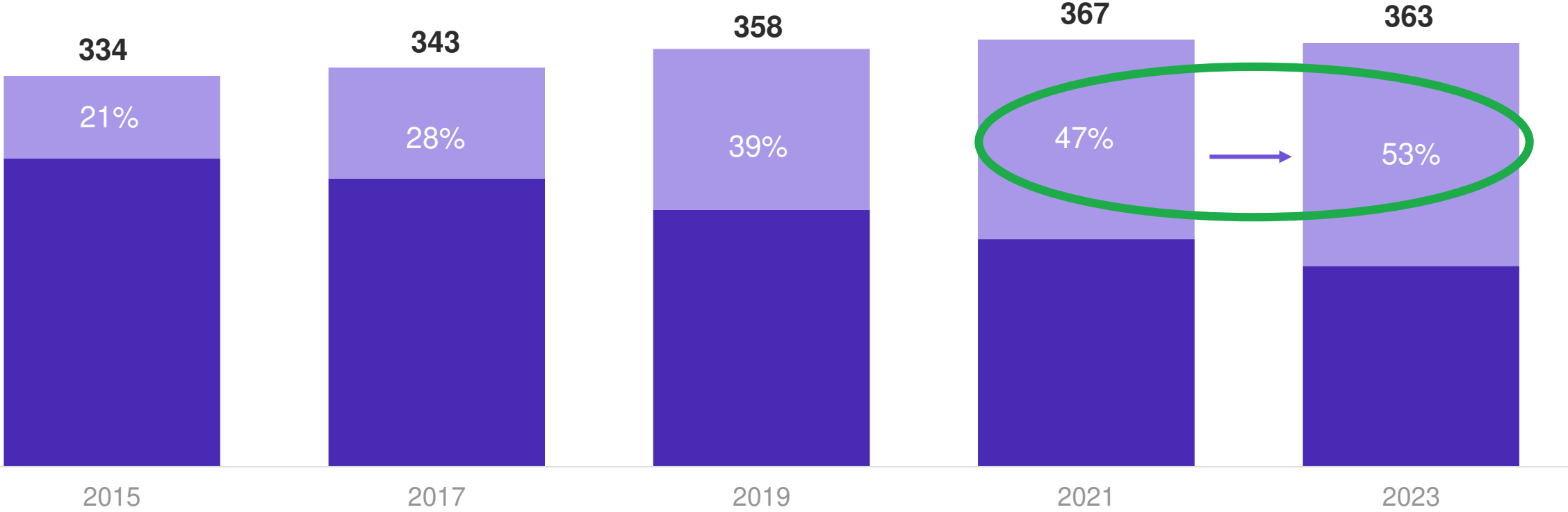
of US Households will Stream
Some Type of Content

This Growth is Propelling Streaming to be a Larger Percentage of Media Mix

Total Video Forecast

Minutes per Person per Day

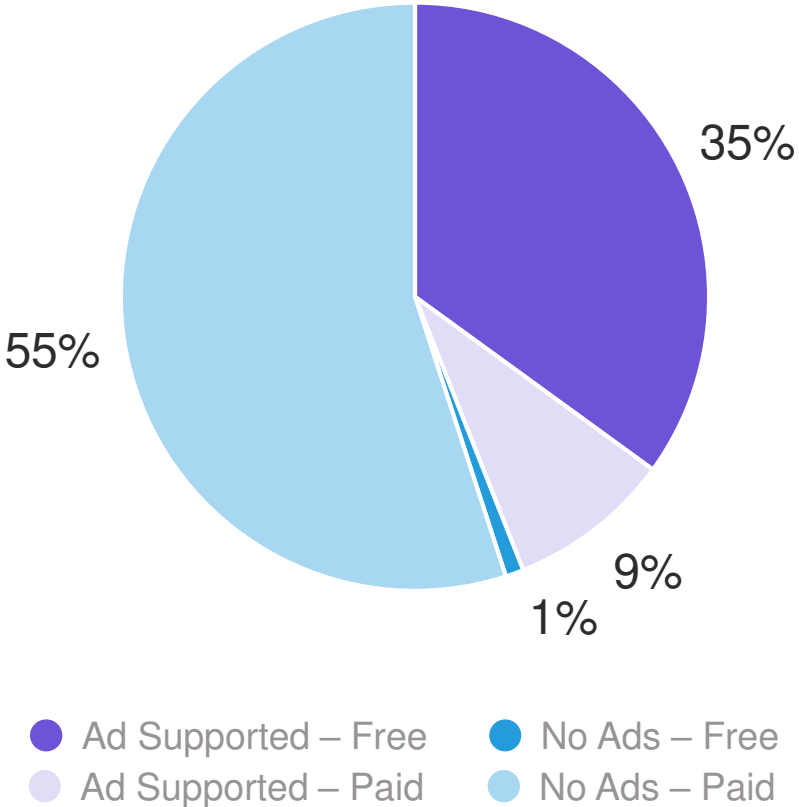
■ Streaming ■ Linear



4 Source: NBCU Total Video Forecast, Oct 2019. Forecast may shift due to COVID-19.

Ad Supported Video Now Accounts for Over 40% of the Total Streaming Consumption

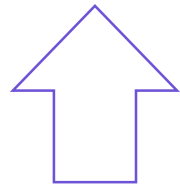
Streaming Hours by Service Type
March 2020



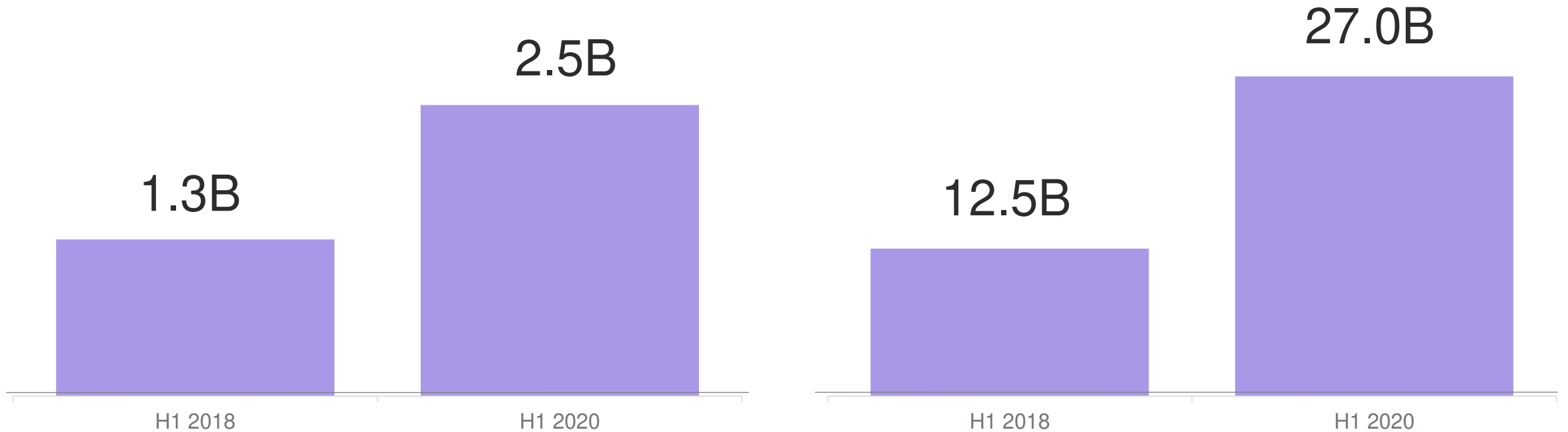
Source: ComScore OTT Intelligence, March 2020, March 2019. Sum of Streaming Hours, HH.

NBCU Streaming Video Consumption & Engagement at an All-Time High

Video Starts & Time Spent Streaming

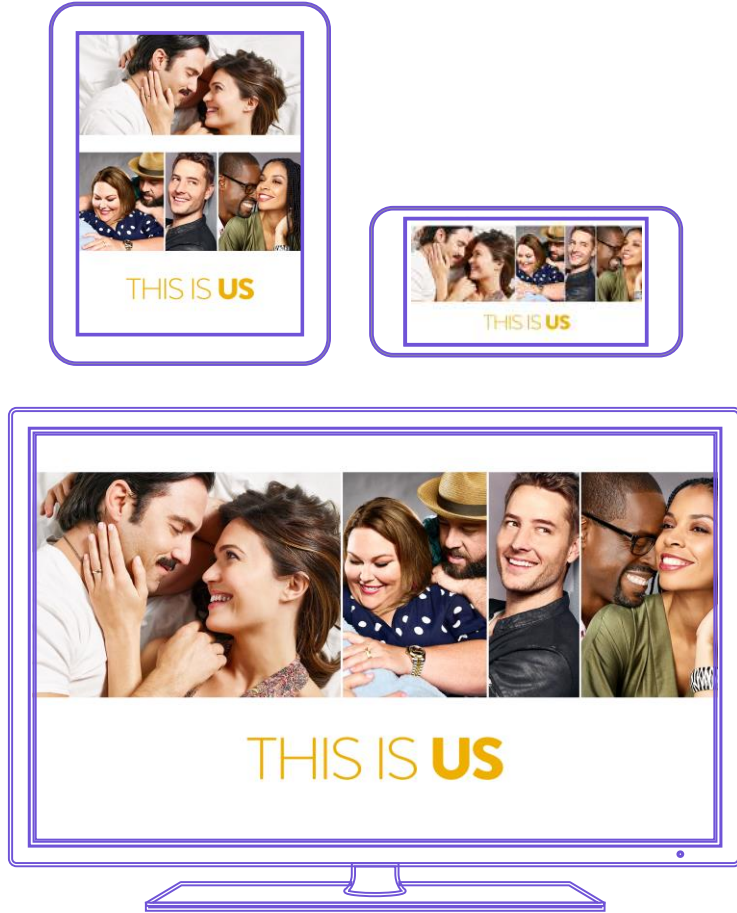
 **+92%**
video starts vs 2018

 **+116%**
time spent (mins.) vs 2018

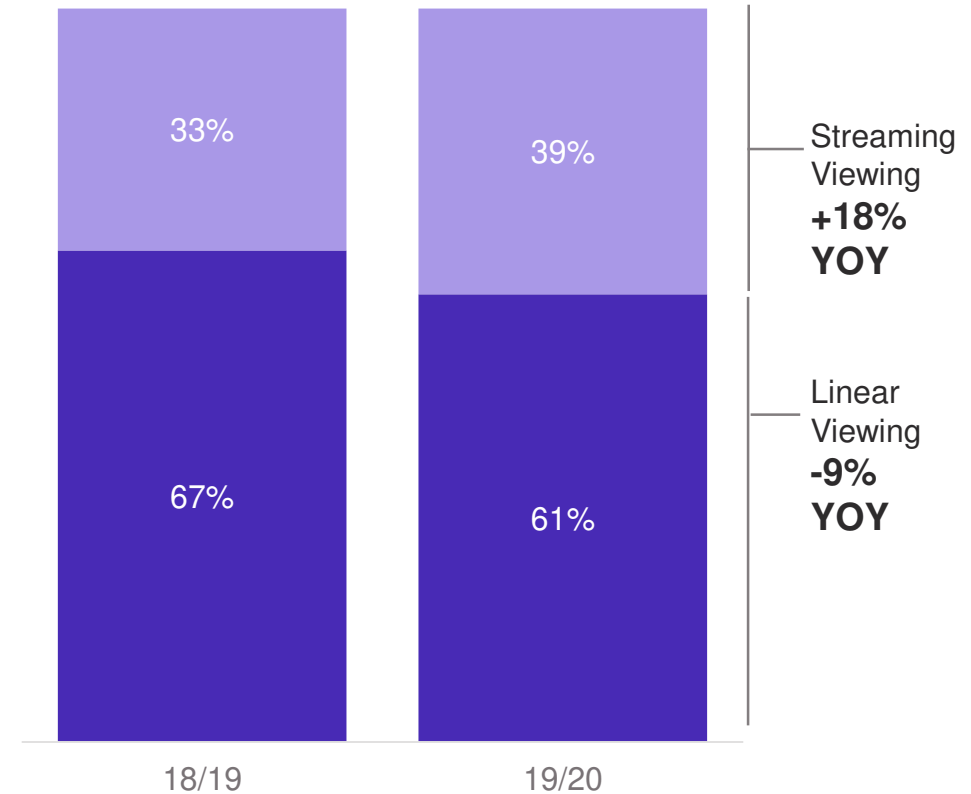


Source: NBCU Internal DAVD data, [Inc. Desktop/Mobile/C TV: Hulu Partner Portal, On Domain TVE (Adobe Analytics), dMVPD partners, OVD, & Off domain TVE (MVPD partners); Set Top Box = comScore Rentrak]. Time Period: Jan-Apr 2018-2020 avg monthly video starts & mins. Incl FEP & short-form video. Totals include "Other". Minutes are underreported due to some data sources not reporting out mins. Inclusive of Linear pass through & DAJ video.

NBC Prime: Streaming Is Growing as Viewers Find Content on Whatever Platform They Choose



NBC Prime P18-49 Share of Rating
Streaming vs. Linear



Source: TAMI: Minutes -- A18-49; Nielsen for Linear (LSD, DVR 1-3 & VOD 1-3, DVR 4-7, DVR 8-35). Digital ratings based on time spent divided by title duration via Comscore OnDemand Essentials, On Domain Adobe Analytics (apps & web), Off-Domain partners w/ demo factors from ComScore/Nielsen TIC; FEP Only. Viewing Events 19-20TD (9/23/19 – 4/5/20), 18-19TD (9/24/18 – 4/7/19), 17-18TD (9/25/17 – 4/8/18), all telecasts

HOW ARE WE GOING TO
Evolve Together
AND
Prepare Your Brand?

The Top 3 Ways to Win in the New Video World

1.

Evolve your video mix to connect with your total market

2.

Build marketing content libraries to satisfy every consumer need state

3.

Experiment with new video formats for advertising to achieve breakthrough



1. Evolve Your Video Mix to Connect with Your Total Market
**We Can Partner to Create a Video Strategy
that Better Reflects Consumption Patterns**

NBCU One Platform

Our Extensive Content Library Across:



Reach Your Audiences One-to-Many or One-to-One



Self-Service & Managed-Service



2. Build Marketing Content Libraries to Satisfy Every Consumer Need State

Now that Consumers Have More Options, They Are Seeking Out Specific Types of Content & They Are More Receptive to Ads that Are Aligned

Customizing Creative for 8 Consumer Need States

We can partner with you to develop the right messaging for your brand for each need state.

INFORM



Up-to-Date



Deep in Thought



Be a Student

INVOLVE



Join the Excitement



Lose Yourself

UNWIND



Have a Laugh



Take a Break



R&R

















3. Experiment with New Video Formats for Advertising to Achieve Breakthrough

The Explosion of Commercial Innovation Drives Ad Performance

NBCU Commercial & Content Innovations

■ 2018 Innovations
 ■ 2019 Innovations
 ■ 2020 Innovations

Commercial Innovation Impact

| | | | | |
|---|--|---|---|---|
| Supersized Show  | Hands of the Fan  | Scripted Commercial Launch | Social Commercial | Brandstanding |
| Show within a Show  | DIY Breaks  | Picture in Picture  | ShoppableTV  | Blended In-Show Open  |
| Going Viral  | Must Hear TV  | Talent as Influencers  | Product Synch  | Talent Room  |
| 1:1 Talent Surprise  | Set on Set  | Brand Fusion  | Pods with a Purpose  | Global Content Innovation  |

98%

Appreciate Commercial Innovation Ads over Standard Ads

88%

Are More Likely to Remember the Brand

78%

Are Less Likely to Change Channels

The industry needs to evolve how we reach consumers and market to them.

Our journey starts here.

Contact your NBCU partner for more information.