

2021

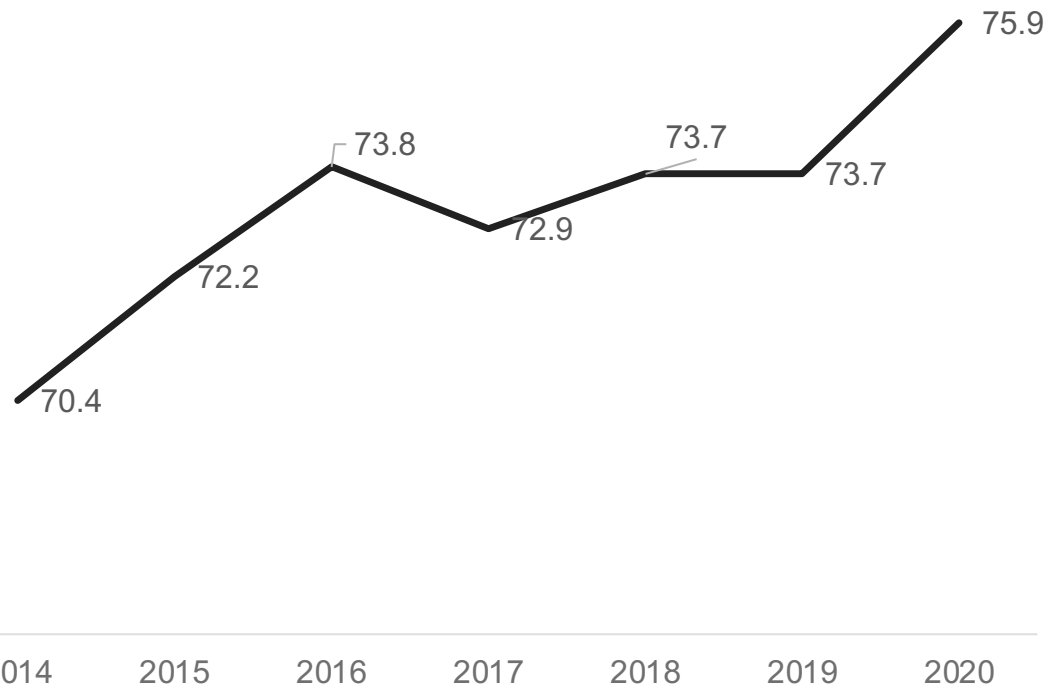
Pet Care Overview

NBCUniversal



Pandemic Pet Adoptions Fueled Pet Ownership Growth Last Year

Number of U.S. Households with Pets (Millions)



“The **pet business is booming** as Americans spend more on their animals while they work from home”



“**Dog adoptions and sales** soar during the pandemic”

The Washington Post

“Pandemic **puppy shortage** shows market going to the dogs – in a good way”

AdAge

The Pet Care Industry Is Expected to Grow

The pet market is made up of four segments: pet food, pet supplies, pet services and veterinary services. Together, the pet care industry was estimated to reach **\$102 billion in 2020**.

47% of pet owners reported they increased the number of times they purchased products online in 2020.

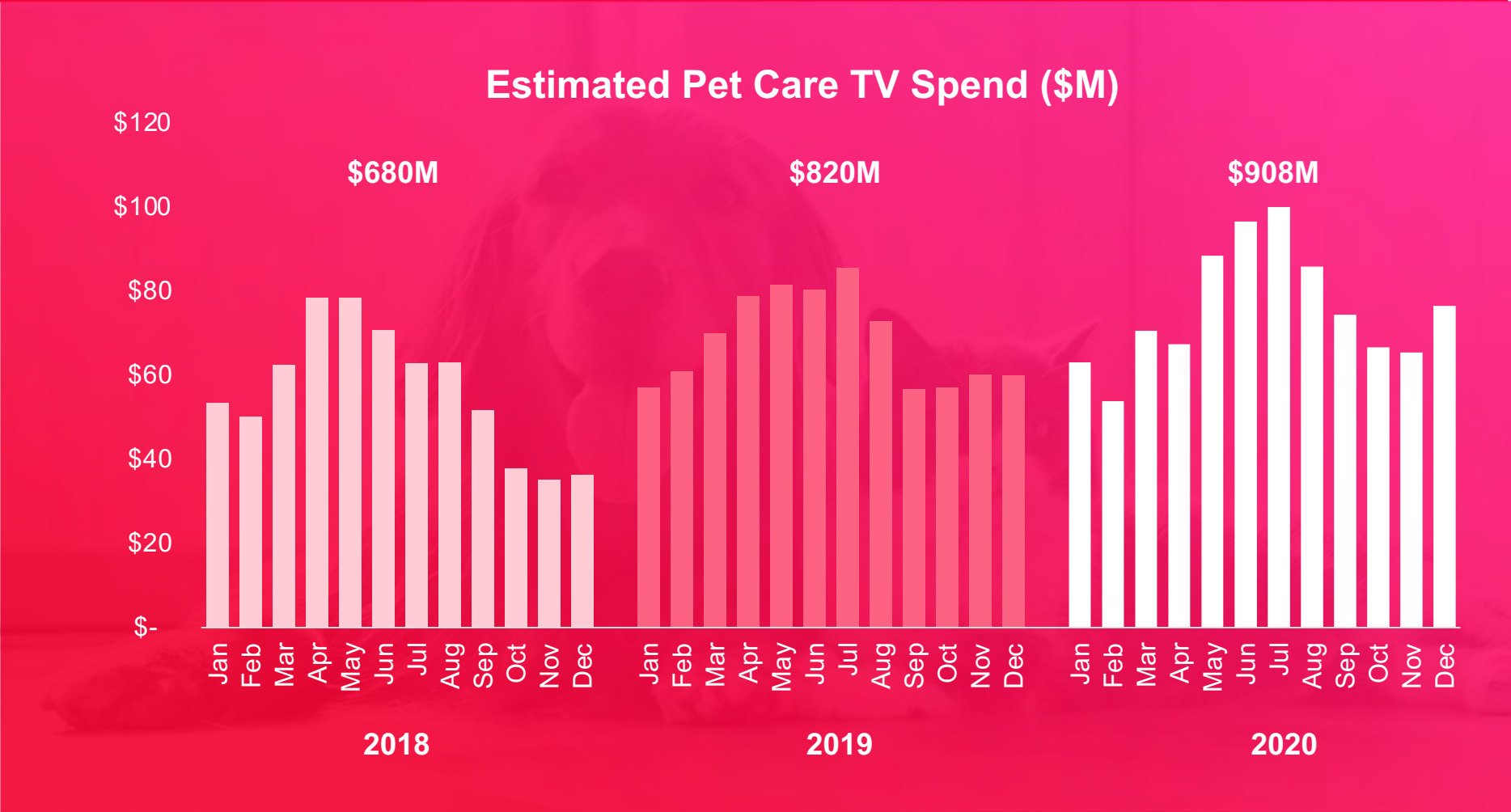
30% of pet owners spent more on their pet/pet supplies in 2020.



+10%

Projected **increase in total U.S. pet retail sales by 2025**, as pet owners' desires to give their pets high-quality products will drive growth

Pet Care TV Spend Continued to Grow Through the Pandemic, Reaching Its Highest Levels in 2020



Source: iSpot Data, Pet, Petcare, 2018-2021* Media Radar, Pets, 2017-2021



Across Industries Brands Are Leveraging Pet Care as a Growth Engine



CPGs

“Acquiring Blue Buffalo, General Mills is hoping **pet food will help it fight lagging cereal and snack sales.**”

“Nestlé Purina Pet Care announced a \$450 million **investment to meet increasing demand for its pet foods.**”

Large Retailers

“Amazon **entered the cat and dry dog food market** with the launch of its private label pet food brand Wag.”

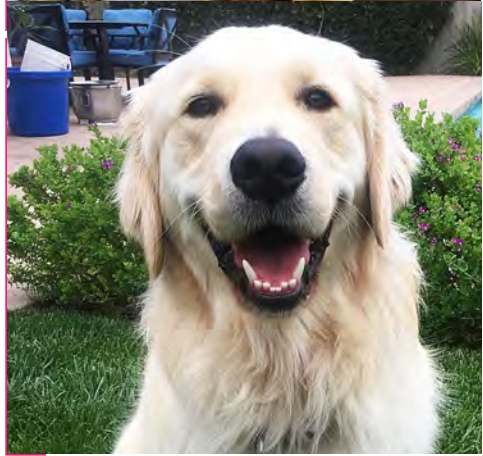
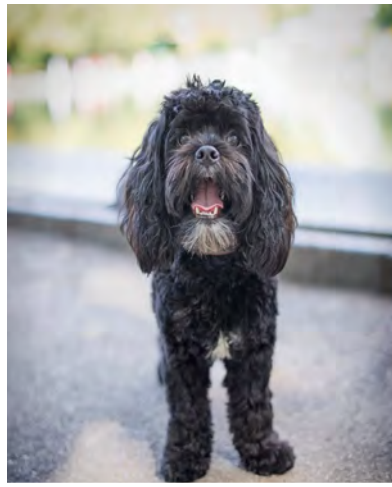
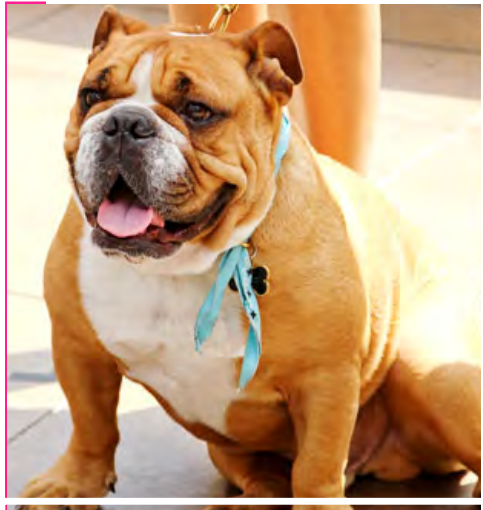
“Walmart is **adding vet clinics and launching pet pharmacy** as millennials spend thousand on their pets.”

DTC Expansion / Acquisition

“PetSmart **acquired Chewy for \$3.35 billion** in what was then the largest e-commerce deal ever.”

“Mars Petcare created the ‘Companion Fund’ with a dedicated \$100 million investment pot, to back **corporate-wide investments in DTC businesses.**”

At NBCU,
we *love*
our pets!





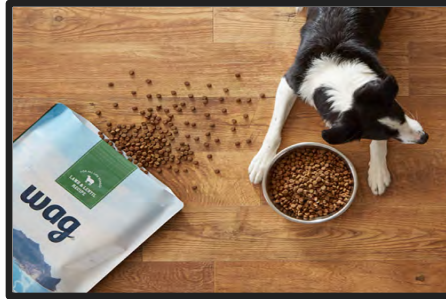
Pet Care Category Trends

What We Are Seeing & Hearing



Ecommerce Acceleration

The pandemic accelerated the growing trend of ecommerce as a channel for pet care products. With Amazon and new D2C start-ups entering the pet care market, brands are looking to build direct connections with consumers.



Private Label

Consumers are evaluating private label or generic alternatives at lower price points. Amazon and Chewy are promoting their own brands to disrupt the market.



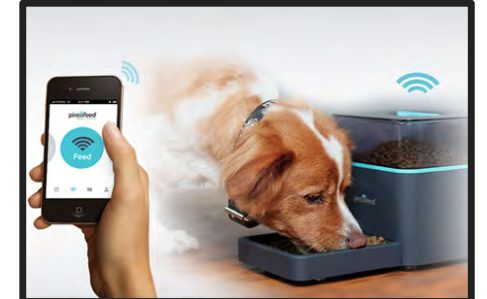
Premiumization

Category sales have been boosted by a trend towards higher-priced premium pet care products, especially in mass retail chains. The notion that pets are members of the family is increasingly universal, with owners motivated to feed their pets as best they can.



Humanization of Pet Category

As pet owners align their lifestyles with fashion and dietary trends (i.e., paleo, organic), they are increasingly extending these values into how they shop for their pets.



Rise of Pet Services

Technology has streamlined caring for and interacting with pets, as new devices and smart home ecosystems are continually evolving. While the pandemic initially had a large negative impact, the sector has rebounded as new pet owners engage with pet care services.



Connect with Pet Owners Across NBCU One Platform Solutions

Reach

Drive brand awareness
with key audiences
through relevant,
brand-safe content

Engage

**Deepen brand
consideration and
understanding** through
high impact storytelling

Influence

**Trigger consumer
behavior** through
actionable content





Connect with Pet Owners Across NBCU One Platform Solutions

Reach

Drive brand awareness
with key audiences
through relevant,
brand-safe content

Engage

Deepen brand
consideration and
understanding through
high impact storytelling

Influence

Trigger consumer
behavior through
actionable content



**NBCU Reaches
Pet Owners
at Scale**

103M
Pet Owners

48%

Of NBCU viewers
are pet owners

37%

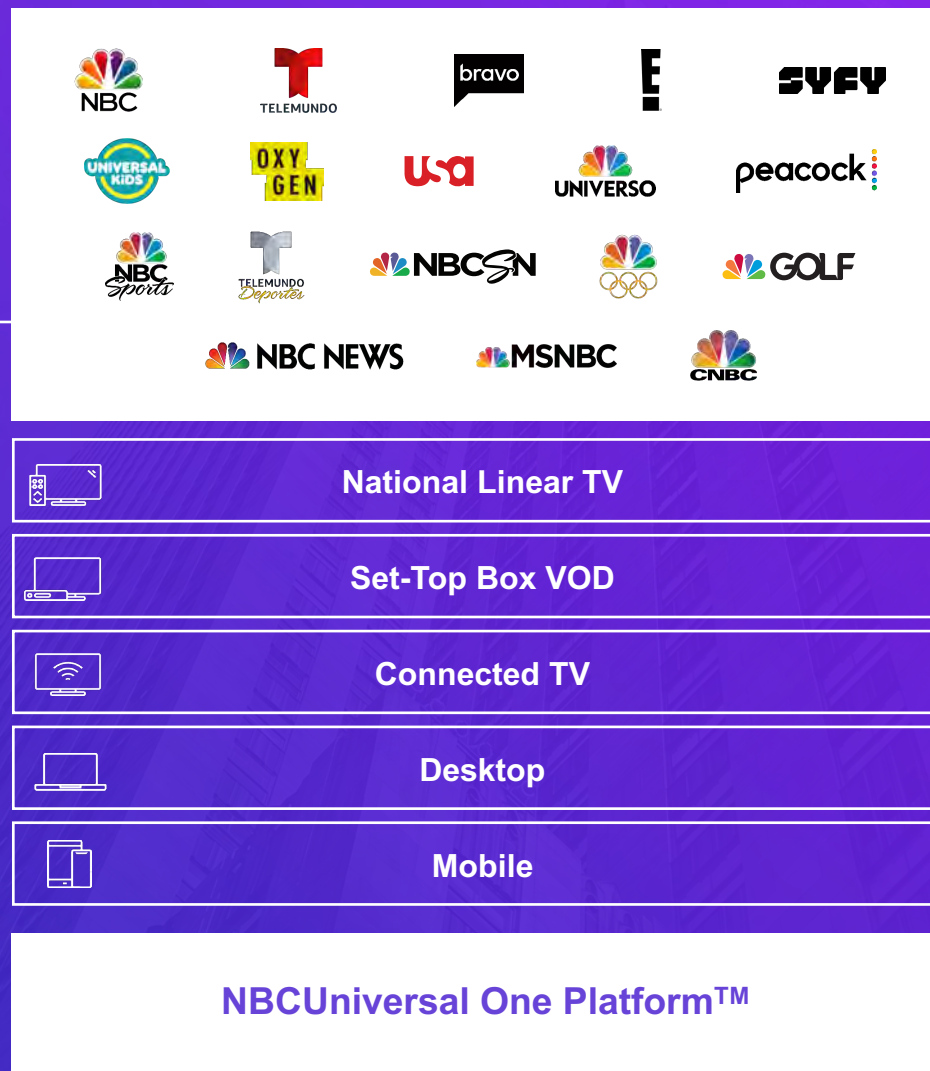
Of NBCU viewers
are heavy category
pet buyers





One Platform = Ad Buying Simplified

Helping marketers reach their audiences—**wherever, however, and whenever they choose to watch**—on a single, unified media plan

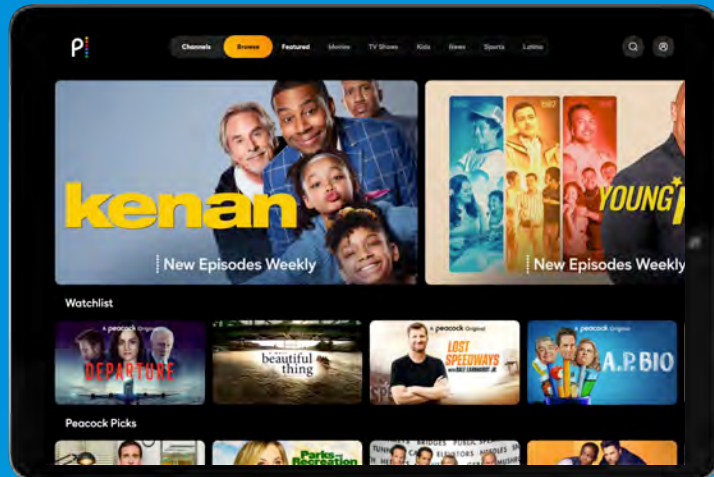


97%

total video consumption is on “big screen”

NBCU Has Invested in Technology & Content To Reach All Audiences & Help Marketers Tell Their Story

peacock



- Premium Content with **Better Advertiser and Viewer Experience**
- Strict **Frequency Cap**
- Most Advanced **Commercial Innovation**

One Digital Video



- Reach the **Right Audience, Wherever They are Watching**
- **Premium Content** Across All Platforms

AdSmart



- **Reach High Value Audiences** Across All Platforms, at Scale
- **Data Source Flexibility**
- **Optimization Tools**

AdSmart Advanced Targeting & Optimization

Connecting your brand with
the right consumers
through **the best premium**
content on every screen



Data-driven linear

Enhanced delivery to target audiences at scale through the broad reach of national TV



Addressable

Dynamic delivery to target HHs through highly engaging STB VOD, OTT, & CTV content



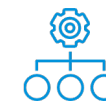
Targeted OLV

Dynamic delivery to target users through premium video on desktop & mobile

Activate your way:



Managed service



Self-service



The Challenge

Drive Incremental Sales

A leading CPG company wanted to leverage advanced targeting on linear TV to drive sales of two of their top dog food brands.

The Insight

Advanced TV Targeting Drives CPG Buys

The strong contribution of target households to the campaign's incremental sales indicates an opportunity for more CPG brands to use audience-based planning for their linear buys.

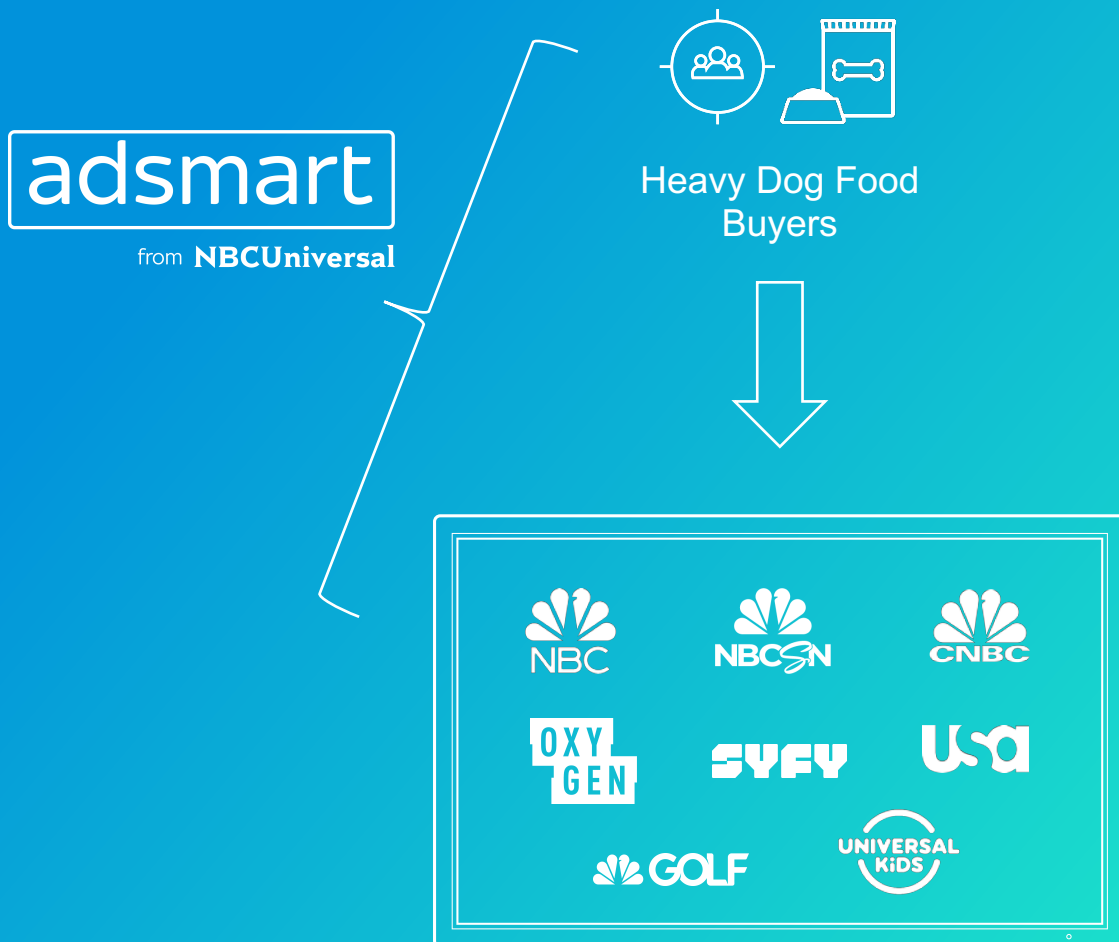
The Solution

Target Dog Food Buyers via National TV

We partnered with the client to run an AdSmart national TV campaign optimized across our portfolio to reach a custom NCS “Heavy Dog Food Buyers” consumer target instead of a traditional Nielsen demo.

The Approach

Advanced TV targeting to reach the right consumers across NBCU's linear portfolio



The Results

We commissioned a custom NCS study to measure the impact of the AdSmart campaign on driving incremental sales of the advertised brands.

Incremental Sales

- **+6%** incremental sales lift from AdSmart exposure
- **7%** of exposed households were **in target** and drove **59%** of incremental sales

Return on Ad Spend

- **\$12.59** in incremental brand sales for every \$1 spent on AdSmart campaign

Brand Penetration

- **32%** of incremental sales came from **high category, low brand** buyers



Connect with Pet Owners Across NBCU One Platform Solutions

Reach

Drive brand awareness
with key audiences
through relevant,
brand-safe content

Engage

**Deepen brand
consideration and
understanding through
high impact storytelling**

Influence

Trigger consumer
behavior through
actionable content





NBCU Has Experience with Pets!

Pet Activations Across NBCUniversal



NBC LATE NIGHT

BarkBox

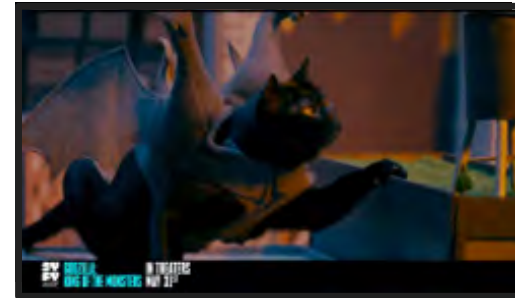
Seth & BarkBox gave each member of his studio audience a "Grinch"-themed BarkBox package, encouraging audiences to post photos of their dog in the package's antlers.



TODAY

Subaru

Together with some adorable pups, Subaru took over the TODAY plaza to highlight adoption as a great way to #MakeADogsDay and encouraged fans to upload photos using the hashtag.



SYFY Wire

Warner Brothers

Warner Brothers challenged SYFY to have fun with the film's cast to create entertaining content that appeals to viewers by dressing up kittens as the titans and with the cast's commentary on how dangerous and destructive these "monsters" truly are.



WWE

Universal Pictures

Universal Pictures partnered with USA & WWE for a RAW Episode Takeover around The Secret Life of Pets 2 with custom content, commercial innovation, sneak peaks, billboards and more!

Leverage NBCU Storytelling Capabilities

Three ways to
create 'lean-in'
experiences for
your brand

Commercial Innovation

National Pet Day/Month

The National Dog Show



Engaging Pet Owners Through Commercial Innovation

NBCU is committed to serving consumers first, giving them the best experiences while making authentic connections between brands and our audiences.



Talent as Influencers

Dynamically employ NBCU **talent as brand influencers** – connecting brands with NBCU talent who are well-known animal lovers to positively impact affinity and the bottom line



ShoppableTV

Drive pet care buyers down the purchase funnel by directly engaging them with purchase opportunities as they watch TV – from pet food to pet apparel



Create Moments of Engagement by Tapping into Our Pet Loving Talent



KYLE RICHARDS
RH OF BEVERLY HILLS



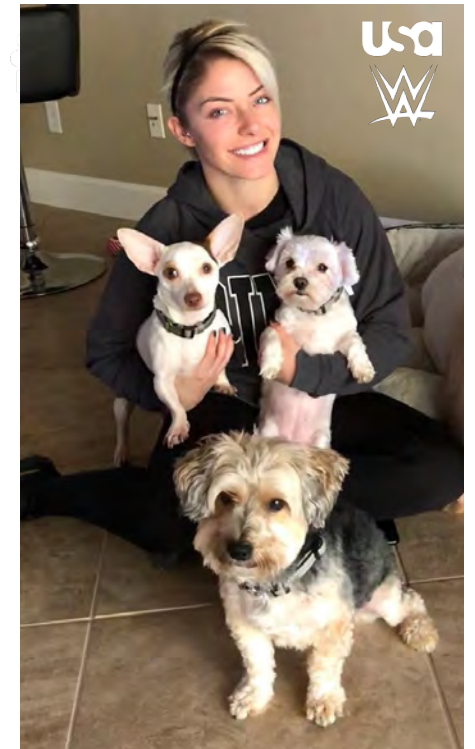
RAMONA SINGER
RH OF NEW YORK



SETH MEYERS
*LATE NIGHT WITH
SETH MEYERS*



THE MIZ
WWE



ALEXA BLISS
WWE



Celebrate National Pet Day/Month or Adopt a Shelter Month

Take over an untapped holiday and show them all how it's done! At NBCUniversal, we believe no one makes a family whole quite like your four-legged companion. Together, let's celebrate our pets like never before.



ADOPT A PET...TODAY!

TODAY + Hoy Dia will help deserving animals find a great home. **Host an adoption-oriented segment** – inclusive of expert tips to adoption success stories, let's help some adorable pets find their forever homes.



LOVE PETS WITH SETH!

Noted dog lover **Seth Meyers** will amplify priority pet care messaging in a custom and comedic in-show live ad during October's Adopt a Shelter Dog Month or April's National Pet Day!



DOGS ON THE CATWALK: PET STYLE

Who doesn't like to see adorable pets show off their best looks? **Access Daily** and **SYFY** can tailor this theme to their audience passions to **bring cute content overload!**



NEW TAKE ON DOG SHOWS

We all know a standard dog show, but what about a dog's take on our favorites? Together, **your brand and NBCU** will make fun custom opportunities featuring pets and our IP.

- Housewives Dog Confessionals
- Dogs Love USA



WHAT SUPERSTAR PETS THINK OF THEIR PAW-RENTS

During a special episode of RAW, a customized, a docu-style in-show **integration will feature a pet-owning WWE Superstar** answering humorous and heartfelt questions about their pets with social extensions. For example...

- The Phenomenal, AJ Styles, discusses what makes his pets "phenomenal" at home
- The Miz & Maryse answer what embarrassing thing their dog would say about them



The National Dog Show



ABOUT THE SHOW:

On Thanksgiving Day, man's best friend takes center stage at the Kennel Club of Philadelphia as we celebrate The National Dog Show Presented by Purina. Actor, author, and Broadway star, John O'Hurley hosts this event attended by two thousand of the nation's leading canines from over 170 breeds.

PARTNERSHIP OPPORTUNITIES:

IN-SHOW "GROUP" SPONSOR

- Your brand can own the branding and messaging around one of the seven breed group segments within the show. Example: "The Sporting Group Presented by [Your Brand]."
- In-show verbal brand mention
- Billboard identification
- On-site opportunities to explore, including venue signage

SEAMLESS TRANSITION

- Coming out of live National Dog Show programming, we will transition immediately into your brand's commercial by using custom graphics and animation that incorporates your brand's look and feel



ALL IDEAS PENDING PROGRAMMING AND EXECUTIVE PRODUCER APPROVAL. PARTNERSHIP, PRODUCTION AND TALENT FEES APPLY



Connect with Pet Owners Across NBCU One Platform Solutions

Reach

Drive brand awareness
with key audiences
through relevant,
brand-safe content

Engage

Deepen brand
consideration and
understanding through
high impact storytelling

Influence

**Trigger consumer
behavior through
actionable content**



88.3MM

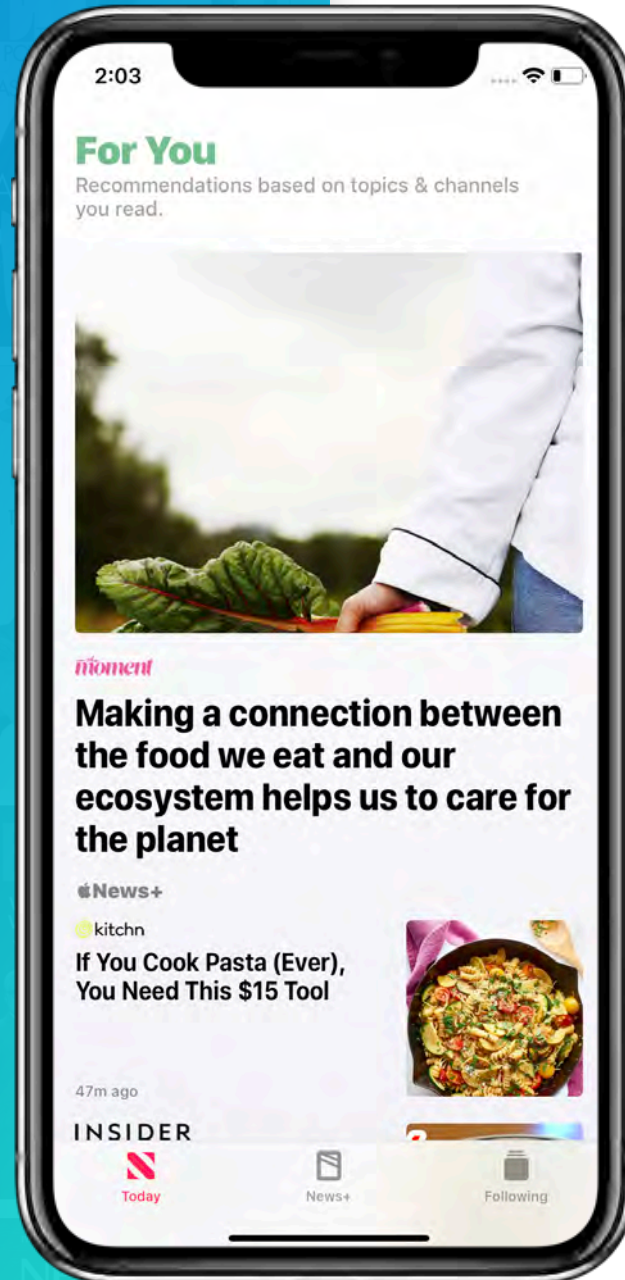
Monthly Users

45MM

Users own a dog

53MM

Apple News users who own dogs and bought pet supplies in the last 12 months



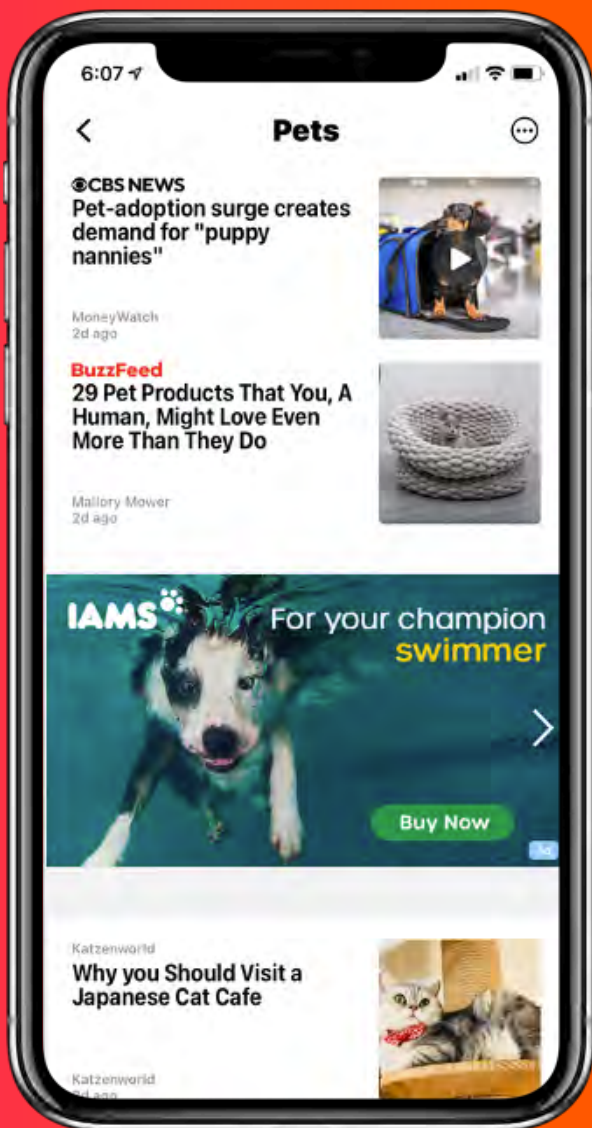
Apple News

The #1 Mobile Destination To Stay Informed on Your Interests

Apple News has become the trusted resource to keep users informed on their interests— from the latest news to updates on food, music and more.

The platform distinguishes itself with a **publisher onboarding process to ensure a strictly premium content experience**. This trustworthy content has driven record usage: there are 20% more users, time spent is up 46%, and app sessions are up 56% since March 2020.

Apple's impactful ad units and precise targeting capabilities will drive consideration and demand among qualified audiences.



Target Pet Owners with Apple's Data

Apple owns a rich set data pulled from users' behavior and App Store registration data. Leverage this exclusive first-party data to target users with incomparable precision.

Behavioral Targeting

Entertainment & Lifestyle Audiences

Reach users who consume relevant content with these daily-refreshed segments

Contextual Targeting

Entertainment & Lifestyle Content

Adjacency to relevant topics like pet care or home care

Demo/DMA Targeting

Target key age segments and markets

App Segments

Reach users based on their app downloads

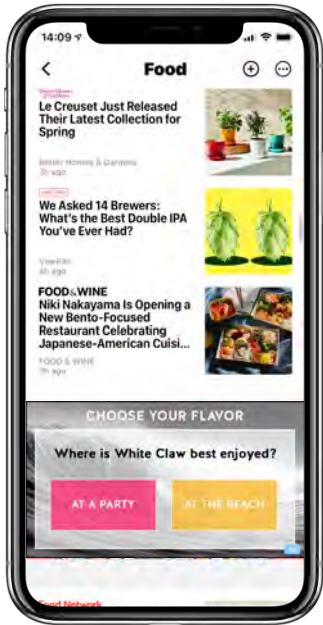
Pet Owners





Actionable Creative

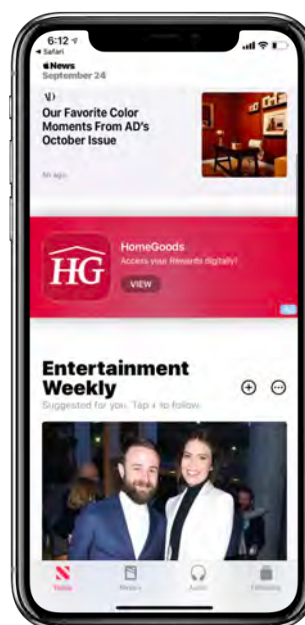
Immerse Apple News Users Into Your Ad Experience By Engaging Them With Custom Actions



Quiz



Tap-to Map



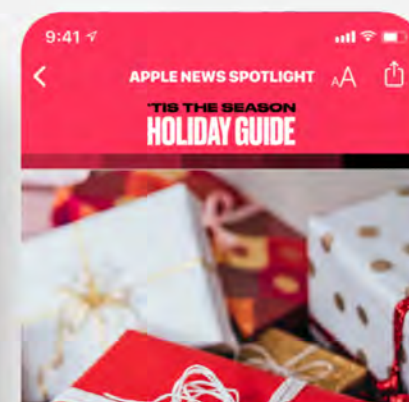
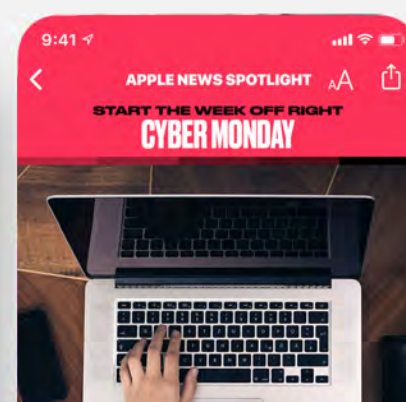
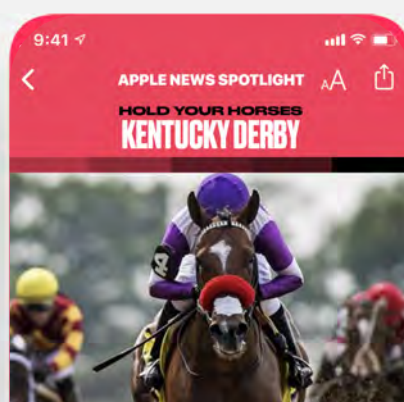
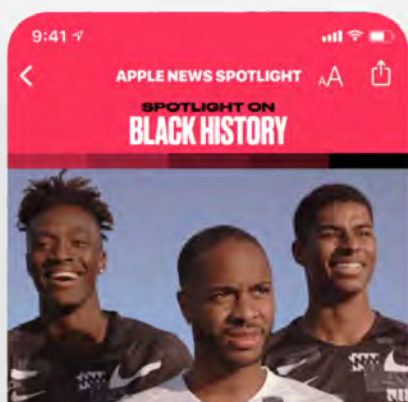
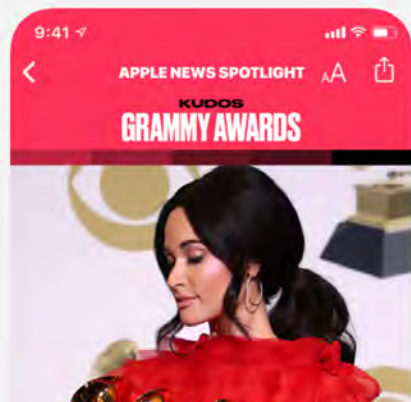
Tap-to-App



Swipe-able Shoppable Gallery



Swipe-able Gallery



Spotlight Takeovers for Special Events

Apple also curates' collections for major events and moments that advertisers can surround with 100% SOV. These are only available as part of larger NBCU sponsorship packages.

Potential examples, pending Apple approval include:

Q1

- Super Bowl Recap
- Black History Month
- Tax Season Preview
- Super Bowl
- Valentine's Day Preview
- Spring NY Fashion Week
- NFL Combine
- Golden Globes Recap
- Int'l Women's Day
- Grammys Recap
- Oscar Nominees
- The Players Championship
- March Madness
- SXSW
- St. Patrick's Day

Q2

- MLB Season Preview
- Tax Day Preview
- World Health Day
- The Masters
- Coachella (TBD)
- Earth Day
- Oscars
- Billboard Music Awards
- NFL Draft
- NWSL Season Preview
- WNBA Season Preview
- Met Gala
- Kentucky Derby
- Pulitzer Prize Winners
- Mother's Day
- PGA Golf Championship
- Preakness (Triple Crown)
- French Open Tennis
- Stanley Cup Playoff Preview
- Cannes Film Festival
- World Economic Forum
- NBA Playoffs Preview
- 50-year Anniversary of Mars Mariner 9
- Indy 500
- Memorial Day
- Pride Month
- Stanley Cup Preview
- Belmont (Triple Crown)
- US Golf Open
- Juneteenth
- Father's Day
- Wimbledon

Q3

- NBA Draft Recap
- NBA Finals Preview
- Independence Day Weekend
- British Golf Open
- Summer Olympics
- Comic-Con
- National Park Service Birthday
- U.S. Tennis Open
- College Football Season Preview
- Back to School
- Emmys
- NY Fashion Week
- Premier League Season Preview
- Labor Day Weekend
- NFL Season Preview
- Ryder Cup
- Fall TV Preview
- Hispanic Heritage Month

Q4

- MLB Playoffs
- NHL Season Preview
- World Mental Health Day
- Halloween
- NASCAR Playoffs
- MLB World Series
- Peoples' Choice Awards
- Thanksgiving Day
- Black Friday Gift Guide
- Cyber Monday Gift Guide
- Giving Tuesday
- Holiday Gift Guide
- Year in Review
- New Year's Eve

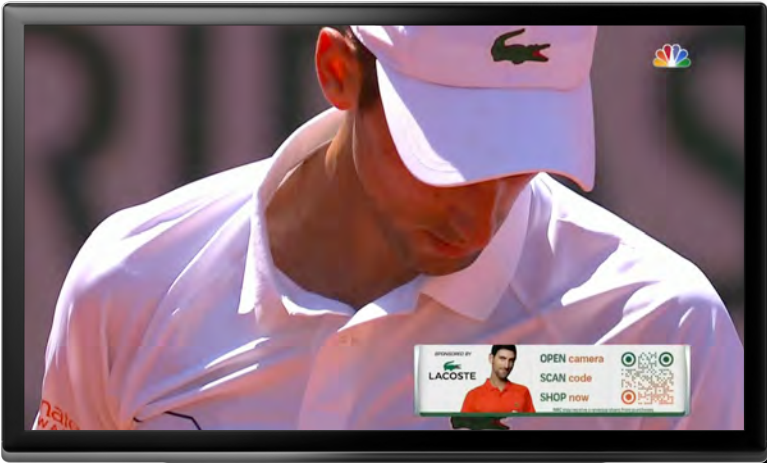
NBCU COMMERCE PARTNERSHIPS MISSION STATEMENT



Through the power of storytelling,
we inspire **seamless and
meaningful shopping
experiences for
consumers.**

ONE PLATFORM COMMERCE PRODUCTS

POWERED BY **NBCU CHECKOUT**



SHOPPABLETV IN SHOW

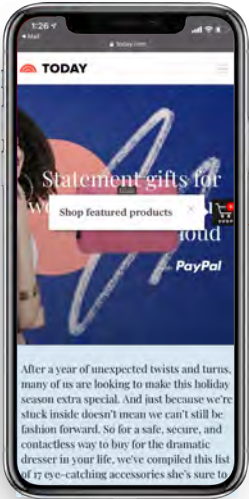
SHOPPABLETV OUT OF SHOW



SHOPPABLE PEACOCK PAUSE AD



SHOPPABLE RICH MEDIA UNIT



SHOPPABLE ARTICLE

2021



Thank You!

NBCUniversal