NBCUniversal

The Pharma RX Streaming Opportunity with NBCUniversal

2021
Purpose

1. Share consumer viewership changes and Pharma Rx digital challenges
2. Demonstrate NBCU’s streaming benefits for Pharma advertisers
3. Highlight our approach across the marketing funnel
TV Has Proven Successful for Pharma

Industry ROI Measurement
Crossix study showed the power of TV to drive new patients and improve all channels

Campaign Effectiveness Studies
Tresiba’s DTC TV campaign led to 2X unaided awareness and +65% brand consideration

Media Spend
Pharma National TV spend has grown an average of 9.5% a quarter since 1Q17

Sources:
Consumer Behavior is Changing and P55+ are Increasingly Streaming

Streaming Video Share of Time Spent by Age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Q2 2019</th>
<th>Q2 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>P2-11</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>P12-17</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>P18-24</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>P25-34</td>
<td>19%</td>
<td>18%</td>
</tr>
<tr>
<td>P35-54</td>
<td>30%</td>
<td>27%</td>
</tr>
<tr>
<td>P55+</td>
<td>19%</td>
<td>26%</td>
</tr>
</tbody>
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P55+ Growth Q2'20 vs. Q2'19: +7pp

Source: Nielsen Total Audience Report August 2020
Aligning With This Shift in Viewership Requires Overcoming Legacy Digital Obstacles

<table>
<thead>
<tr>
<th>Legacy Digital Obstacle</th>
<th>NBCU Solution</th>
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<tbody>
<tr>
<td><strong>Content Length</strong></td>
<td>80% of NBCU non-linear content is longform</td>
</tr>
<tr>
<td>Short-form content does not work with longer Pharma ad formats</td>
<td></td>
</tr>
<tr>
<td><strong>Brand Safety</strong></td>
<td>Premium 100% viewable content &amp; transparent reporting</td>
</tr>
<tr>
<td>Little transparency leading to uncertainty on where your content runs</td>
<td></td>
</tr>
<tr>
<td><strong>Scale</strong></td>
<td>Reaching 161M P2+ per month</td>
</tr>
<tr>
<td>Struggle to achieve scale similar to TV</td>
<td></td>
</tr>
</tbody>
</table>
NBCU Has the Potential to Increase Your Audience Reach

With NBCU, Pharma Can Now have the Best of Both Worlds

Viewing is Still on the TV Screen, it’s Just How You Engage

Source: NBCU Internal DAVD data, reflects streaming only (not Linear)
NBCU Streaming Advantages for Pharma

**Superior Scale**, offering **Incremental Reach** to Linear

+26% incremental reach, Linear to Linear + Streaming (P35+)

**Opportunity to Run Longform, in Premium Content**

Ability to run :60s and :90s

**Brand Safety via Content Transparency**

Premium 100% viewable content and transparent reporting

**Measurement**

Learning and adjusting, against audiences that matter to you
Our Approach to Streaming for Pharma

Objective Based Approach

<table>
<thead>
<tr>
<th>Objective</th>
<th>Desired Consumer Response</th>
<th>Streaming Benefit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education</td>
<td>Curiosity about symptoms or diseases</td>
<td>Reach extension to linear buy</td>
</tr>
<tr>
<td>Memorability</td>
<td>Personal research with your brand in mind</td>
<td>Brand safe premium content across all platforms</td>
</tr>
<tr>
<td>Script Intent</td>
<td>Take your product or switch to your product</td>
<td>Data informed targeting</td>
</tr>
<tr>
<td>Repeat Refill</td>
<td>Remember to refill a prescription</td>
<td>Targeted adherence messaging to customers</td>
</tr>
</tbody>
</table>
NBCU Streaming Engages the Right Audience at Scale Based on Your Objective

**OBJECTIVE**

**Education**
Awareness

**Memorability**
Consideration

**Script Intent**
Purchase Intent

**Repeat Refill**
Adherence

**AUDIENCE**

Reach a broad audience such as P18+ or P35+ and reach key demographics like Hispanics or P25-54

Engage key potential audiences based on behavioral signals indicative of the condition/disease and audiences such as caregivers and HCPs

Connect with those with a higher likelihood of having the disease*

Connect with Current Patients*

*NBCU Data Partners include Crossix and IQVIA
Thank You