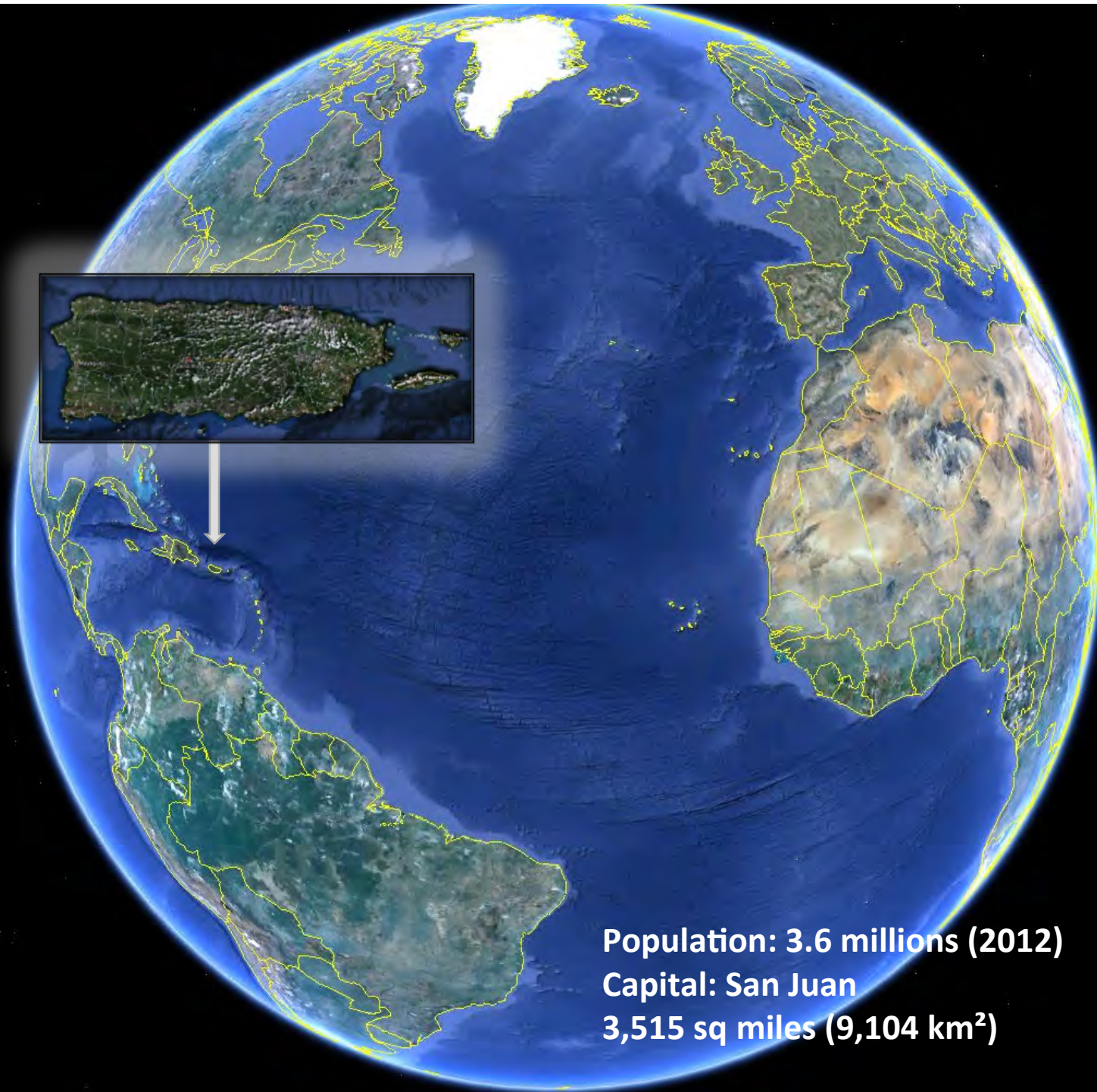


GFR MEDIA

MAY 2013

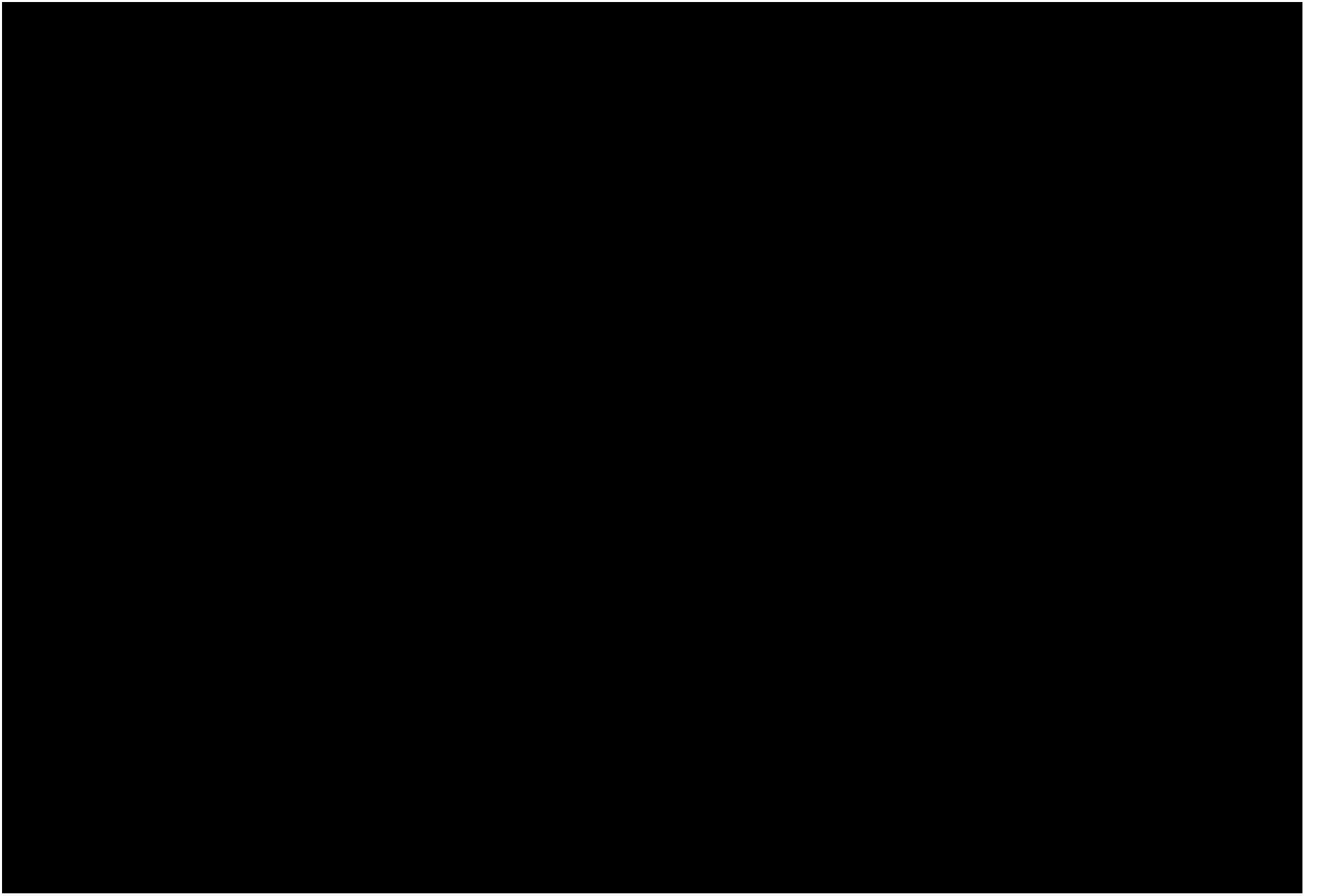
P U E R T O R I C O



Population: 3.6 millions (2012)
Capital: San Juan
3,515 sq miles (9,104 km²)

- Family business
 - Third generation
- Strong commitment to Puerto Rico
- Leading media and digital company in the Island
- Core business is content production and distribution through diverse platforms
 - Over 20 brands, sub brands and other products that are market leaders or among the top





A PERFECT STORM

Industry

Economy

Technology & consumer trends

US NEWSPAPER INDUSTRY

Print vs. Online Ad Revenue

In Millions of Dollars

	Print	Online	Total
2003	\$44,939	\$1,216	\$46,155
2004	46,703	1,541	48,244
2005	47,408	2,027	49,435
2006	46,611	2,664	49,275
2007	42,209	3,166	45,375
2008	34,740	3,109	37,848
2009	24,821	2,743	27,564
2010	22,795	3,042	25,838
2011	20,692	3,249	23,941
2012	19,184	3,343	22,528

Source: Newspaper Association of America, 2012 estimates by Rick Edmonds and Emily Guskin

PEW RESEARCH CENTER

2013 STATE OF THE NEWS MEDIA

Loss of 23,627

PUERTO RICO INDUSTRY



CIRCULATION

	2000	2013
Monday - Saturday	204,551	183,559
Sunday	240,665	219,491
Monday-Friday	107,098	125,246
Saturday	80,986	101,696

LET'S TALK ABOUT THE TRENDS

Technology & devices

On demand & on my time

Social & sharing my way

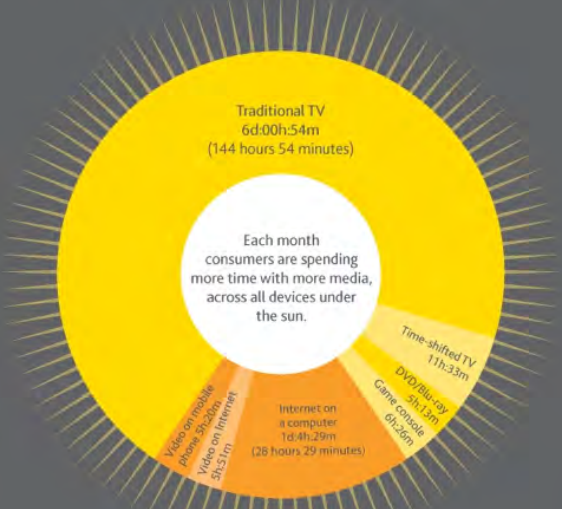
PROLIFERATION OF DEVICES

The Media Universe

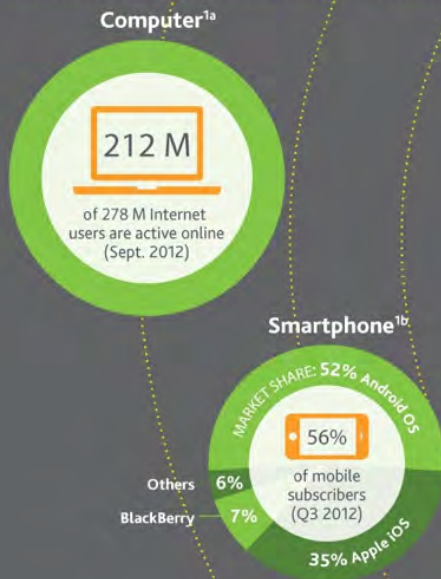
The consumer solar system has an increasing number of media options in its orbit.

CONSUMER MEDIA USAGE²

MONTHLY AVERAGE, Q2 2012

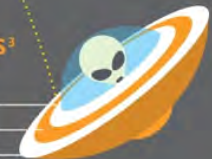
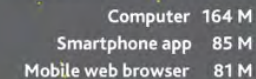


COMPUTER & MOBILE DEVICE OWNERSHIP¹



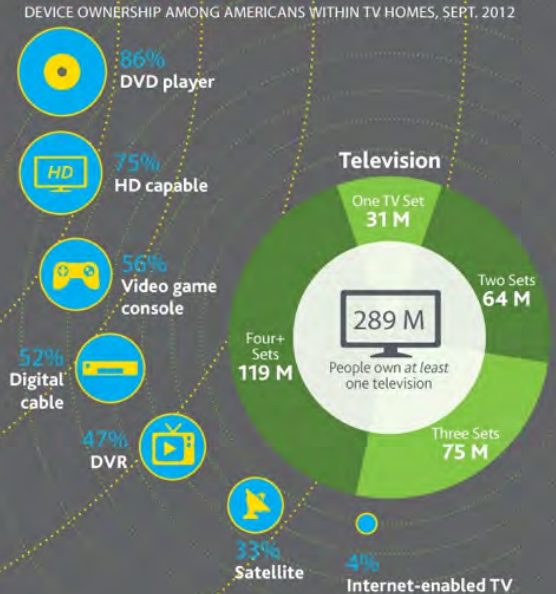
SOCIAL MEDIA USERS³

USAGE BY PLATFORM, SEPT. 2012



TELEVISION OWNERSHIP⁴

DEVICE OWNERSHIP AMONG AMERICANS WITHIN TV HOMES, SEPT. 2012



Pulled out of orbit
(devices receding in ownership)



Source: Nielsen

connecting the story

THE FIRST GLOBAL STUDY OF NEWS CONSUMPTION ACROSS MULTIPLE SCREENS

WORLD NEWS

.com

InSites Consulting

BASE: 3610 respondents from nine countries



Tablet owners watch more TV news, not less, with 43% of tablet users saying they consume more TV than they did five years ago.



TV still dominates overall usage, taking 42% of people's news consumption time compared with laptops (29%), smartphones (18%) and tablets (10%)



Second screening for news is becoming commonplace. 83% of tablet users say they have used their tablets while watching television.



84%

79%

84%

87%

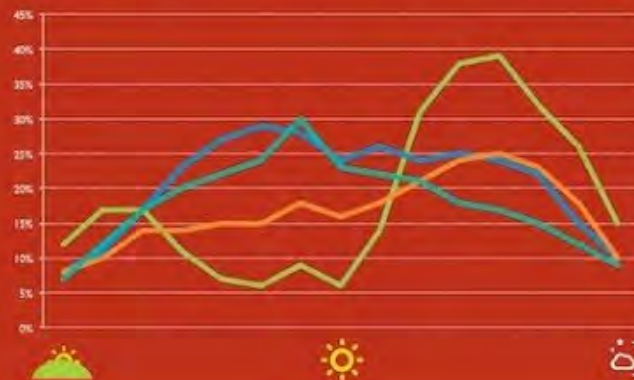
News audiences expect to see advertising nearly as much on mobile (79% tablet, 84% smartphone) as they do on TV (87%) and online (84%).



People respond to advertising across all the screens, with 1 in 7 users indicating they responded to a mobile ad in the last four weeks whilst responses to TV and desktop are 1 in 5 and 1 in 4 respectively.

For each device people have access to over a typical 24-hour period, this is how they would use it to access the news or consume the news during the week.

TV
LAPTOP/DESKTOP
TABLET
SMARTPHONE



CONSUMING THE NEWS

News audiences expect to see advertising nearly as much on mobile as they do on tv and online

CONSUMING THE NEWS

An **online survey** of 5,000 US adults, conducted by Nielsen on behalf of the Newspaper Association of America (NAA), reveals that respondents rate newspapers (in print and on the internet) as the most effective advertising source among various media. The study measured advertising effectiveness across various metrics, with print newspapers coming out on top overall, ahead of radio, internet, and TV. Breaking the media types down into different segments, the local paper topped the ratings for likelihood to purchase and propensity to notice ads.

NAA survey, December
2012 through January 2013

IN AN INDUSTRY THAT
IS IN **DECLINE**
IN AN ECONOMY THAT
IS IN A **RECESSION**
IN A DIGITAL & SOCIAL
EXPLOSION

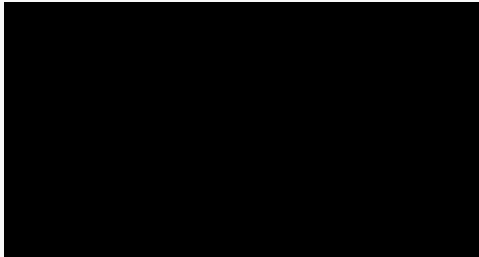
YOU CREATE **NEW**
USERS OF
TECHNOLOGY
& **MORE**
CONSUMERS
OF CONTENT

A NEW COMPANY

FROM **NEWSPAPER**

TO A **CONTENT & MEDIA & AUDIENCE DISTRIBUTION**
COMPANY

2000 - OUR BRANDS



2013 - OUR BRANDS



GFRMedia Products

- **Subscription Newspapers:** El Nuevo Dia, Primera Hora
- **Free Newspaper:** Indice
- **Regional Newspapers:** El Norte, Horizonte
- **Newspapers Magazines:** DeViaje, Mi Pequeño Dia, Magacin, Sal, Revista Negocios, EA, Construccion, Por Dentro, Autos, n-punto, Hogar y Construccion, Drive, Lola, Asi
- **Internet:**
 - **Information web sites:** elnuevodia.com, primerahora.com, indicepr.com, notus360.com(webTV)
 - **Specialized content web sites:** salpr.com (restaurants), logon.pr (young readers-13-18 age), magacin.com (social life), n-punto (young readers- 18-25 age) , Construccion and Bumbia.com (video)
 - **Transactional web sites:** clasificadospr.com, ofertadeldia.com, deluxo.com
 - **Advertising web site:** Shop.pr
- **Mobile**
 - Mobile web: El Nuevo Dia, Primera Hora
 - Apps on Iphone: El Nuevo Dia, Primera Hora, Sal, Magacin, n-punto, mi pequeño dia
 - Apps on Androids: El Nuevo Dia, Primera Hora
 - Apps on blackberry: El Nuevo Dia, Primera Hora
 - Ipads- El Nuevo Dia, Magacin
 - Reponsive design: Indice

PROJECT “PAUTA”

THE VISION

2010

Vision

Pauta represents our dream of creating a **new future** combining the strengths and talents of **El Nuevo Dia** and **Primera Hora** in the same physical space. Together we will create the most important and diversified media company of Puerto Rico, protecting the **strength** of **both brands**

AN INTEGRATED VISION



PROJECT “PAUTA”

a central content producing unit gave us the opportunity to create new products



A NEW COMPANY

It is not only about content production and
proliferation of devices

It is about **re-inventing our physical space** in order to
sell differently

THE SPACE 2011



THE SPACE 2012



THE SPACE 2013



A NEW SPACE



HOW DO WE SELL DIFFERENTLY?

Time spent

The structure

The culture & language

THE SALES FORCE 2000

- VP Sales
- The Account Executive
 - Ad agencies
- Direct Sales
- Independent Sales

THE ISSUES

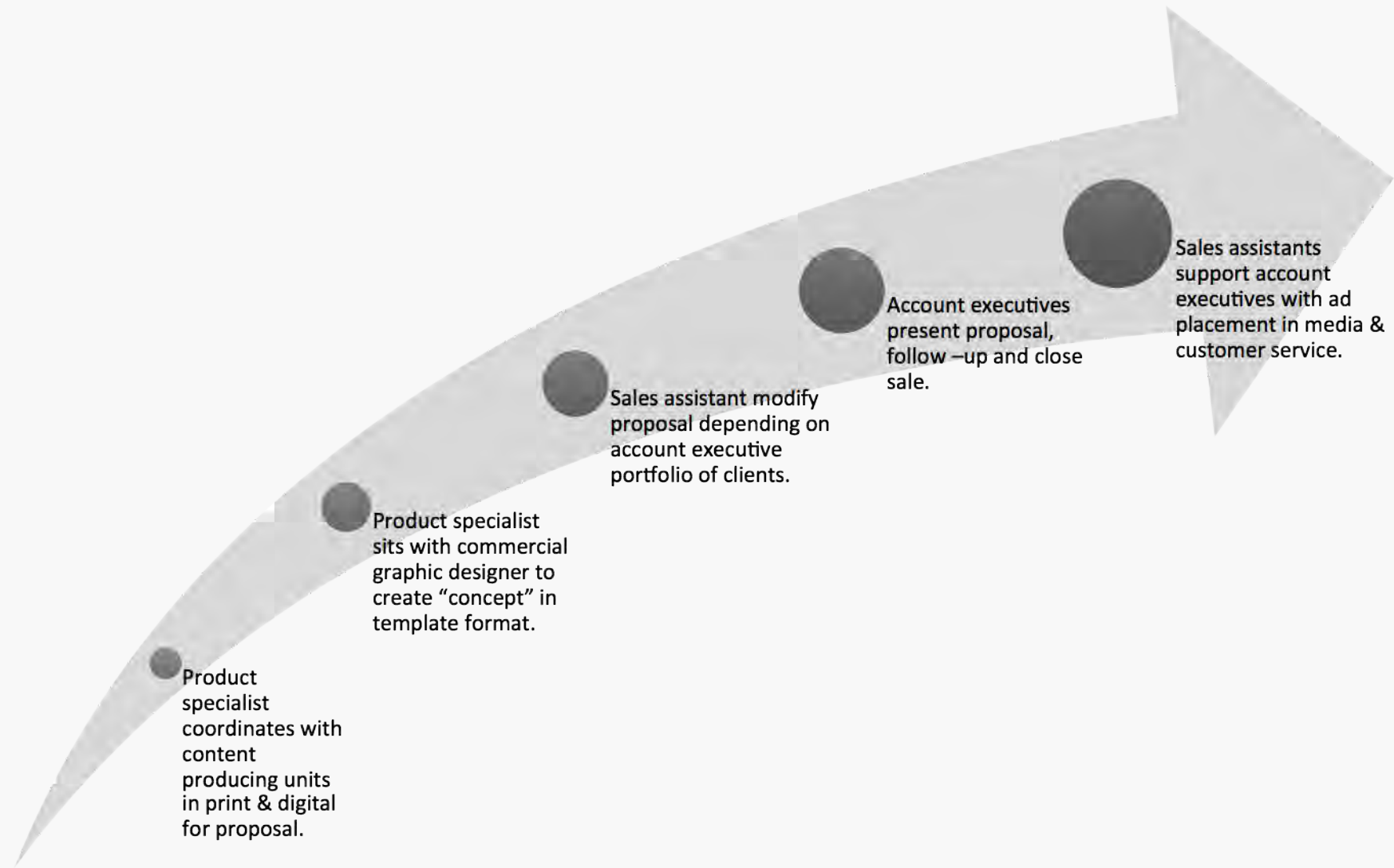
- Account executives spent too much time in the office
 - Preparing proposals/quotes
 - Attending to client service
 - Coordinating internally ad placement
- Account executives spent too little time
 - Visiting ad agencies
 - Visiting new clients
 - Thinking of new projects

THE SALES FORCE 2013

- VP Sales
- Senior Director
 - The account executive
 - The direct sales force
 - The independent sales force
- A NEW back end structure to optimize sales
 - The pre – sale desk
 - Data & market analyst
 - The product specialist
 - The promotions specialist
 - Presentation coordinator
 - The creative commercial
 - Customer service
- Reaching clients differently



THE PROCESS



HOW DO WE
INTEGRATE TO
OPTIMIZE THIS NEW
CONTENT
PRODUCTION AND
NEW MEDIA
PLATFORMS?

A NEW VISION

NEW PRODUCTS

Mobile





- ***Over 3 million phones in Puerto Rico***
- ***About 2.7 million users a month in GFR Mobile Network***

Resources:

***Junta Reglamentadora de Telecomunicaciones,
Flurry Analytics y Comscore (2013)***



Mobile

CLICK TO CALL

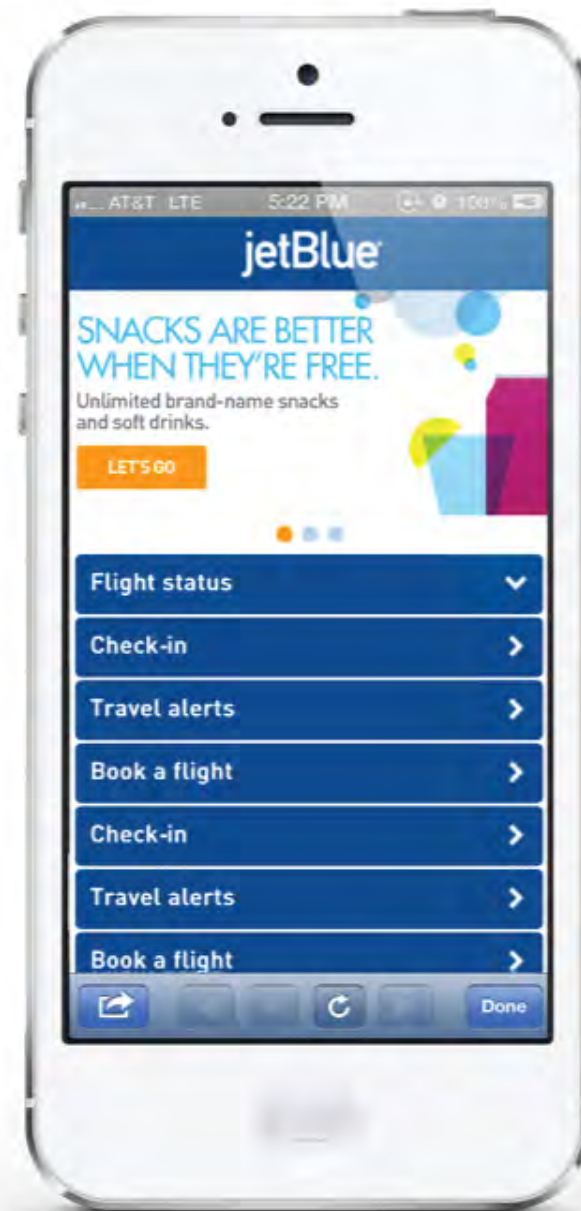


UNIQUE
BENEFIT



Mobile

CLICK TO URL



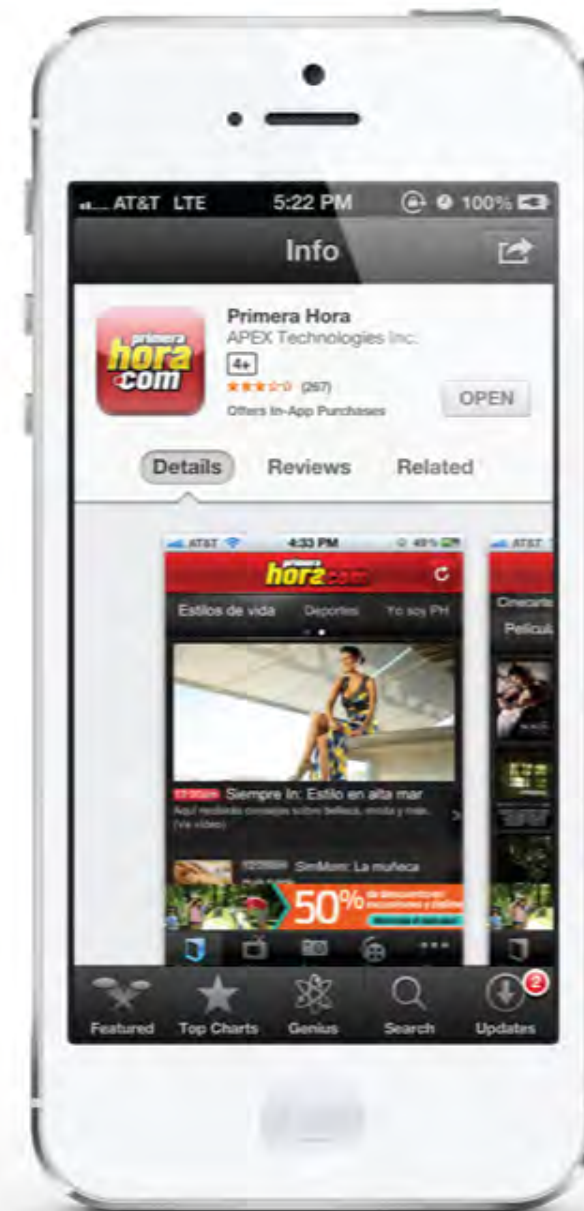
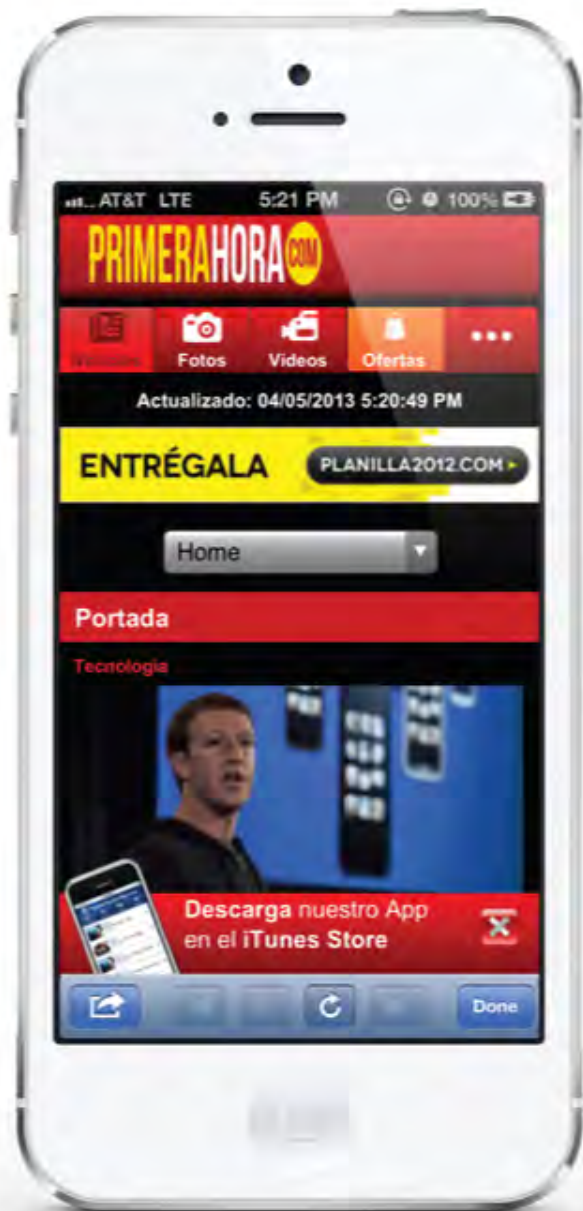
Mobile

CLICK TO VIDEO



Mobile

CLICK TO APP





clasificadospr.com



indicepr.com



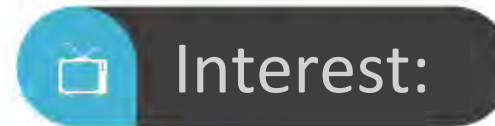
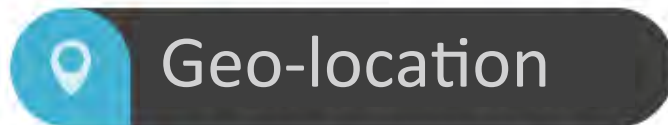
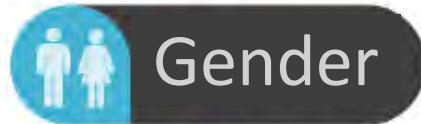
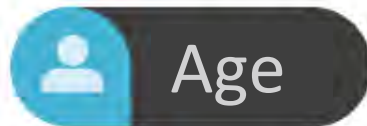
bumbia.com



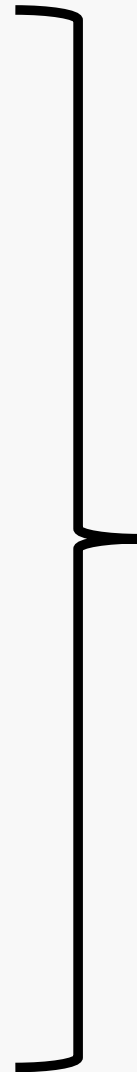
magacin.com

Coming Soon

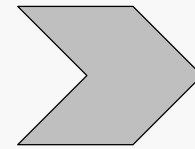
Segmentation of advertising by:



- *Gaming*
- *Music*
- *Film*
- *Health and exercise*
- *Auto*
- *Home and gardening*
- *Sports*
- *Moms*
- *Etc.*



**DATA BASE &
BUSINESS INTELLIGENCE**



USER PROFILE

- By Gender
- By Age
- By Geo-location
 - 8 districts in PR
- By Profile
 - Auto Enthusiasts
 - Avid Runners
 - Bookworms
 - Business Professionals
 - Business Travelers
 - Casual & Social Gamers
 - Catalog Shoppers
 - Entertainment Enthusiasts
 - Fashionistas
 - Food & Dining Lovers
 - Hardcore Gamers
 - Health & Fitness Enthusiasts
 - Home & Garden Pros
 - Home Design Enthusiasts
- By Profile (cont.)
 - Leisure Travelers
 - LGBT
 - Moms
 - Movie Lovers
 - Music Lovers
 - New Moms
 - News & Magazine Readers
 - Parenting & Education
 - Personal Finance Geeks
 - Pet Owners
 - Photo & Video Enthusiasts
 - Real Estate Followers
 - Singles
 - Slots Players
 - Small Business Owners
 - Social Influencers
 - Sports Fans
 - Tech & Gadget Enthusiasts
 - TV Lovers
 - Value Shoppers

PRIMERAHORA  **COM**

Redesign

HOY LUNES

BK DIARIO BACON DOUBLE DELUXE

\$2

por sólo

08.04.2013 Actualización 8:25 PM Log In Registrarse

BETA PRIMERA HORA .COM

Like Seguir a @primerahora

San Juan Tiempo 88°F

¿Qué buscas?

[NOTICIAS](#) [ENTRETENIMIENTO](#) [DEPORTES](#) [ESTILOS DE VIDA](#) [YO SOY PH](#) [BOMBÓN](#) [MULTIMEDIOS](#)

[AUTOS](#) [CASAS](#) [EMPLEOS](#) [OFERTAS](#) [SALI](#)

LAS MÁS CALIENTES:
[Gilberto Santa Rosa](#) • [Alexandra Malagón](#) • [Margaret Thatcher](#) • [Sara Montiel](#) • [Corea del Norte](#) • [Lotería Electrónica de Puerto Rico](#) • [Ramón Power y Giralt](#)

Gilberto Santa Rosa recibe nacionalidad dominicana como regalo de bodas

Farándula
hace 6 horas

VICTOR MANUELLE

"UN RECORRIDO POR MI HISTORIA"

Excepción del premio Activa del Año Tropical Bata de la más reciente edición de Premio La Nación para una trayectoria de su carrera. Ha ganado los reconocimientos más importantes del país. En el camino ha sido nominado a Premios Grammy y Latin Grammy. Su álbum más reciente, "Viviré", es un homenaje a sus raíces, sus amores y su familia.

SÁBADO, 25 DE MAYO

COLISEO DE PUERTO RICO "JOSÉ MIGUEL AGRELOT" 8:30 P.M.

BOLETOS A LA VENTA

DESDE EL 1^{RO} DE MARZO EN:

[ticketpop.com](#)
 787-234-0001
[Walmart](#) [AMIGO](#)

AHORA REGRESA A SU CASA A ENCONTRARSE CON SU GENTE...

POLICIA Y TRIBUNALES

GOBIERNO Y POLÍTICA

MUNDO

NOTUS

Por falta de abogado posponen vista por timo a la UPR

hace 3 horas

Eduardo Bhatia defiende desempeño del Senado

hace 3 horas

Muere la ex primera ministra británica Margaret Thatcher

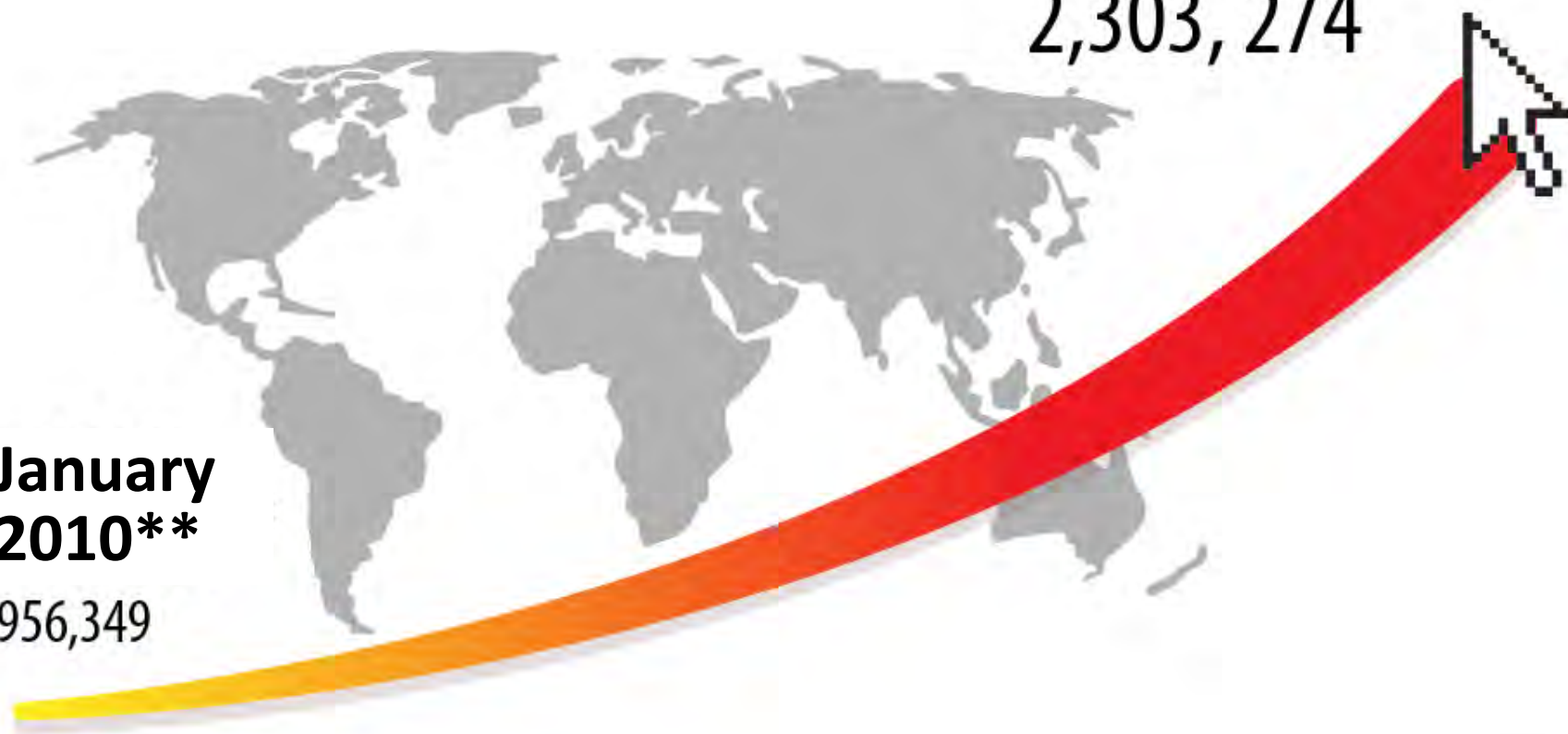
Documental presenta supuesta criatura alienígena

TECNOLOGÍA

192,764* AVG. DAILY

+58%
March 2013*
2,303,274

**January
2010****
956,349



*DAX ANALYTICS, COMSCORE
MARZO, 2013
**CERTIFICA
ENERO, 2010

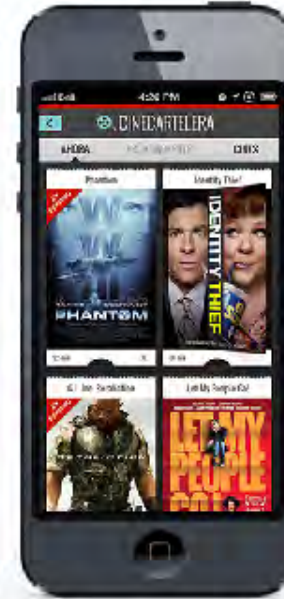
Where you want
Anytime



Weather



Horoscope



Films



Lottery

SOCIAL MEDIA COMMUNITY



+1.7m
Facebook fans



+457 k
Twitter followers

LIKES AND ACTIVITIES OF OUR BRANDS



63% women

27.6% between the ages of 18-24

613k



PRIMERA HORA .COM

62.3% women

30.2% between the ages of 25-34

411k



70% women

53.1% between the ages of 18-34

240k



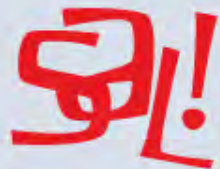
64% women

29.4% between the ages of 18-24

75k



LIKES AND ACTIVITIES OF OUR BRANDS



68.6% women

58.9% between the ages of 25-44

28k



BOMBÓN

87.3% men

40% between the ages of 25-34

26k



magacín

74.5% women

28.7% between the ages of 25-34

6.9k



EXAMPLE OF SPONSOR POST

The image shows a screenshot of a Facebook post. At the top, there are several greyed-out placeholder elements, including a text box with horizontal lines and a small box with dimensions '111px' and '74px'. Below these is another greyed-out placeholder. The main content of the post is a white rectangular area. At the top left of this area is the 'Primer Hora' logo, which consists of a red square with the word 'Primer' and a yellow square with the word 'Hora'. To the right of the logo, the text reads 'Primer Hora' in bold and 'about an hour ago' in a smaller font. Below this, there is a line of text: 'Se revoluciona el atletismo con la nueva linea de tenis "Todo Terreno" de Zumba Shoes. Conoce más detalles en www.zumbashoes.com.' The main image of the post shows a man in athletic wear running on a sandy beach with tall grasses in the background. The text 'ZUMBA SHOES' is overlaid in large, bold, black letters on the left side of the image. At the bottom of the post, it says '12,152 people saw this post' and 'Promote' with a downward arrow.



concurso nadie sabe más que mami

TAB DE CONCURSO LLEVA A



Tierno. Sabroso. Saludable.

primera hora.com

COMPARTE TU HISTORIA DE POR QUÉ

Nadie sabe más que mami

¿Te cogió jangueando cuando dijiste que estabas estudiando?

¿Parece leer tu mente?

¿Tiene la cura para todos tus males?

y podrías ganar:



Hasta \$1,000



Variedad de Productos Agrosuper: pollo, pavo, salmón y verdo fresco congelado.

NADIE SABE MÁS QUE MAMI

¿Cómo participar?

1. Haz clic en "Participa"
2. Regístrate y dime por qué "Nadie sabe más que mami"
3. Dale "Like" a Primera Hora (o aún no lo has hecho)
4. Comparte en tu muro e invita a tus amigos a votar su historia
5. ¡Listo! Ya estás participando

Se seleccionarán las tres (3) historias con la mayor cantidad de votos como ganadoras de nuestros premios. La historia con la mayor cantidad de votos ganará el gran premio de \$1000. Segundo y Tercer Lugar podrán escoger hasta \$100 en productos Agrosuper.

Accede a los términos y condiciones para más detalles

[Términos y Condiciones](#)

Last entries:



[View and vote for entries](#)

Registration open until:

10/24/2012 11:59pm closed

Voting open until:

10/24/2012 11:59pm closed

Requirements:

Only fans



URBAN
SOCIAL
IN MOTION
VISUAL READER
CONNECTED TO NETWORK
CONSUMER
ADVENTURER
ACTIVE

Distribution from 11am to 2pm
at 15 strategic locations

High concentration areas of
professionals and college students

CIRCULATION



SAN JUAN – 29,200

- 38 traffic lights
- 13 stores
- 6 universities
- 4 train stations
- 4 gyms
- 3 hospitals
- 3 offices
- 1 mall



BAYAMON – 12,900

- 8 hospitals
- 5 stores
- 4 universities
- 2 gyms
- 1 train
- 1 office



GUAYNABO – 9,600

- 12 traffic lights
- 3 stores
- 2 gyms
- 1 office

CIRCULATION



PONCE – 7,100

- 5 traffic lights
- 7 universities
- 19 offices
- 1 store
- 1 mall
- 1 gym



MAYAGUEZ – 6,400

- 4 traffic lights
- 2 universities
- 14 offices
- 10 stores
- 1 gym



ARECIBO / HATILLO – 5,700

- 5 traffic lights
- 2 universities
- 6 stores
- 3 hospitals
- 1 gym

HOUSE SAMPLING

- We are the only free newspaper to have this service. About 20,000 target households are a chosen daily
- This house-sampling can be tailored according to the request of a customer.

CUSTOMERS

SALLY HANSEN - 9,500, front page ad, web banner, social media

TANG - 120,000 samples

PEPSI NEXT - 3,000 delivered cold Pepsi, advertisement on the front page, social media

CHURCH'S (fast food)- Free breakfast with ad in front. Over 20,000 breakfasts served

WAL-MART - Five-day store opening promotions, traffic direction, Shoppers



SOCIAL MEDIA



Like - Comment - Share

👍 33 people like this.



Write a comment...



Zuheil M. Pérez Birriel GRAXXXX POR LA GALLETAS ME LAS ESTOY COMIENDO CON UNA TAZA DE CHOCOLATE CALIENTE

Unlike · Reply · 👍 1 · 28 minutes ago



Lucía Alexandra Molina Silva El chico adicional q. pusieron en el puente dos hermanos es super activo repartiendo. Grax. ;)

Like · Reply · 10 minutes ago via mobile







Traditional TV

VS



Primary categories of:
Enjoy, find and discover

90 + Channels

The screenshot displays the Bumbia website interface. At the top, there is a red banner with the text "Heavy artillery" and "The Economist". Below this is the Bumbia logo with the tagline "¡qué quieres ver?". Navigation links include "Goza", "Infórmate", and "Descubre". A search bar is located on the right. The main content area features a featured video titled "Downhill en Caguas" with a description: "Matt Gadea y su equipo nos muestran una de las disciplinas más radicales del ciclismo." Below this is a "Recomendados" section with a "Hoy" filter and five video thumbnails. The "Canales" section lists three channels: "PiccoloMondoPR" (Un mundo lleno de imaginación y entretenimiento entre un padre y su familia), "Tatito Tales" (Temas populares y noticias), and "El Teatro está de Moda" (Información sobre la industria teatral en Puerto Rico). The "Goza" section shows five video thumbnails with titles like "Primera Hora Dando Candela: Noemi Aguirre sobre la muerte de su hija" and "N-Punto Dyland y Lenny presentan My World 2". The "Infórmate" section is partially visible at the bottom.

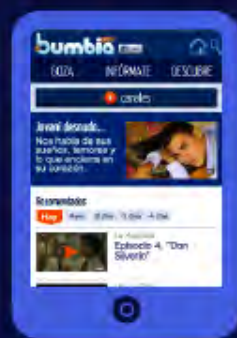
MULTI-Device



Desktop



Tablet



Mobile

MULTI-Platform



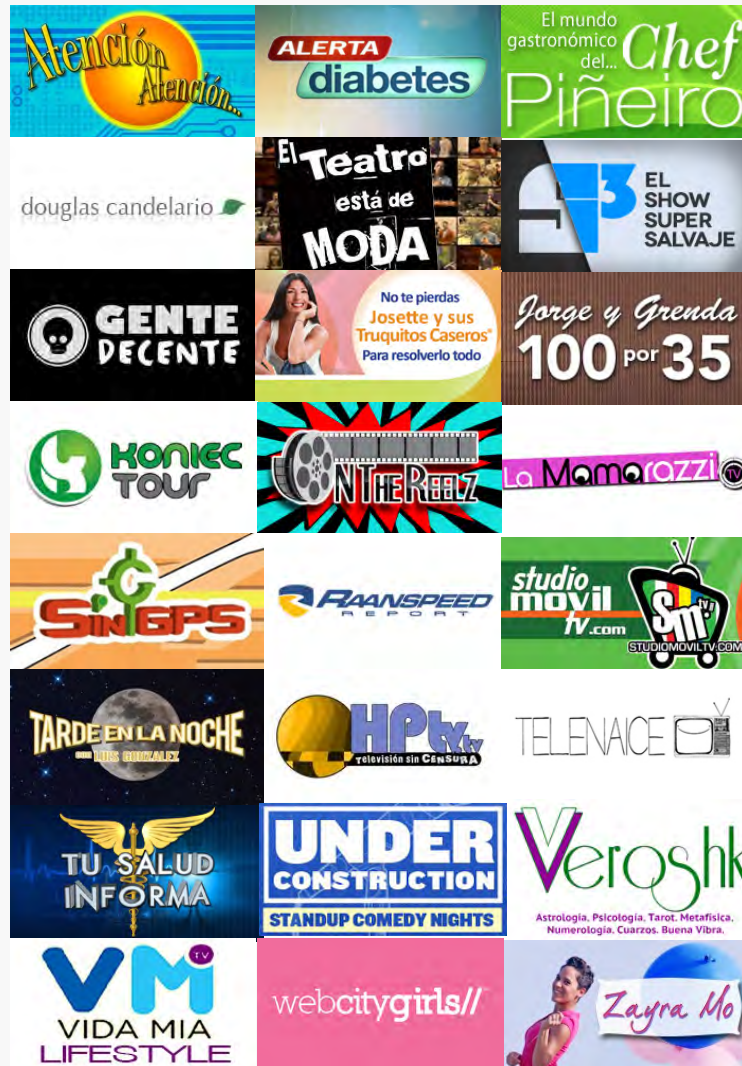
1 Recommendation block in *PrimeraHora.com's* multimedia section

2 300x250 widget

Constantly highlighting Bumbia recommendations throughout END, PH, Indice, Sal! & others.



90+ partners



Original Programming



La Agencia

PRONTO **Manejando
A Bobby**

LEARNING A NEW LANGUAGE



MORE TO COME

NEW DESIGN

El Nuevo Dia- print and digital

NEW E-COMMERCE SITE

deluxo.com

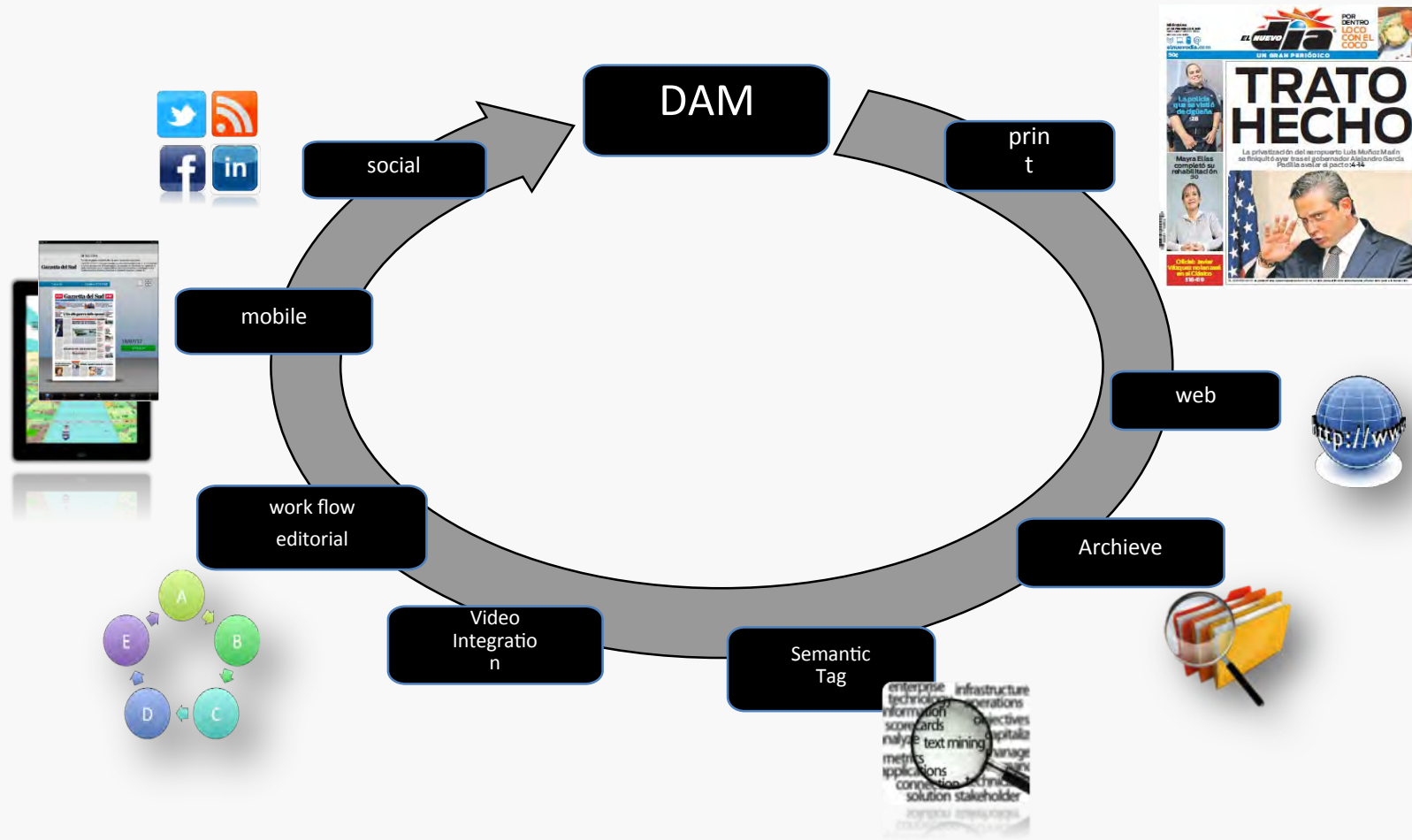
NEW WAY TO SALE AND CREATE CONTENT

Branded content

NEW WAY TO DEVELOP AND PUBLISH THE STORY

more analysis

NEW INTEGRATED SOLUTION



IT IS ABOUT
RE-INVENTING FROM
THE CORE

FROM THE INSIDE OUT

IT IS ABOUT BELIEVING
THAT YOU CAN BE

SOMETHING **OTHER**
THAN WHAT YOU ARE
EXPECTED TO BE.