

The Future of Media Use Insights from Consumer Research

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NBC Universal

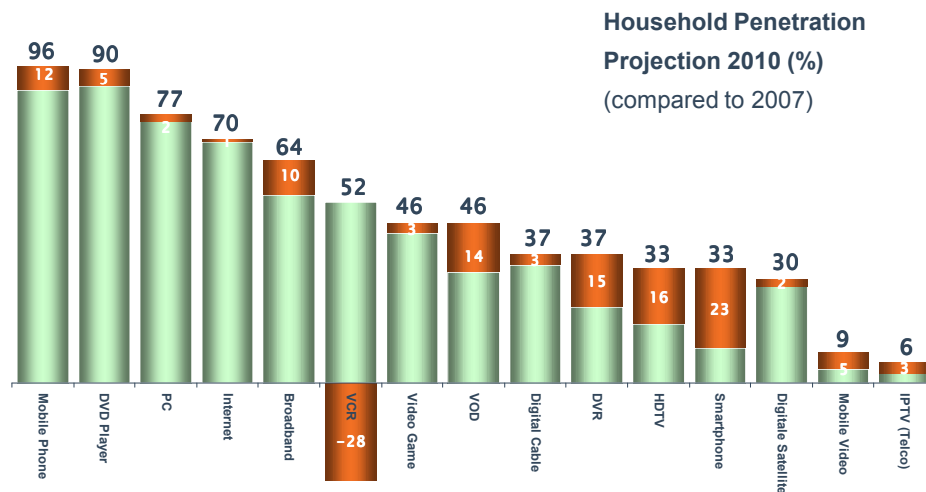


Consumer Research

- ➔ Media Technology Ownership
- ➔ How Media Use is Changing
- ➔ The Future of Media Use and Implications for the Media Business

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Media Technology Ownership Growth



Sources: NBC Research based on SNL Kagan, Veronis Suhler Industry Forecasts, MAGNA Global, Forrester, Consumer Electronics Association, Nielsen Media Universe estimates, IDC, eMarketer
 Mobile phone and Smartphone ownership based on % of US Population; mobile video based on % of wireless subscribers; HD Receiving numbers based on Nielsen's estimates of HHTs that receive at least one HD channel, regardless of subscription; IPTV based on eMarketer

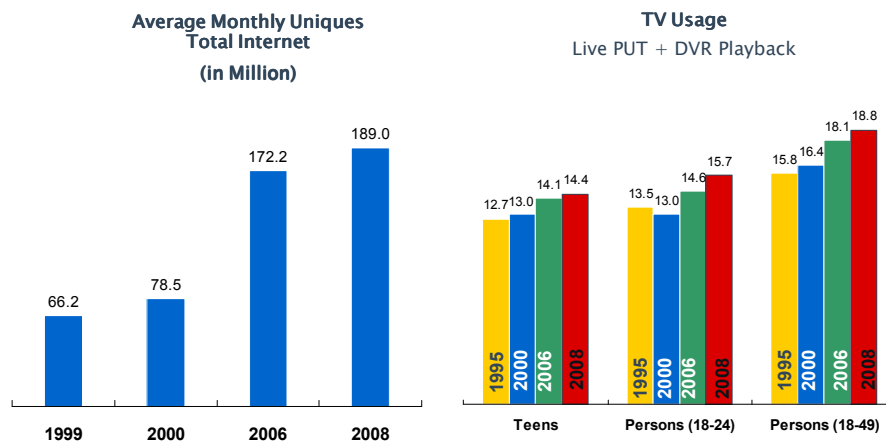
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Three Key US Media Trends

1. TV Viewing has Not Decreased

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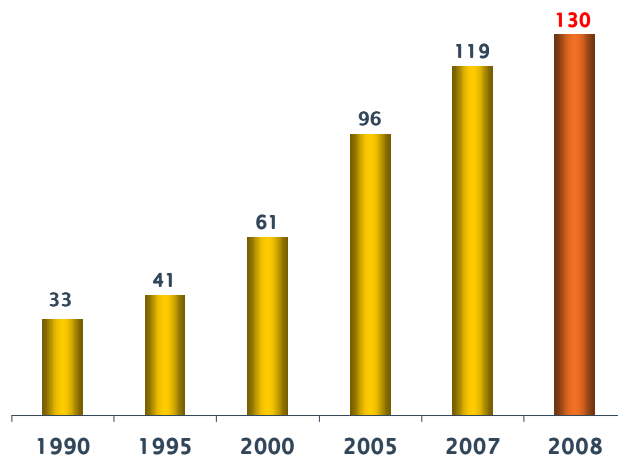
Increase in TV Viewing Despite Growth of Internet



Source: Nielsen Media Research, Live +7 Days; Calendar Years; 2006 & 2008 include Live PUT rating plus DVR playback; ComScore

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Impact of Digital Cable: Number of Available Channels in US Homes



Source: NTA Adumeter Sample, Feb 1990-1986 and National People Meter sample, Feb 1987-89 and Sept 1990-present. Includes broadcast and cable.

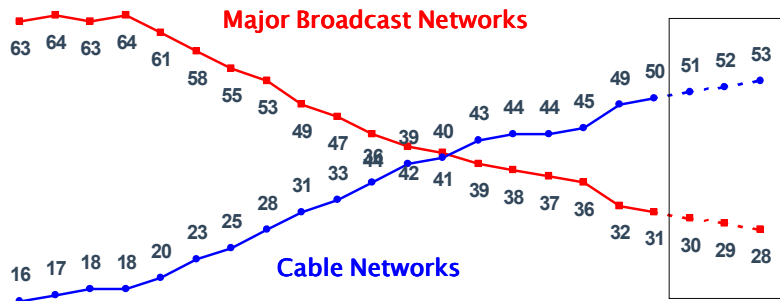
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Three Key US Media Trends

2.
**Increase in Audience
Fragmentation
(in all Media)**

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Audience Fragmentation in US Television



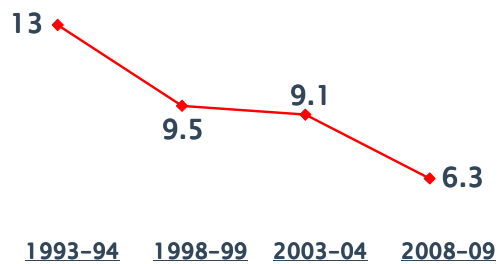
Primetime Audience Shares (18-49)

'90-'91 '91-'92 '92-'93 '93-'94 '94-'95 '95-'96 '96-'97 '97-'98 '98-'99 '99-'00 '00-'01 '01-'02 '02-'03 '03-'04 '04-'05 '05-'06 '06-'07 '07-'08 '08-'09 '09-'10 '10-'11 '11-'12

Source: Nielsen Media Research, NBCU Research; September-May Seasons updated through 5/20/09; Season 09/10 -11/12 PROJECTED (7 data 12/26/05-5/21/08), Nielsen Media Research, NBCU Research; September-May Seasons updated through 5/20/09; Season 09/10 -11/12 PROJECTED (7 data 12/26/05-5/21/08)

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Average Rating Top 10 Prime Shows (18-49)



Today's top rated show (American Idol 10.3 Rating) would have ranked 10th in 93/94

Source: NTL Live + 7 Day Data 9/28/08-4/05/09 VS. Pre-DVR Sept-May prior ssns, regularly scheduled programs, excluding Sports, all data 18-49

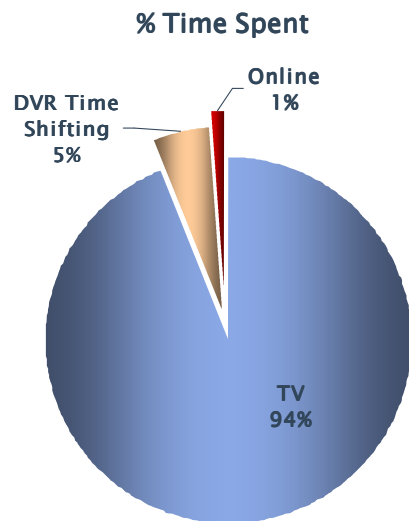
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Three Key US Media Trends

3. Time-Shifting: Increase in Use of Content on Demand Technologies

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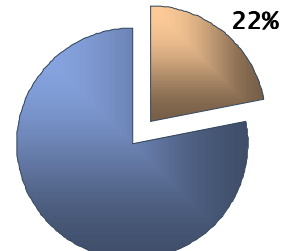
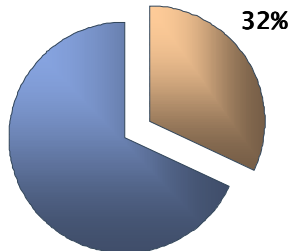
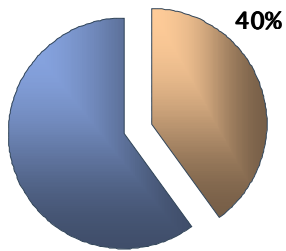
Overall Use of Platforms for Video



Source: Nielsen 3-Screen Report Q1 2009

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Impact of DVR Use on Prime Time Shows

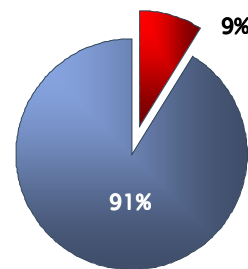
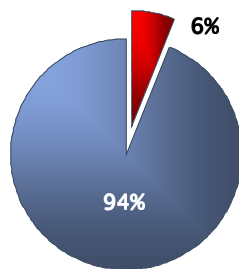
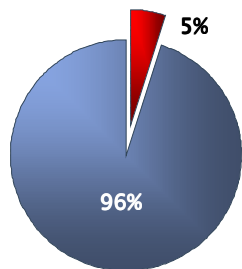


% Time-Shifted Viewing

Source: Nielsen Media Research 1st Quarter 2009; A18-49

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Impact on Online Viewing on Primetime Shows



% Online Viewing

Online= NBC.com and Hulu

Source: Omniture; episode starts to total program for week after air/ Hulu Partner Portal episode views to total program week after air; Nielsen P2+ L7 Reach; average of all weeks to date; NBC Research May 2009

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Media Business Challenges

- ➔ Audience Fragmentation
- ➔ Commercial Evasion (DVRs),
“Consumer Control”
- ➔ Developing Effective Cross-Media
Advertising Strategies
- ➔ Effect of current Economic Downturn
- ➔ Piracy
- ➔ Assessing Technological Changes and their
Future Impact on Consumers & Business,
Develop New Business Models

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