Evolution of Cross-Platform Media Use in the United States

Insights from Consumer Research and NBC Universal’s “Olympic Research Labs”

Horst Stipp
SVP, Strategic Insights and Innovation, NBC Universal Research

Columbia University May 2010
## Growth of Media Technologies

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Technology Ownership: 2008

% of US Households (end of year 2008)*
(Project. Change 2008–2009)

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<th>'09–'08 % Change</th>
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* Mobile phone and Smartphone ownership based on % of US Population; mobile internet and mobile video video based on % of wireless subscribers
** HD Receiving numbers based on Nielsen’s estimates of HHs that receive at least one HD channel, regardless of subscription; Feb ‘09 penetration at 29%
NBC Universal’s Olympic Research Labs

- Olympic Research Opportunities
  - Deep Content Distribution Across All Platforms
    - Television Platforms
      - Broadcast Network
      - 3 Cable Networks
    - Internet
      - Website with Video
    - Mobile
      - WAP, APP
      - Video Clips
  - Huge Scale of Consumer Use
- Across 17 Days
Research Summary
The Contemporary Media Consumer
Increase in TV Viewing Despite Growth of Internet

Average Monthly Uniques
Total Internet
(in Million)

Source: Nielsen Media Research, Live +7 Days; Calendar Years; 2006 & 2008 include Live PUT rating plus DVR playback; ComScore.
Impact of Digital Cable: Increased Number of Available Channels

HD is Giving TV a Boost

93% of HD viewers agree “Watching the Olympics in HDTV adds to my enjoyment of the games”

Source: NBC Research; survey August 2008 (Beijing Olympics)
Olympics: More Screens = More TV Viewing

TV Viewing by Screen Status
(Index of TV Ratings)

Source: Arbitron cross-platform panel. Based on 2,596 in tab (12 of 17 days in tab) A18+ panelists w/ broadband in 30 mkts. TV Viewing from 7:30 PM 2/12/10 to 6:00 AM 2/19/10. Olympics Exposed = 2,158 panelists who followed the Olympics on TV and/or Online. Underlying numbers: A18+ Both Rtg 8.79 (n=177), A18+ TV Only Rtg 4.26 (n=1970); M18+ Both Rtg 8.86 (n=74), M18+ TV Only Rtg 4.35 (n=824); W18+ Both Rtg 8.73 (n=103), W18+ TV Only Rtg 4.18 (n=1146); A18-49 Both Rtg 7.60 (n=82), A18-49 TV Only Rtg 3.56 (n=993); M18-49 Both Rtg 7.24 (n=33), M18-49 TV Only Rtg 3.67 (n=395); W18-49 Both Rtg 7.85 (n=49), W18-49 TV Only Rtg 3.44 (n=598).
(2) Internet and Multi-Platform Use is Becoming Mainstream

Source: Beijing; Knowledge Networks “Total Touch” study (8/8-8/24). Based on “To Date” cume, Persons who were reached by ANY NBCU Olympics Platform. CD.
Simultaneous Cross Platform Use is “normal” for Consumers over 50

Simultaneous Users during Olympics

A18 – 34: 36%
A35 – 49: 30%
A50+: 34%

Source: Vancouver Olympics; Arbitron cross-platform panel of Adults with Broadband in 30 major markets Feb 2010; use TV and Internet at same time
(3) Growth of Online Video

Unique Viewers (in millions)

Source: comScore VideoMetrix
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
Reasons for Watching TV Shows Online

- Watched an episode that I missed on TV: 76
- Watched a program that I hadn’t watched before on TV: 23
- Watched an episode again that I had already watched on TV: 10
- Other: 5

Source: NBC Rewind Intercept Study; 4Q08
(4) Mobile Video is Starting to Take Off

Mobile Videos Streamed
Beijing vs. Vancouver

301,000

+564%

2,000,000

Source: Omniture
Consumers expect Multi-Platform Content

By offering content online and on mobile as well as on television, NBC is making the Olympics more convenient to follow.

I think Olympics content should be available online and on mobile phones in future Games.

The Olympics should only be available on television.

Source: Beijing; Knowledge Networks/SRI Olympics Daily study, Day 11, Monday, Aug. 18.
Measuring Multi-Platform Media Use:

*If We Can’t Measure It, We Can’t Sell It*
TAMi Cross-Platform Measurement

- **VOD**
  - Rentrak
  - Set Top Box Uniques

- **MOBILE**
  - Omniture & Carriers
  - WAP Uniques & Mobile VOD

- **ONLINE**
  - Omniture
  - Online Uniques

- **TELEVISION**
  - Nielsen Media Research
  - P2+ Reach (NBC Network & NBCU Cable)
Single Source Cross-Platform Measure during Vancouver
A Day In The Olympic Media Life (Beijing):

Miami Female, 23 Years Old – Monday 8/11/08

Source: NBC Research/iMMi, 2008; data summary
Studies Show Cross–Platform Effectiveness (NBC TV plus NBC Online Video)

Same–Brand/Product Exposure

Source: Nielsen IAG, P13+, 11/8/07 – 6/3/08, NBC Primetime only, Inclusive of brands/products that also ran tagged ads on NBC.com Rewind (see list below). Based on time period(s) for advertisers where impressions were also being delivered on NBC.com Rewind for same brand and product; TV+Rewind sample = 174; TV Only sample = 30,250
Thank you for your Attention!

Horst Stipp, Ph.D., SVP, Strategic Insights & Innovation, NBC Universal, New York