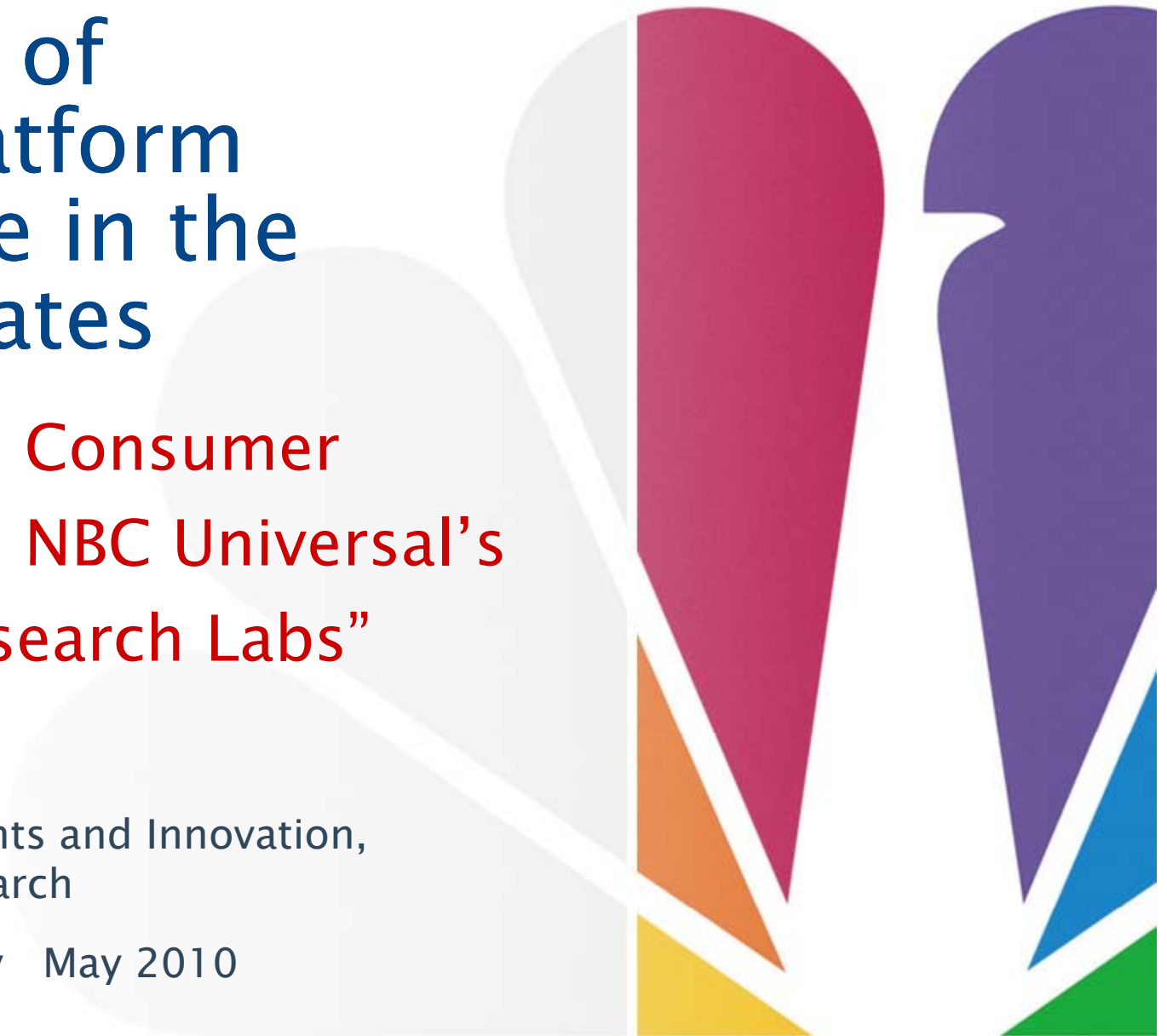


Evolution of Cross-Platform Media Use in the United States

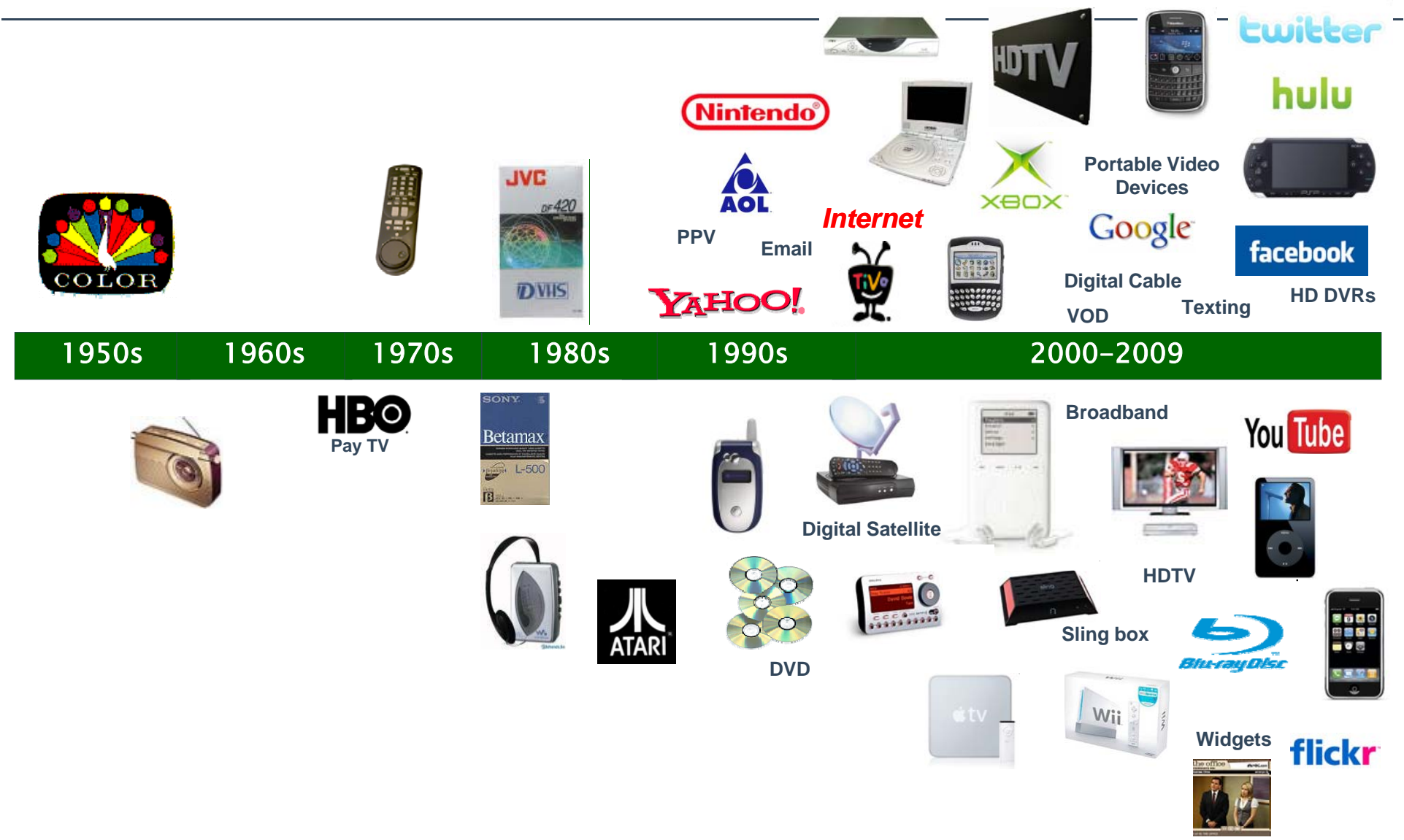
Insights from Consumer
Research and NBC Universal's
“Olympic Research Labs”

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

Columbia University May 2010

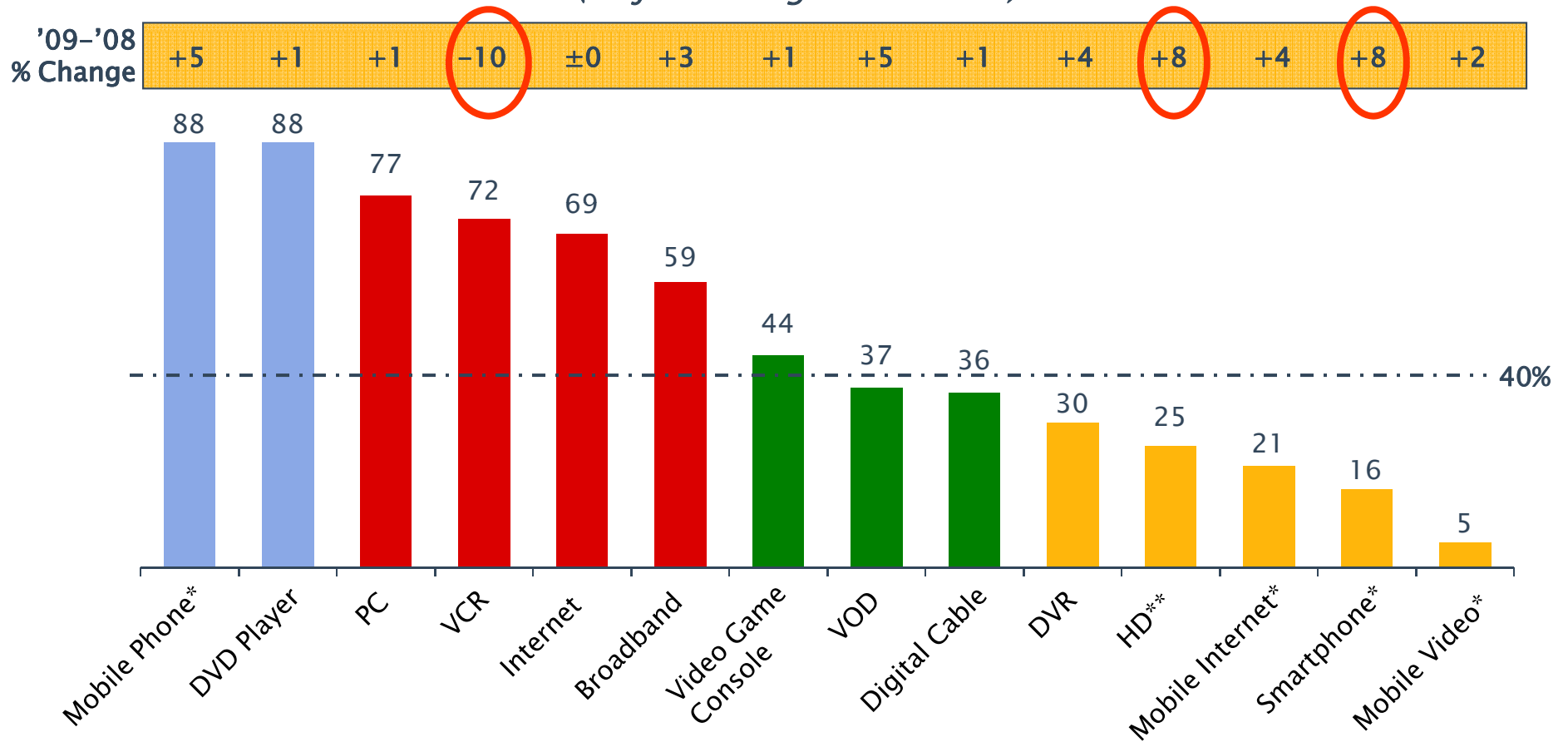


Growth of Media Technologies



Technology Ownership: 2008

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



Sources: Household Penetrations based on 2008 SNL Kagan, SNL Financial LC estimates, Veronis Suhler Industry Forecasts 2008, MAGNA Global On-Demand Quarterly Q3 08, Forrester: The State of Consumers and Technology Benchmark 2008, 2009 Consumer Electronics Association- U.S. Sales and Forecasts January 2009 and November 2008 Nielsen Media Universe estimates average. Projections: NBC Research

* 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



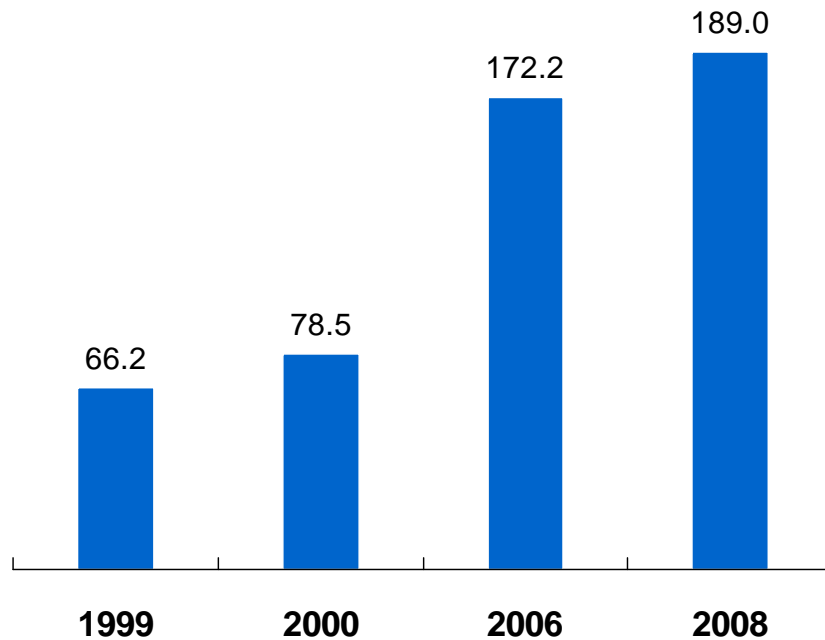
- Olympic Research Opportunities
 - Deep Content Distribution Across All Platforms
 - Television Platforms
 - Broadcast Network
 - 3 Cable Networks
 - Internet
 - Website with Video
 - Mobile
 - WAP, APP
 - Video Clips
 - Huge Scale of Consumer Use
 - Across 17 Days

Research Summary
The Contemporary
Media Consumer

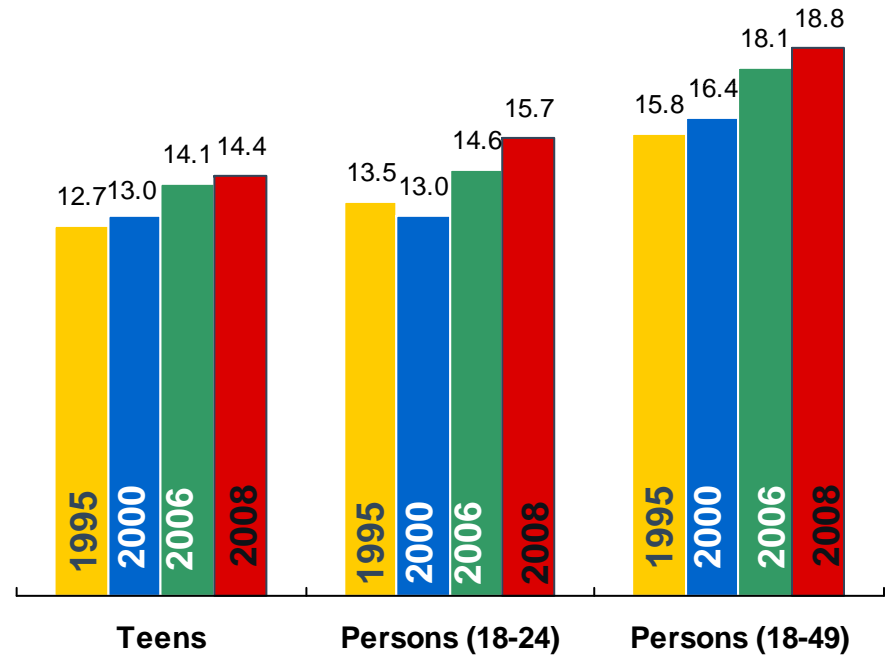


(1) Increase in TV Viewing Despite Growth of Internet

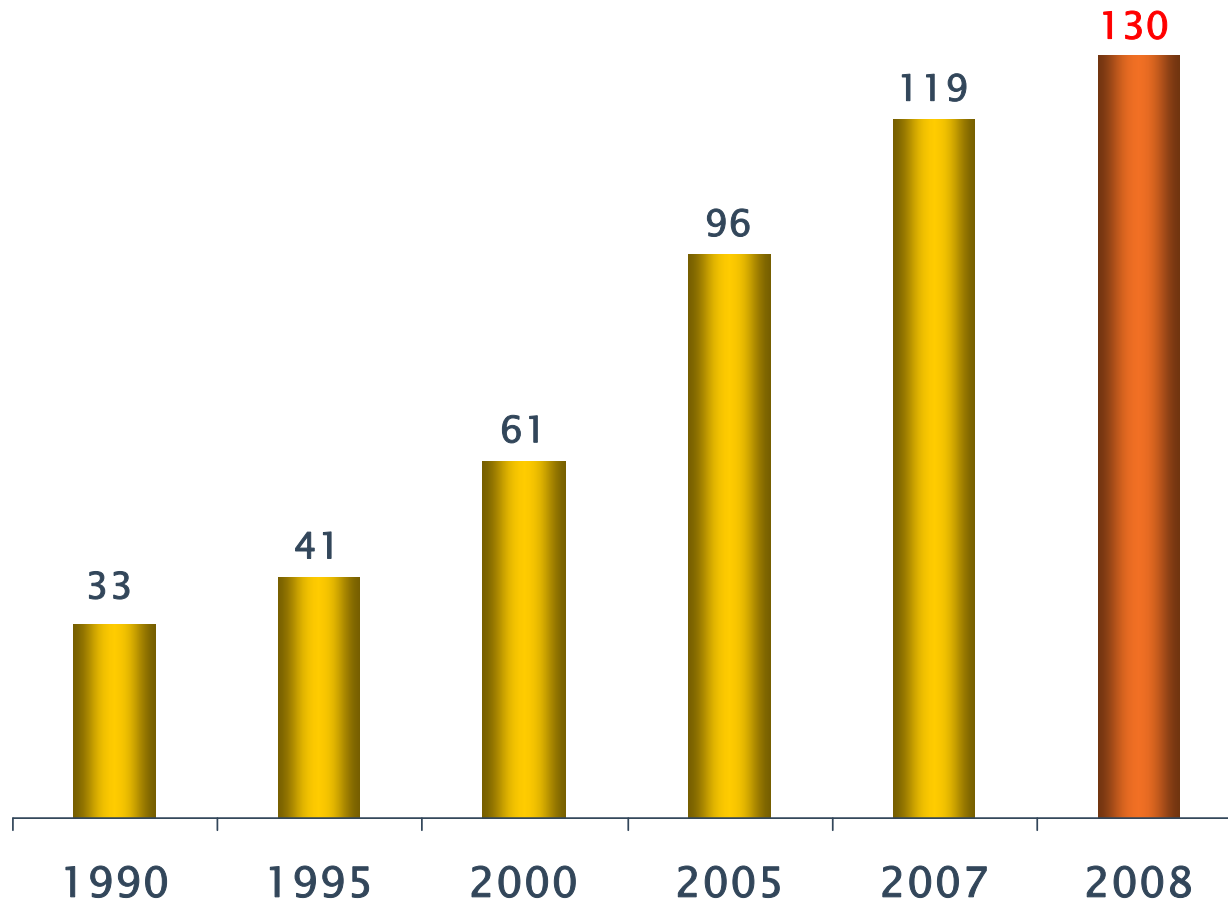
Average Monthly Uniques
Total Internet
(in Million)



TV Usage
Live PUT + DVR Playback



Impact of Digital Cable: Increased Number of Available Channels



HD is Giving TV a Boost

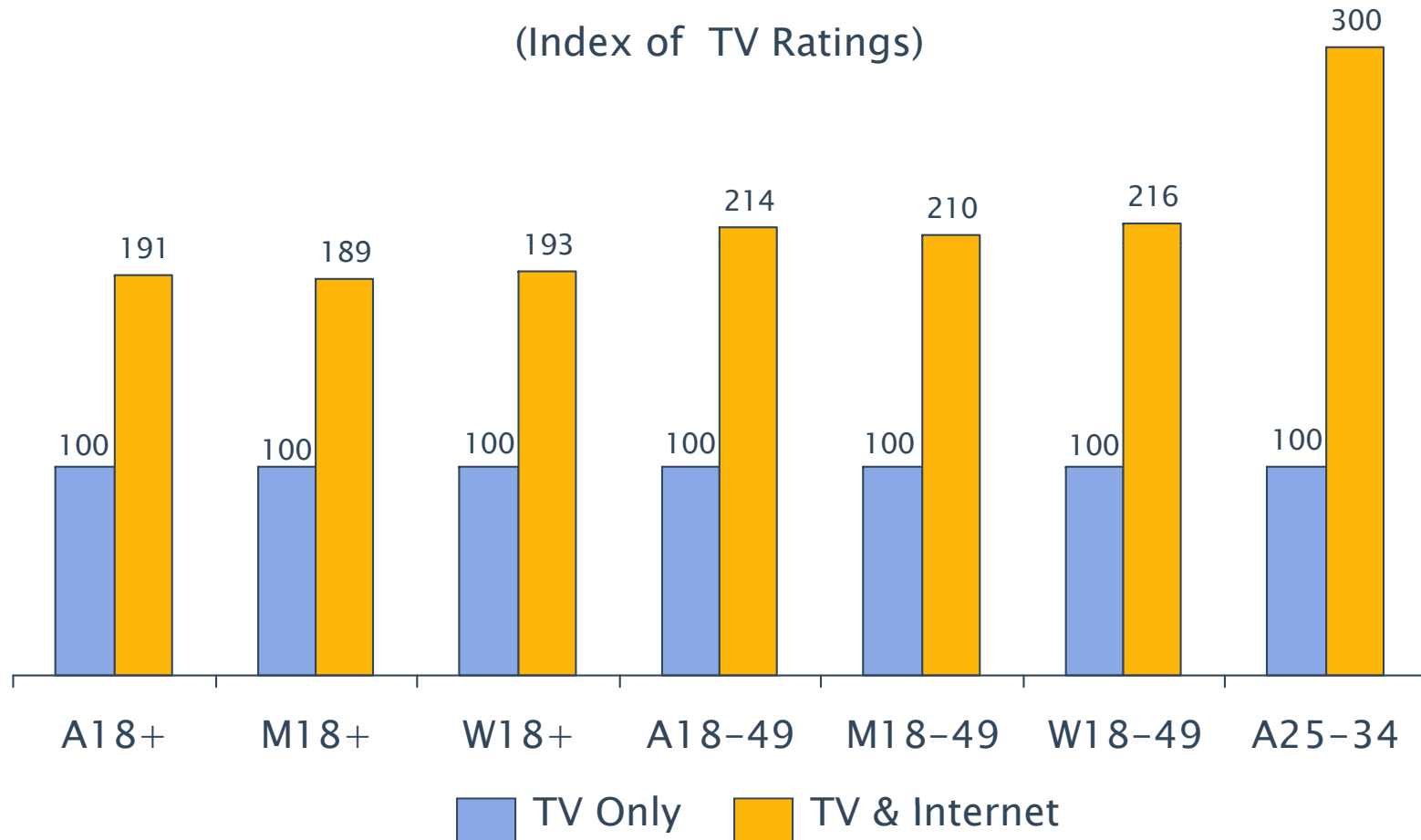


93% of HD viewers agree *“Watching the Olympics in HDTV adds to my enjoyment of the games”*

Olympics: More Screens = More TV Viewing

TV Viewing by Screen Status

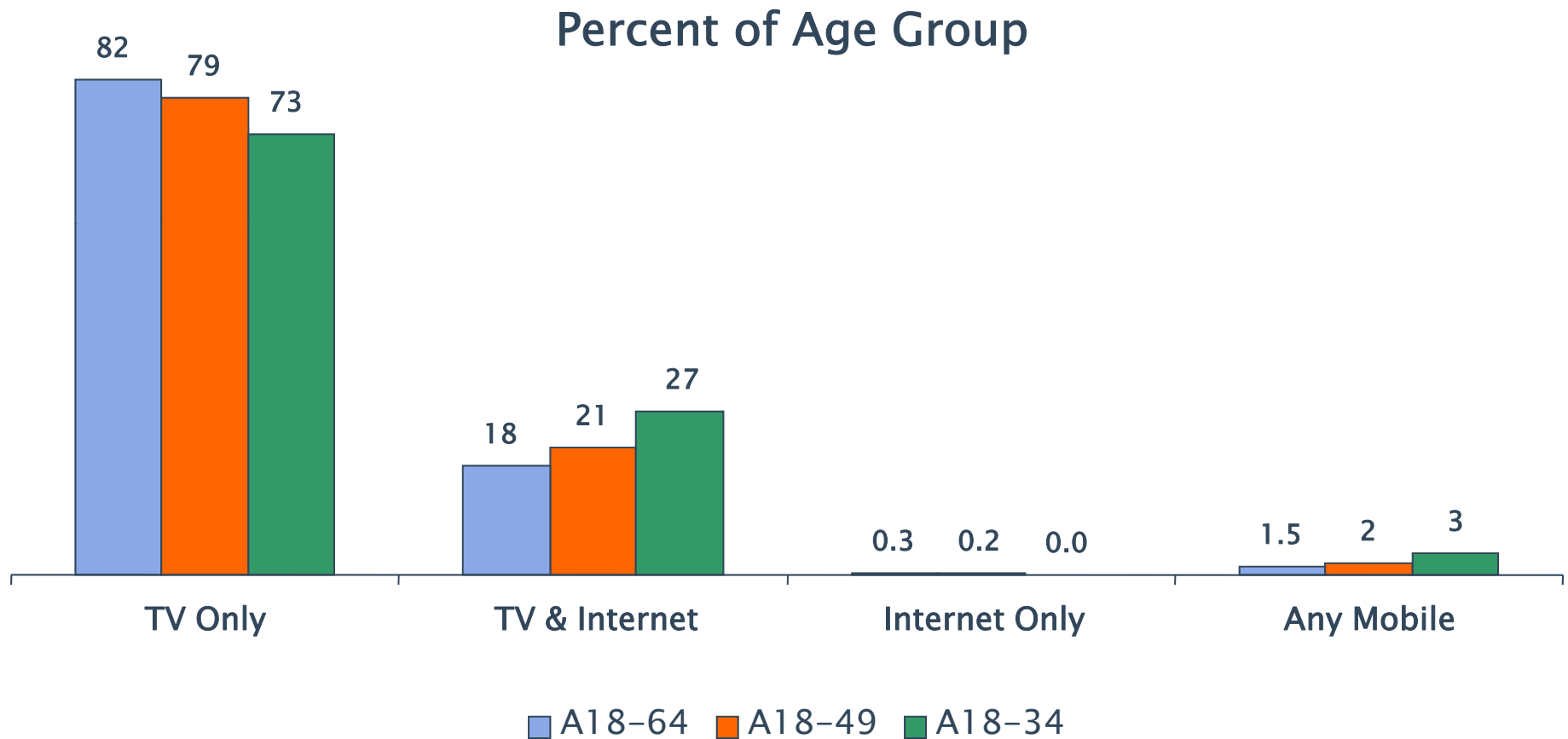
(Index of TV Ratings)



Source: Arbitron cross-platform panel. Based on 2,596 in tab (12 of 17 days in tab) A18+ panelists w/ broadband in 30 mks. 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)

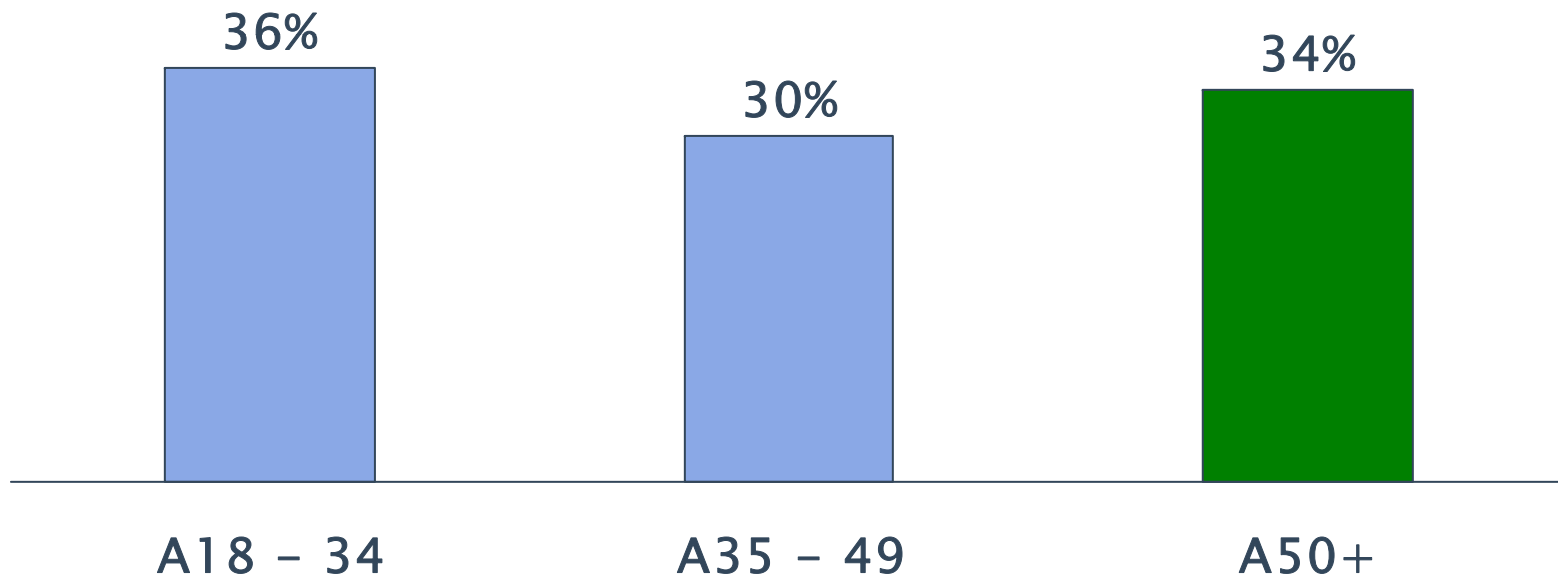
Internet and Multi-Platform Use is Becoming Mainstream



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

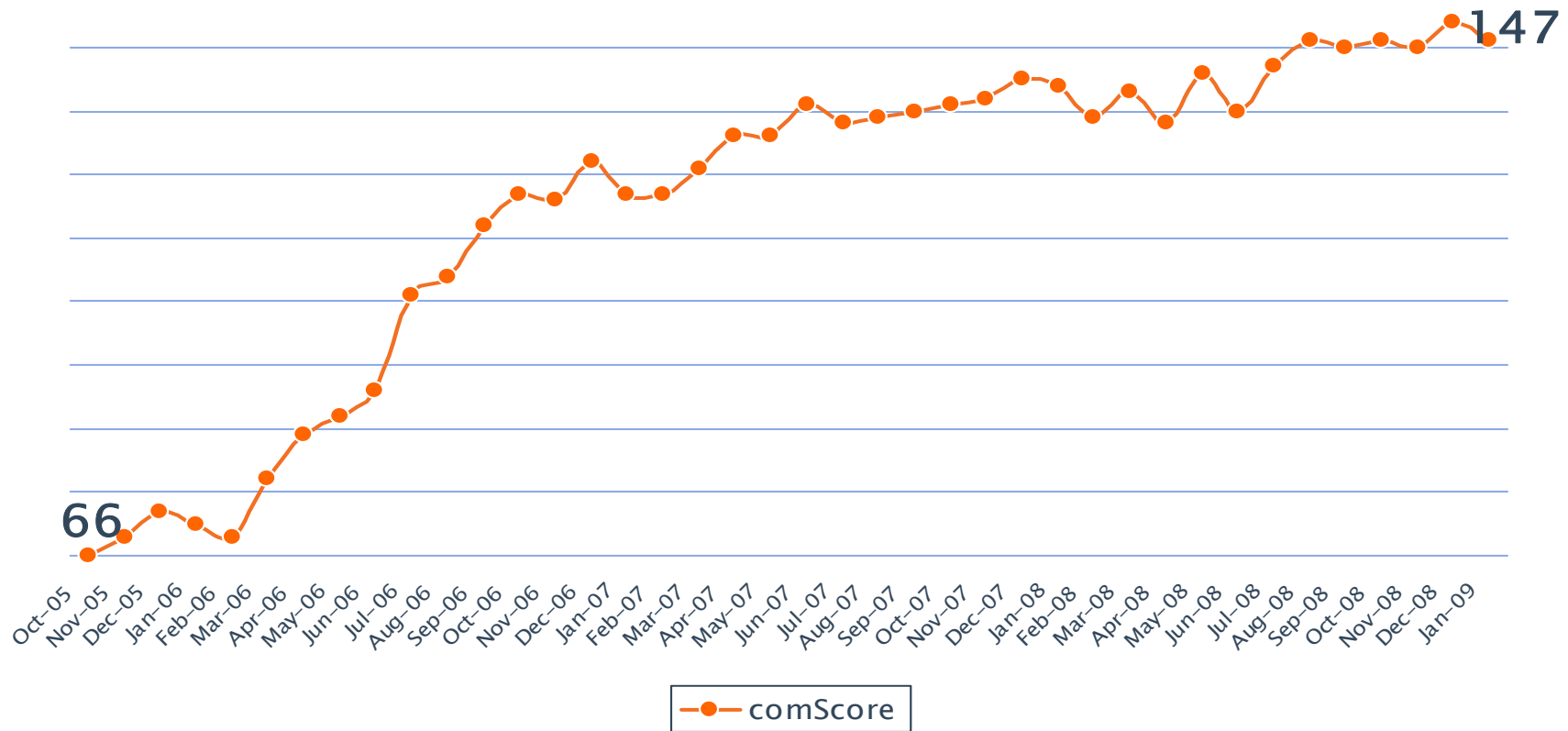
Simultaneous Users during Olympics



Source: Vancouver Olympics; Arbitron cross-platform panel of Adults with Broadband in 30 major markets Febr 2010; use TV and Internet at same time

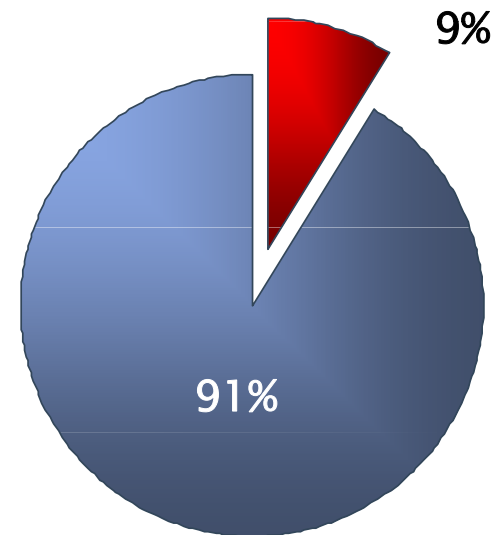
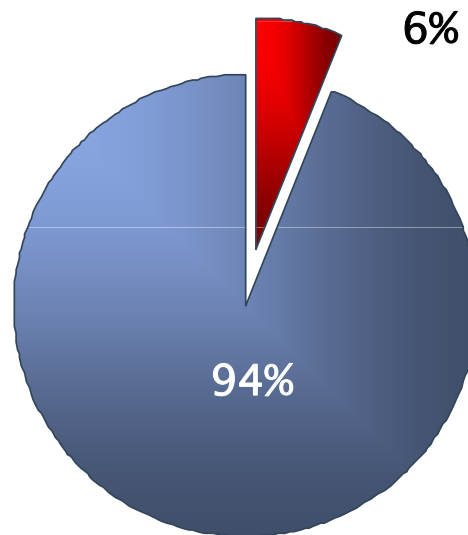
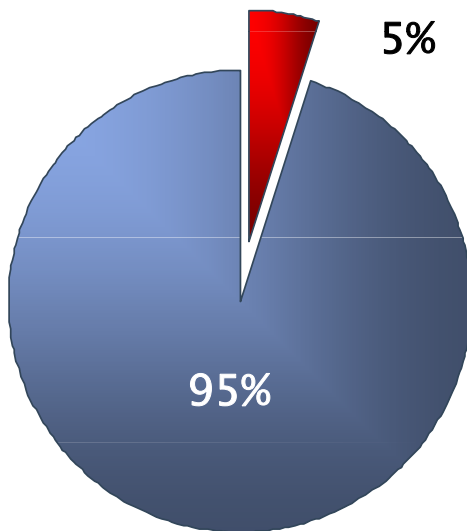
(3) Growth of Online Video

Unique Viewers (in millions)



Source: comScore VideoMetrix

Impact on Online Viewing on Primetime Shows

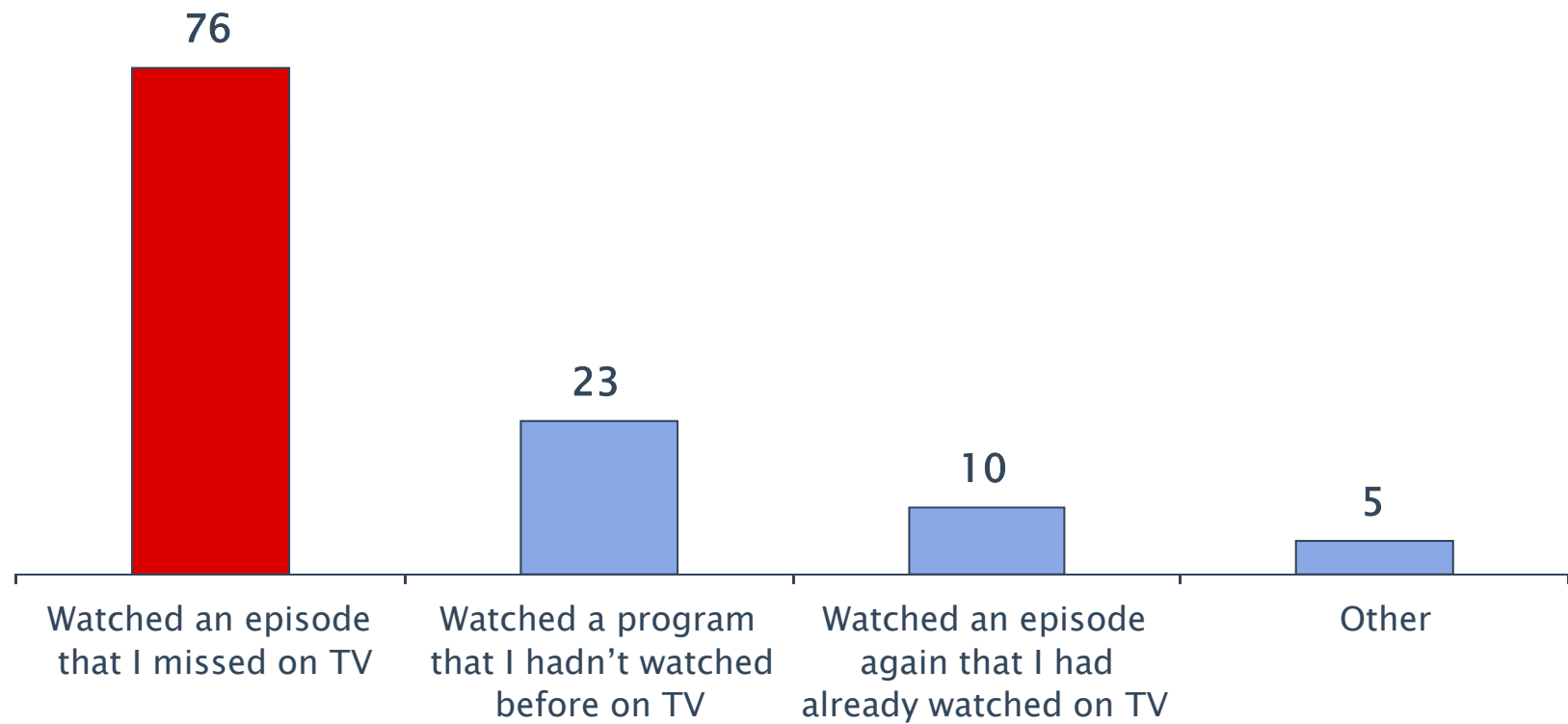


% Online Viewing

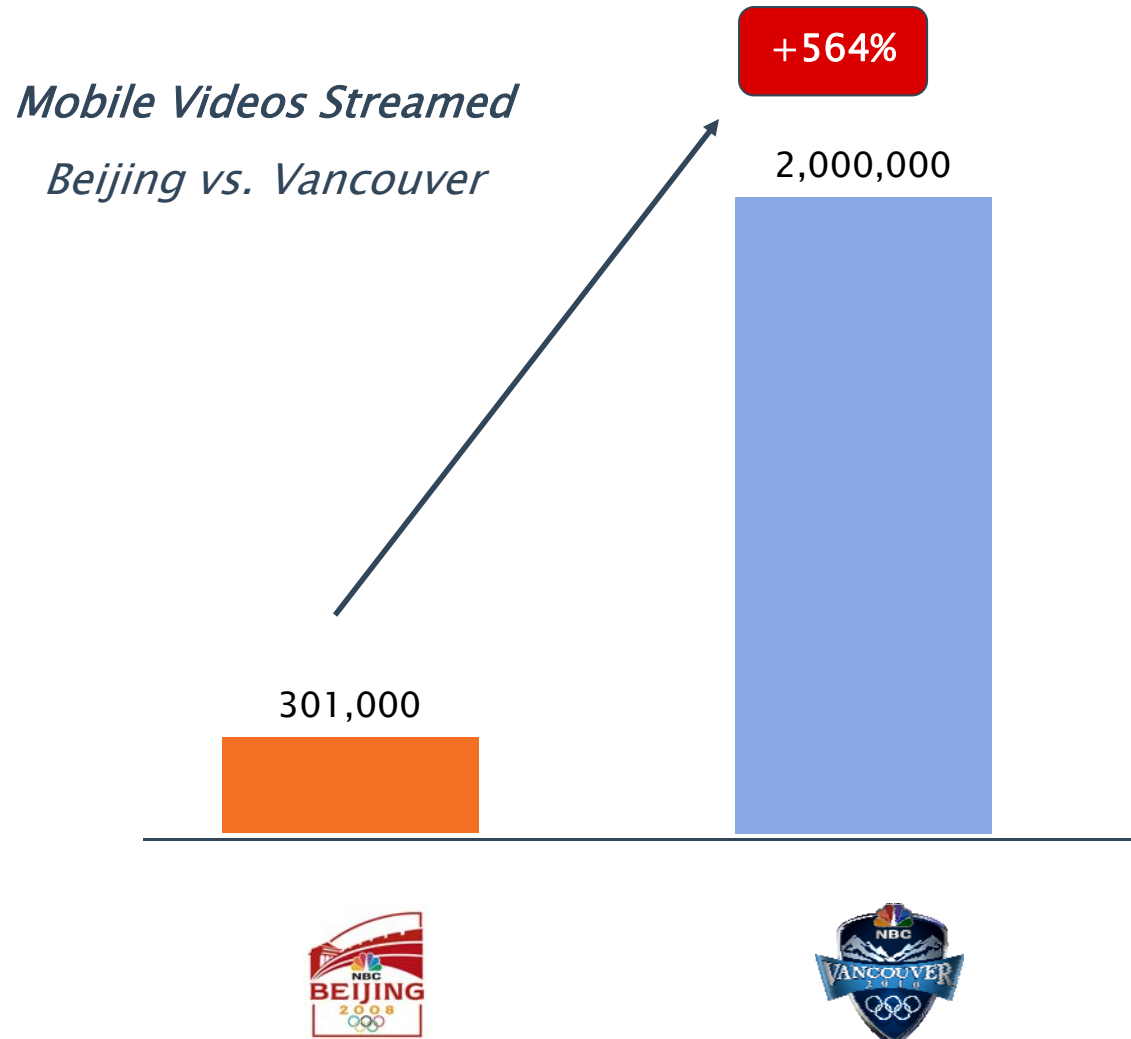
Online= NBC.com and Hulu

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

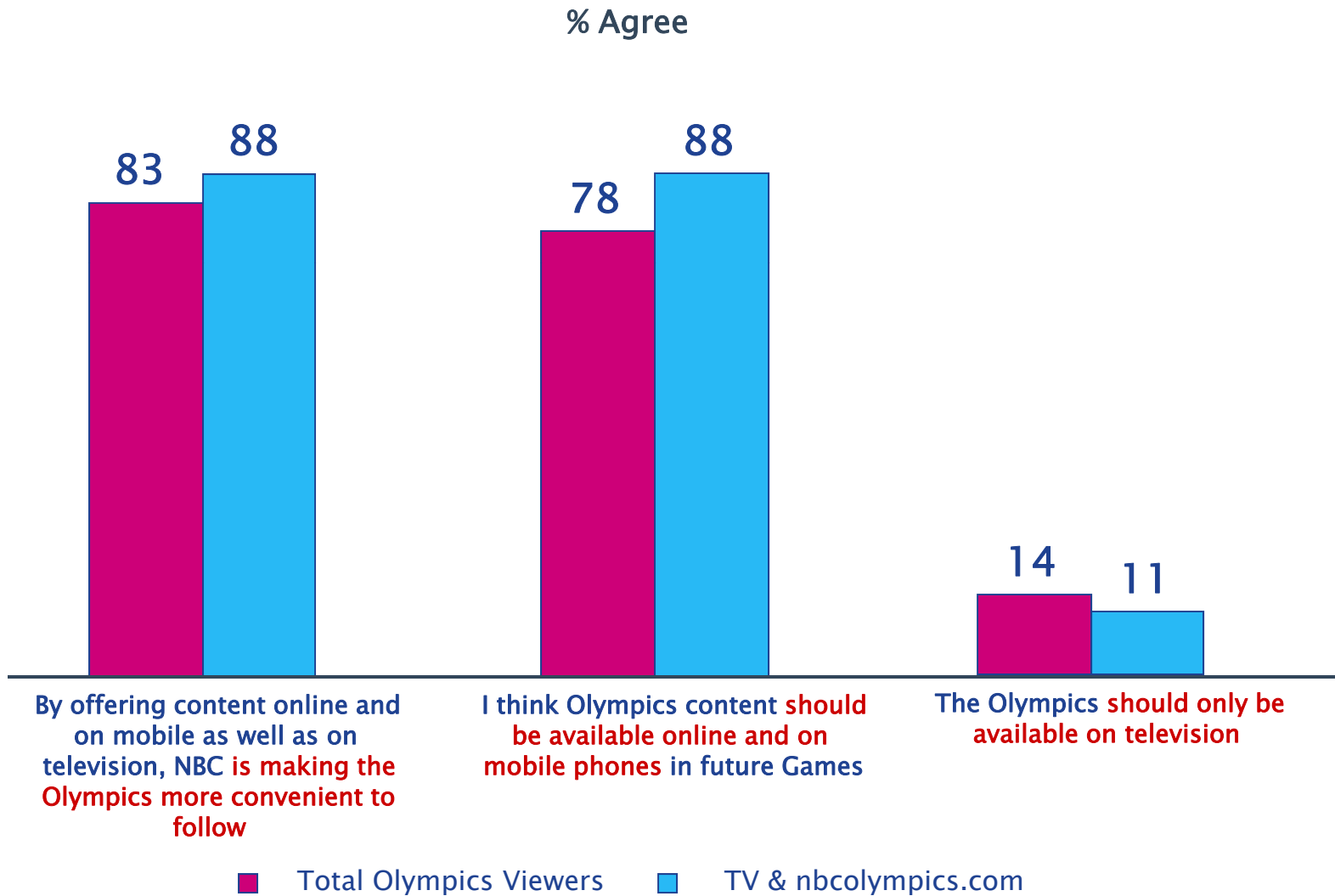
Reasons for Watching TV Shows Online



(4) Mobile Video is Starting to Take Off



(5) Consumers expect Multi-Platform Content

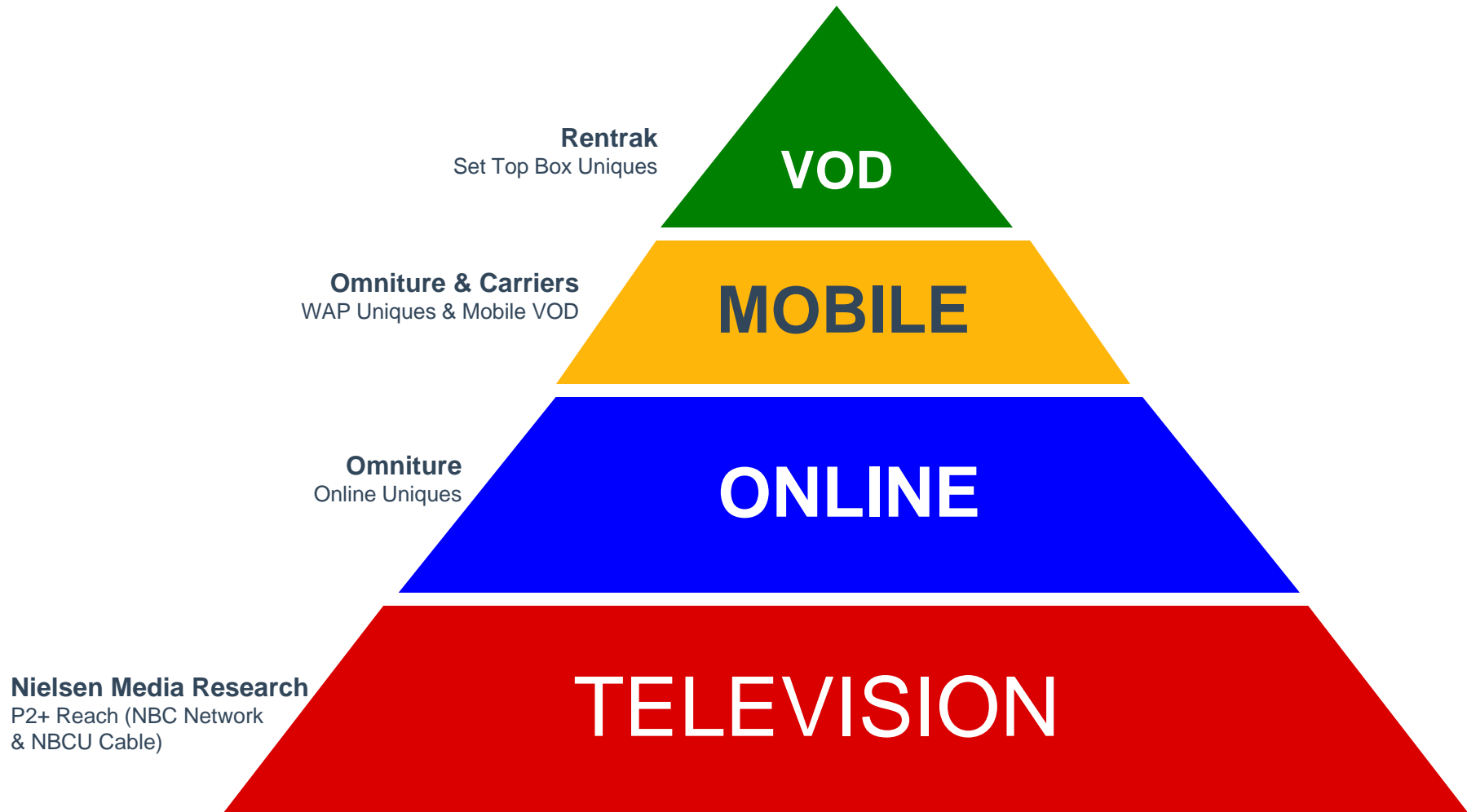


Measuring Multi-Platform Media Use:

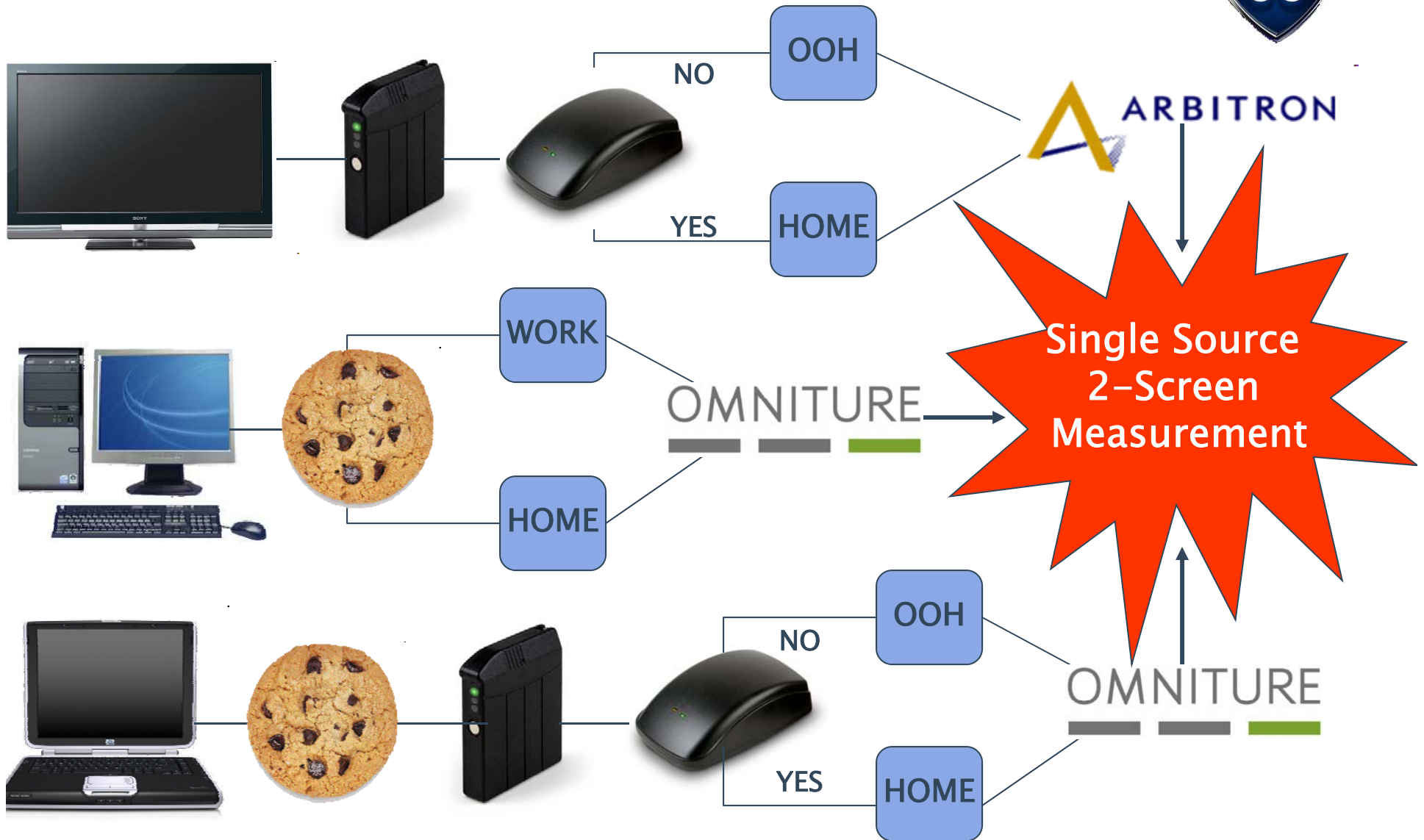
*If We Can't Measure It,
We Can't Sell It*



TAMi Cross-Platform Measurement



Single Source Cross-Platform Measure during Vancouver

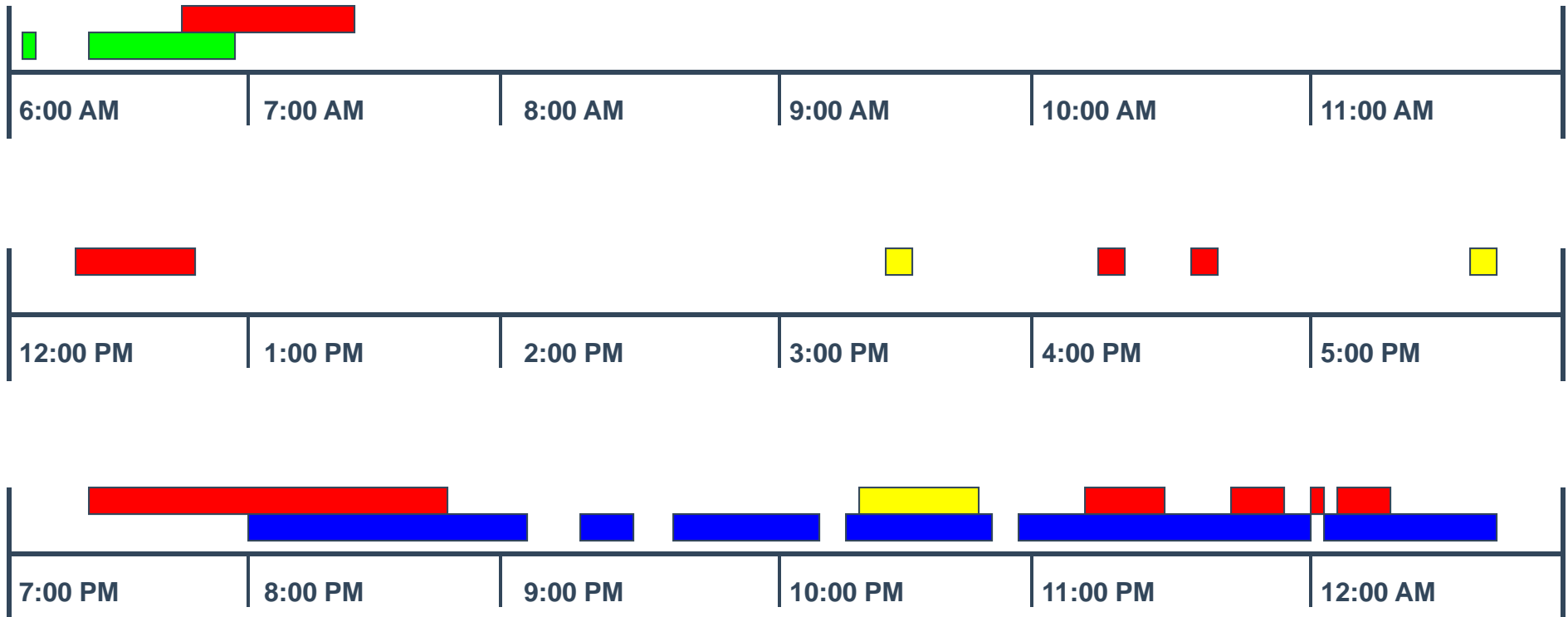


A Day In The Olympic Media Life (Beijing):

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



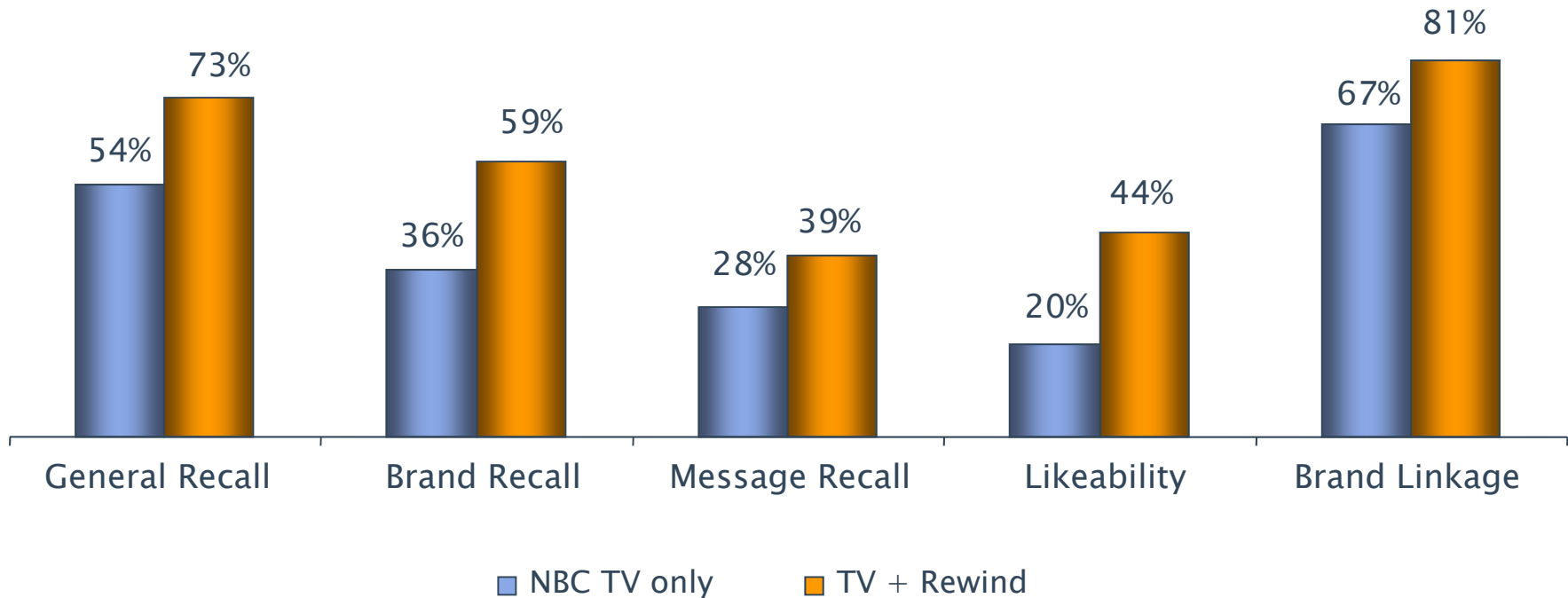
- NBC TV Network
- nbcolympics.com
- nbcolympics.com - Mobile
- USA Network



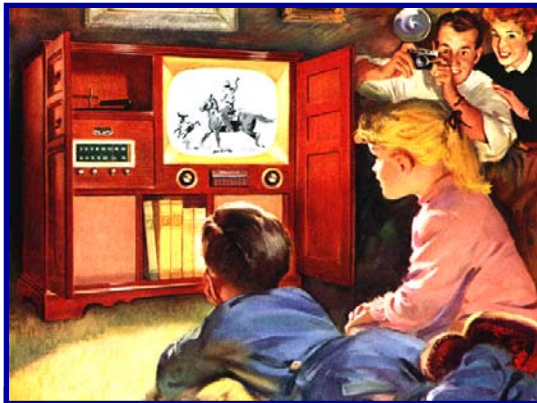
Source: NBC Research/iMMi, 2008; data summary

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

