

Oct 31

European TV Symposium



The Billion Dollar Research Lab

Eight Lessons We Learned from Beijing

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November 2008



The Billion Dollar Research Lab

- Deep Content Distribution Across All Platforms
 - 3600 Hours of Video
 - 2300 Hours OnLine Streaming Video
 - Television Platforms
 - Broadcast Network
 - 4 Cable Networks
 - Internet
 - Website with Videostreaming
 - Mobile
 - WAP
 - Video Clips

- Huge Scale of Consumer Use

- Across 17 Days

The Making of a Cultural Phenomenon

The most viewed event in
U.S. Television history

215,000,000

The Making of a Cultural Phenomenon

- **Television: 16.4 HH**

- **Internet**
 - **Unique Visitors: 52 MM**
 - **Page Views: 1.3 Billion**
 - **Videostreams: 10 million hours**

- **Mobile**
 - **Unique Visitors: 6.5 MM**
 - **Page Views: 35 MM**

The Making of a Cultural Phenomenon

- **76%** stayed up later than usual to watch the Olympics.

- **48%** *“changed my routine because of Olympics.”*

- **32%** said Olympic viewing delayed:
 - Running errands
 - Paying bills
 - Doing laundry

#1

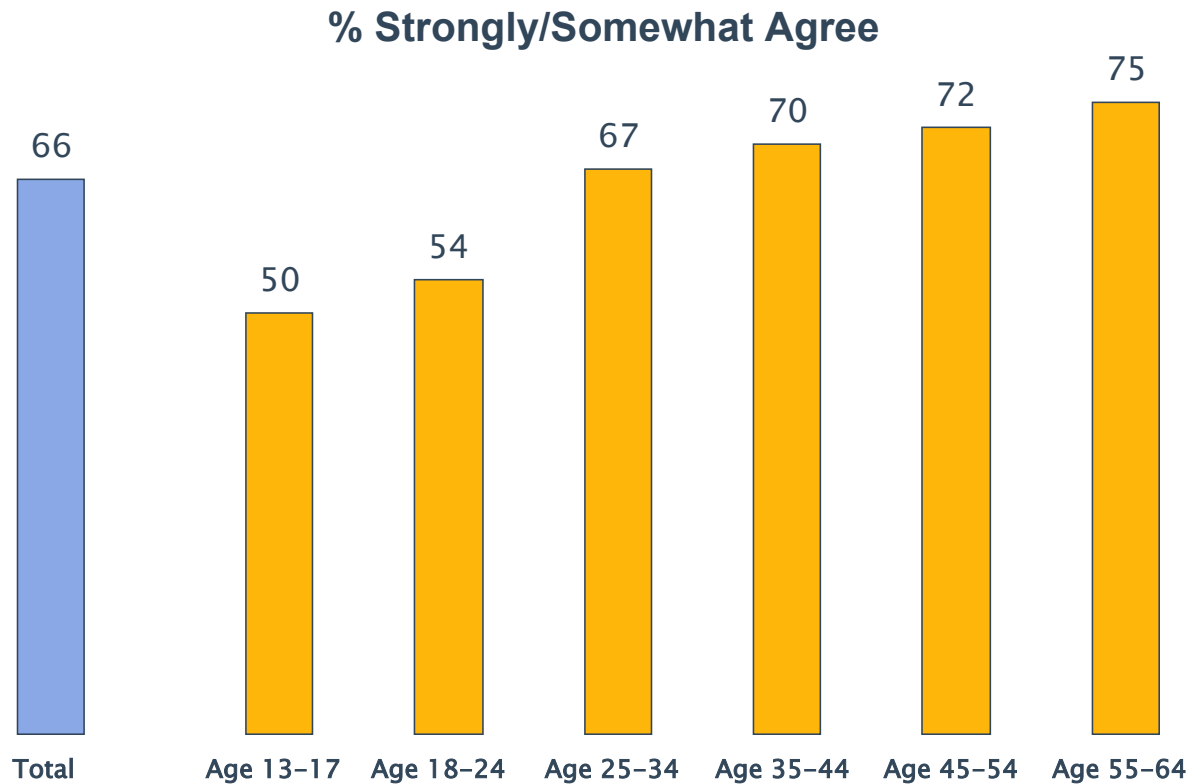
Television is ^{still} King

Television is ^{still} King

- **90%** of Olympics consumed *on TV*
- NBC Network accounted for **93% of all TV viewing**
- **82%** agree “*I like Olympics available online and on mobile but prefer to watch it on television*”
- **93%** agree “*Watching the Olympics in HDTV adds to my enjoyment of the games*”

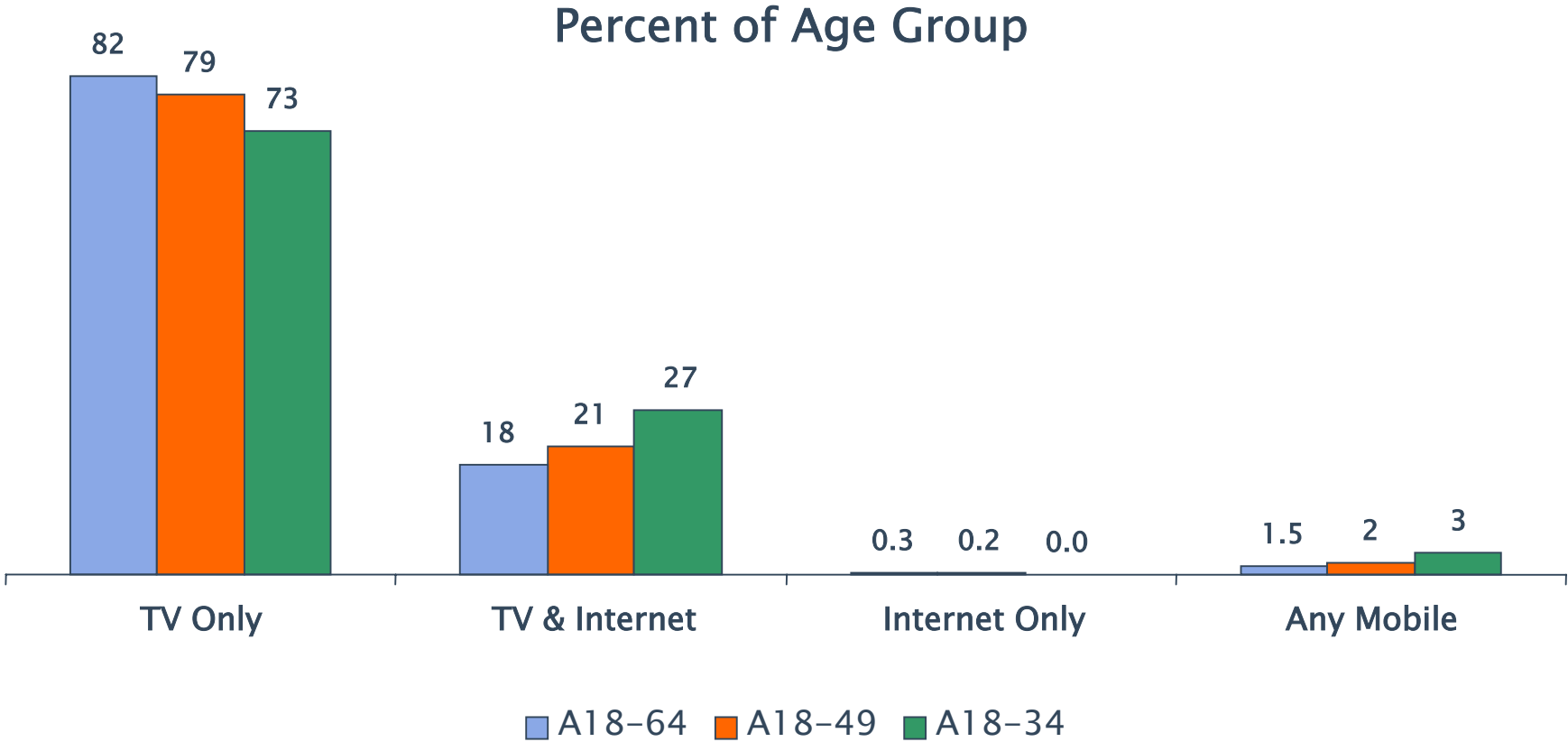
Default to Best Viewing Experience

“If I had a choice, I would always prefer to watch a video on my TV versus watching it on my computer or a portable video device”



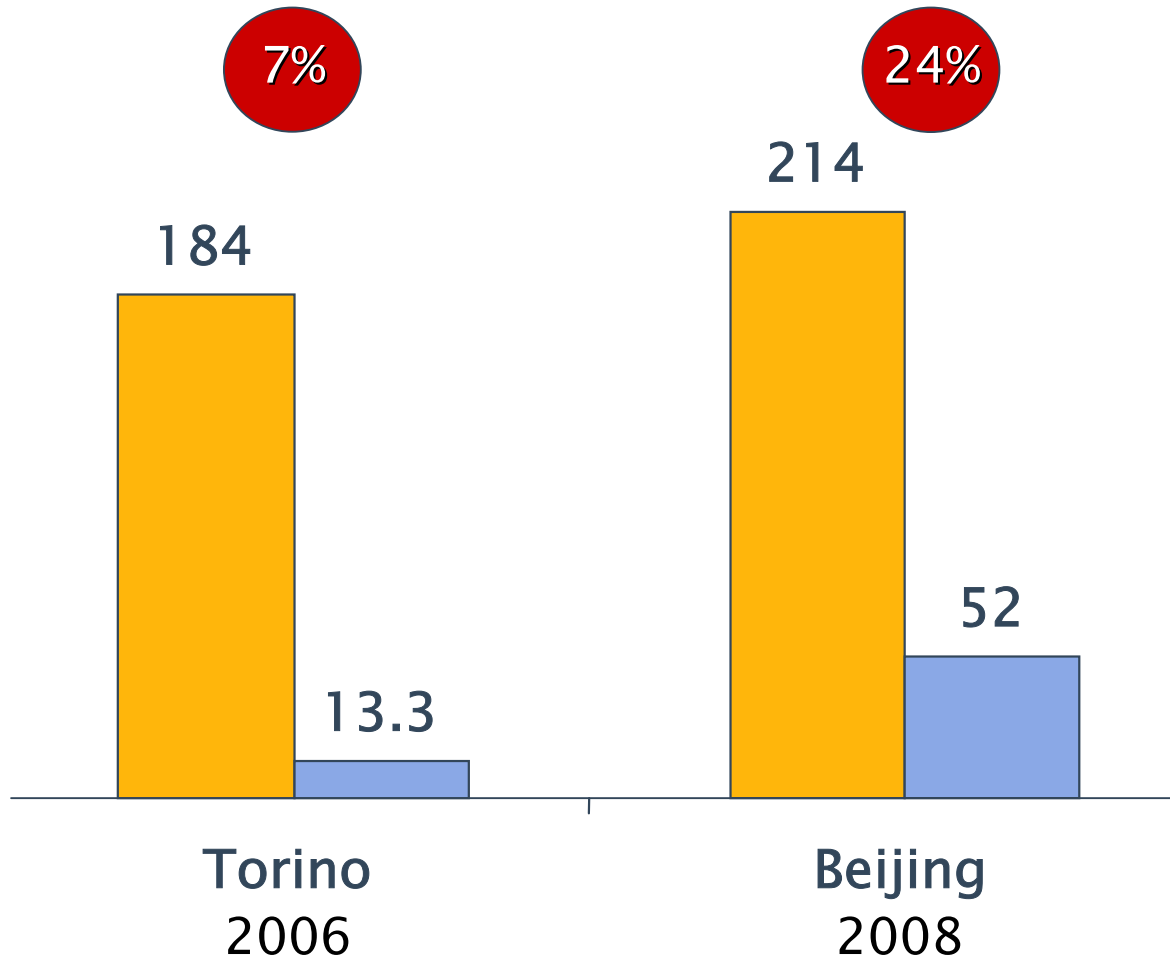
Source: Harris Interactive: How strongly do you agree or disagree with the following statements about videos that you might download or stream off the Internet? Base: U.S. Respondents 13-64; Age 13-17 (n=1,028), Age 18-24 (n=1,924), Age 25-34 (n=2,367), Age 35-44 (n=3,097), Age 45-54 (n=2,831), Age 55-64 (n=1,934) Online survey

Olympic Consumption: Platform Use by Age



Source: Knowledge Networks "Total Touch" study (8/8-8/24). Based on "To Date" cume, Persons who were reached by ANY NBCU Olympics Platform. CD.

Olympic Online Use



2

Digital & TV Viewing

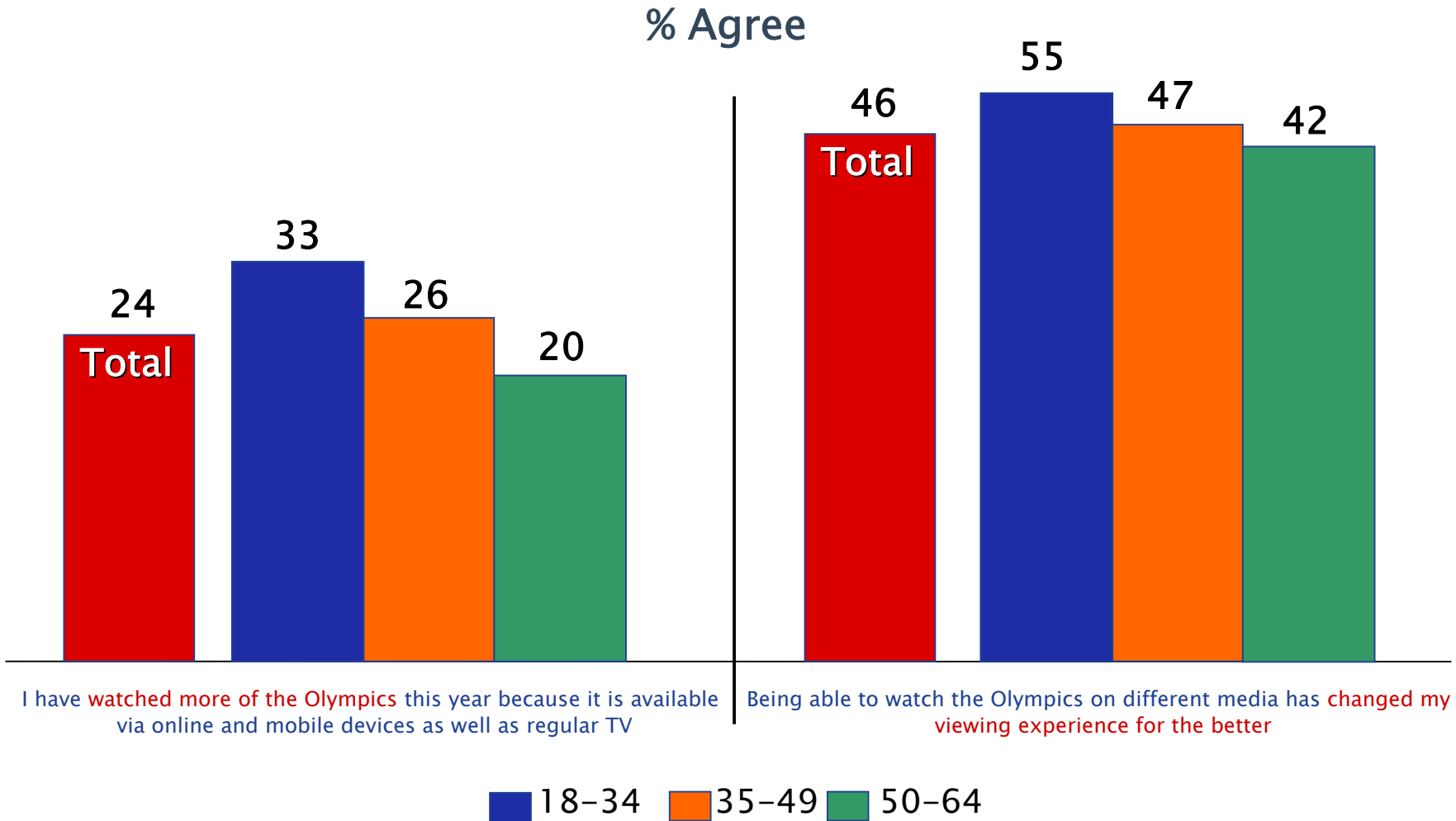
- Complements
- Enhances
- Increases

Interaction of TV and Internet: Olympic TV Viewing

Average Time Spent Watching
Olympics Daily
(Self-Reported)

TV Only	TV and Internet
3:26	6:57

Impact of Multi-Platform Use on Olympic Viewing

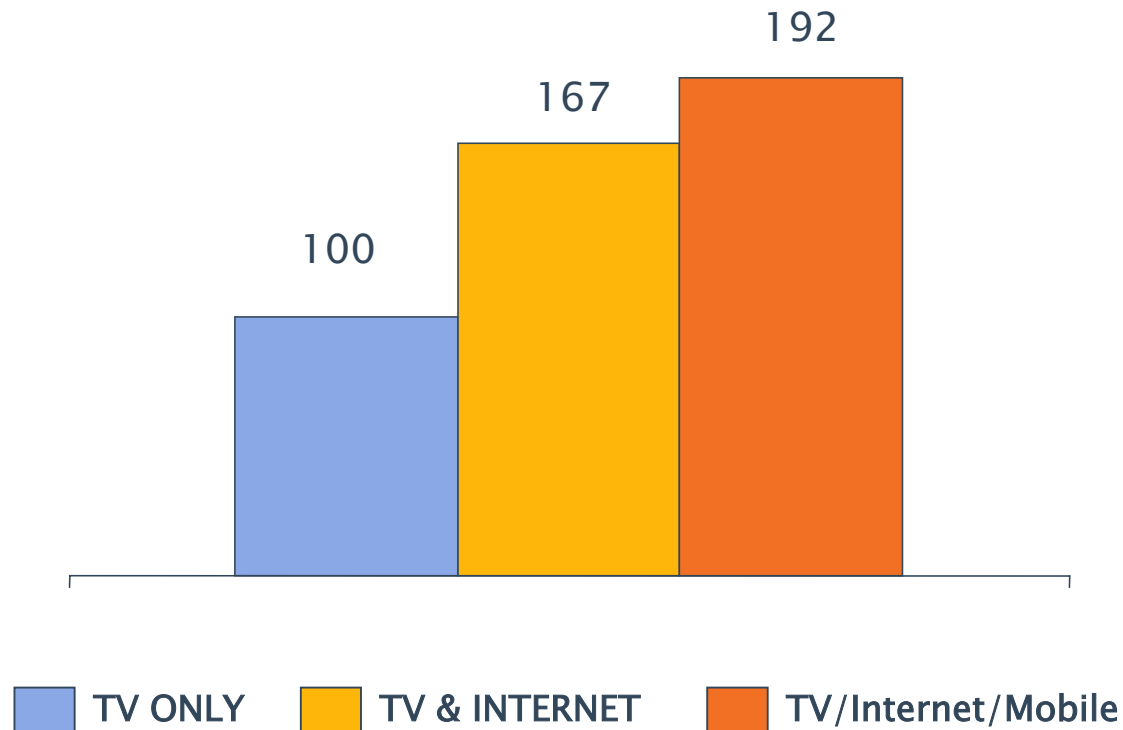


TV & Web: Complementary Platforms

- Two-thirds of all Olympic site visitors used TV and website **simultaneously** at least once
- **10%** reported “regular” simultaneous use of TV and web
- **43%** learned about website from TV

More Cross-Platform Use Drives More TV Viewing

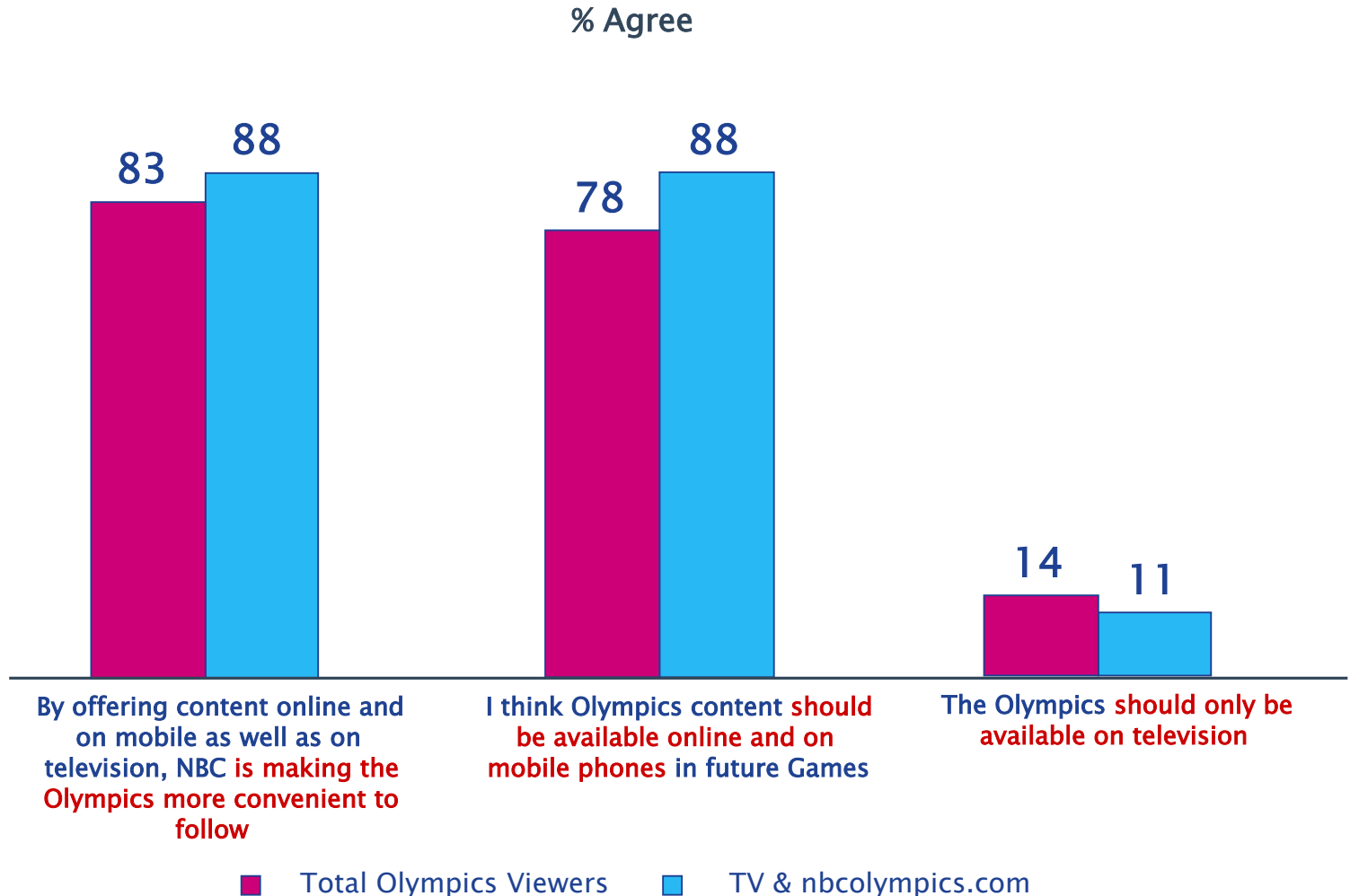
AVG Time Spent On TV Throughout Olympics
(Indexed to “TV Only” Viewing)



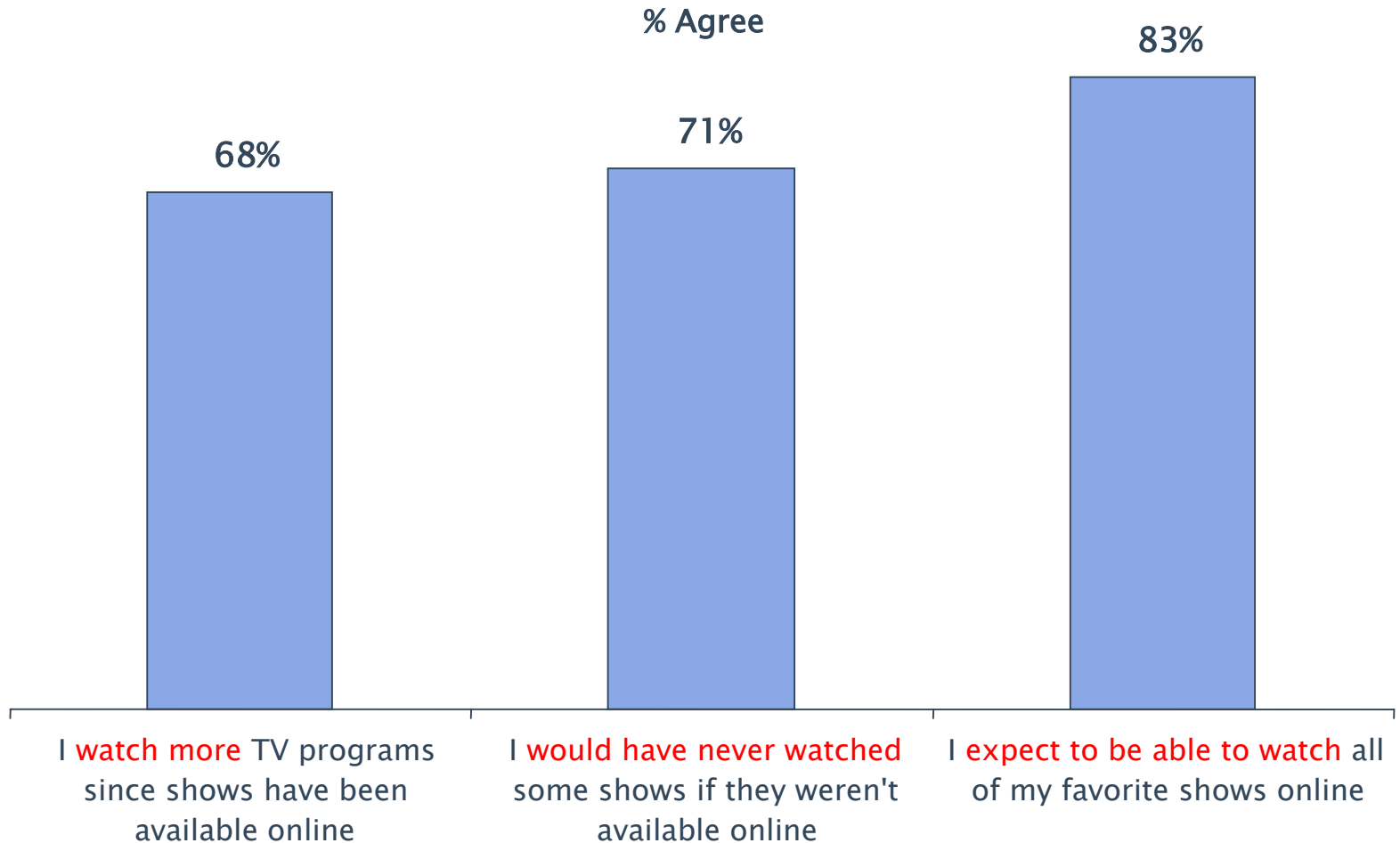
#3

Consumer *Expects*
Multi-Platform Content

The Consumer Expects Multi-Platform Content



Cross-Platform Expectations: Non-Olympic



Source: NBC Rewind Study Q2'08

Q: How much do you agree or disagree with the following statements? Agree completely/somewhat

#4

Internet Primarily An
Informational Medium...

And a Video Enhancement...

But *not* a TV
Replacement

Why Use Online Website?

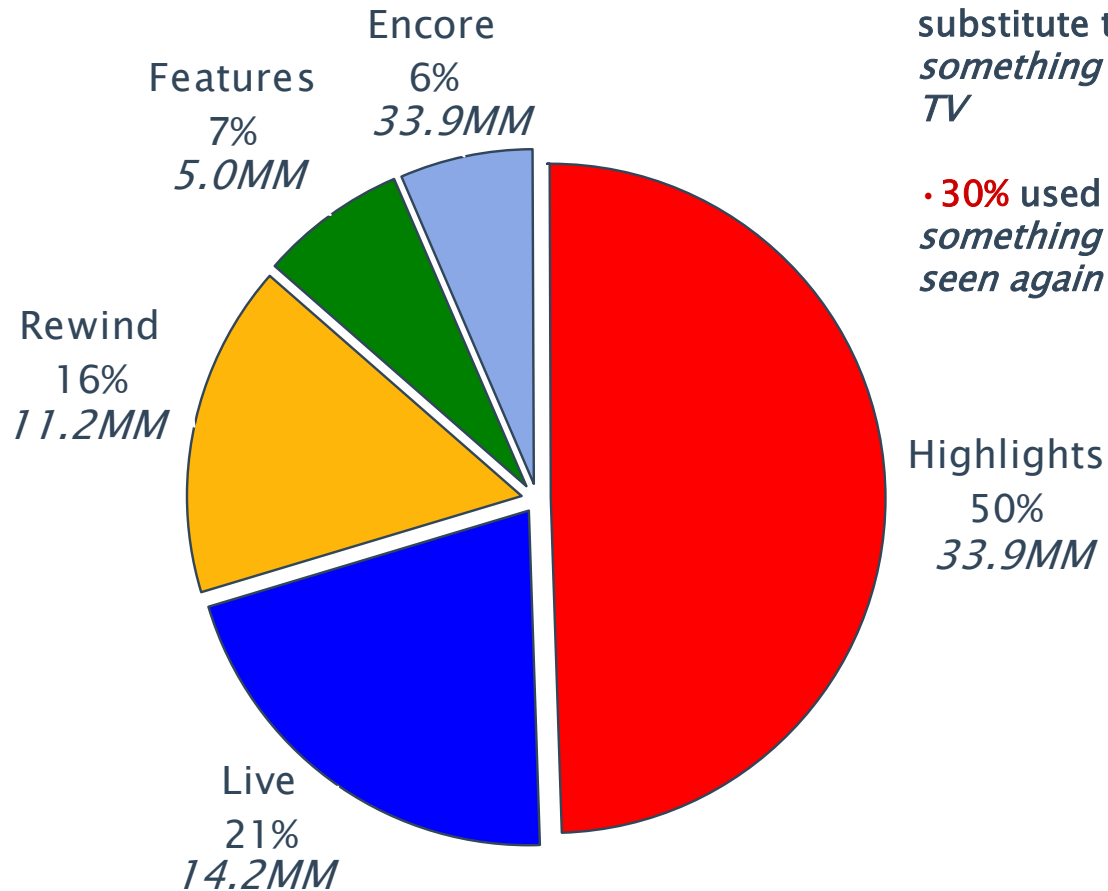
- Primary reason for visit
 - Learn facts about athletes, sports
 - Check results
 - Information about competition schedules

- Some felt too difficult to find things online vs. just watching TV

- Website Content Accessed
 - 94% Photos/Display (1.225 B)
 - 6% Video (75.5 MM)

Website: Video Streams

Views



• **43%** used it as DVR substitute to “watch something they missed” on TV

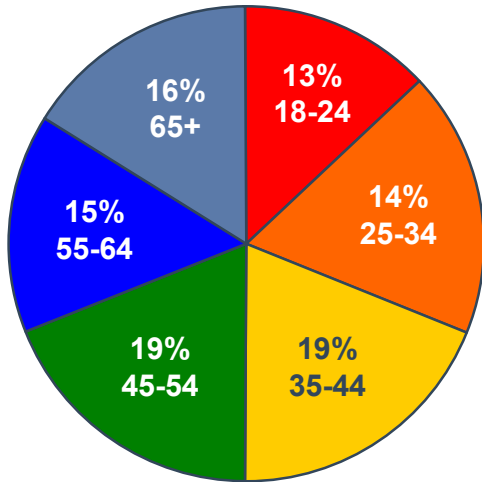
• **30%** used it to “watch something they’d already seen again”

#5

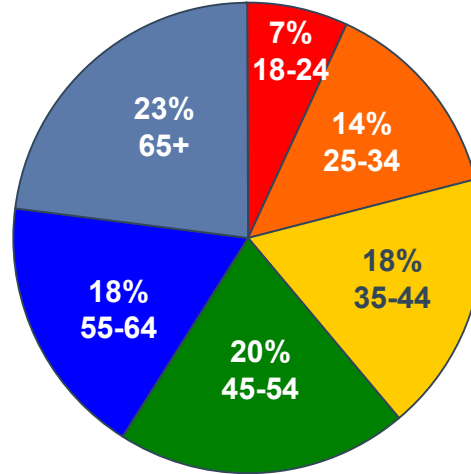
Never Underestimate
the Importance of a
Great User Experience

Internet is Mainstream

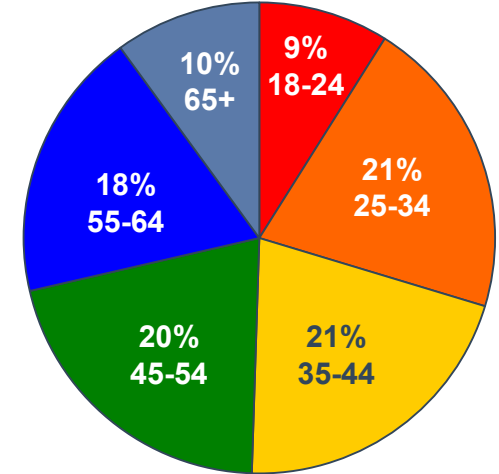
Total Population



TV Prime



Online



User Experience Critical to Site Use

- Video adoption and repeat site visitation depended on quality of viewer experience
- Minimize barriers to entry
 - Widgets
 - Site features
- Importance of ease of navigation can't be overstated
 - Some reported not knowing what was available on the site including video
 - Accurate/Effective Titling
- For average user, *“less is more”*

6

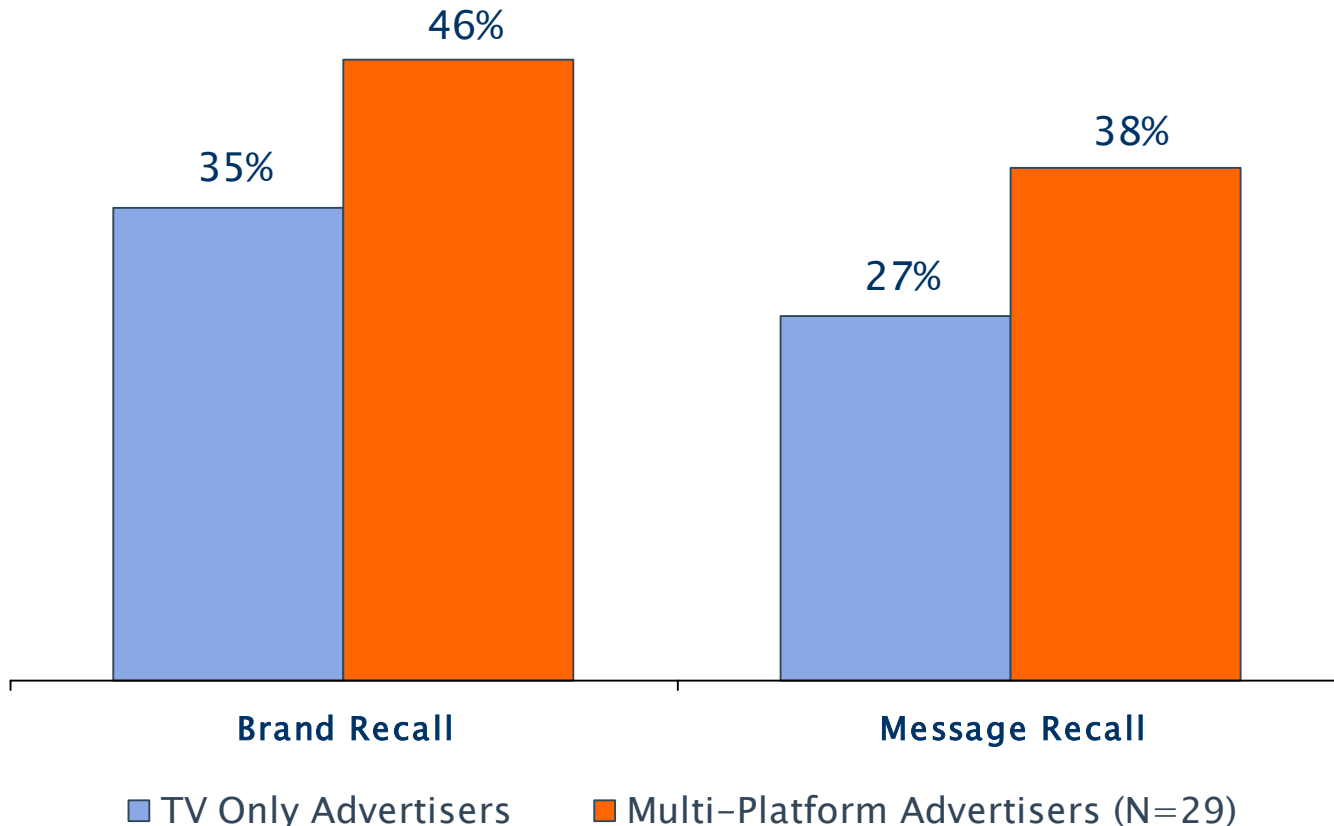
Cross-Platform Advertising *really* Works

Positive Interaction of Olympic TV + Digital Advertising Platforms

Multi-Platform Adv.

+31%

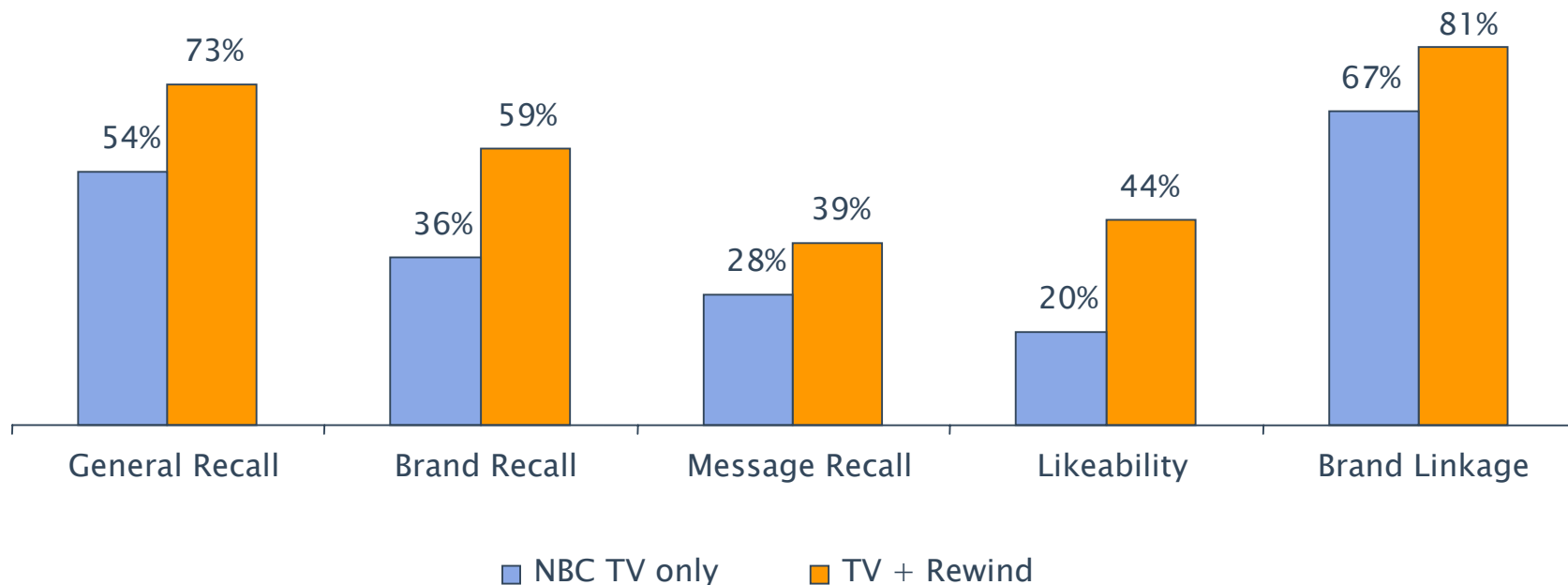
+41%



Source: Nielsen IAG; A18-49; Prime Olympic data = 8/8/08-8/24/08. Multi-platform advertisers: Acuvue, AT&T, Band-Aid, Bank of America, Blackberry, Budweiser, Coca-Cola, DirecTV, ExxonMobil, GE, GM, Chevrolet, Hilton, Home Depot, J&J, Klondike, Lenovo, Liberty Mutual, Listerine, McDonalds, Neosporin, Neutrogena, Nike, Nissan, Target, Tylenol, United Airlines, Visa, Zyrtec.

Cross Platform Effectiveness: NBC Rewind and TV Network

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; **indicates low sample, use with caution

#7

**Link Commercial
Creative to Program
Theme/Content**

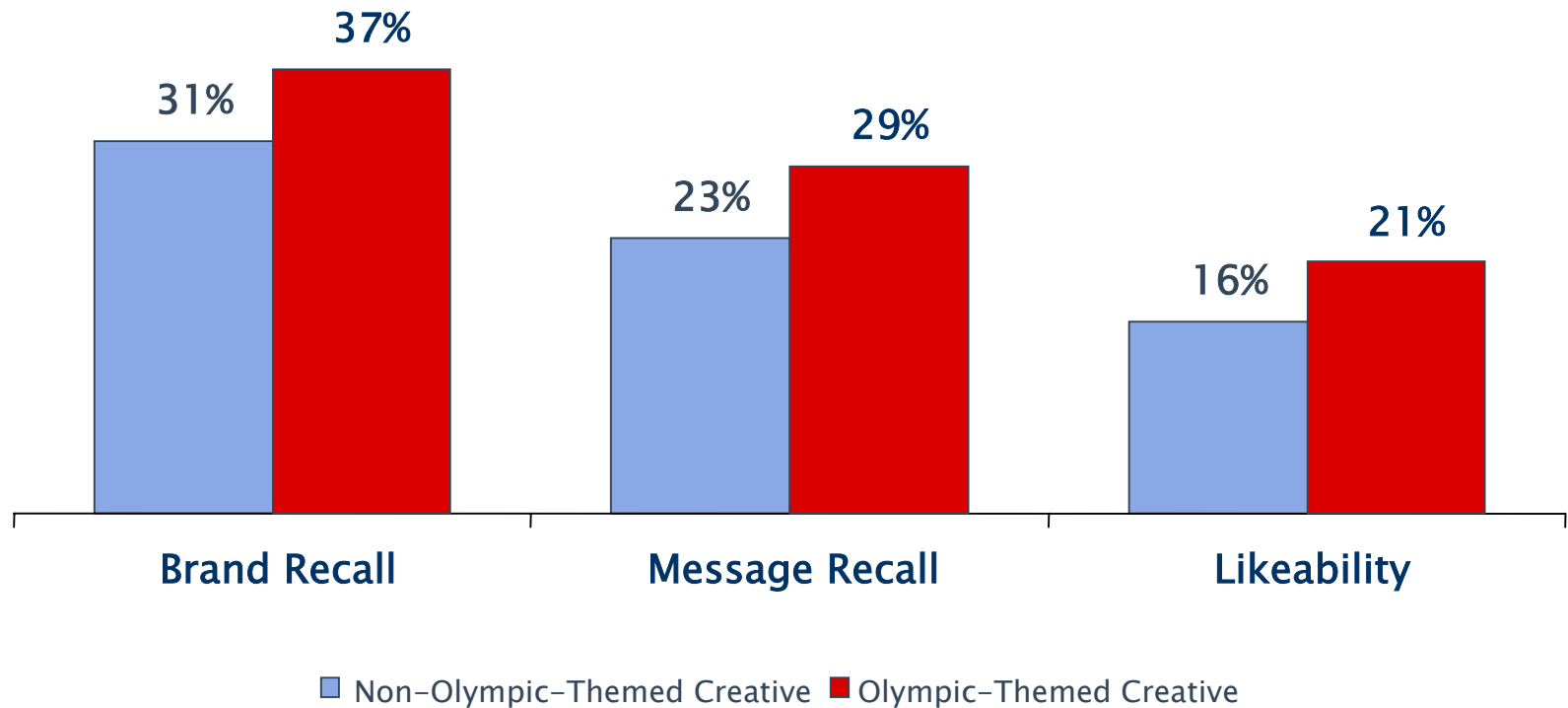
Effect of Thematic Creative

Olympic-Themed Adv.

+19%

+26%

+31%



#8

Produce Commercials in HDTV

Impact of HDTV

- **35%** of Olympic viewers watched the Games in HDTV
- **82%** HD viewers agree *“Companies that bring HDTV to Olympics broadcasts have a commitment to quality and excellence”*
 - **58%** among non-HDTV viewers
- **74%** HD viewers agree *“Olympics sponsors who show ads in HD are industry leaders”*
 - **44%** among non-HDTV viewers

*“ If You Can’t Measure It
You Can’t Sell It“*

The Development of a
Single-Source Metric

Single-Source Measure: *iMMi* Methodology

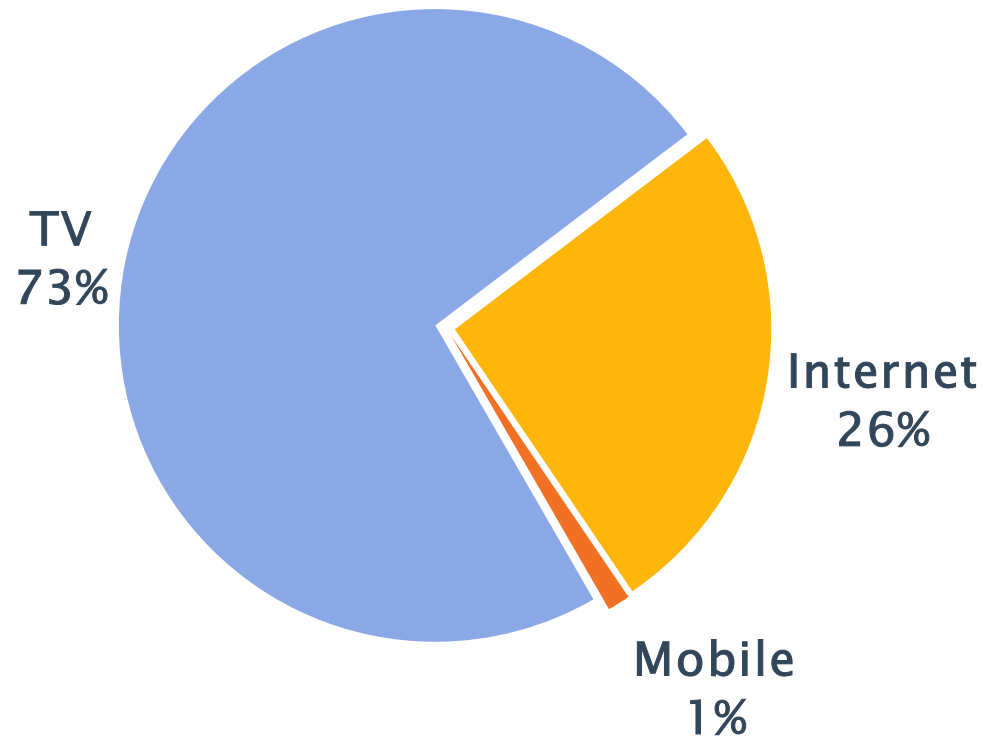
- Panelists
 - 39 equipped with cell phone
 - 6 Markets
 - “Olympic Fans” and “Tech-Forward”

- Television
 - Continuous, passive measurement of Olympics viewing
 - In-home and Out of Home

- Internet – *nbcolympics.com*
 - Home and Work
 - Video
 - Print pages

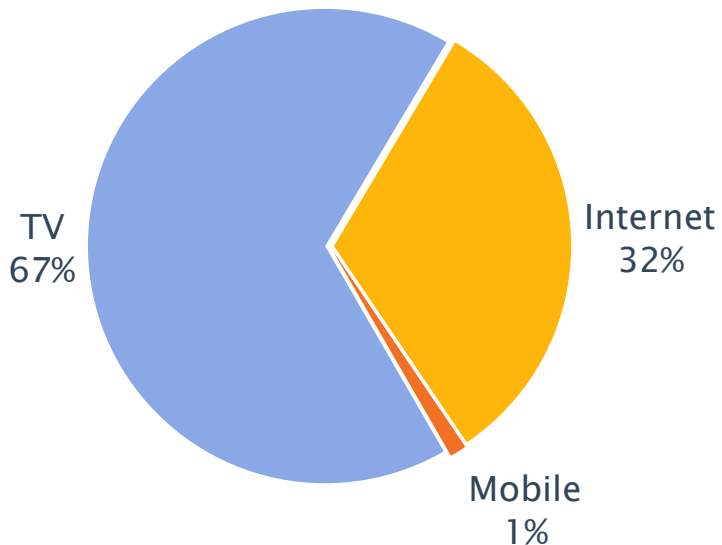
- Mobile
 - Internet Browsing *nbcolympics.com* WAP site
 - Streaming video clips

Share Of Olympic Consumption By Platform: **Total Olympics**

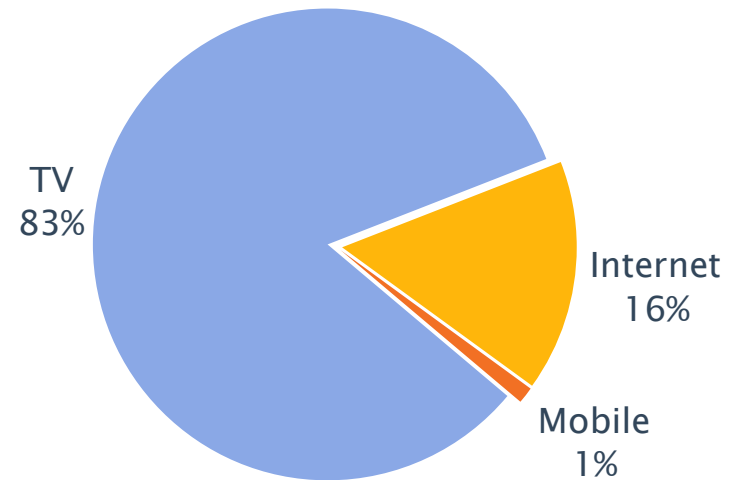


Share Of Olympic Consumption By Platform: **Weekday Vs. Weekend**

Weekday Consumption

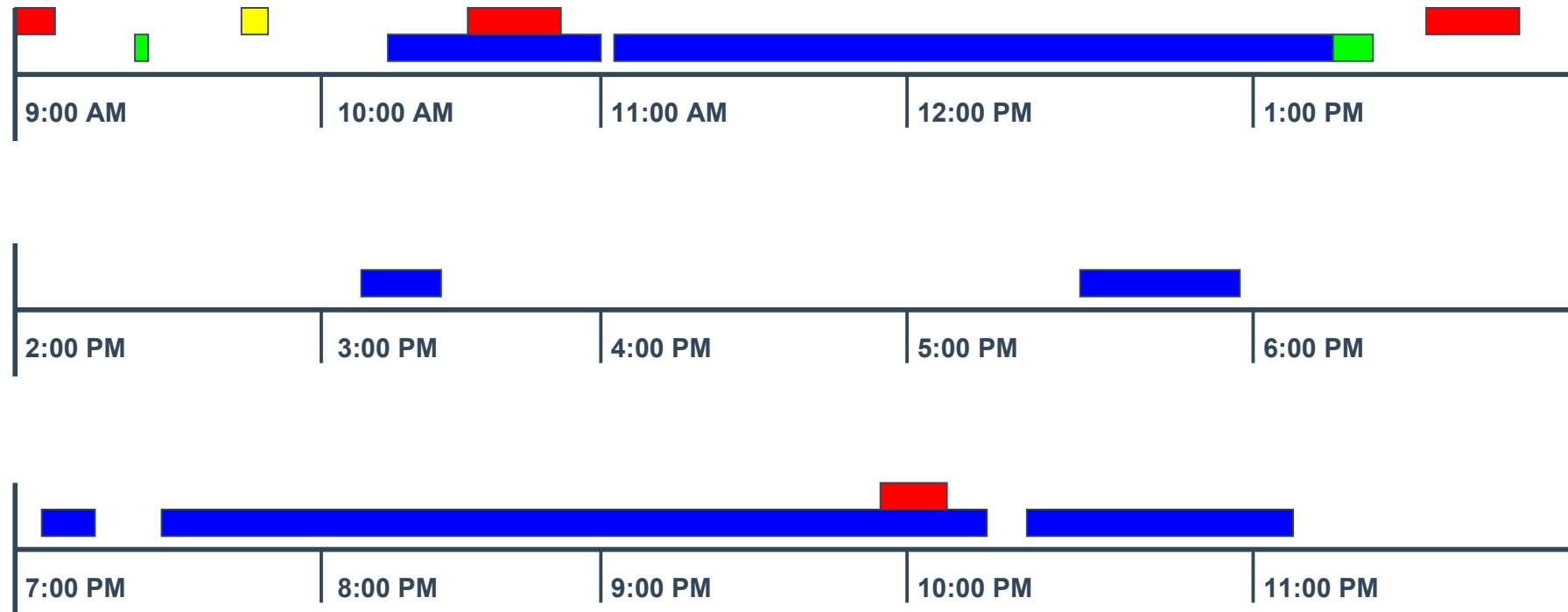
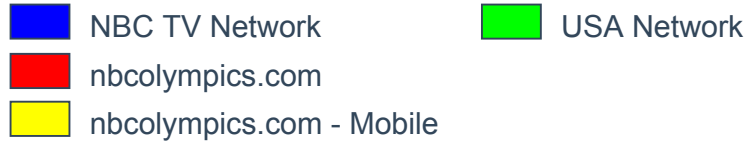


Weekend Consumption



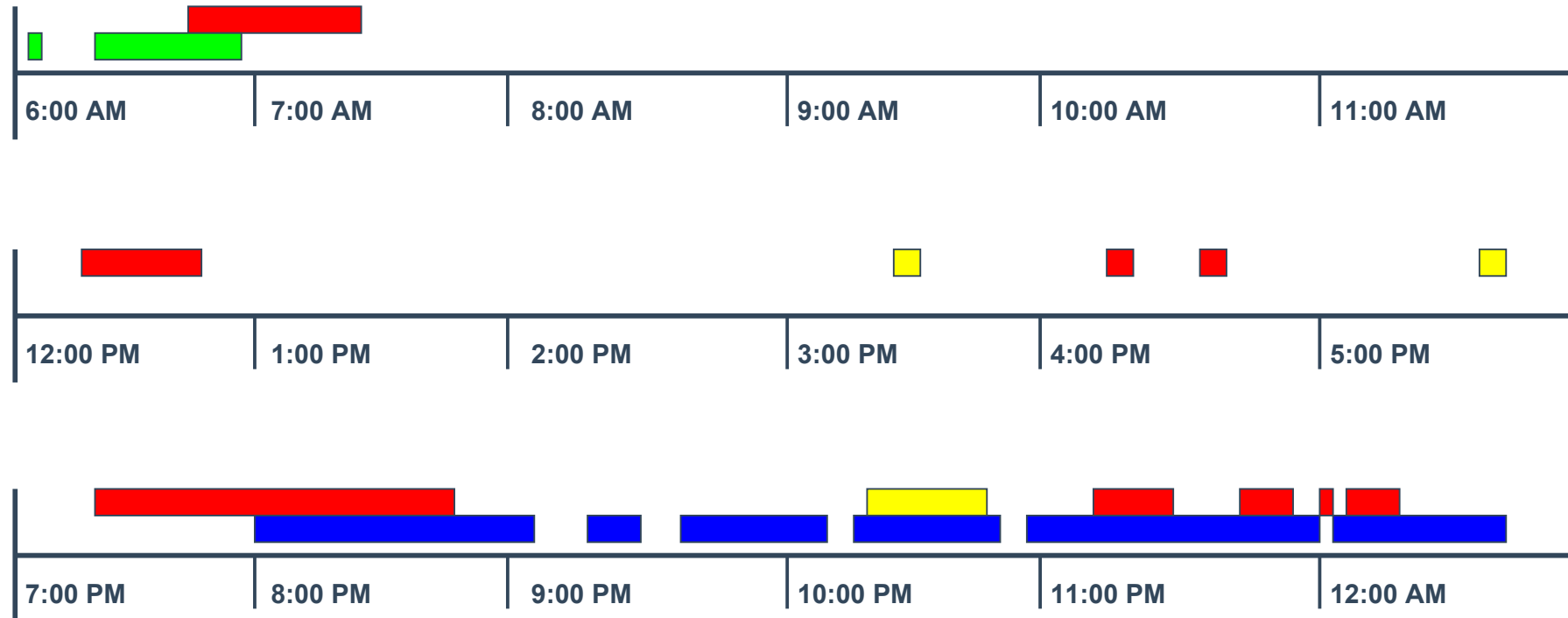
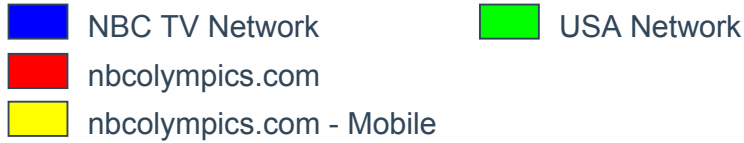
A Day In The Olympic Media Life:

Miami Female, 23 Years Old - Sunday 8/10/08



A Day In The Olympic Media Life:

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

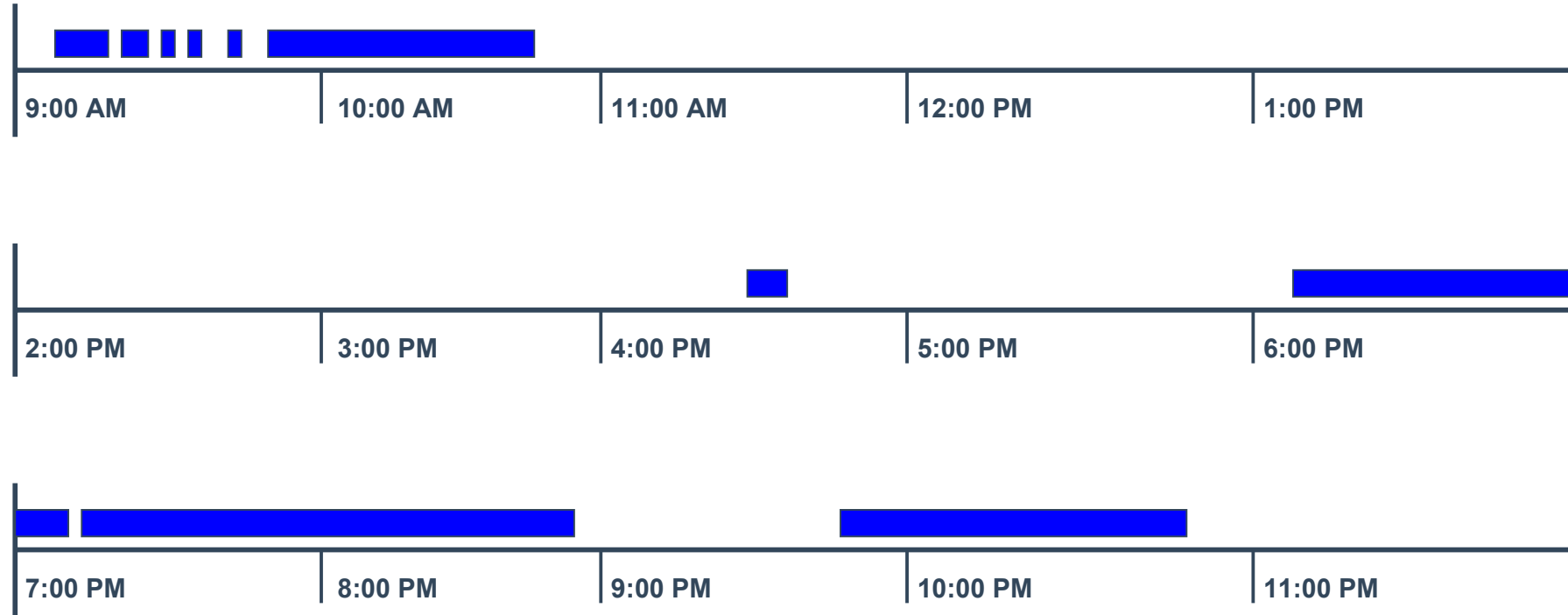


A Day In The Olympic Media Life:

Chicago Male, 33 Years Old – Sunday 8/10/08

 NBC TV Network

 nbcolympics.com

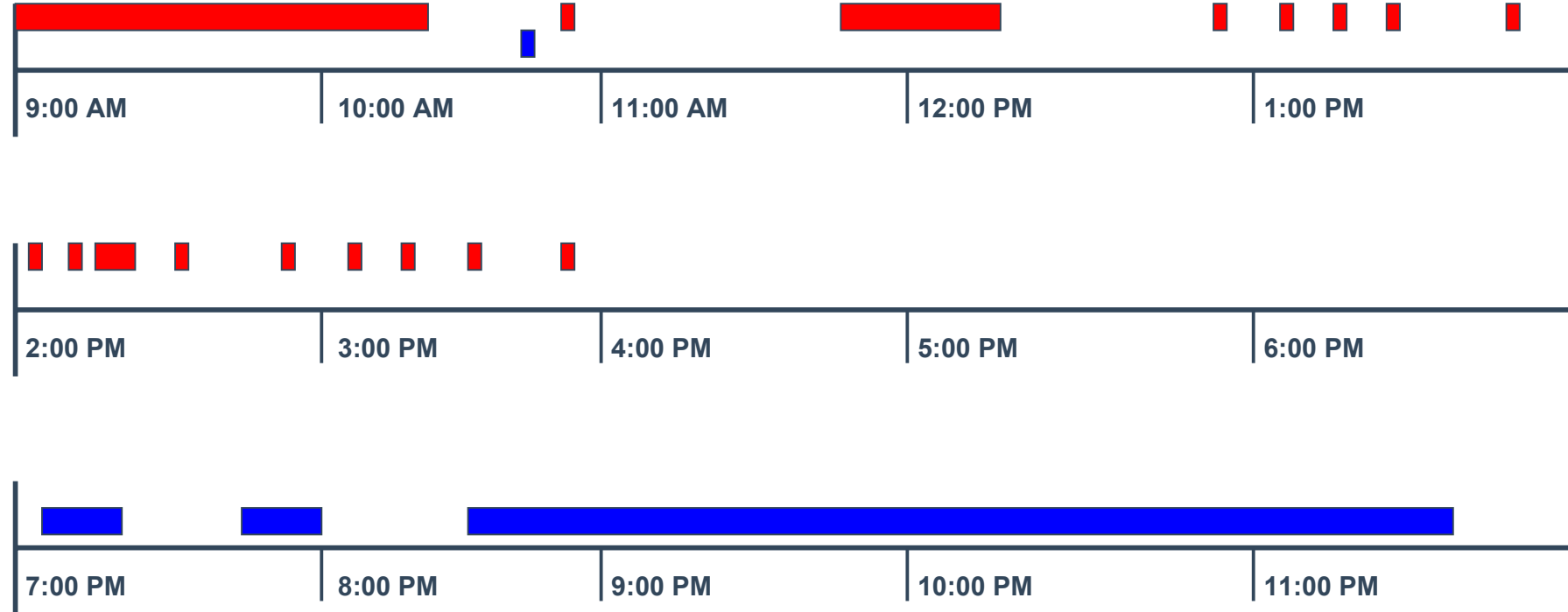


A Day In The Olympic Media Life:

Chicago Male, 33 Years Old – Monday 8/11/08

 NBC TV Network

 nbcolympics.com



TAM*i*

TAM_i : Total Audience Measure Index

- Total *Exposures* to an Episode (or Day)
- *Contribution* of Each Individual Platform
- *Trending* Over Time

TAMi Platforms



Rentrak / Omniture / Carrier Direct
VOD, mobile & total downloads to episode

VMD

NBC.com / Hulu.com / NBC Direct
Total episode streams

**INTERNET
STREAMING
VIDEO**

Nielsen Live + TSV
P2+ TA Impressions (NBC)
P2+ AA Impressions
(NBCU Cable)

TELEVISION

TAMi: Measuring Total Exposure to Olympics

	Fri 8/8	Sat 8/9	Sun 8/10	Mon 8/11	Tue 8/12
TAMi	74,612,793	97,799,246	113,059,496	103,172,593	105,080,259
TV VOD (uniques)	42,255	67,533	85,930	124,411	116,273
Mobile (WAP uniques and Mobile VOD uniques)	210,336	424,980	494,522	476,079	471,650
Online (uniques)	4,216,202	4,831,733	5,116,044	7,807,103	7,723,336
Television (P2+ reach)	70,144,000	92,475,000	107,363,000	94,765,000	96,769,000
	Wed 8/13	Thu 8/14	Fri 8/15	Sat 8/16	Sun 8/17
TAMi	101,011,152	101,600,151	95,124,049	107,981,917	107,369,890
TV VOD (uniques)	125,411	119,987	138,737	118,983	134,402
Mobile (WAP uniques and Mobile VOD uniques)	485,764	507,901	583,884	667,887	506,488
Online (uniques)	7,351,977	7,352,263	7,938,428	5,558,047	4,806,000
Television (P2+ reach)	93,048,000	93,620,000	86,463,000	101,637,000	101,923,000

TAMi: Heroes

Exposures by Episode

						Season-to-date Running Total
TOTAL	33,758,405	19,705,824	18,182,453	16,022,480	14,322,577	101,991,739
VOD/Mobile/Downloads	148,671	71,959	62,279	52,332	27,168	362,409
Internet Streaming Video	9,081,734	4,752,865	4,540,174	3,818,148	2,839,409	25,032,330
Television	24,528,000	14,881,000	13,580,000	12,152,000	11,456,000	76,597,000
Episode	1/2*	3	4	5	6	
Episode Title	The Second Coming/ Butterfly Effect	One Of Us, One Of Them	I Am Become Death	Angels And Monsters	Dying Of The Light	
NBC Original Air Date	09/22/08	09/29/08	10/06/08	10/13/08	10/20/08	
	* Two-hour telecast + Broadcast replay					

Please note that all platforms experience data delivery lags. For example, earlier episodes have 2-7 day time-shifted data and are available longer on alternative platforms and therefore, can accumulate more exposures.

Sources:

Television: TV ROCS; NBC broadcast data is based on Nielsen P2+ TA Impressions using Live + TSV (L7: 9/15/08-10/12/08; LS: 10/13/08-10/26/08).

Internet Streaming Video: [1] NBC.com/Omniture: A stream is counted at the beginning of a clip/segment. A single episode is the sum of these clips/segments, typically six for an hour long show. If a user watches all six clips/segments of a given episode, that will generate six streams (STD-10/26/08); [2] Hulu.com data is counted based on a 1 stream to 1 episode relationship and does not count individual chapters (STD through 10/27/08);

[3] NBC Direct: Total # of downloads (STD 10/26/08).

VMD: [1] VOD: Rentrak OnDemand Essentials (9/15/08-10/28/08); [2] Mobile: Starcut (9/22/08-10/01/08); Omniture (10/2/08-10/26/08); [3] Downloads: Carrier Direct (9/15/08-10/27/08).

* qualifications available

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