

Oct 31

European TV Symposium



# The Billion Dollar Research Lab

## Eight Lessons We Learned from Beijing

Alan Wurtzel  
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November 2008



# The Billion Dollar Research Lab

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- 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

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The most viewed event in  
U.S. Television history

**215,000,000**

# The Making of a Cultural Phenomenon

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- **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

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- **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 <sup>still</sup> King

# Television is <sup>still</sup> King

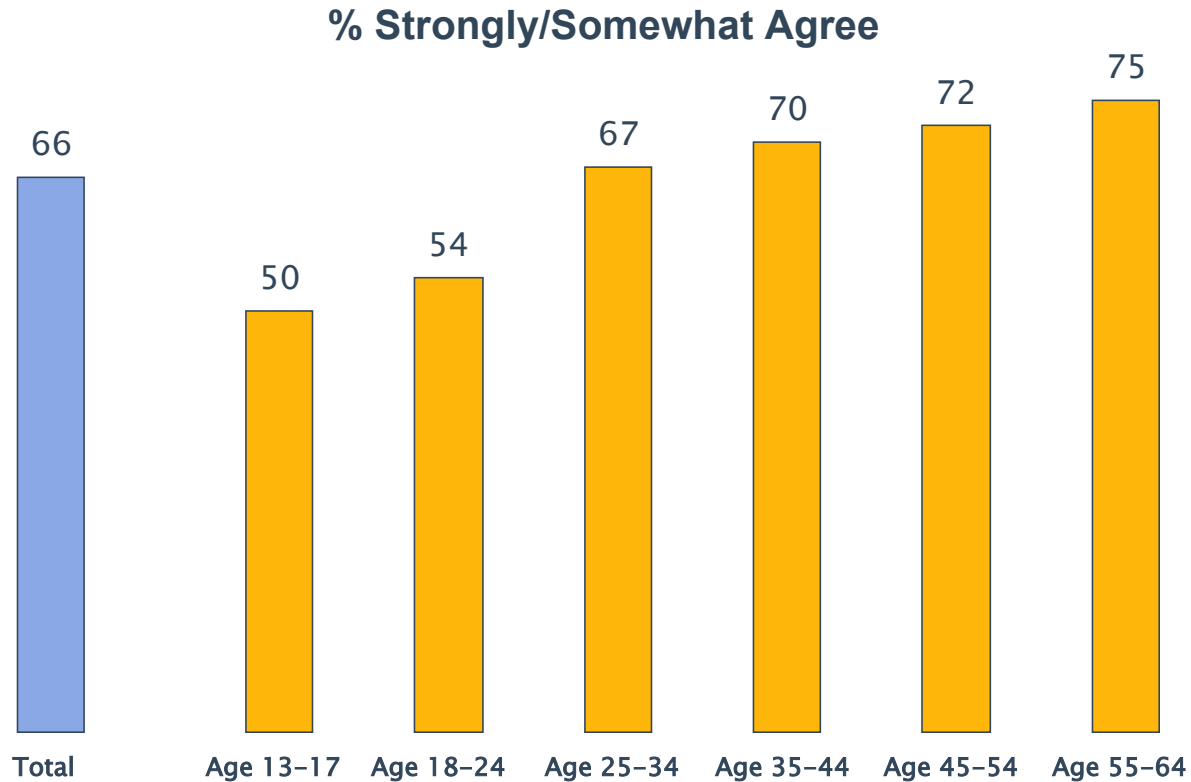
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- **90%** of Olympics consumed *on TV*
- NBC Network accounted for **93% of all TV viewing**
- **82%** agree “*I like Olympics available online and on mobile but prefer to watch it on television*”
- **93%** agree “*Watching the Olympics in HDTV adds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



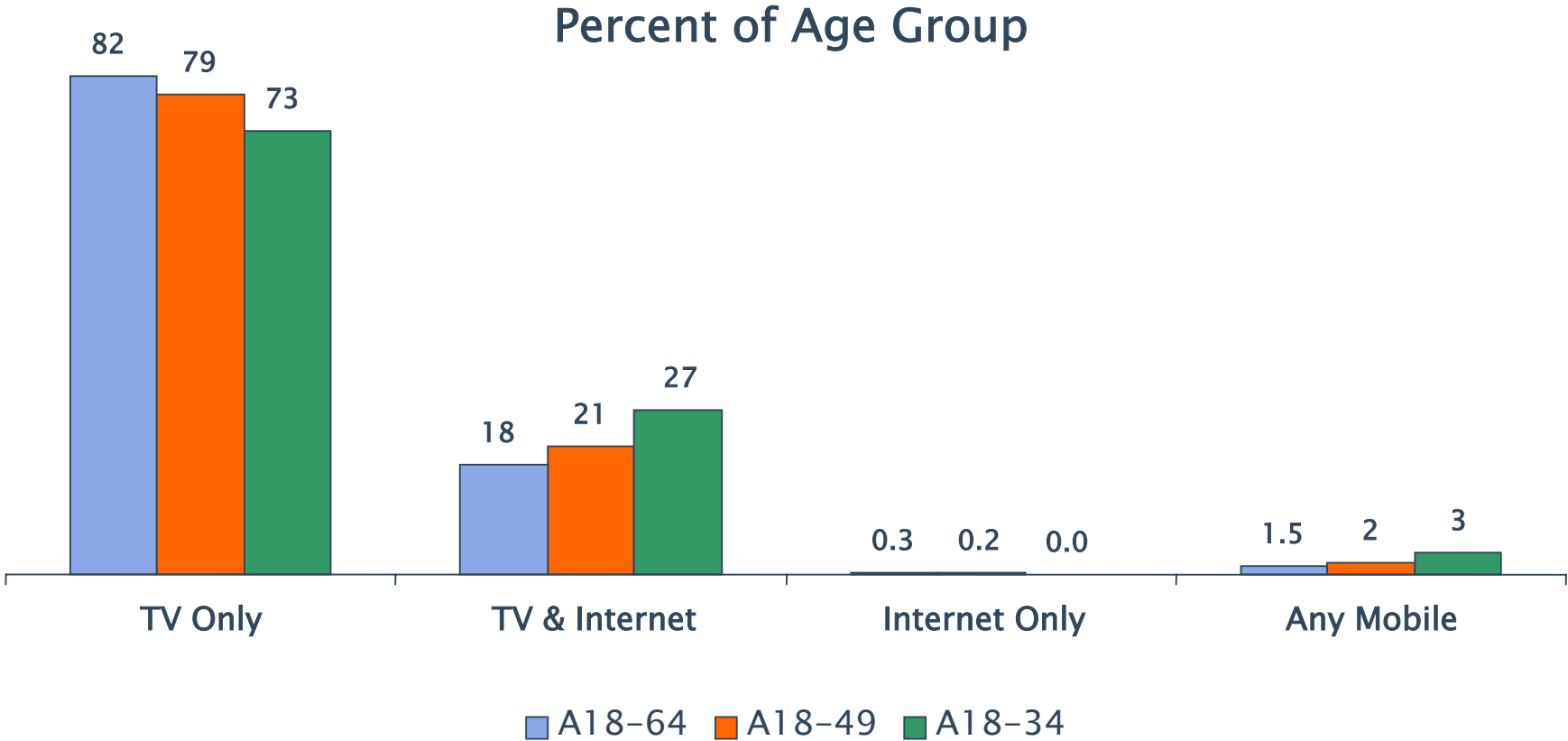
# Default to Best Viewing Experience

*“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”*



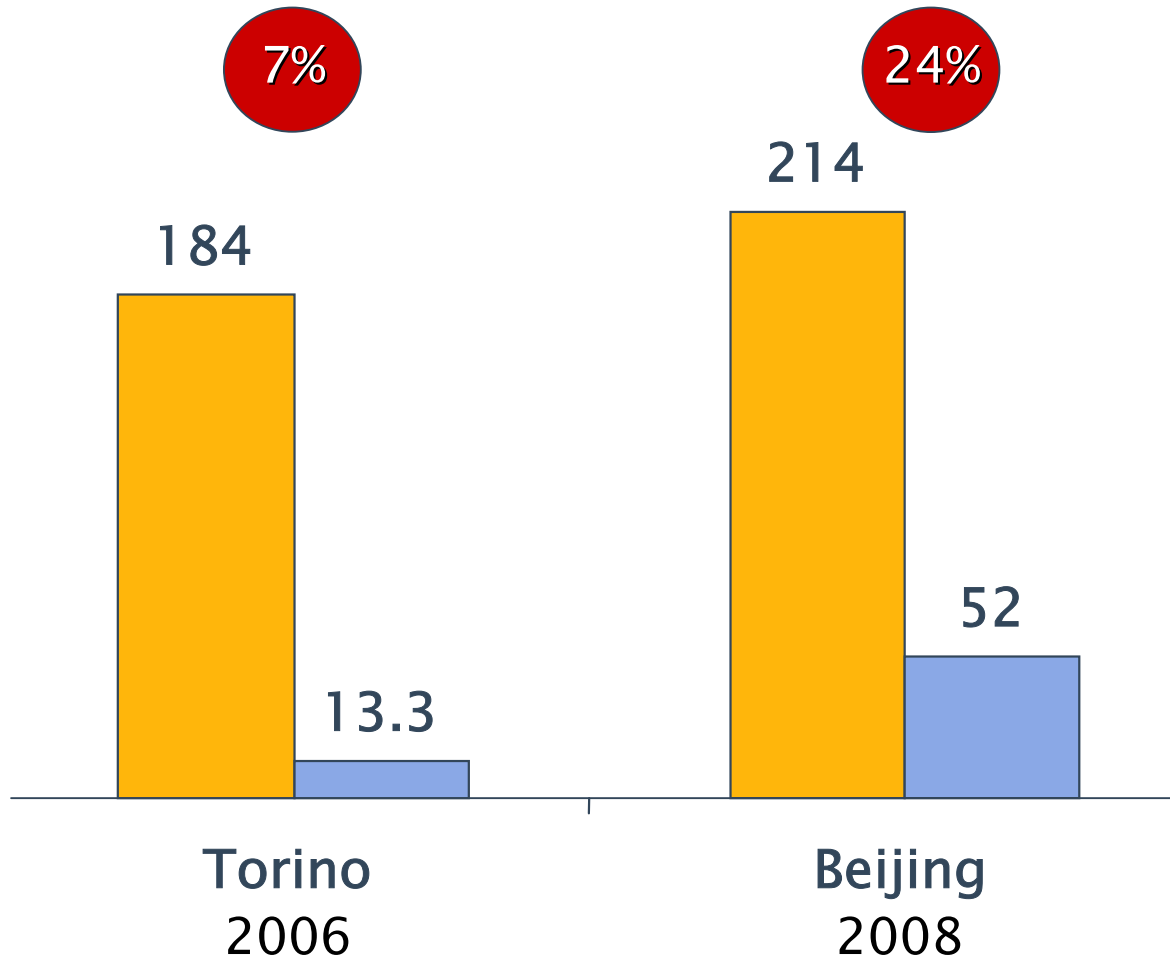
Source: Harris Interactive: How strongly do you agree or disagree with the following statements about videos that you might download or stream off the Internet? Base: U.S. Respondents 13-64; Age 13-17 (n=1,028), Age 18-24 (n=1,924), Age 25-34 (n=2,367), Age 35-44 (n=3,097), Age 45-54 (n=2,831), Age 55-64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

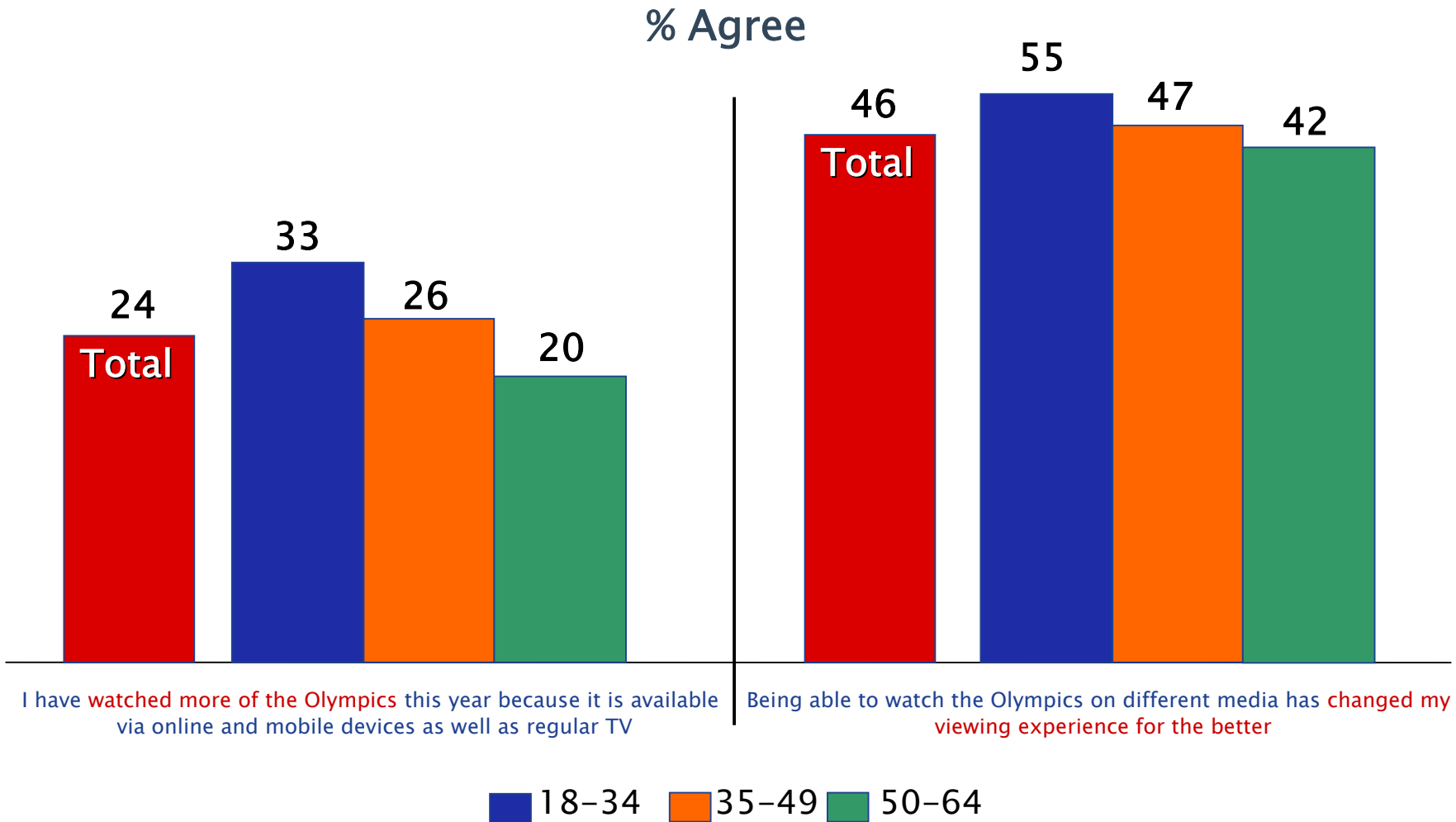
# Interaction of TV and Internet: Olympic TV Viewing

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Average Time Spent Watching  
Olympics Daily  
(Self-Reported)

| <b>TV Only</b> | <b>TV and Internet</b> |
|----------------|------------------------|
| 3:26           | 6:57                   |

# Impact of Multi-Platform Use on Olympic Viewing



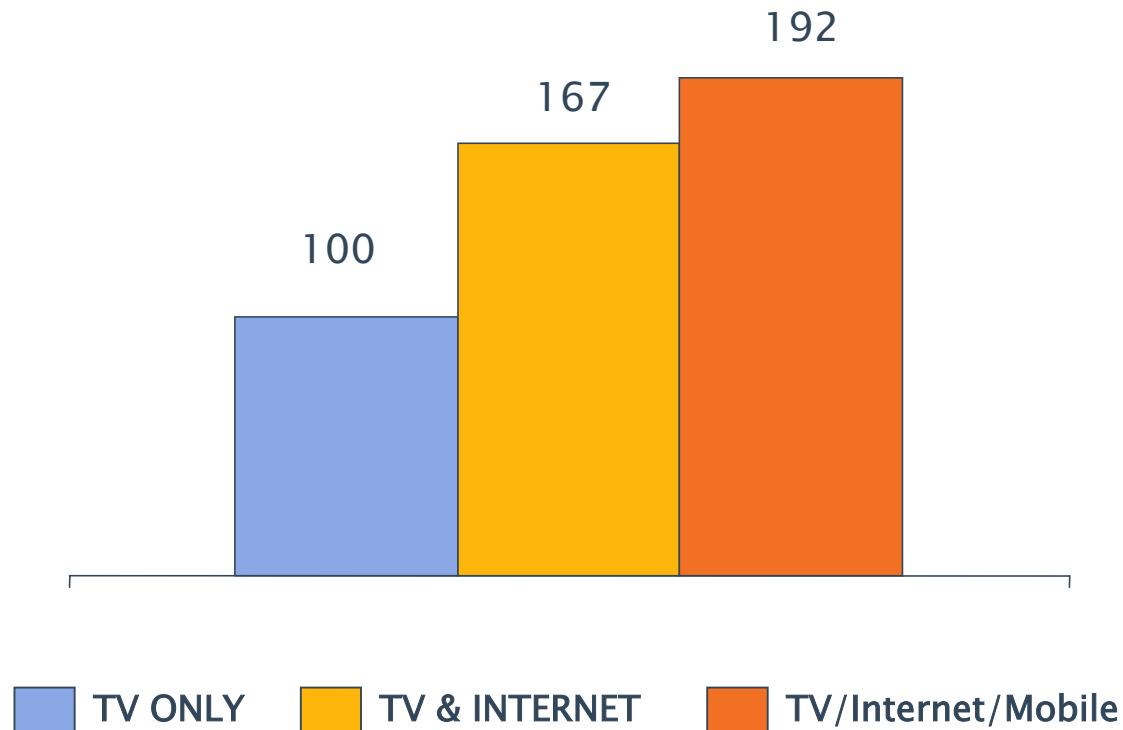
# TV & Web: Complementary Platforms

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- 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)

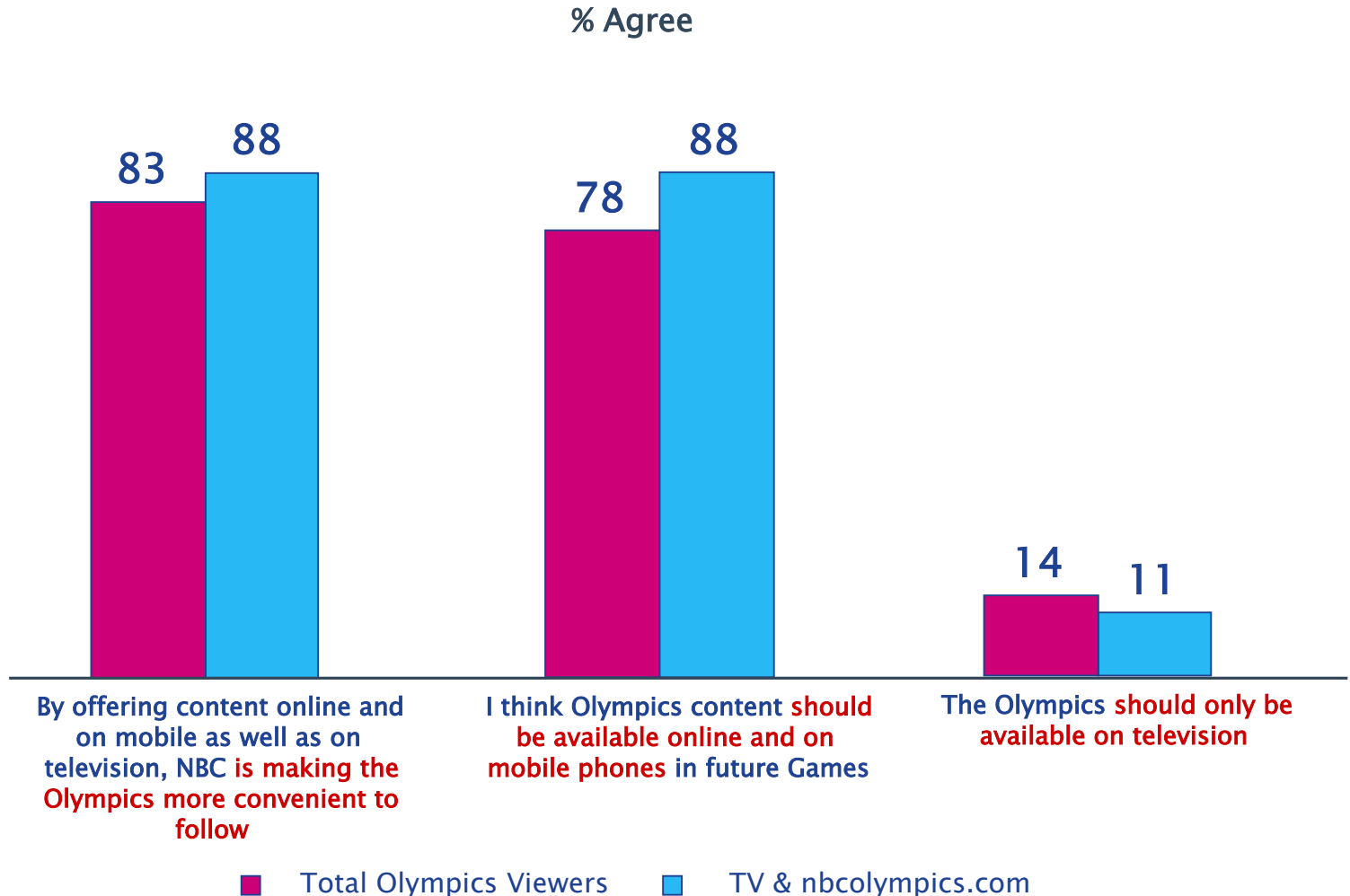




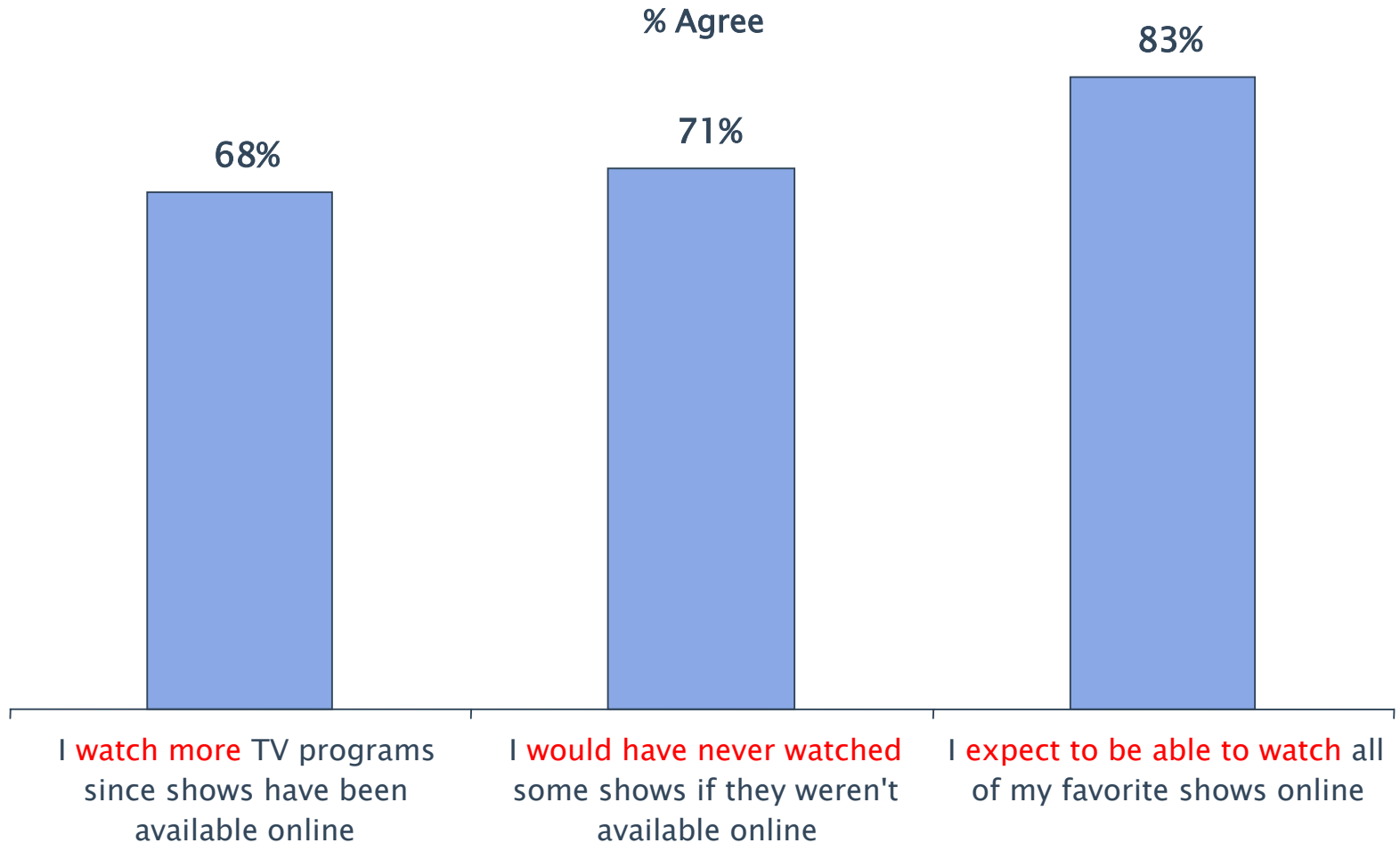
#3

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

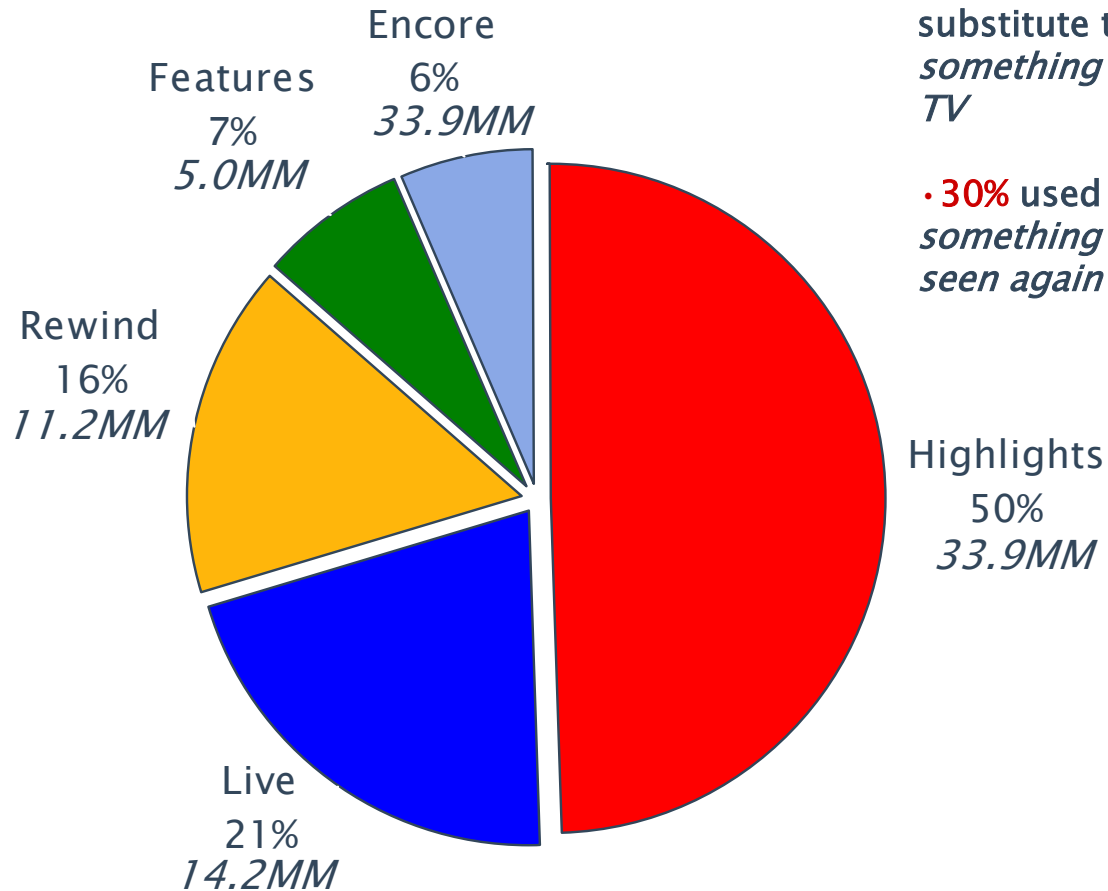
# Why Use Online Website?

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- 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

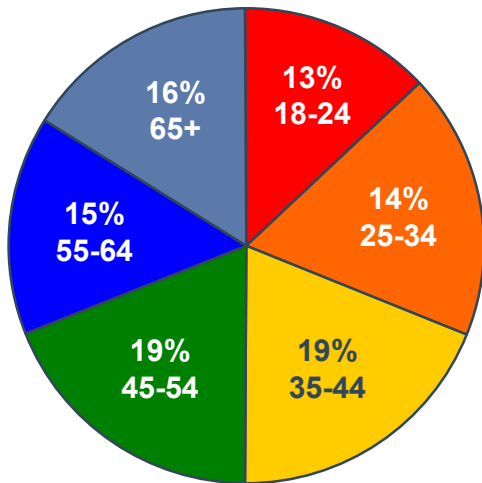
• **30%** used it to “watch something they’d already seen again”

#5

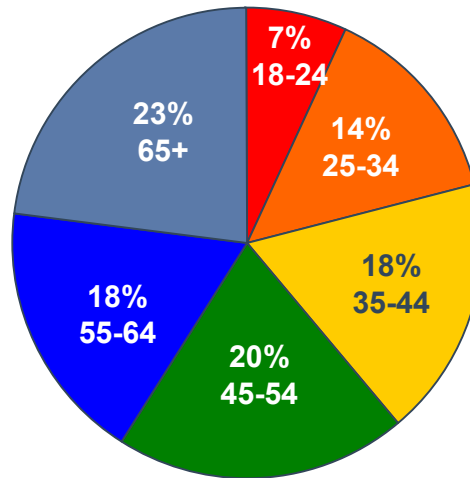
Never Underestimate  
the Importance of a  
*Great* User Experience

# Internet is Mainstream

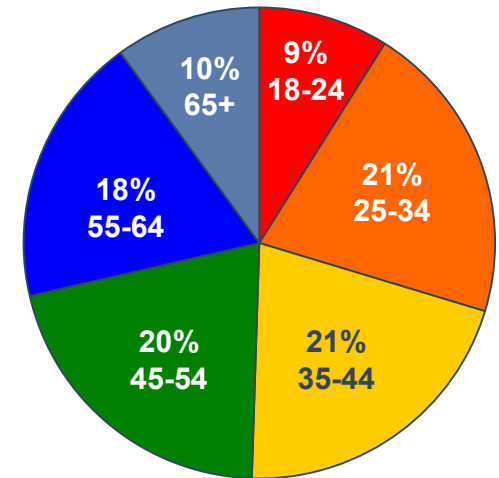
## Total Population



## TV Prime



## Online





# User Experience Critical to Site Use

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- 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

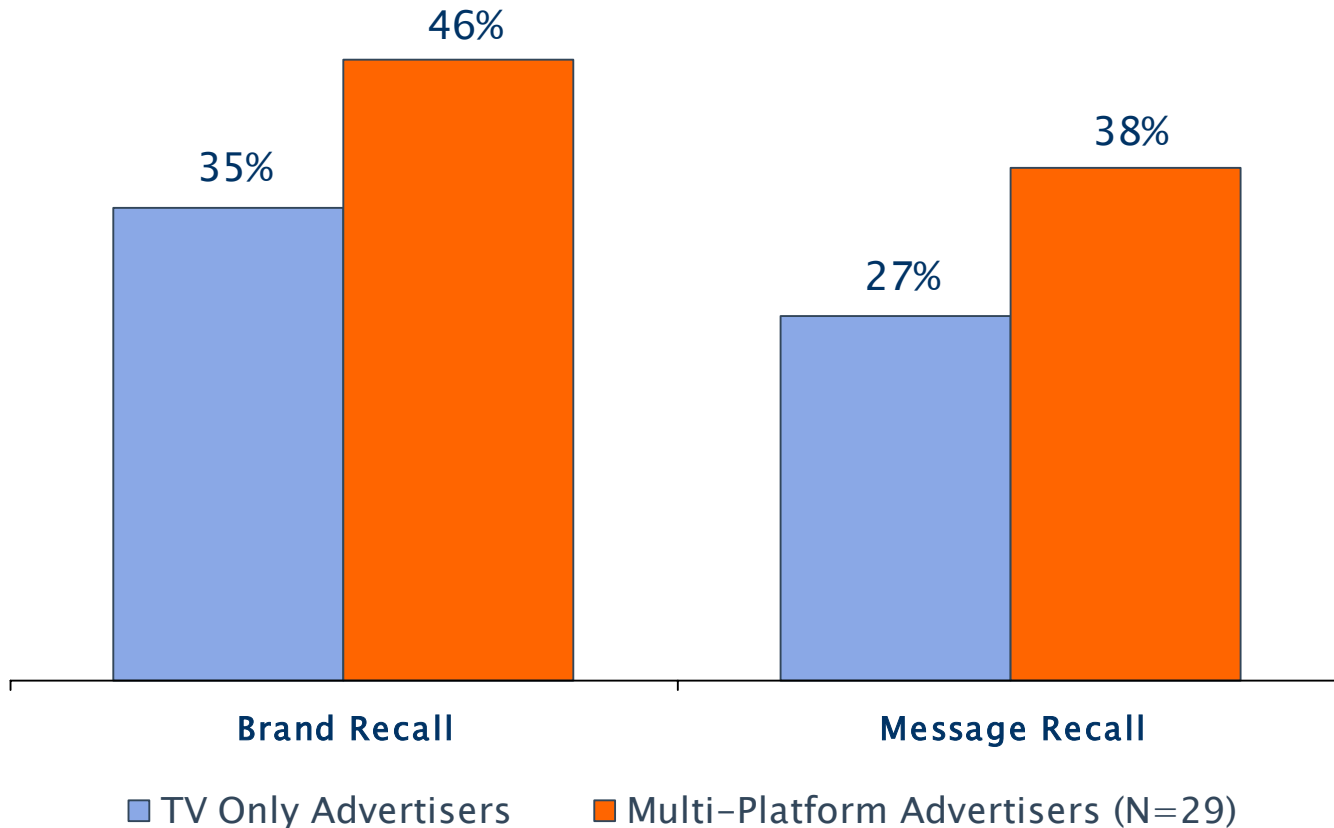
Cross-Platform Advertising *really* Works

# Positive Interaction of Olympic TV + Digital Advertising Platforms

Multi-Platform Adv.

**+31%**

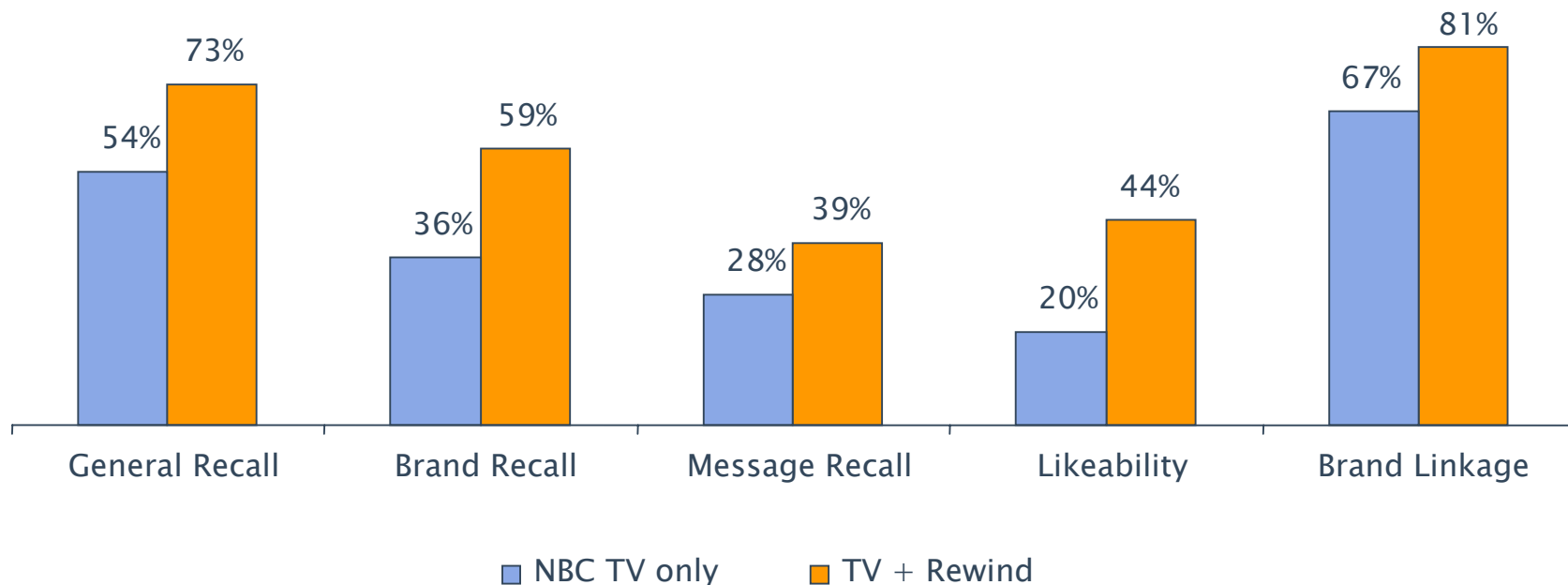
**+41%**



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**

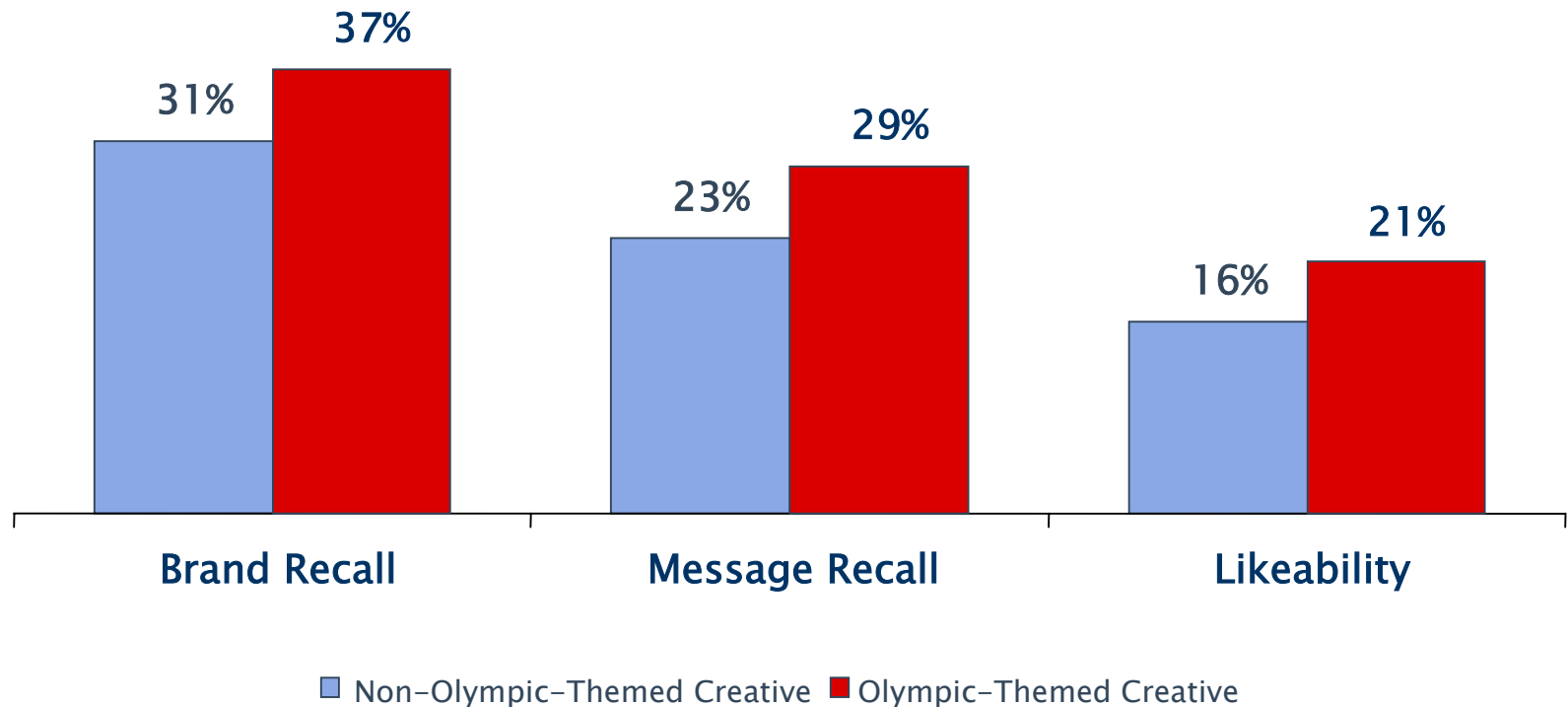
# Effect of Thematic Creative

Olympic-Themed Adv.

+19%

+26%

+31%



#8

# Produce Commercials in HDTV

# Impact of HDTV

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- **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

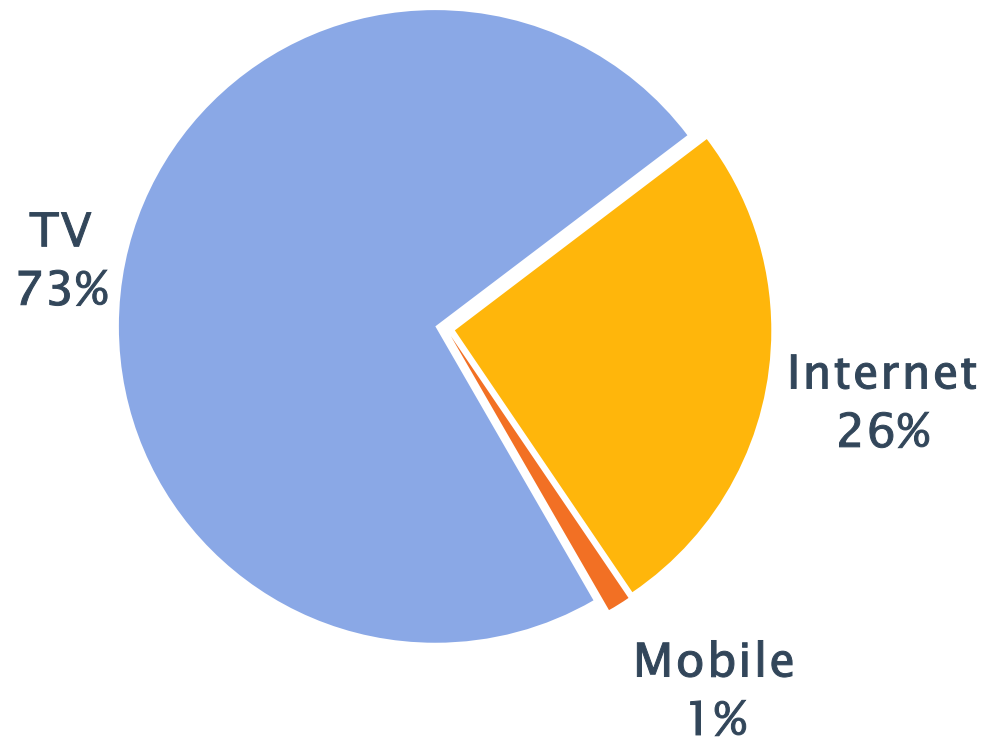
# Single-Source Measure: *iMMi* Methodology

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- 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

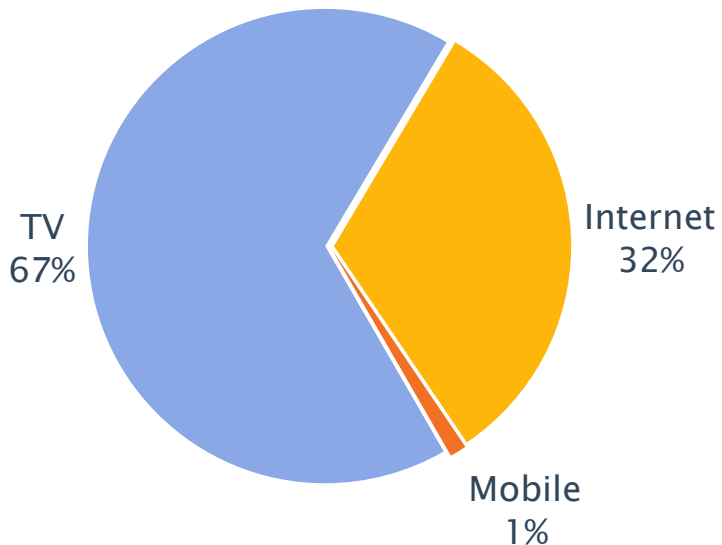
# Share Of Olympic Consumption By Platform: **Total Olympics**

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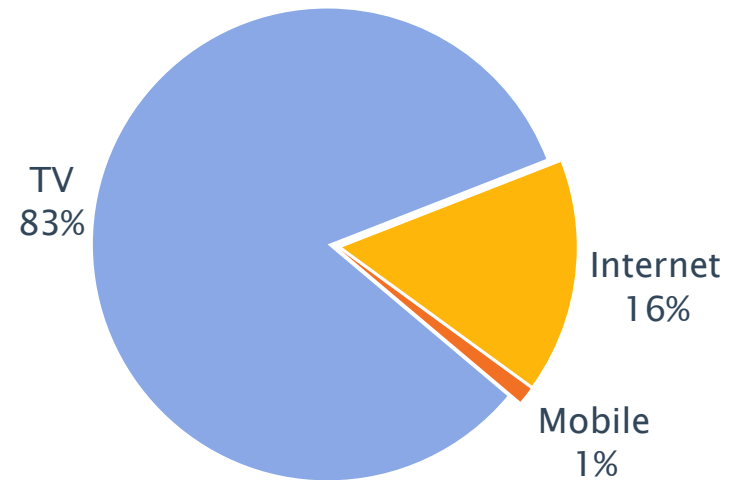


# Share Of Olympic Consumption By Platform: **Weekday Vs. Weekend**

Weekday Consumption

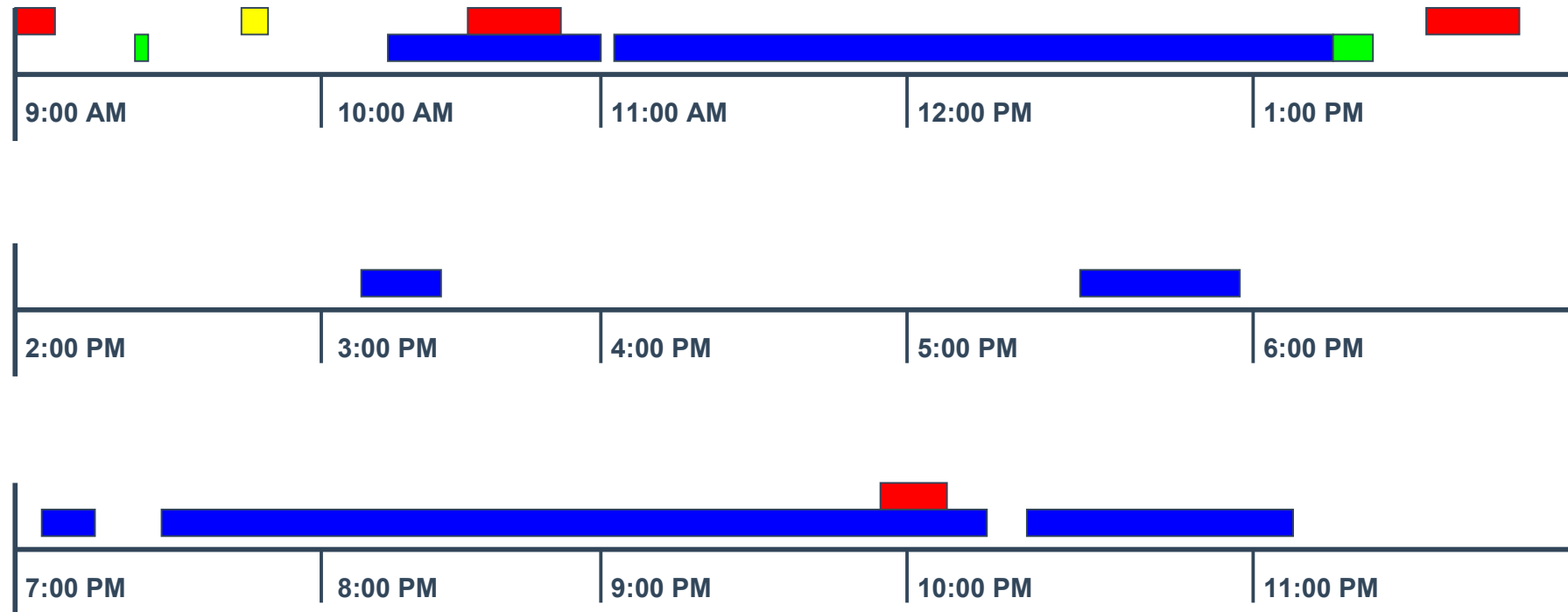
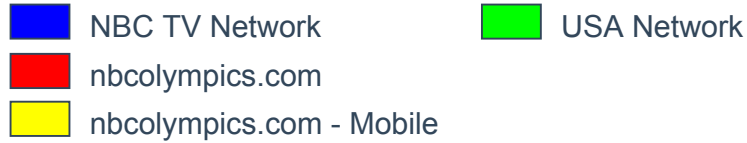


Weekend Consumption



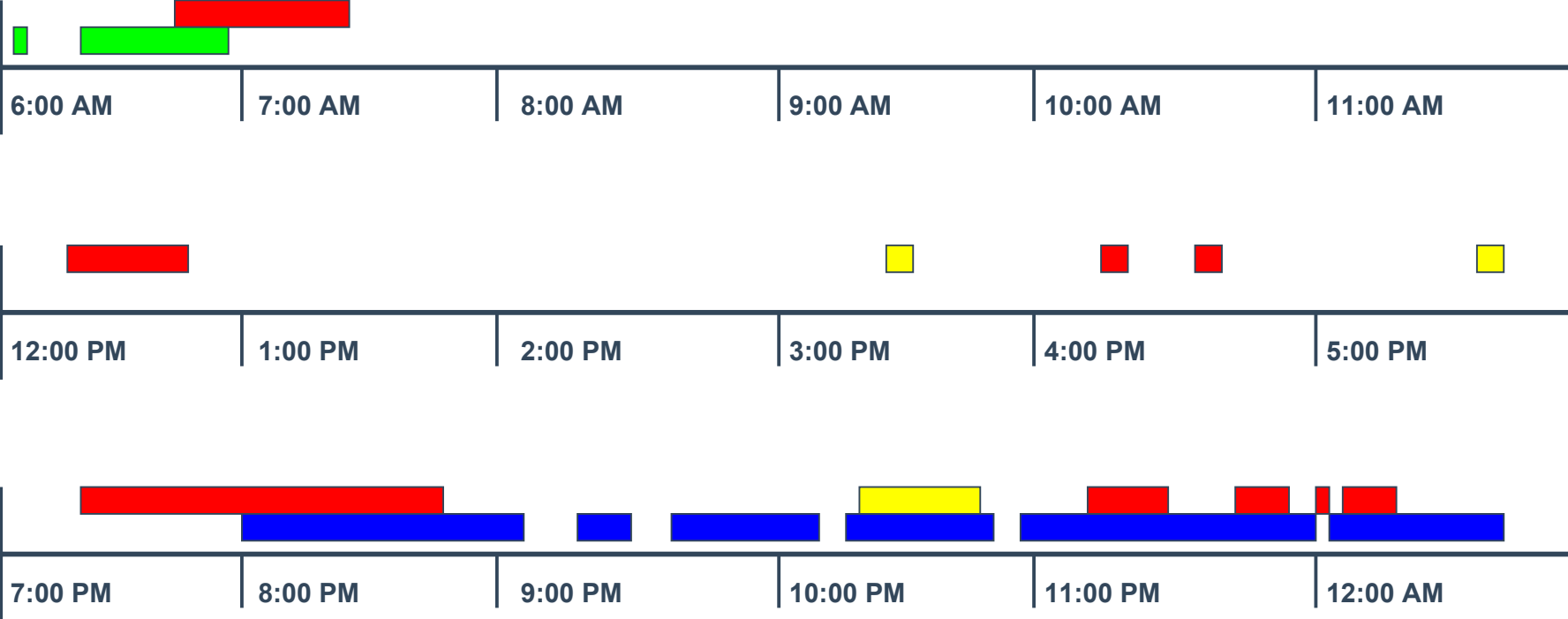
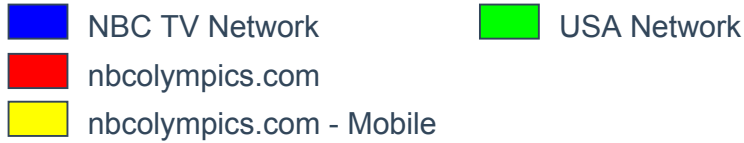
# A Day In The Olympic Media Life:

*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*

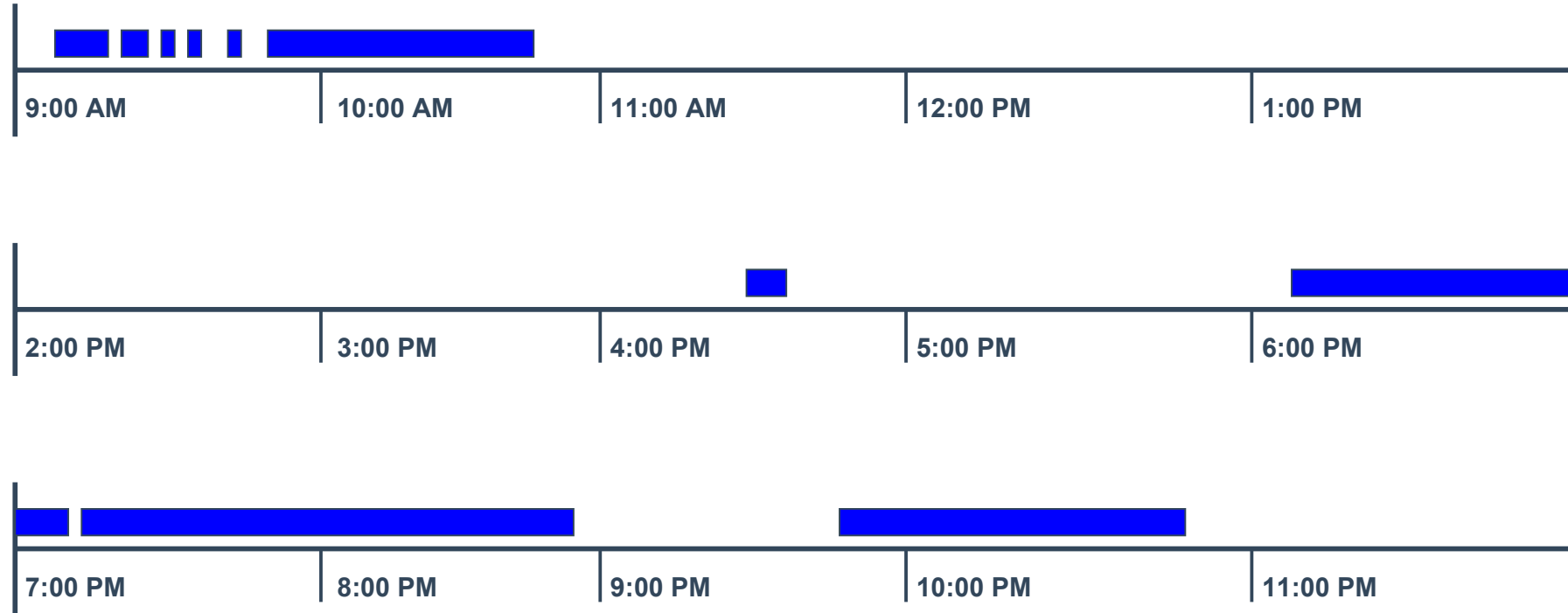


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*Chicago Male, 33 Years Old – Sunday 8/10/08*

 NBC TV Network

 nbcolympics.com

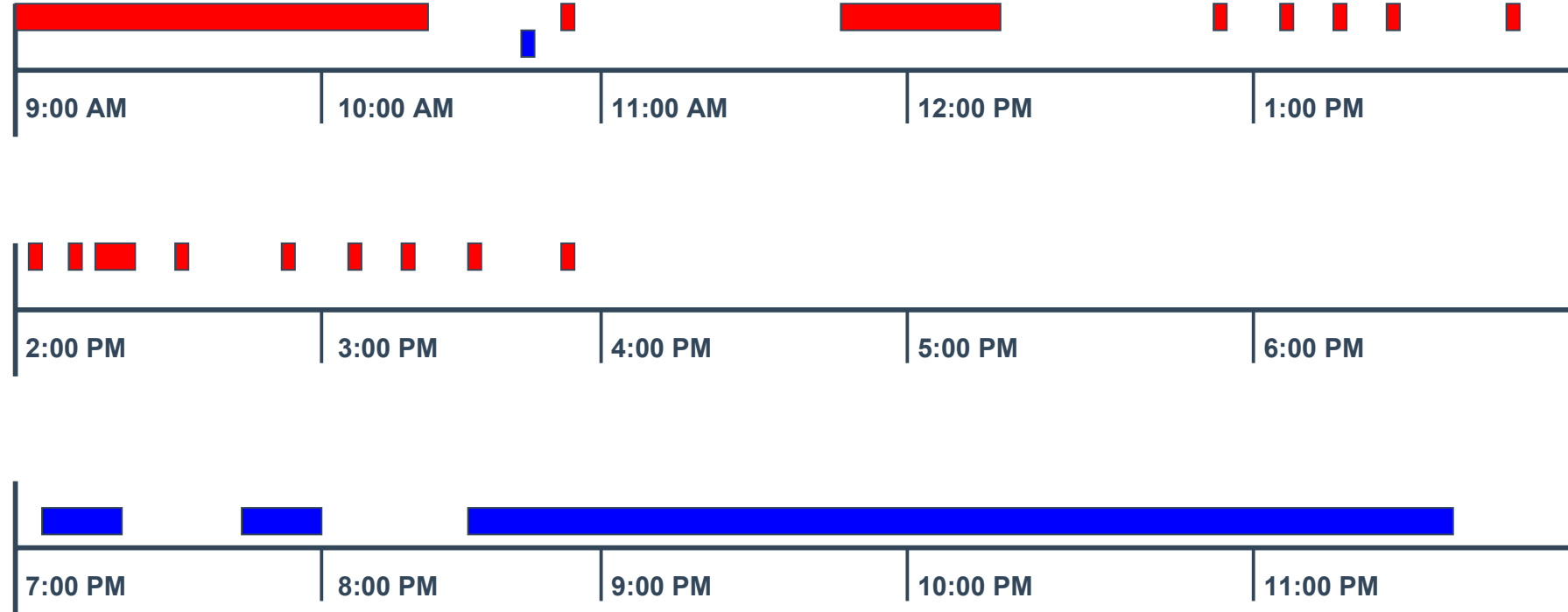


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TAM*i*

# TAM<sub>i</sub> : Total Audience Measure Index

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

# TAMi: Heroes

## Exposures by Episode

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