



NBCUniversal

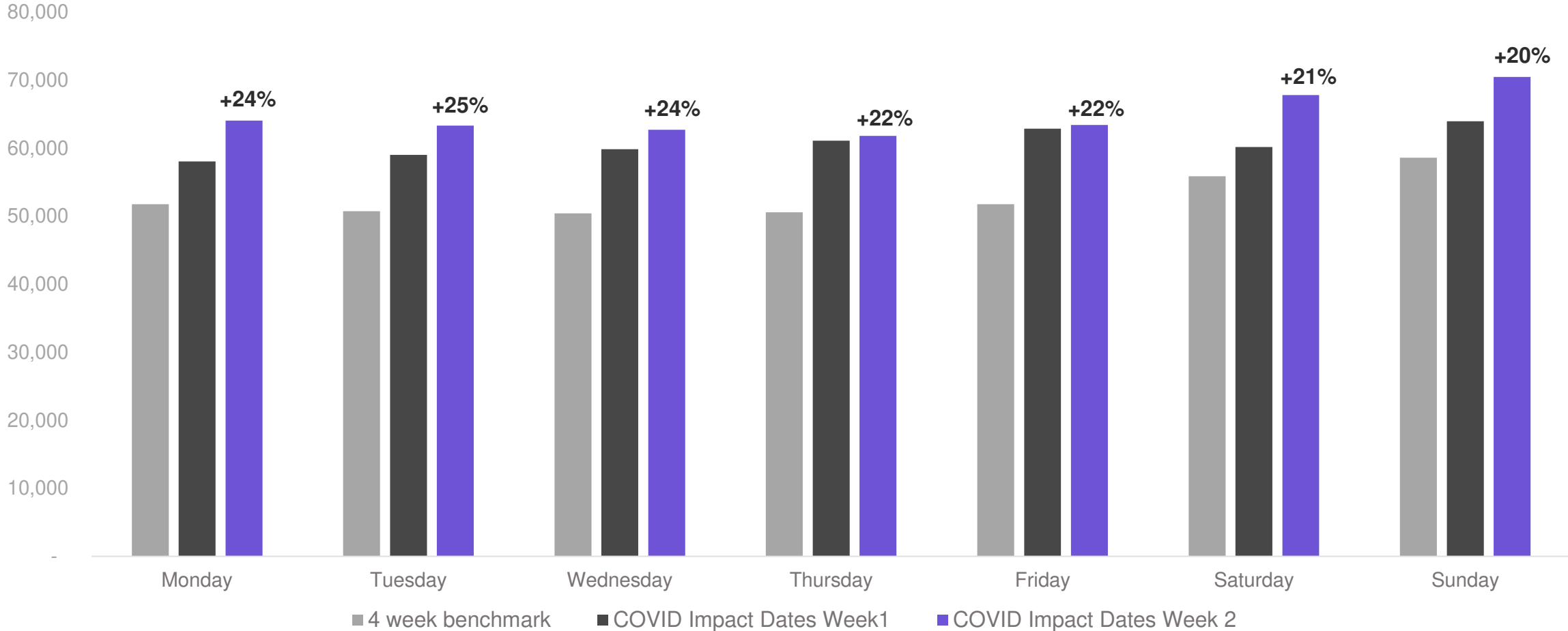
COVID-19 Impact on Media Habits & Ad Engagement

APRIL 2020

Media Consumption is Still Increasing Dramatically

A18+ (000) Total TV Users

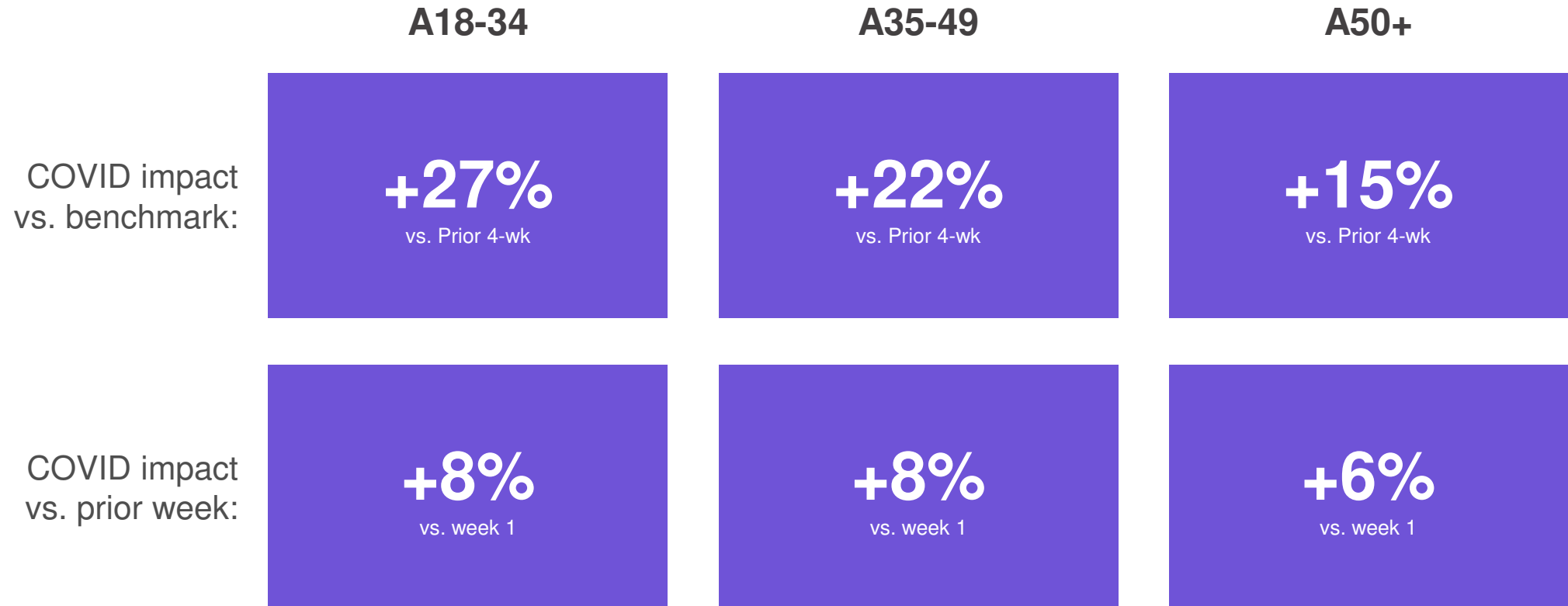
(includes Linear and Non-Linear TV Usage)
% Change vs. 4 week Benchmark



COVID-19 CONSUMPTION INSIGHTS

And This Consumption Growth Is Across All Demos

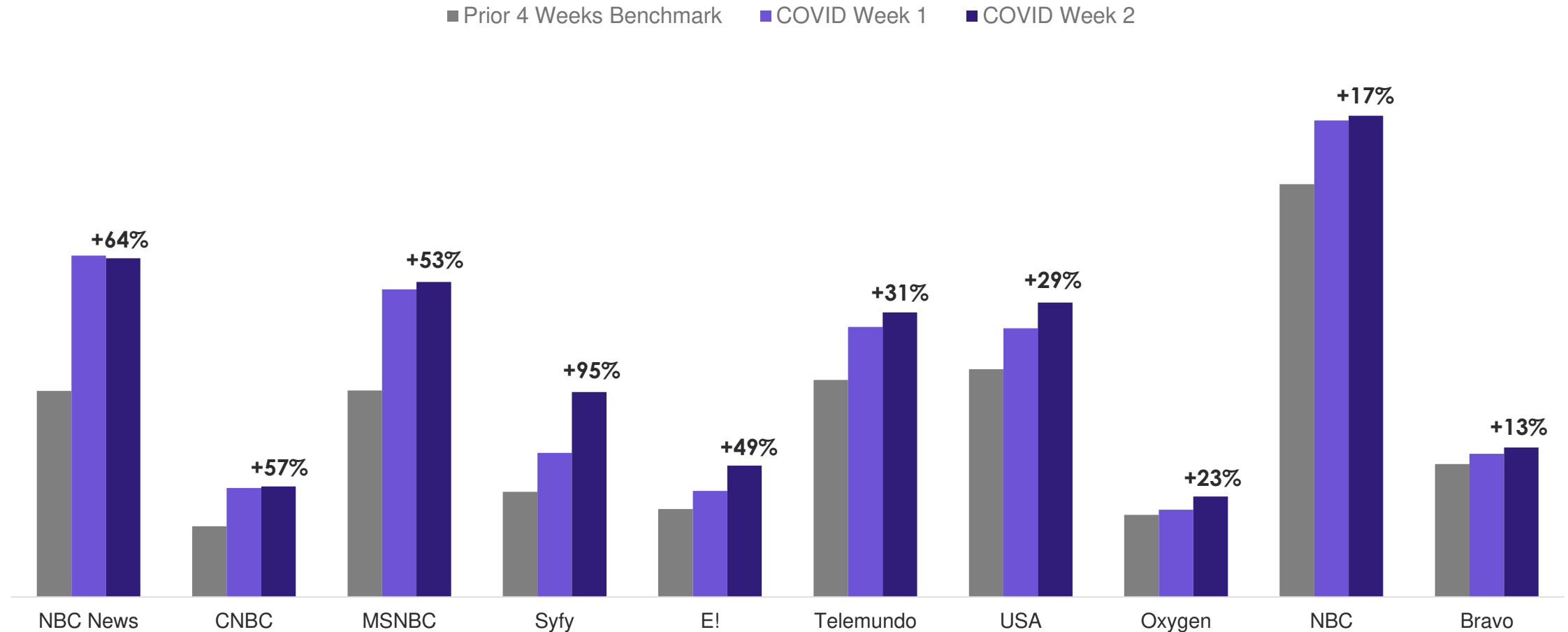
A18+ Total TV Users % Change



COVID-19 CONSUMPTION INSIGHTS

Continued Consumption Growth for News & Entertainment

A18-49 Total Minutes Viewed (Linear + Digital) %Change by Brand
 COVID Impact Weeks vs. Prior 4 Weeks Average



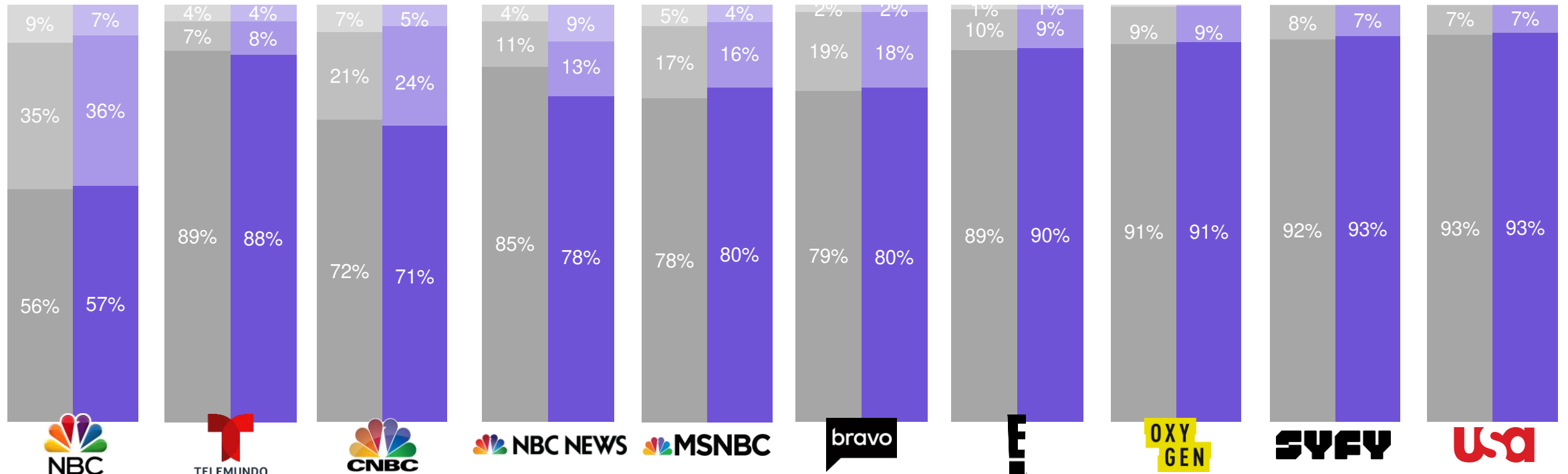
COVID WEEK 2 CONSUMPTION INSIGHTS

The Way Consumers Watch Is Not Changing

With the exception of NBC News which is seeing increased Digital Consumption as people seek information and updates

P18-49 Percent of Linear vs. Long Form vs. Short Form

COVID Impacted Dates vs. Prior 4 Weeks Average



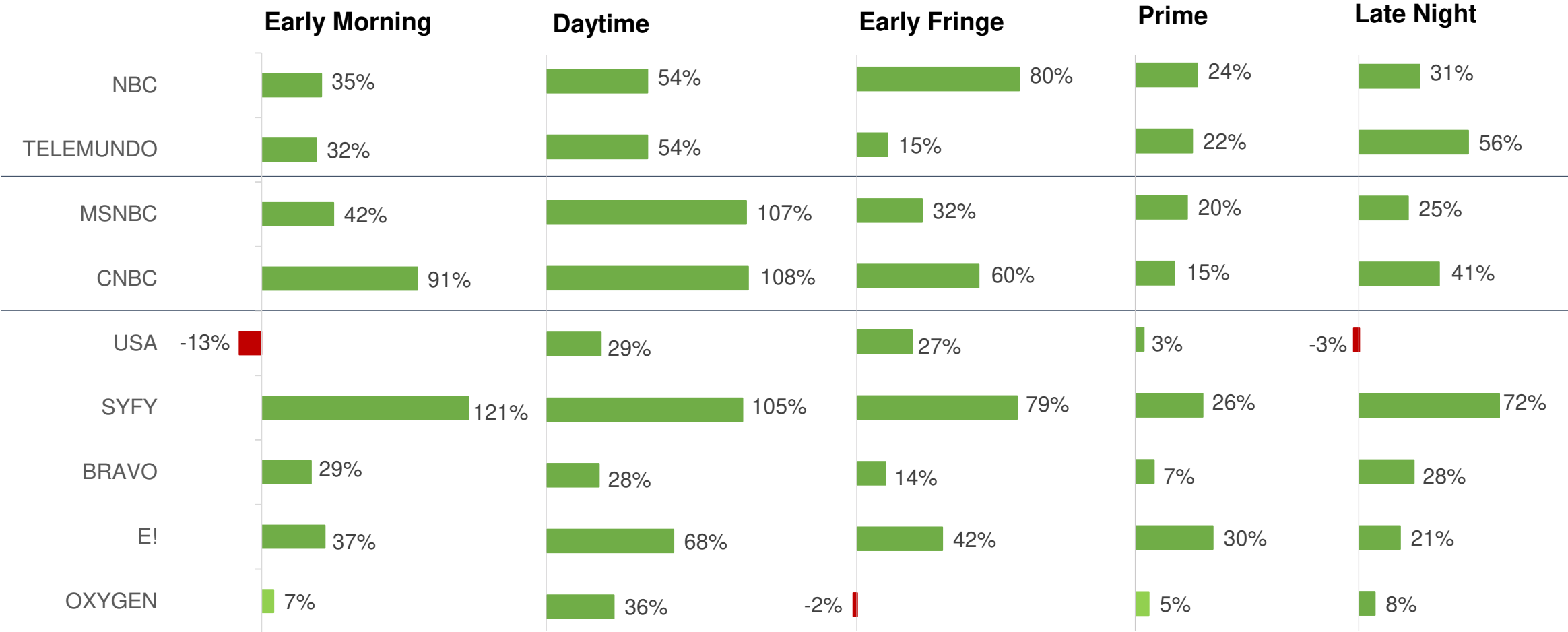
Prior 4 Week Benchmark

COVID Impacted Dates

Linear
 Long Form
 Short Form
 Linear
 Long Form
 Short Form

Consumers are Watching More Content Throughout the Workday

% Change by Weekday Daypart: A18-49 Average Audience
 COVID to Date (Week 1-2) vs. Prior 4 Weeks



COVID-19 CONSUMPTION INSIGHTS



With the Shift in Consumption Patterns, NBCU One Platform Continues to Increase Share

% Share of total Linear TV Prime Consumption (Minutes)

P18+
NBCU Still #1
in A18+ Market Share

17% share

+1 pt.
overall market share
vs. prior 4 weeks

P18-34
NBCU Now #1
in A18-34 Market Share

17% share

+3 pts.
overall market share
vs. prior 4 weeks

P18-49
NBCU Now #1
in A18-49 Market Share

17% share

+2 pts.
overall market share
vs. prior 4 weeks

COVID-19 IMPACT ON MEDIA HABITS

These Trends Have Led to

Increased NBCU One Platform Reach & Effectiveness

NBCU Linear Is Driving +10% More Daily Reach

+7M Adults 18+ reached every day vs. the prior 4-wk avg.

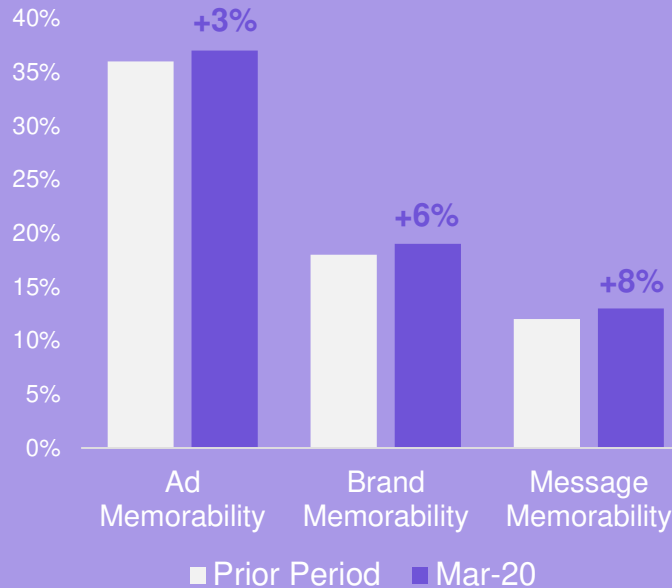
NBCU Digital Time Spent is Up Significantly

+29% Adults 18+ time spent viewing vs. the prior 4-wk. avg.

Ad Performance on the Rise

Memorability across the board is increasing in line with the consumption spikes.

NBCU Ad Performance



Cross-Platform Works Hard

NBCU cross-platform campaigns drive more impact than single platform campaigns.



+26% Recall



+14% Favorability



+20% Intent



+10% Recommendation

Source: Linear TV: Lake 5 Media, Nielsen Media Research, Daily Average Reach, 2/15/20 – 3/13/20 vs. 3/14/20 – 3/27/20, P18+, LSD, All NBCU networks total day, 1 minute qualifier.

NBCU Digital: DAVID. Feb 15 – March 27. Includes short form and long form. Excludes STB VOD, Hulu Live, and News On Domain. Based on Sat-Fri average performance.

PhoenixMI TV Brand Effect, P18-49, total day, all programming genres, measured programs on Bravo, MSNBC, NBC, SYFY, Telemundo and USA; Likeability = Top 2 Box; March 2020 – 3/1-3/29/20, Prior Period – 2/1-2/29/20.

Source: custom research (vendors vary), average of NBCU measured campaign test cells; one platform = linear, digital or social, cross platform = linear, digital and social; Jun 18 - May 19; aided ad recall, top 2 box brand favorability, purchase intent and brand recommendation; all differences are statistically significant at 90% confidence level.



Marketer Considerations

1

Opportunity to engage with consumers at scale.

2

Capture share of mind as consumers turn to our platform for News, Information and Entertainment.

[Click here for information on Why News](#)

3

Build brand equity with consumers throughout the day.