

NBCUniversal

Mature Audiences & Streaming

Streaming Attitudes & Behaviors
of Adults Over 55

JUNE 2023



DID YOU KNOW?

More Than Half Our Day is Spent With Media



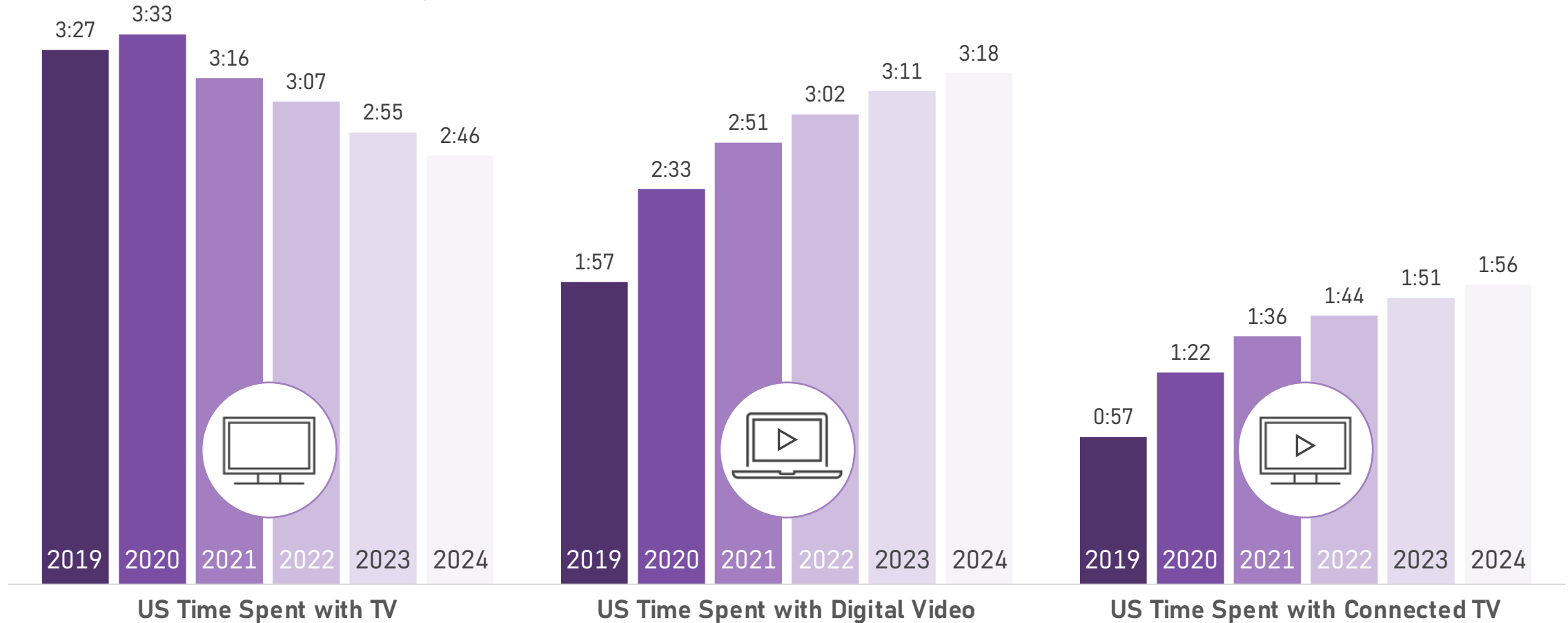
In 2023, it is estimated we
will spend an average of

13.4 hours

per day with media

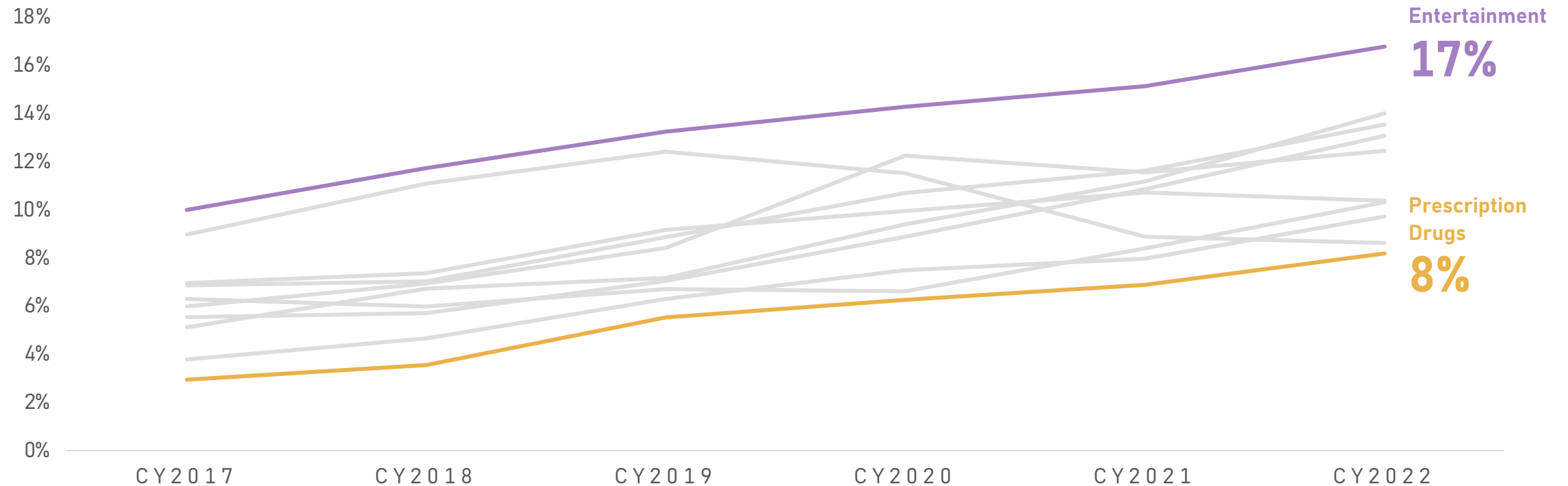
Time Spent With Media Continues Be Driven by Digital & Streaming Viewing

Average Time Spent Per Day with Media



While Pharma Advertisers are Evolving their Video Mix, Adoption of Streaming is Slow

% of Investment on Streaming for Top Spending Industries* | CY '17-'22



Top Spending Industries include: Entertainment, Telecom, Food, Insurance, QSR, Personal Care, Banking & Investments, Auto,** Consumer Electronics, and Prescription Drugs

*Top Spending Industries refers to the 10 industries with the highest total media spend in 2022. **Auto includes Automotive Aftermarket Parts & Services, Automotive Vehicles & Dealerships. Categories are in order of highest share of streaming spend to lowest; Source: SMI Core 2.0, 2017-2022 calendar year. Streaming includes TV Network - Digital & Pureplay Video (including shortform, such as YouTube). Linear includes Broadcast TV, Cable TV, Ad Sales House, Syndication TV, Spot TV, Local/MSO Cable, and Other TV.

Despite The Consumer & Marketplace Shift,

There Is Still Hesitation To Adopt Streaming



Skepticism that Mature
Audiences are Streaming



Performance of Linear TV

Today



Adoption of Streaming by Mature Audiences

Consumer Behavior



Streaming Attitudes & Motivations

Consumer Mindset



Capitalizing on Streaming

Taking Action

*[Click here for additional
details on approach](#)*

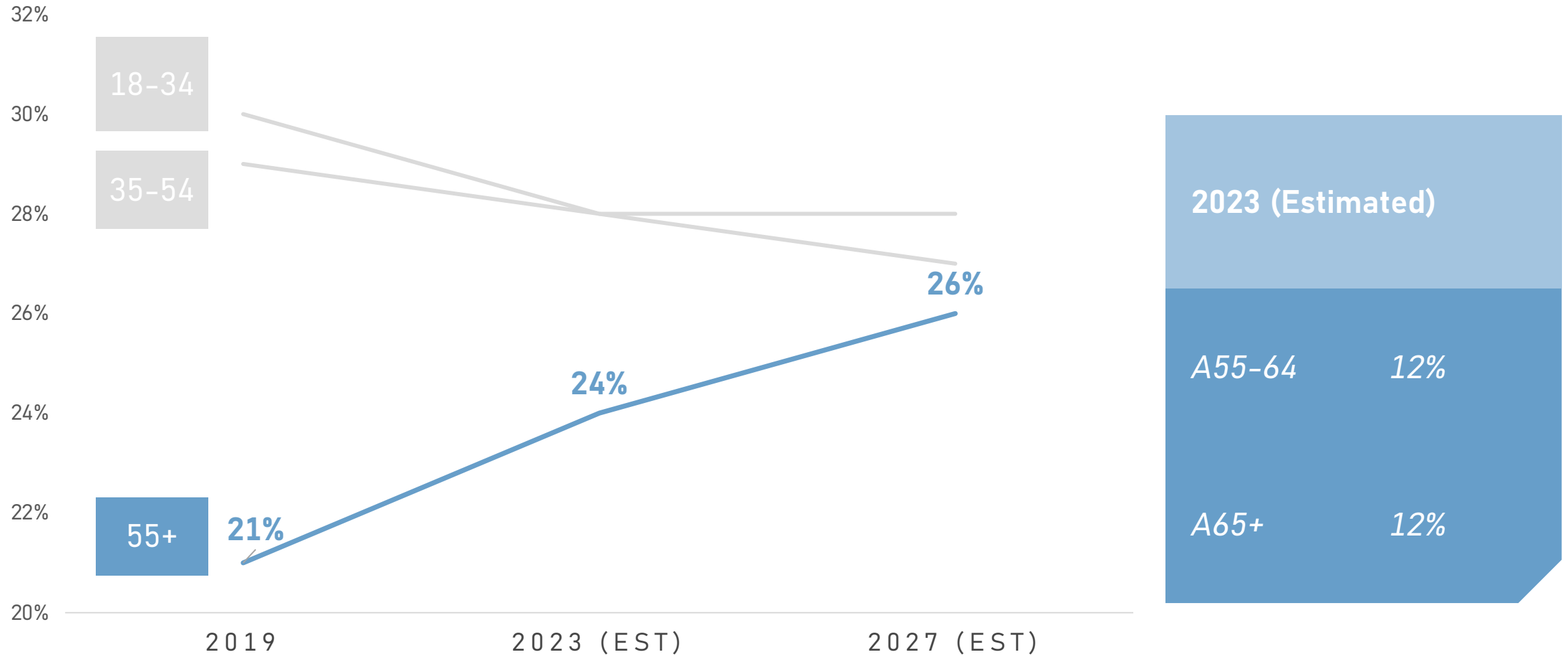
Adoption Of Streaming

By Mature Audiences



Mature Audiences are a Key Driver of Streaming Growth

Share of Digital Video Viewers

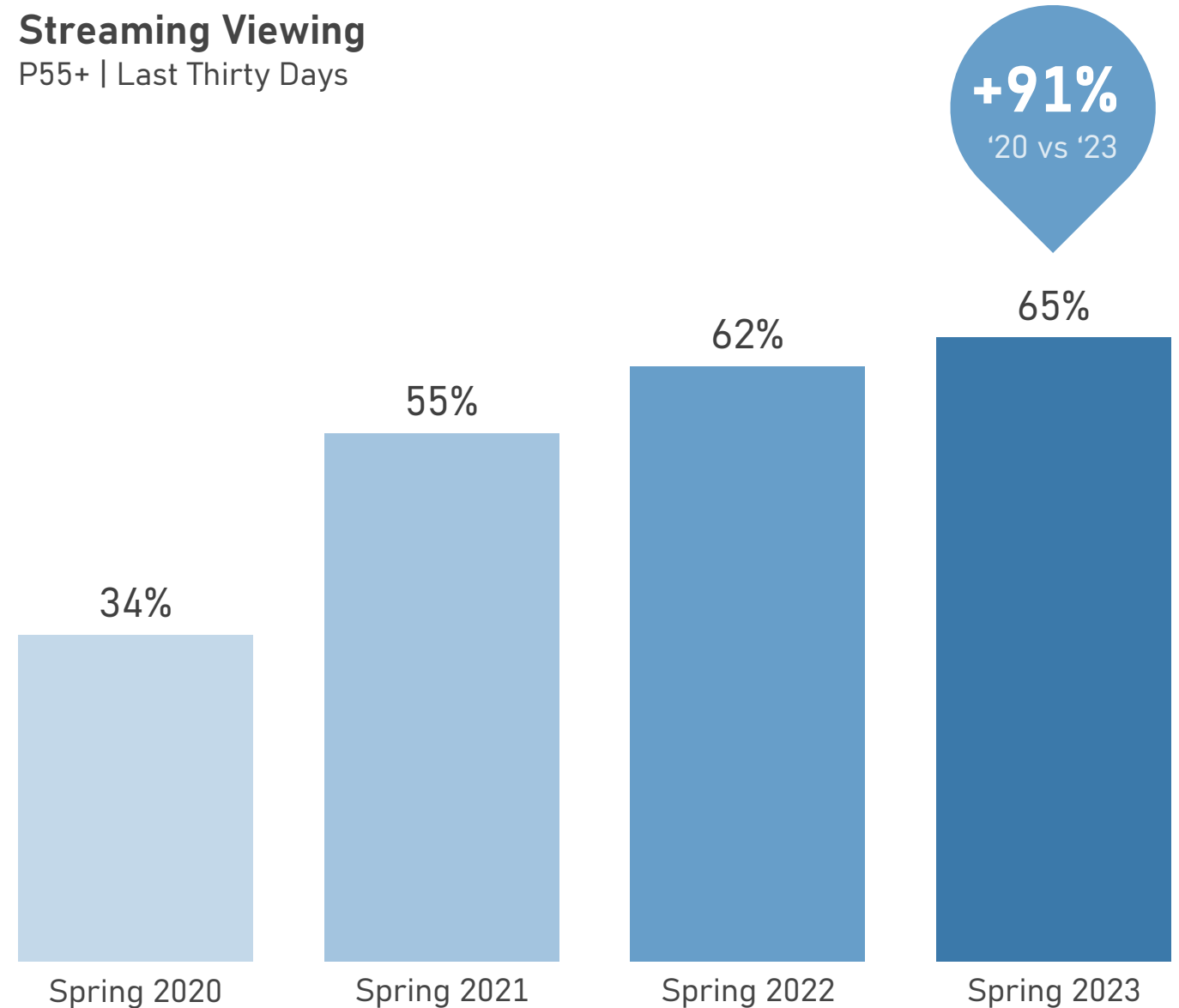


More Adults 55+ are Streaming

+31pp vs. 2020

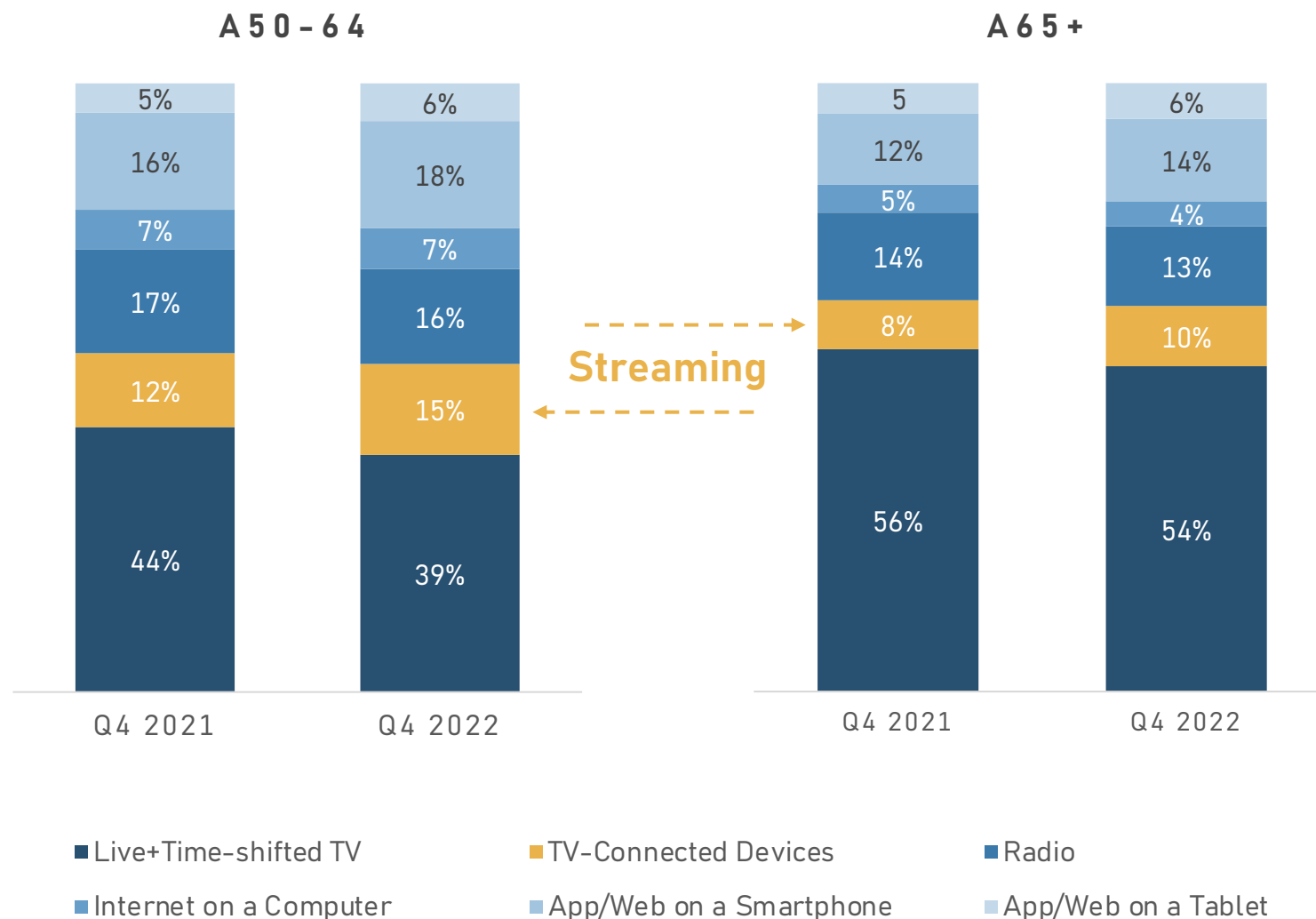
As people age and
people adopt

Streaming Viewing P55+ | Last Thirty Days



They Continue to Trade Traditional Media for Digital Increasing Their Time Spent with Streaming

Share of Daily Time Spent by Platform



Streaming Attitudes & Motivations



Key Findings



01.
There is
No Distinction
Between Linear & Streaming



02.
The Concept Of "TV" Has
**Changed for
the Better**



03.
Watching TV is
**Easier Today
than Yesterday**



04.
Receptive
to Advertising

01.

There is No Distinction Between Linear & Streaming



Over **55%*** of those 55+, consider

**anything that can be
watched on the TV set, TV**

*+6% vs. Spring 2022 Study

02.

The Concept of “TV” Has Changed... For the Better

As there is more content, and higher quality content available at your “convenience”



“

No question...how I watch TV has changed germanely; it's great.

- ROBERT K

”

“

*In the last year I changed from watching cable to watching streaming. I think it's just going to increase **more**, because the more time goes by, the more there is to add to the library.*

- CINDEE S

”

“

We watched a lot more; we discovered streaming services. We got Amazon Prime, and a service that allows my wife to watch movies in her native language. We love all this new content.

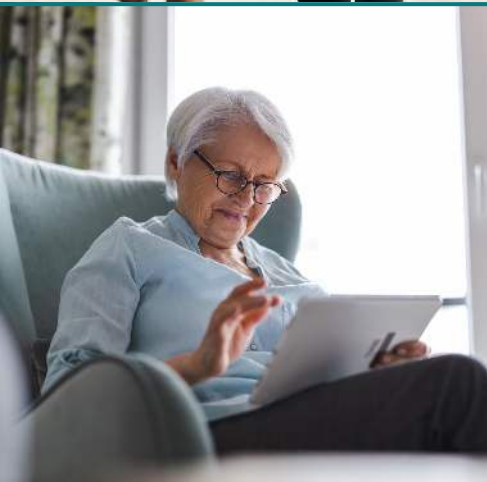
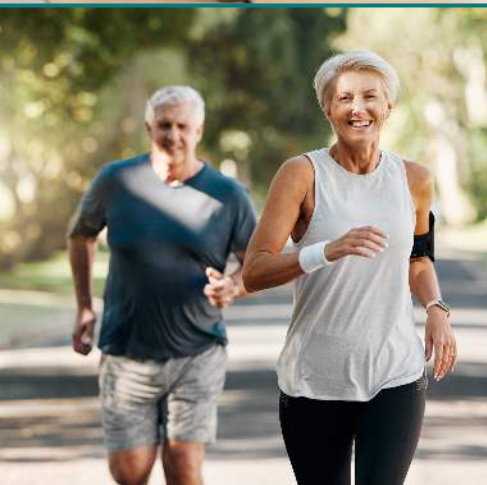
- WILLIAM D

”

03.

Watching TV is Easier Today

With a great appreciation for the **flexibility**... in contrast to a time when TV was not convenient



“

*In the 60s, you had to turn the knob, to one of four channels. **Today is a golden age.***

- DOROTHY A

”

“

***Back in the 70s, TV was like being in a relationship.** You had to give it a lot of attention, you had to be there at certain times, and if you didn't you missed out on a lot of stuff. Now, it's pretty much at our convenience.*

- JIM C

”

“

*It's just much better [streaming video content]. For one thing, **I don't have to wait for something to come on. It's there, no matter what.** [...] You don't have to worry about missing an episode, cause it's there.*

- TREVOR V

”

04.

Receptive to Advertising

Understanding the Value Equation of Ads & Appreciating the Relevancy



“

***I don't mind advertising; I get it. It's a part of the deal we make.** On apps with ads it's usually a lot less than cable."*

- WILLIAM D

”

“

*Sure, ads are necessary but **sometimes it feels like too much on Cable. Rarely do I feel that way when I see an ad on my Roku.***

- CINDEE S

”

“

*...(it helps) if you have a health problem you can see an ad for a new medication... **I saw an ad (for a medical product), I bought it and it worked.***

- DOROTHY A

”



Video content consumption
continues to shift to streaming

Landscape Dynamics



Mature audiences are
increasingly streaming

Consumer Behavior



The majority of those 55+
believe content that is on
the TV screen, is TV

Consumer Mindset

For Mature Audiences

**Streaming is
TV, Just Better**

Capitalizing on Streaming



WE KNOW

Linear Has Proven Successful for Pharma

Creating broad awareness

(new patients starting treatment)

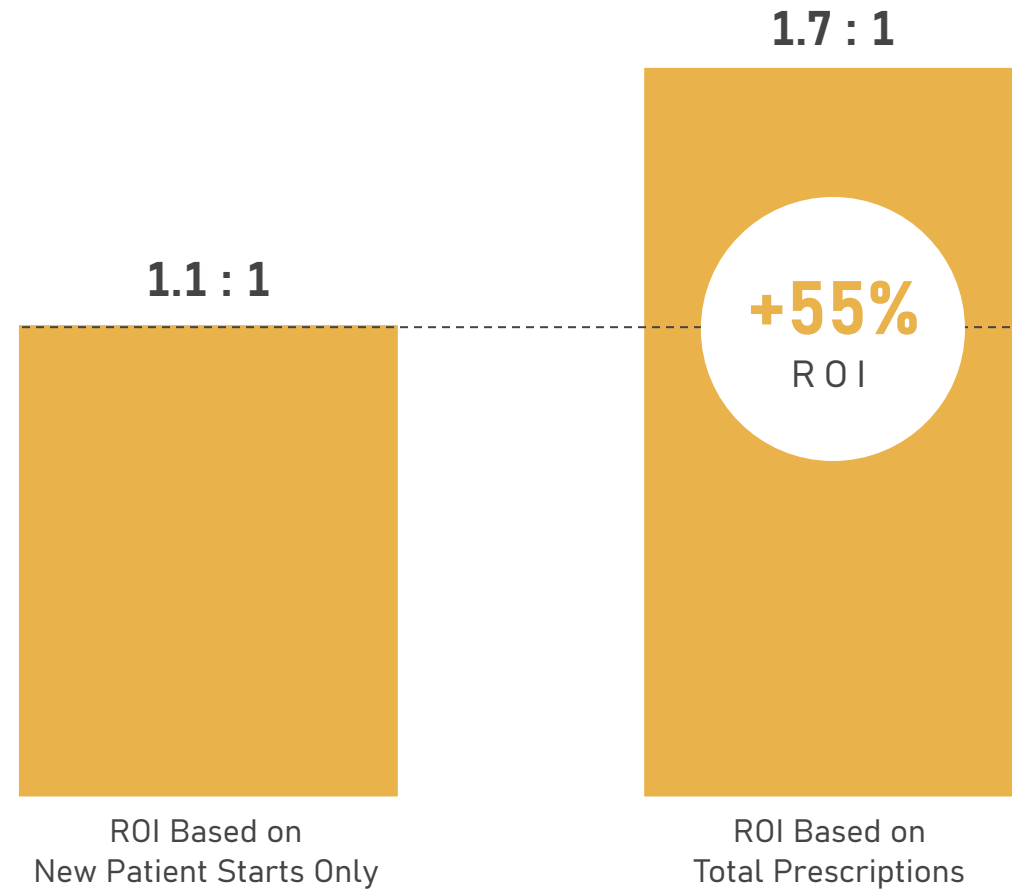
&

Promoting adherence

(current patients refilling prescriptions)

Linear TV ROI

Endocrinology Case Study (2021)



When it Comes to Pharma Media Mixes, Linear Works

126

Pharma Medications on TV¹
(+5% vs. 2021)



1,553,831

Pharma Commercial Airings¹
(+31% vs. 2021)



Streaming

More Brands are Catching On... With More Medications

41

Pharma Companies on Streaming²
(+14% vs. 2021)



127

Pharma Medications on Streaming²
(+30% vs. 2021)



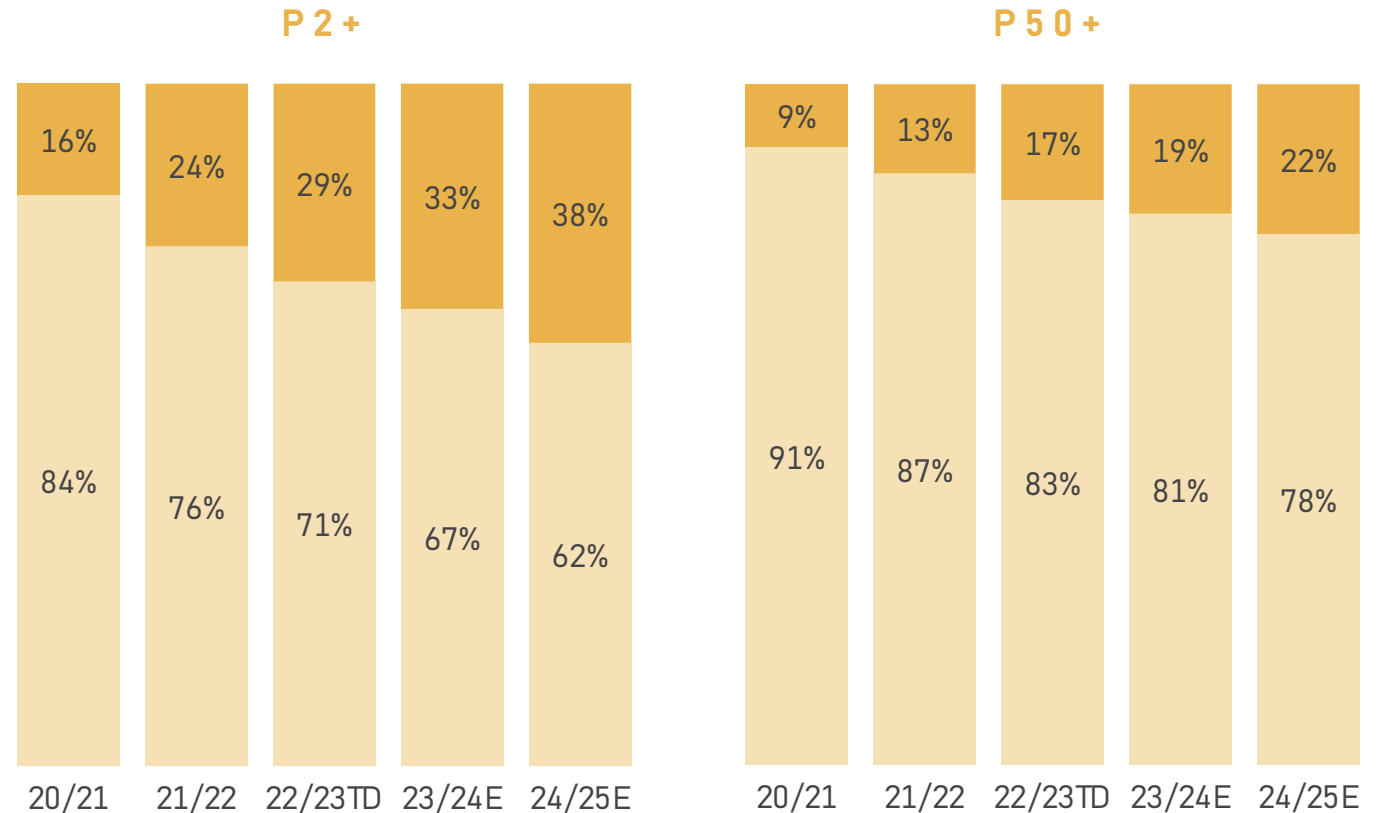
NBCU One Platform

% Share of Hours

Following Mature Audiences' Behavior

Which is Balancing Linear & Streaming

We see this on our own platform:



Traditional TV (MVPD)

Non-Traditional TV (Streaming/Digital)

Source: Traditional TV (MVPD): Nielsen Media Research, L7, Time Spend Viewing TV = AA*Duration. Non-Traditional TV (Streaming/Digital): DAVD (NBCU's Internal Reporting Platform) and Peacock Internal Data. Includes all available and measured consumption across the portfolio, where data is available. 22/23TD based on 4Q22-1Q23, 23/24E and 24/25E are projections based on internal estimates.

WITH NBCU,
**Diversifying Your
Video Plan
Increases Reach**

Streaming offers gains in reach vs. a linear only strategy

A18+

+44%

+69M Incremental

A25-54

+67%

+45M Incremental

A35-49

+56%

+20M Incremental

A55+

+16%

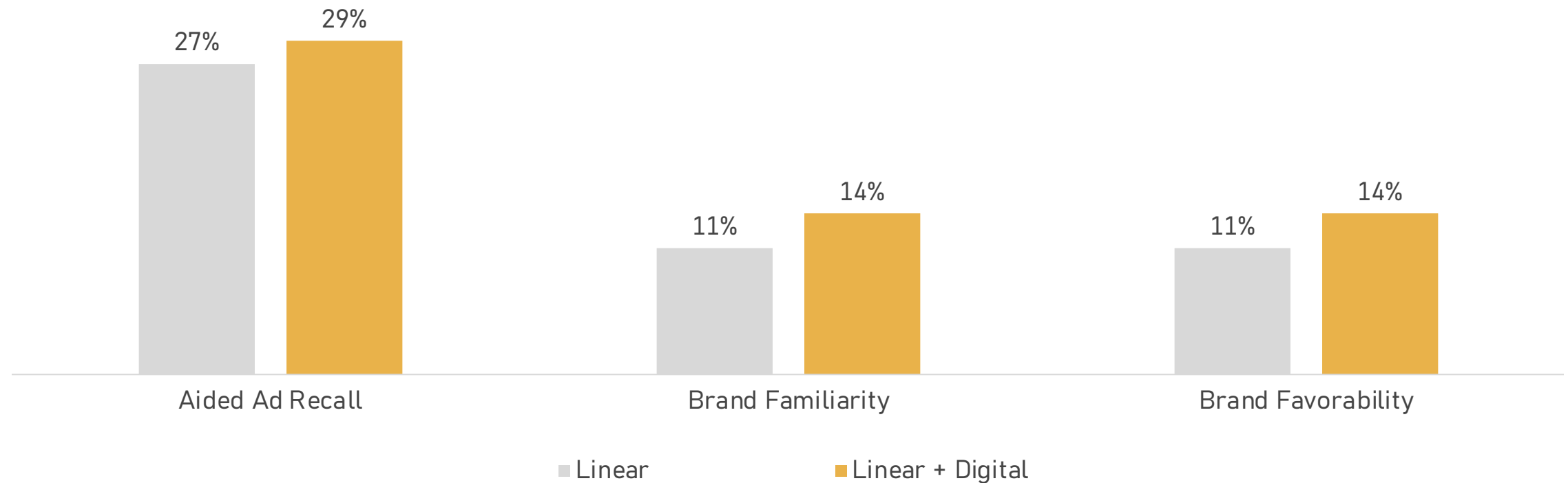
+13M Incremental

Source: H2'21-H1'22, (UEs based on Total HHs, not TV HHs) TV- Nielsen. C3, Total Day, Reach %, 1 minute qualifier (Incl Syndication); Digital- comScore Video Metrix: Media Metrix. Multi-Platform Data US Only; STB VOD-Canoe Reach and HHs, SNL Kagan using Nielsen VPVH. NBCU Connect based on FW Markets in comScore OTT Intelligence H2'21-H1'22, P18+ is 1:1. Peacock based on comScore VMX Jul'21-Jun'22. All YouTube data (competitor-specific YT assets and YT Parent-level) is Mobile/Desktop Only (excl CTV). Excl Apple News.

And Achieves Performance Against Your Objectives

Traditional linear and digital work harder together

NBCU Campaigns Lift In Exposed vs. Control



Key Takeaways

01.

Video content consumption
continues to shift to streaming, across age groups

02.

A55+ are a
key driver of streaming growth

03.

A55+ view
anything that is on the TV screen, is TV
and believe TV has changed for the better – content, convenience, ads, and personalization

04.

Diversifying the video mix
increases reach and performs stronger
against key brand metrics

Taking Action

Learnings & Best Practices

Full Funnel Video Approach

Implementing a strategic mix of 1:Many and 1:1 targeting, *engaging patients and their networks*
e.g., family, caregivers, HCPs

Connected Media & Marketing Plans

Ensuring branded or unbranded messaging and content is across screens, engaging the right audience *where they are viewing*

Ad Innovation

Invites the audiences in to *learn more & be educated*
e.g., about the condition, the medication, ways to engage their HCP, insurance, etc.

NBCUniversal

Thank You

QUESTIONS? PLEASE CONTACT:

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KEY CONTRIBUTORS:

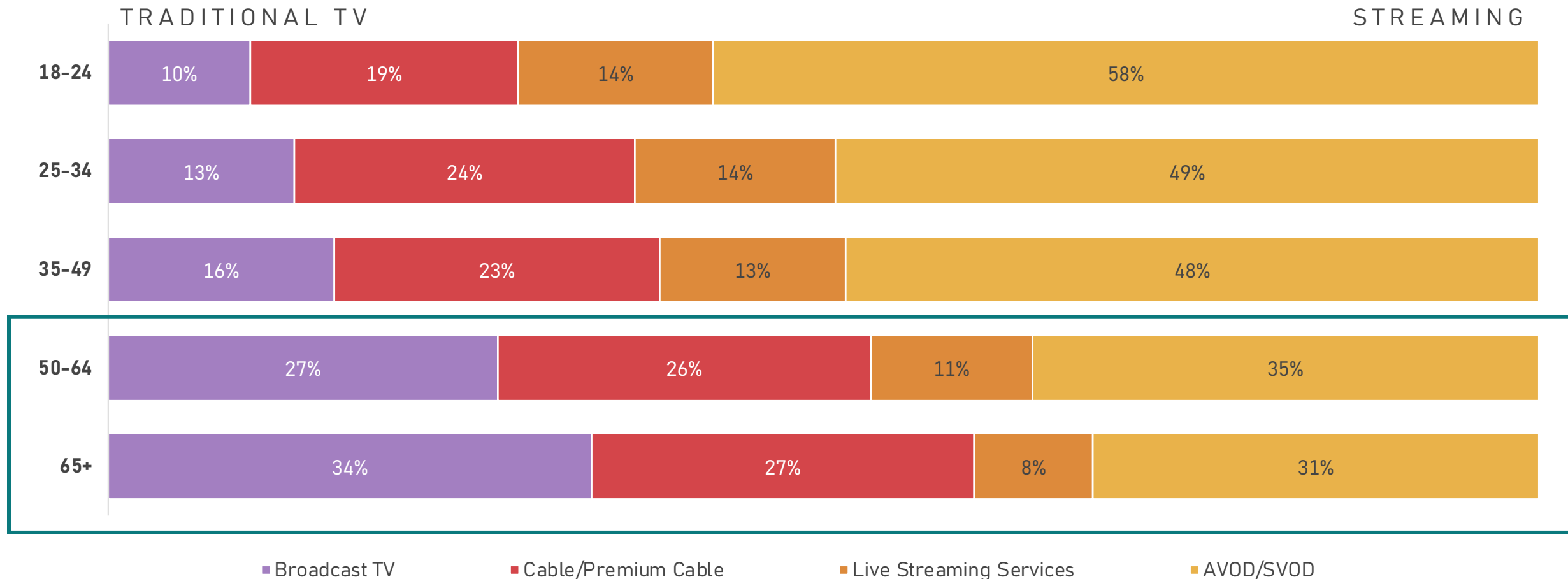
Jake Trupin, Elizabeth Henebry,
Nikita Tolani, Rosie Nisanyan

JUNE 2023



A55+ Use a Variety of Platforms to Watch the Content They Want

% of Longform Viewing by Platform



Overview of Approach



Proprietary & Secondary Consumption Analysis

Viewership
and time spent



Interviews in Partnership with Magid



Motivations
and attitudes



Panel Survey in Partnership with Magid



Touchpoints and
viewing habits



Consumer Syndicated

Attitudes and
viewing habits

Research Approach

In Partnership with MAGID Research

01.

In the Summer of 2021, **8 in-depth interviews** were conducted within older American's homes regarding how streaming content factors into their lives



02.

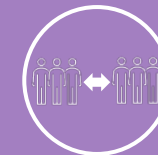
Leveraged MAGID's **VES learnings** (Video Entertainment Study) from the second half of 2021



Nationally Representative
Online Survey of N=2,400
Online Users



Ages 13+



Sample matched to
the US Census for
Age, Gender, and Race



Data collected March
29 – April 9, 2021



Groups for Analysis:

- Gen Z N=393
- Millennials N=609
- Gen X N=596
- Boomers N=687



51%

of A55+ **stream**
on a TV screen

at least weekly – up from 42% in 2022

Source: 2023 Video Entertainment Pulse Study. How often do you watch video (e.g. TV shows, movies, news, sports, live events, and/or video clips) in the following ways? A55+