2021 Global Gaming Opportunity

NBCUniversal + Sky
2020 WAS POISED TO BE AN INFLECTION POINT IN GAMING

 Highly anticipated launch of Next Gen consoles

 Big tech enters the gaming space betting on the cloud

 New pricing models continue to gain adoption

 Esports continues to go mainstream
### Gamers leaned in more than ever

While the pandemic posed threats to distribution and production, ultimately it led to increases across all aspects of gaming, from time spent gaming all the way to streaming and spending.

<table>
<thead>
<tr>
<th><strong>Gaming Industry</strong></th>
<th><strong>$174.9B</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue in Gaming Market</strong></td>
<td><strong>+39%</strong></td>
</tr>
<tr>
<td>Expected to grow +19.6%, $15.6B higher than originally forecasted</td>
<td></td>
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</tbody>
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<table>
<thead>
<tr>
<th><strong>Game Publishers/Brands</strong></th>
<th><strong>Consoles</strong></th>
<th><strong>PCs</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Game publishers as well as hardware providers reeled from disruptions in distribution and development due to closures</td>
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<tr>
<td>Despite a fully digital distribution, PC gaming brands faced delays in new game development</td>
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</table>

<table>
<thead>
<tr>
<th><strong>Gamers</strong></th>
<th><strong>80%</strong></th>
<th><strong>+30%</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Of gamers watched video game streams during lockdown</td>
<td></td>
<td></td>
</tr>
<tr>
<td>More time spent playing video games</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

34% of gamers either subscribed, used a cloud service, or watched a virtual gaming for the first time in 2020.

Source: NewZoo, Game Engagement during COVID
KEY TAKEAWAY

COVID has not fundamentally changed the gaming industry or created new player behavior. Rather, it accelerated existing trends.
The biggest challenge and opportunity for gaming brands coming out of 2020 will be *retaining and gaining* new gamers post-COVID.
OUR CREDIBILITY IN THE SPACE IS ONLY GROWING
GAMING IS IN OUR DNA
NBCU + SKY GAMER PROFILE

414M NBCU+SKY ACTIVE GAMERS

67% GAMING AUDIENCE REACH

REGIONAL GAMER REACH

<table>
<thead>
<tr>
<th>Region</th>
<th>Reach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia</td>
<td>70%</td>
</tr>
<tr>
<td>Europe</td>
<td>55%</td>
</tr>
<tr>
<td>Latam</td>
<td>67%</td>
</tr>
<tr>
<td>Na</td>
<td>45%</td>
</tr>
<tr>
<td>Mea</td>
<td>68%</td>
</tr>
</tbody>
</table>

GENERATIONAL REACH

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Reach</th>
</tr>
</thead>
<tbody>
<tr>
<td>16-24</td>
<td>28%</td>
</tr>
<tr>
<td>25-34</td>
<td>35%</td>
</tr>
<tr>
<td>35-44</td>
<td>23%</td>
</tr>
<tr>
<td>45-54</td>
<td>10%</td>
</tr>
</tbody>
</table>

63% of our global gamer reach are Gen Z and Millennials

REACHING GAMERS ON NBCU + SKY

<table>
<thead>
<tr>
<th>Channel</th>
<th>Reach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telemundo</td>
<td>247</td>
</tr>
<tr>
<td>E</td>
<td>228</td>
</tr>
<tr>
<td>Nbcsports</td>
<td>236</td>
</tr>
<tr>
<td>Bravo</td>
<td>230</td>
</tr>
<tr>
<td>Usa</td>
<td>225</td>
</tr>
<tr>
<td>Syfy</td>
<td>216</td>
</tr>
<tr>
<td>Nbc</td>
<td>221</td>
</tr>
<tr>
<td>Cnbc</td>
<td>203</td>
</tr>
</tbody>
</table>

Source: Global Web Index, December 2019
OUR GAMING PARTNERSHIPS ARE EVOLVING

1. Adjust Our Mix To Match Consumption
   OLV, OTT, social, etc.,

2. Access Data For More Precise Targeting
   1st, 2nd, 3rd party

3. Use Branded Content For Storytelling
   But needs distribution

4. Trailer Launches Need High Impact
   Live events, sports

5. Explore Strategic Partnerships
   With endemic entities

6. Identify Big Global Ideas And Activation
MORE CONTENT = MORE OPPORTUNITY
NBCUniversal + sky

World-class TV content on every screen, live and on demand

615M+ PEOPLE REACHED PER MONTH
150+ COUNTRIES
$24B INVESTED IN CONTENT ANNUALLY
THE HOME OF SPORTS IN THE US AND EMEA

SOCCER
- Premier League
- MLS
- EFL
- Bundesliga
- Champions League

GOLF
- THE OPEN
- PGA
- Masters
- U.S. Open
- WGC
- European Tour

RUGBY
- Gallagher Premiership
- Rugby World Cup
- Super Rugby

OLYMPICS
- Winter Olympics
- Summer Olympics

AMERICAN FOOTBALL
- NFL
- College Football

CRICKET
- IPL
- Test Cricket

MOTORSPORTS
- F1
- NASCAR
- IndyCar

TENNIS
- ATP
- WTA

FIGHTING
- UFC
- World Boxing

AND MORE!
The world’s largest football app is now the world’s largest football media company.

OneFootball partners with 130+ clubs, federations, and leagues to distribute their content across their global footprint.

Globo SporTV is the largest Pay TV sport channel in Brazil – with the most complete sports portfolio.

Here fans can watch 30+ sports including Football, NBA, Volleyball, Formula 1, Tennis MotoGP, Tokyo Olympics and e-Sports.

*If Central America is of interest, we have the opportunity to explore Televisa as well, which includes relevant sports such as La Liga (Spanish League) and all the games of Atlético de Madrid (currently in 1st place) and Villarreal (currently on 4th). They also cover the Mexican League, and wrestling.
WORLD-CLASS ENTERTAINMENT

THE MOST TRUSTED VOICES IN NEWS

UNFORGETTABLE GLOBAL EVENTS
PATHS TO PARTNERSHIP
THE ABILITY TO CAPTIVATE FANS AND IMPACT CULTURE

SOCIAL MEDIA
DIGITAL VIDEO
SHOPPABLE MOMENTS
EXTENDED IP REACH
Reach potential consumers on Twitter when they’re watching (and talking) about the must-see moments from NBCUniversal’s & Sky’s social powerhouse brands.
SURROUND THE FASTEST GROWING ENTERTAINMENT BRAND ON YOUTUBE

Source: YouTube Analytics (January – September 2020)

SOCIAL MEDIA
DIGITAL VIDEO
SHOPPABLE MOMENTS
EXTENDED IP REACH
Client’s Shoppable unit performed 1.7x better than their standard ad.
REACH 91M GLOBAL FANS ON SYFY

SOCIAL MEDIA

DIGITAL VIDEO

SHOPPABLE MOMENTS

EXTENDED IP REACH

*UK, SPAIN, PORTUGAL, POLAND, GERMANY, FRANCE

*MEXICO, BRAZIL, ARGENTINA, CENTRAL AMERICA, CHILE, COLOMBIA, PERU
MORE OPPORTUNITY
TO FIND YOUR AUDIENCE
ALLOW US TO (RE)INTRODUCE G4

The new G4 will be a multi-platform content network geared towards the ever-growing *video game*, *e-sports*, and *fandom* audiences.

The foundation of G4 programming is an innovative, interactive live format featuring celebrities, gamers, and influencers.

The New G4’s Content Pillars

- Comedy
- Live Esports
- Live/Premium
- Gaming/Culture
- Creators/Streamers
A modern approach
Projected reach year 1 is 82M+

**G4 DISTRIBUTION MODEL & CONTENT LIFECYCLE**

Distribution channels

- **LINEAR**
- **DIGITAL/SOCIAL**
- **OTT/CTV**

**Content Lifecycle**

- **G4 LIVE STREAM (Twitch & YouTube)**
  Live & uncut, G4 will give fans an opportunity to pull back the curtain and watch the show, no outtakes

- **LINEAR**
  Prime programs will be edited and polished to deliver a more traditional TV viewing experience

- **VOD (YouTube)**
  Each prime program will have its own YouTube channel giving fans an opportunity to snack or binge

- **SOCIAL**
  Clips, highlights, and “in case you missed it” moments shared from each programs social handle
ADSMART CONNECTS YOUR BRAND WITH GAMERS

Leverage data to identify strategic audiences across NBCU + Sky

**DEFINE YOUR AUDIENCE**
- All Gamers
- TV Viewership
- Game Purchase History
- Addressable
- Targeted Online Video
- And More

**CHOOSE YOUR CHANNEL**
- Data-Driven Linear
  - Optimized delivery to target audiences at scale through the broad reach of national TV
- Addressable
  - Dynamic delivery to target homes through highly engaging TV content on set-top boxes & connected devices
- Targeted Online Video
  - Dynamic delivery to target users through premium video on desktop & mobile

**ACTIVATE GLOBALLY**
ADSMART
- Proprietary tech to target audiences on TV and on digital
  - USA
  - Germany
  - UK + IRL
  - Italy
# ADSMART ADVANCED TARGETING DATA SOURCES

<table>
<thead>
<tr>
<th></th>
<th>US</th>
<th>UK</th>
<th>Ireland</th>
<th>Germany</th>
<th>Italy</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1ST-PARTY DATA</strong></td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>e.g. NBCU+ Sky Viewing Data</td>
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<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td><strong>3RD PARTY PARTNERS</strong></td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>e.g. Demographic Targeting &amp; Replicating Pen Portraits</td>
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<td>✔️</td>
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<tr>
<td>e.g. Console Owners</td>
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<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td><strong>CLIENT DATA</strong>*</td>
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<td>✔️</td>
<td>✔️</td>
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*Requires Data Sharing Agreement

**Best in-market 3rd-party partners**

- ADSMART ADVANCED
- Best in-market 3rd-party partners

(AD) Addressable  (DDL) Data Driven Linear  (TOV) Targeted Online Video
<table>
<thead>
<tr>
<th></th>
<th>1Q 2021</th>
<th>2Q 2021</th>
<th>3Q 2021</th>
<th>4Q 2021</th>
</tr>
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<tbody>
<tr>
<td>Tentpoles &amp; Events</td>
<td>![Images of Premier League and other events]</td>
<td>![Images of Premier League and other events]</td>
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</tr>
<tr>
<td>Targeted Distribution</td>
<td>adsmart Data Targeting &amp; Programmatic</td>
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<tr>
<td>Always On Digital</td>
<td>![Icons of various platforms]</td>
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HOW TO REACH AND ENGAGE GAMERS ACROSS NBCU + SKY

- High Impact Tentpoles & Events
- Comcast Enterprise Partnerships
- First-to-Market Global Activation
- Social Media, Talent & IP
- Content Marketing & Contextual Alignment
- Immersive Experiences
FOR MORE INFORMATION REACH OUT TO

CORY HINTON, Director Client Strategy

KRISTIN O’DAY, Global Partnerships Gaming

LINDSAY OROSCO, Director, Global Client Strategy

NICHOLAS YOUNGMAN, VP, Client Strategy
Thank you!

NBCUniversal + Sky