ADDRESSING NEW REALITIES
Embracing & Connecting with Today’s American Family

NBCUniversal
Americans place more importance on their role as a family member than anything else

Family and connection have become even more of a priority over the last few years.

<table>
<thead>
<tr>
<th>Role as a parent</th>
<th>Role as a spouse/partner</th>
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<tbody>
<tr>
<td>71%</td>
<td>69%</td>
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<td>73%</td>
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<thead>
<tr>
<th>Religion</th>
<th>Career/Job</th>
<th>Race/Ethnicity</th>
<th>Political Party</th>
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<tr>
<td>43%</td>
<td>37%</td>
<td>29%</td>
<td>28%</td>
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<td>44%</td>
<td>39%</td>
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Source: 2020 American Family Survey (YouGov)
NBCUniversal has studied, celebrated, and entertained the American Family for generations.
Over time the meaning of ‘family’ has evolved
Family bonds have been broadened beyond blood connections

What some Americans are saying about family:

“Family can mean more than just blood relatives. You can consider friends, coworkers, or pets to be family.”

“Family is people who are very close to me and share certain commonalities. People in my family understand who I am as a person and my beliefs, and vice versa.”

“Family are the people who know you most intimately, and who you can most naturally be yourself around.”

“Family to me means being there for each other no matter what the problem or occasion may be.”

Source: NBCU Qualitative Research, November 2021
Note: In Fall 2021, NBCU conducted proprietary research to understand how American consumers define family and their expectations of brands
The structure and composition of ‘family’ has changed to reflect shifting social, cultural, and demographic norms.

Family Unit Structures
Legal and medical advances prompt growth of same-sex and single parent households.

Diversifying Population
Increasing diversity across the U.S. results in more multi-ethnic and multi-racial families.

Attitudes Towards Marriage
New lifestyle preferences lead to growth in single population, delayed marriage, and unmarried co-habitation.

Generational Nuances
Millennials have been slower than previous generations to establish their own households.

Women in the Workforce
More educational and economic opportunities result in women delaying or deciding against having children.
There is no longer one dominant family unit in America
New family realities exist

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
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<tbody>
<tr>
<td>Parenting Postponed</td>
<td>The average age of first-time mothers in America, up from 21 in 1972¹</td>
</tr>
<tr>
<td>Missing Middle Children</td>
<td>The average number of children in a family in 2020, down from 2.33 in 1960²</td>
</tr>
<tr>
<td>Minors Growing Up Multicultural</td>
<td>Of U.S. residents younger than 18 identify their race as Non-White³</td>
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<tr>
<td>Married Nearing Minority</td>
<td>Of adults 25-54 are unpartnered (neither married nor living with a partner) up from 29% in 1990⁴</td>
</tr>
<tr>
<td>No Longer Leaving the Nest</td>
<td>Of 18-29 year-old are living with their parents⁵</td>
</tr>
<tr>
<td>The More (Generations) The Merrier</td>
<td>Of Americans live with multiple generations under one roof⁶</td>
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Many brands are taking steps to respond to new family realities

**Challenging Traditional Roles**
Procter & Gamble’s Dawn dish soap urged consumers to share household chores more equally in their “come clean to close the chore gap” campaign.

**Championing Inclusivity**
Cracker Barrel’s brand refresh included new customer portraits, such as a same-sex couple, to ensure its marketing accurately reflects America.

**Embracing Shared Experiences**
Subaru Crosstrek’s “Girls Trip” campaign (in both English and Spanish) navigates a grandmother-granddaughter road trip where they discover their similarities – defying age stereotypes.

**Responding to Modern Priorities**
As part of its health and wellness positioning, Petco responds to the humanization of the pet care category and promotes bringing pets closer into the family.
While many brands have taken action to reflect the changing American Family, consumer expectations continue to evolve

Brand Efforts Are Being Acknowledged...

“In recent years brands have used more diverse representation of families in their advertisements.”

“I have noticed that brands are showing more family-based ads. I feel that they are helping to bring back a sense of community.”

“I think the family is being shown in a positive light.”

…But there Is Still Room for Progress

“I would like to see more inclusion - using people of color, people with disabilities, and people who are not always represented in advertising.”

“I think more could be done to try to relate to and understand families, as they are a constantly progressing & changing art.”

“I think brands need to consider the overall goals and intentions of most families these days. It’s a delicate balance of being green, time, money, etc.”

Source: NBCU Qualitative Research, November 2021
Brands have an opportunity & responsibility to go beyond the traditional family mold & strengthen connections based on new family realities.

Not only is the face of the American Family evolving, but what’s important to them.

Consumers expect brands to demonstrate they are culturally ‘in sync’ by acknowledging and embracing who the American Family is today.
As brands endeavor to strengthen their connection with families, here are five cultural considerations:

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<td>How can brands authentically connect with diverse families?</td>
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<td>How do brands become a part of new family interests and lifestyles?</td>
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<td>How have families’ relationships with technology changed the role brands can play?</td>
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Consumers Demand Diversity & Authentic Depiction

Move Beyond Reflection
By not only reflecting, but accurately portraying diverse families in their creative, brands can stay at the forefront of change and deepen consumer relationships.

Families want to see diversity

78% of parents want their children to be exposed to media that teaches them about cultures, religions, and lifestyles that are different from their own.

Desire to go beyond outdated tropes

52% of those who feel poorly represented, cite that it’s due to a lack of accuracy in portrayals (behavior, economic level, family, home differences).

I would like to see more when it comes to advertising using people of color, people with disabilities, and people who are not always represented...

I think brands could work harder to represent positive family interactions...

I don't feel that they resonate with our experiences.

Family Members Adopt New Shared Interests

Create New Family Experiences

Align with new shared interests not only to reach adults or kids, but families as a whole. Recognize the power of your brand to bring the family together around these passion points.

Parents want to share their passions

64% of parents choose content for children that reminds them of their own childhoods

44% of parents are more likely to subscribe to sports channels / media

Kids are sharing their passions back

88% of kids feel they have some influence on which streaming subscriptions are purchased

>67% of parents regularly play videogames with their kids

These routine and shared activities, while not always smooth, do provide some regular family time where everyone is together. It provides a break in the day and a moment to bond as a family.

Sources: 1. WARC ‘What we know about marketing to parents and families’ 2. The Drum “Kids will call the shots in video streaming wars” 3. Entertainment Software Association ‘2021 Essential Facts About the Video Game Industry’ 4. NBCU Qualitative Research, November 2021
**Modern Family Issues Prompt New Brand Expectations**

Join the Conversation
Evaluate and communicate the role your brands plays in the world. Connect with consumers through influential topics that are defining today’s cultural conversations.

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<th>Health &amp; Wellness</th>
<th>“How to Discuss your Mental Health with Family Members who Don’t Get it”</th>
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<td>Inclusivity</td>
<td>“Parents Worry More About Bullying than Anything Else”</td>
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<td>Education</td>
<td>“Going to College Should not Be a Financial Albatross”</td>
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<tr>
<td>Sustainability</td>
<td>“How to Raise Kids who Care About the Environment”</td>
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**New issues prompt new brand expectations**

90% of global consumers feel **brands have a duty to respond** to current events with meaningful action.

Brands can be relevant by **addressing the real needs of families.** I would like to see more advertising about sustainability, about helping our future, and emphasizing experiences over things.

Sources: 1. Global Web Index, Allyship and Accountability Study, July 2020 2. NBCU Qualitative Research, November 2021
Centering the Family Around a Single Device Is a New Challenge

Choose to Be a Connection Point
Recognize brands play a role in how families interact and don’t interact. In supporting families, promote activities and entertainment that help family members bridge the divide.

Family members are becoming more siloed as access to technology increases

25
is the average number of connected devices in a U.S. household
In 2019 this number was 11

But families still find ways to come together

>50%
of kids aged 8-15 say they watch TV programs with their parents always or most of the time

Technology serves as a distraction in family settings and does not allow the family to interact together like they used to.

Thanks to technology, living far away from others has not been a hindrance… [it has] been really helpful in connecting family members.
New Household Dynamics Create More Influencers

Engage the New Gatekeepers
Acknowledge the way families make decisions has changed. Consider messaging cues and touchpoints that appeal to new influencers and establish brand connection with the family as a unit.

Growing household size brings more opinions

2.63
is the average U.S. household size, increasing over the last decade for the first time in over 160 years (as multi-generational households grow)¹

Parents value kids’ research skills

72%
of parents say they involve their children in the beginning stage of the purchase journey²

“When I was little, they didn’t have the internet so we couldn’t research products ahead of time. Now my son looks at stuff online on his own and saves me time by finding what and where to purchase it, plus the average price for the item.”²

Sources: 1. Pew 2. NRF’s Fall 2019 Consumer View
### Responding to Key Cultural Influences on Families

**Key Takeaways for Brands to Strengthen Connections with Families**

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As consumer behaviors and family values have evolved, so too has NBCUniversal content...
...And we continue to evolve the overall NBCUniversal experience

Starting Conversations
“Frida Mom, rejected from the 2020 Oscars’ telecast, worked remotely with NBCU on a new spot featuring real mothers in the Golden Globes.”

Sharing Knowledge
“NBCUniversal launches celebrity-filled coronavirus The More You Know PSA with the Ad Council and the White House.”

Inspiring Action
“NBCUniversal activates its Family is Universal platform to give back for the holidays.”

Pushing Innovation
“Peacock will be the go-to place for both timely and timeless content.”
Thank You

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