GAMING INSIGHTS:
Graduating to a Global Media Mindset
Agenda

1. Gaming’s Evolution into a Global Entertainment Industry
2. Gaming’s Opportunity to Level Up Marketing Strategies
3. NBCU Global Core Principles for Mainstream Reach & Relevance
GAMING EVOLUTION INTO A: Global Entertainment Industry
At NBCU, we see Gaming’s revolution as a global entertainment phenomenon.
THE INDUSTRY HAS TRANSFORMED FROM NICHE INTO a global entertainment platform

Elevated from Niche to Mass Media

3.1B
Total Global Gamers

Competing Against All Forms of Entertainment

200+
Global Streaming Services across Video, Music, & Gaming

Inspiring the Next Frontier of Entertainment

>20
Major Film & TV Shows Currently In Production based on Gaming IP

Source: 1) GWI: Waves Q4’2021 – Q3’2022. Based on all 48 markets; 2) Factcheck
Now, Gaming faces the same dynamics as mainstream entertainment

**Growing Shift to Price-Friendly Subscription Models**

**Mainstream Entertainment**
Inflexible bundled TV cable packages developed into flexible streaming DTC platforms

**Gaming**
Expensive hardware and individual game purchases are developing into price-friendly cloud gaming and subscription services

**Increasing Power & Prominence of Proven IP**

**Mainstream Entertainment**
Studios are prioritizing profits & reducing risk by investing in fan-favorite, revenue-driving IP

**Gaming**
IP expansions have successfully extended the lifespan of key titles via incremental sales & attracting new fans

**Fandom Transforms Into Social Community & Engagement**

**Mainstream Entertainment**
Traditional entertainment has spawned communities & social participation, driving social trends and inspiring fans to create content based on favorite IP & moments

**Gaming**
Twitch heralded the modern era of mass streaming and, along with Gaming’s pivot to free-to-play (F2P), has helped foster community and socialization
Level Up Marketing Strategies
Given these dynamics, gaming brands have begun reimagining marketing strategies...

Activating custom crossovers & partnerships to drive pop culture relevance

Leaning into portfolio-based marketing complimented by individual game campaigns for key releases

Executing campaigns that parallel IP extensions to covert incremental fans into gamers
...But Gaming marketing has further opportunities to extend beyond endemic channels

Looking at 2022, gaming brands primarily spent with YouTube and their linear mix remained extremely narrow.

- 64% of 2022 Total Spend on YouTube & Endemic Gaming Websites
- 6/10 of The Top 10 Channels For Gaming Spend, Six Were YouTube
- 88% of 2022 Linear Spend on Sports, Adult Animation, and Kids/Teen Programming

Source: MediaRadar
This endemic-first approach limits the potential reach across gaming’s ever-growing & diverse audience.

**Today’s Gamer Demographics**
Total Global PC and/or Console Players

<table>
<thead>
<tr>
<th>Gender</th>
<th>Age</th>
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<tbody>
<tr>
<td>Female</td>
<td>40%</td>
</tr>
<tr>
<td>Male</td>
<td>60%</td>
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- **Gender**
  - Female: 40%
  - Male: 60%
  - Non-binary: 1%

- **Age**
  - 10-20: 22%
  - 21-30: 27%
  - 31-40: 22%
  - 41-65: 29%

Source: Newzoo, Global Web Index
Gaming’s new mainstream entertainment dynamics & diverse userbase mandates evolved marketing goals

**GOAL #1**
Drive Excitement & Awareness In Key Markets

**GOAL #2**
Expand To New Categories and Cultural Audiences

**GOAL #3**
Grow Brand Cultural Relevance
NBCU Global Core Principles for Mainstream Reach
GOAL #1

Drive Excitement & Awareness In Key Markets

A Dynamic Approach To Fandom

GOAL #2

Expand To New Categories and Cultural Audiences

Stay In Front Of Consumers

GOAL #3

Grow Brand Cultural Relevance

Leveraging & Creating Cultural Moments
To drive excitement & awareness with dynamic gaming audiences, brands should build upon existing interests & fandoms

**GAMERS’ PASSIONS & INTERESTS EXTEND BEYOND GAMING**

- **Finance Enthusiast**
  68% of Gamers are interested in investing and the economy (129i)

- **Horror TV Fan**
  70% of Gamers identify horror as a favorite TV genre (131i)

- **Reality TV Junkie**
  65% of Gamers are interested in Reality TV (124i)

- **News Enthusiast**
  62% of Gamers are interested in TV News coverage (117i)

- **Worldly**
  65% of Gamers are interested in other cultures and like to explore the world (124i)

- **Sports Fan**
  66% of Gamers are interested in Sports (125i)

Source: Global Web Index – “Gamer” defined as anyone played an online game, premium game or free-to-play game, used a cloud gaming or a subscription service, or purchased a videogame/downloadable content within the month of the survey
NBCU has the expertise to help brands leverage fandoms & passion points

With our years as a global entertainment leader and understanding of the psychology of fandom, we know that premium content drives deeper fan connections & affinity.

#1
NBCUniversal spends more on global premium content than any other media brand, network or streaming platform.

+13%
Biometric testing showed NBCUniversal content delivered average engagement scores 13% above content norms in EMEA.

80%
Fandoms are highly emotional relationships that brands can capitalize on, with 80% of brand preference is based on emotions.

AND WITH OUR MULTI-PLATFORM ECOSYSTEM, NBCU can craft a cohesive campaign to get the most out of fandom.

**Puss in Boots: The Last Wish**
Symphony Promotional Campaign centered around Shrek Fandom

- A Prime Time holiday family movie night event
- Curated Shrek Universe and family-friendly content on Peacock & TPlus
- Family-friendly holiday programming across NBCU
- Rotten Tomatoes and Fandango Network
- Editorial and press coverage of Puss in Boots: The Last Wish across NBCU

**Commercial & Critical Results**

$480M+ Global Box Office

Academy Award Nominee
Best Animated Picture
GOAL #1
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A Dynamic Approach To Fandom

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GOAL #3
Grow Brand Cultural Relevance
Leveraging & Creating Cultural Moments
Fragmentation has created new opportunities for more persistent reach & NBCU Global has built a portfolio to stay in front of consumers wherever they are.

With viewer attention and leisure time continuing to fragment, brands should leverage all media channels to meet consumers wherever they are.

NBCU Global has established key strategic partnerships across all channels to provide a one-stop shop for all reach needs.

Source: GWI. Waves Q4'2021 - Q3'2022. Based on all 48 markets.
And across key global markets, we leverage the best of our content, platforms, IP & technology to drive unparalleled reach

**Monthly Reach**

- **All platforms**
  - **North America**: 299M
  - **EMEA**: 417.2M
  - **Asia-Pacific**: 124.6M
  - **Latin America**: 157M

**Top markets**
- **United States, Canada**
- **UK, Italy, Germany, France, Spain, Middle East**
- **Australia, Philippines, India, Indonesia, Singapore**
- **Brazil, Mexico, Colombia, Argentina, Peru, Chile**

**Partnerships & Platforms**

- **North America**
  - NBCUniversal, Apple News, anzu, YouTube, reachtv, Twitter, TikTok
- **EMEA**
  - NBCUniversal, Apple News, Sky, RTL AdConnect, YouTube
- **Asia-Pacific**
  - NBCUniversal, YouTube
- **Latin America**
  - NBCUniversal, YouTube, globo, ONEFOOTBALL

Source: 1) NBCUniversal Global De-Duplicated Reach Model, cy2021; 2) Not exhaustive. Availability & scale of tentpoles to vary by market; 3) Multi-market roll-up; 4) Pre-existing local trading agreements may preclude some partners from being involved in NBCU Global deal negotiations.
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A Dynamic Approach To Fandom

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Leveraging & Creating Cultural Moments
Crafting cultural moments has become more complex than ever before

Numerous Channels For Engagement

As consumers use a wide variety of content channels, tentpole attention has become increasingly fragmented

Polarized Viewers

Cultural polarization bleeds into content consumption as consumers align with media brands that best reflect them

Saturated Content Landscape

Given the growing amount of content available, standing out is increasingly difficult
But we understand that unforgettable moments are driven by emotional connections & storytelling. That’s why we've continued to invest in premium events which define cultural moments around the world.
Capitalize on cultural moments & captivated audiences

Build a deeper connection with an already invested audience by creating a lean-in experience and establishing your brand presence before, during, and after cultural events.

56% of global audiences interested in live events consider themselves part of a fandom community.

Pre-Event
Build Anticipation

During Event
Prompt Participation

Post-Event
Continue the Conversation

NBCU Live Event Impact

+48% Ad Recall
+68% More Likely to Search
+24% Purchase Intent

Sources: Proprietary NBCU + Sky study “Global Connections in Culture”, executed with GlobalWebIndex, March 2021; NBCU Global Qualitative Research, April 2022; +48% NBCU measured campaigns running from June 2017-June 2021; Live event = awards shows, OTT events and select sports.
Gaming brands can leverage these principles to achieve mainstream reach & cultural relevance goals

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**PRINCIPLE #1**
A Dynamic Approach To Fandom

**PRINCIPLE #2**
Stay In Front Of Consumers

**PRINCIPLE #3**
Leveraging & Creating Cultural Moments

With our expertise, NBCU has solutions & resources to help gaming brands further graduate to a global media mindset.
Thank You
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