



2021 Global Gaming Opportunity

NBCUniversal + sky

TABLE OF CONTENTS

A cinematic scene from Star Wars: The Force Awakens. A character, Rey, stands on the edge of a dark, metallic structure, holding a blue lightsaber. In the background, a massive, dark, mechanical structure, likely the First Order's Star Destroyer, looms over the scene. The sky is dark and filled with small, glowing orange particles.

The 2020 Effect

Gamer Impact

The NBCU + Sky Advantage

Paths to Partnership

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**

COVID IMPACT

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.

GAMING INDUSTRY

\$174.9B

REVENUE IN GAMING MARKET
expected to grow +19.6%, \$15.6B
higher than originally forecasted

+39%

INCREASE IN SPENDING
per month on video games

GAME PUBLISHERS/ BRANDS

CONSOLES

game publishers as well as
hardware providers reeled from
**disruptions in distribution and
development** due to closures

PCs

despite a fully digital distribution,
PC gaming brands faced **delays
in new game development**

GAMERS

80%

of gamers watched video game
streams during lockdown

+30%

more time spent
playing video games

34%

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



KEY TAKEAWAY

COVID has not fundamentally changed the gaming industry or created new player behavior

Rather, it **accelerated** existing trends

OPPORTUNITY

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

COMCAST
SPECTACOR



xfinity



twitch

sky

GINX
ESPORTSTV



FIFA WORLD CUP
Qatar2022



NBCU + SKY GAMER PROFILE

414M

NBCU+SKY
ACTIVE GAMERS

67%

GAMING AUDIENCE
REACH

REGIONAL GAMER REACH

70%

ASIA

55%

EUROPE

67%

LATAM

45%

NA

68%

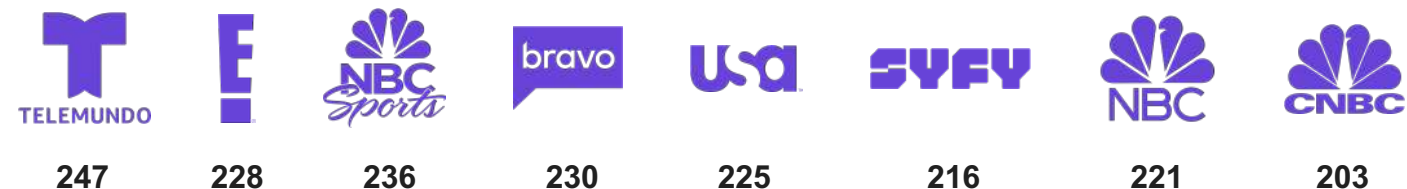
MEA

GENERATIONAL REACH



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

REACHING GAMERS ON NBCU + SKY



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+

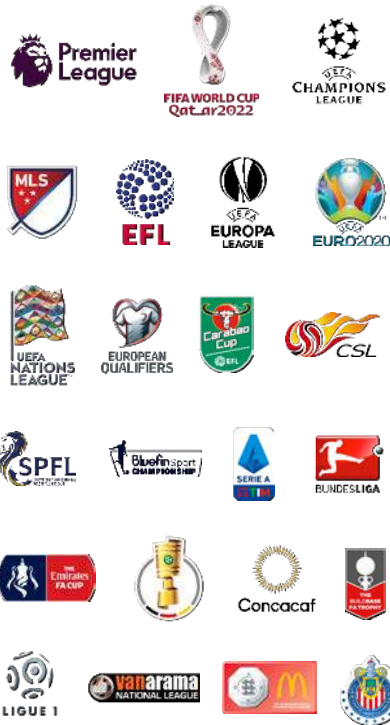
COUNTRIES

\$24B

INVESTED IN
CONTENT ANNUALLY

THE HOME OF SPORTS IN THE US AND EMEA

SOCCER



GOLF



RUGBY



MOTORSPORTS



OLYMPICS



AMERICAN FOOTBALL



CRICKET



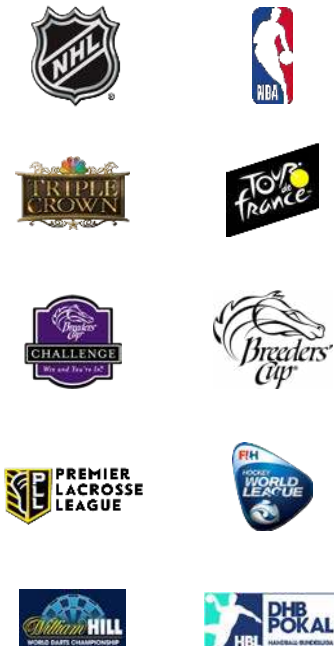
TENNIS



FIGHTING



AND MORE!



sky sports | sky sports mix | sky sports news | sky sports football | sky sports main event | sky sport | sky sport Serie A | sky sport 24 | sky SPORT 2 HD | sky SPORT HD | sky SPORT AUSTRIA HD | sky SPORT NEWS HD | sky sport football

NBC Sports

NBCSN

GOLF

TELEMUNDO Deportes

UNIVERSO

BT SPORT

BT SPORT 1

BT SPORT 2

BT SPORT 3

BT SPORT ESPN

BT SPORT EXTRA

NOW INCLUDING REPRESENTATION DEALS ACROSS LATIN AMERICA & BRAZIL



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.



WORLD-CLASS ENTERTAINMENT



CHERNOBYL

SUCCESSION



THE MOST TRUSTED VOICES IN NEWS



sky news



MSNBC



UNFORGETTABLE GLOBAL EVENTS



LIVE
FROM



Premier
League

A promotional image for Mass Effect 3 featuring two N7 soldiers, a woman on the left and a man on the right, both in black and red armor. They are holding hands in a gesture of partnership. The background is a dramatic space scene with a bright blue and white nebula and a red comet streak. A large orange-outlined rectangle is centered over the characters, containing the text "PATHS TO PARTNERSHIP".

PATHS TO PARTNERSHIP

THE ABILITY TO CAPTIVATE FANS AND IMPACT CULTURE

SOCIAL MEDIA

DIGITAL VIDEO

SHOPPABLE MOMENTS

EXTENDED IP REACH



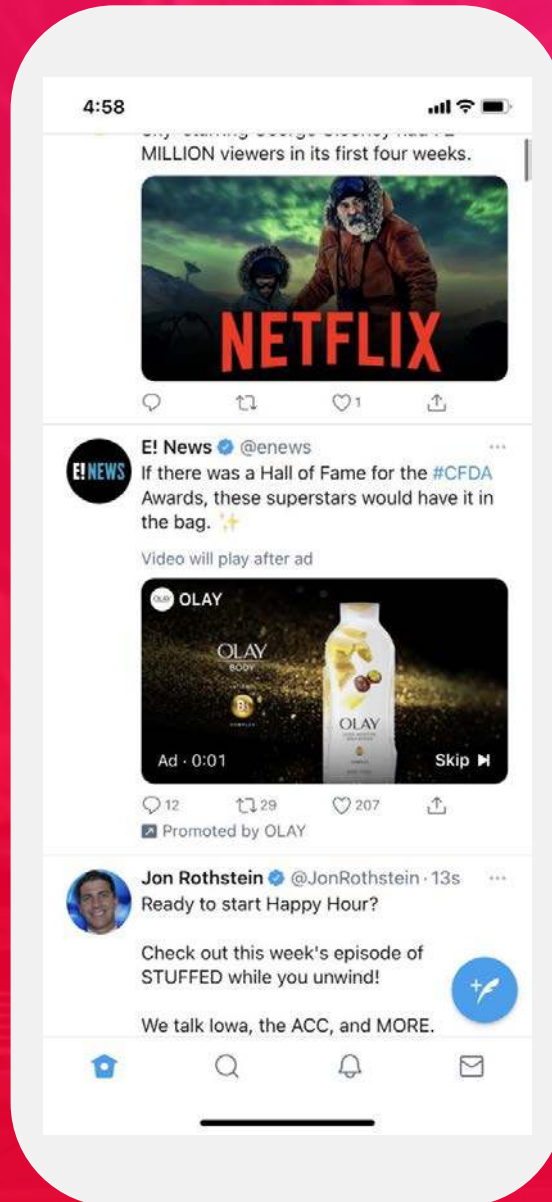
THE BEST OF NBCU+SKY FOR TWITTER'S ENGAGED FANS

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

#1

Platform for Discovery

322M

Global Active Users 2021

209M

Monthly NBCU Global Video Views on average in 2020

SURROUND THE FASTEST GROWING ENTERTAINMENT BRAND ON YOUTUBE

SOCIAL MEDIA

DIGITAL VIDEO

SHOPPABLE MOMENTS

EXTENDED IP REACH



44.2B

Organic Views
+38% YTD



3.0B

Organic Hours
+48% YTD



791M

Engagements
+33% YTD



427B

Impressions
+65% YTD



59M

Global NET SUBSCRIBERS
+12% YTD



154K

VIDEOS PUBLISHED A YEAR

INTERNATIONAL SHOPPABLE

SOCIAL MEDIA

DIGITAL VIDEO

SHOPPABLE MOMENTS

EXTENDED IP REACH



+1.7x

Client's Shoppable unit performed
1.7x better than their standard ad.



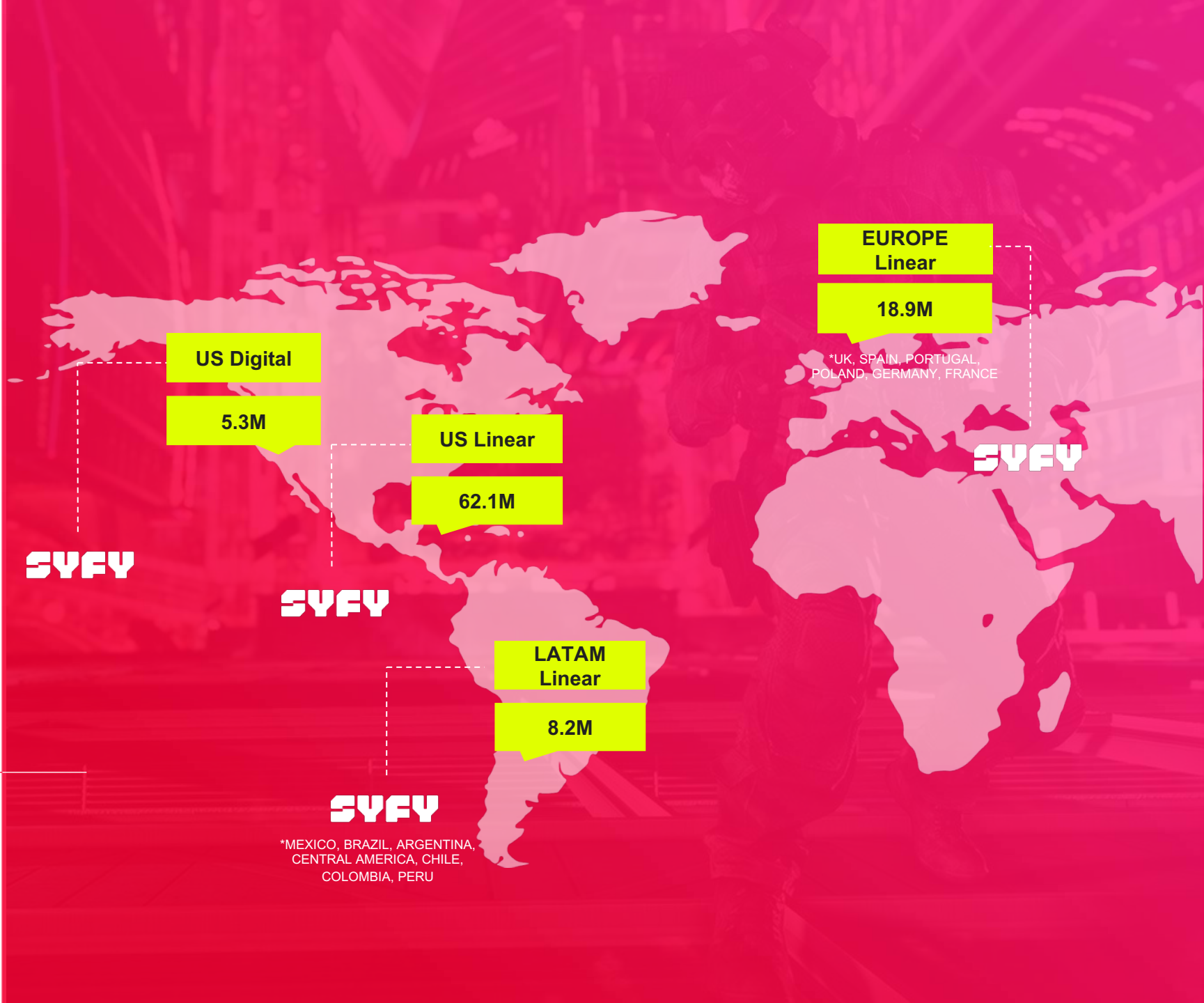
REACH 91M GLOBAL FANS ON SYFY

SOCIAL MEDIA

DIGITAL VIDEO

SHOPPABLE MOMENTS

EXTENDED IP REACH



A fantastical scene set against a dark, starry night sky. In the center, a young girl with brown hair in a high ponytail, wearing a dark dress with a gold brooch, floats with her arms outstretched. To her left, a blue, mechanical robot with a conical head and glowing orange eyes floats, holding a long, thin sword. To her right, a large, translucent, glowing die with various symbols and colors (blue, red, green) floats in the air. On the far right, a witch with a large, pointed hat and glowing orange eyes floats. The background is a deep blue with scattered white stars and faint, glowing patterns. The overall mood is magical and mysterious.

**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



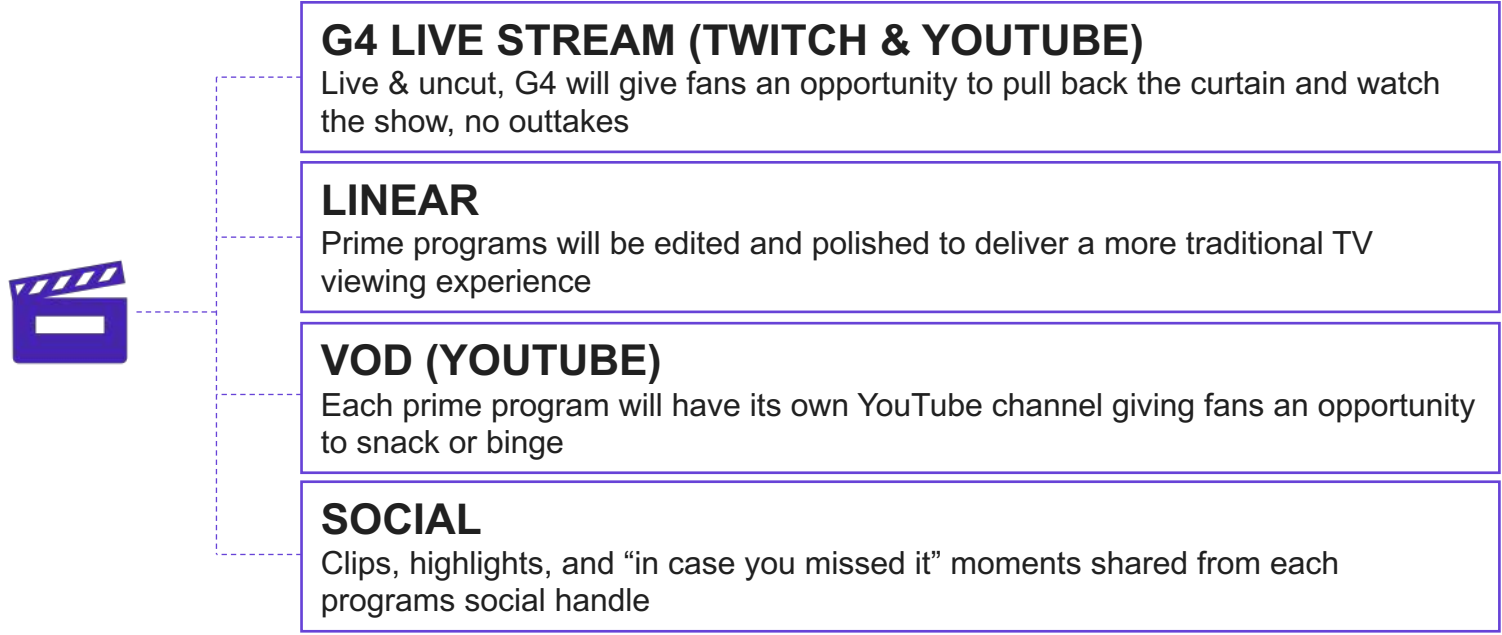
G4 DISTRIBUTION MODEL & CONTENT LIFECYCLE

A modern approach
Projected reach year 1 is 82M+

Distribution channels



Content Lifecycle



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



CONSOLE
OWNERSHIP

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

AD|SMART

Proprietary tech to target audiences on TV and on digital



USA



GERMANY






























































UK + IRL



ITALY

ADSMART ADVANCED TARGETING DATA SOURCES

Best in-market
3rd-party partners

	 US			 UK			 Ireland			 Germany			 Italy				
	AD	DDL	TOV	AD	DDL	TOV	AD	DDL	TOV	AD	DDL	TOV	AD	DDL	TOV		
1ST-PARTY DATA e.g. NBCU+ Sky Viewing Data								—			—			—			
3RD PARTY PARTNERS e.g. Demographic Targeting & Replicating Pen Portraits	 	 	 	 	 	 	 	—	 	 	 	—	 	 	—	 	
3RD PARTY PARTNERS e.g. Console Owners				 	 	 	—	—	—	—	—	—	—	—	—		
CLIENT DATA* 							—	—	—	—	—	—	—	—	—		
*Requires Data Sharing Agreement																	

NBCUniversal + sky

YOUR FULL-YEAR PARTNER

1Q 2021

2Q 2021

3Q 2021

4Q 2021

Tentpoles & Events



Targeted Distribution

adsmart Data Targeting & Programmatic

Always On Digital



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