

JUNE 2023

NBCUniversal

GAMING INSIGHTS:

# Graduating to a Global Media Mindset



# Agenda

## Gaming's Evolution

into a Global Entertainment Industry



## Gaming's Opportunity

to Level Up Marketing Strategies



## NBCU Global Core Principles

for Mainstream Reach & Relevance

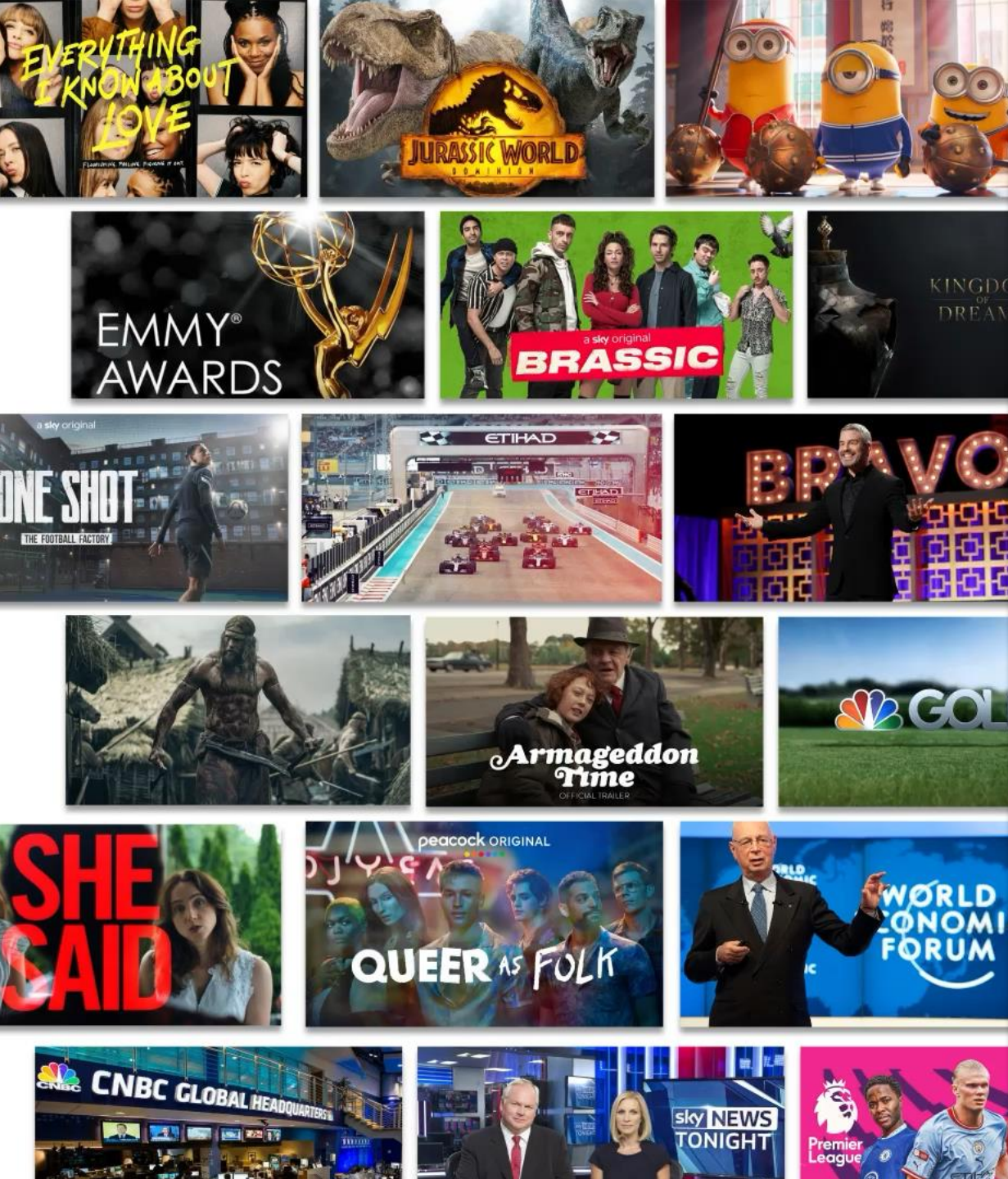


GAMING EVOLUTION INTO A:

# 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

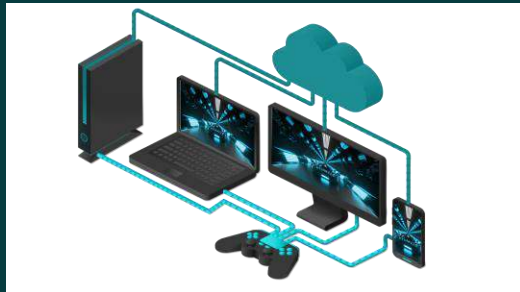


Inspiring the Next Frontier  
of Entertainment

# >20

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

# 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



GAMING OPPORTUNITY TO

# Level Up Marketing Strategies

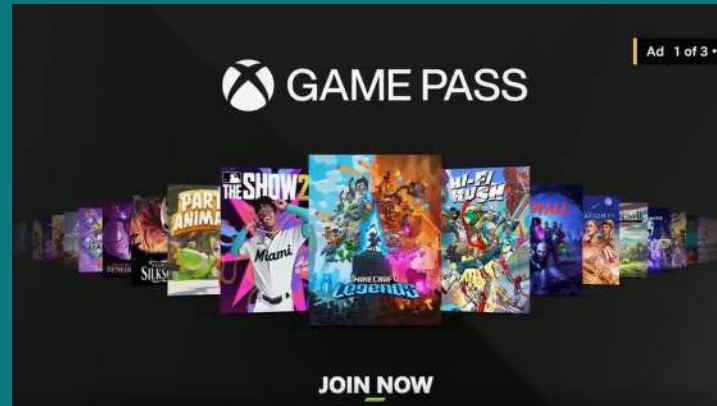


GIVEN THESE DYNAMICS,

**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**

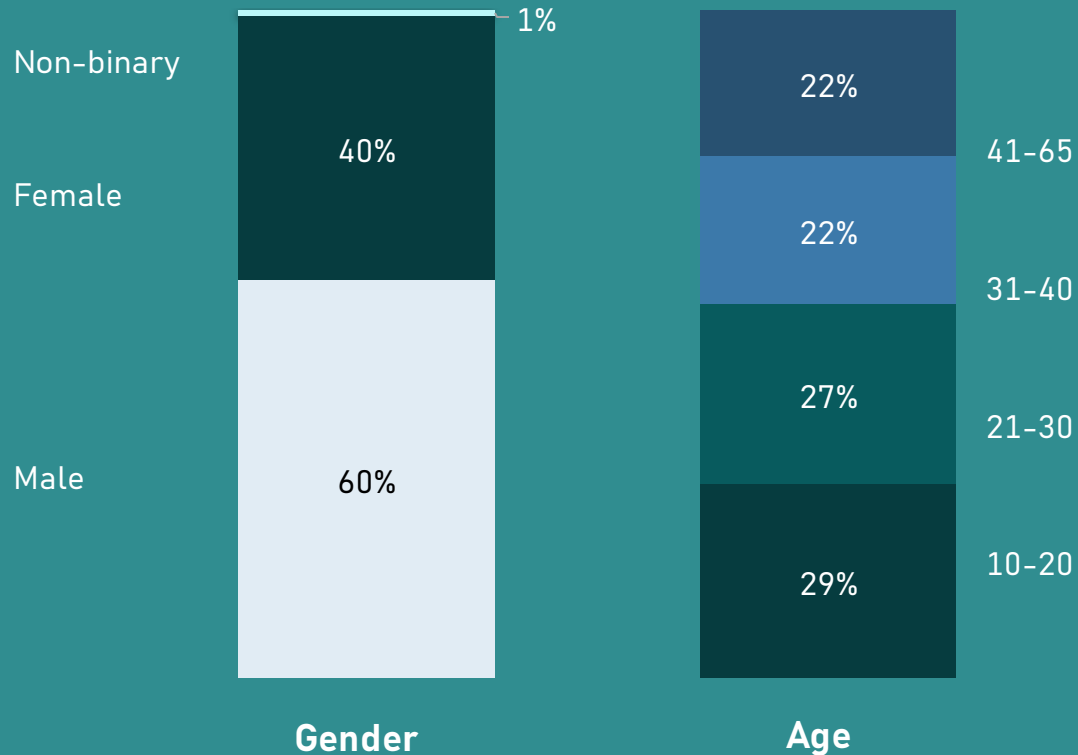
88%

of 2022 Linear Spend on  
**Sports, Adult  
Animation, and  
Kids/Teen Programming**

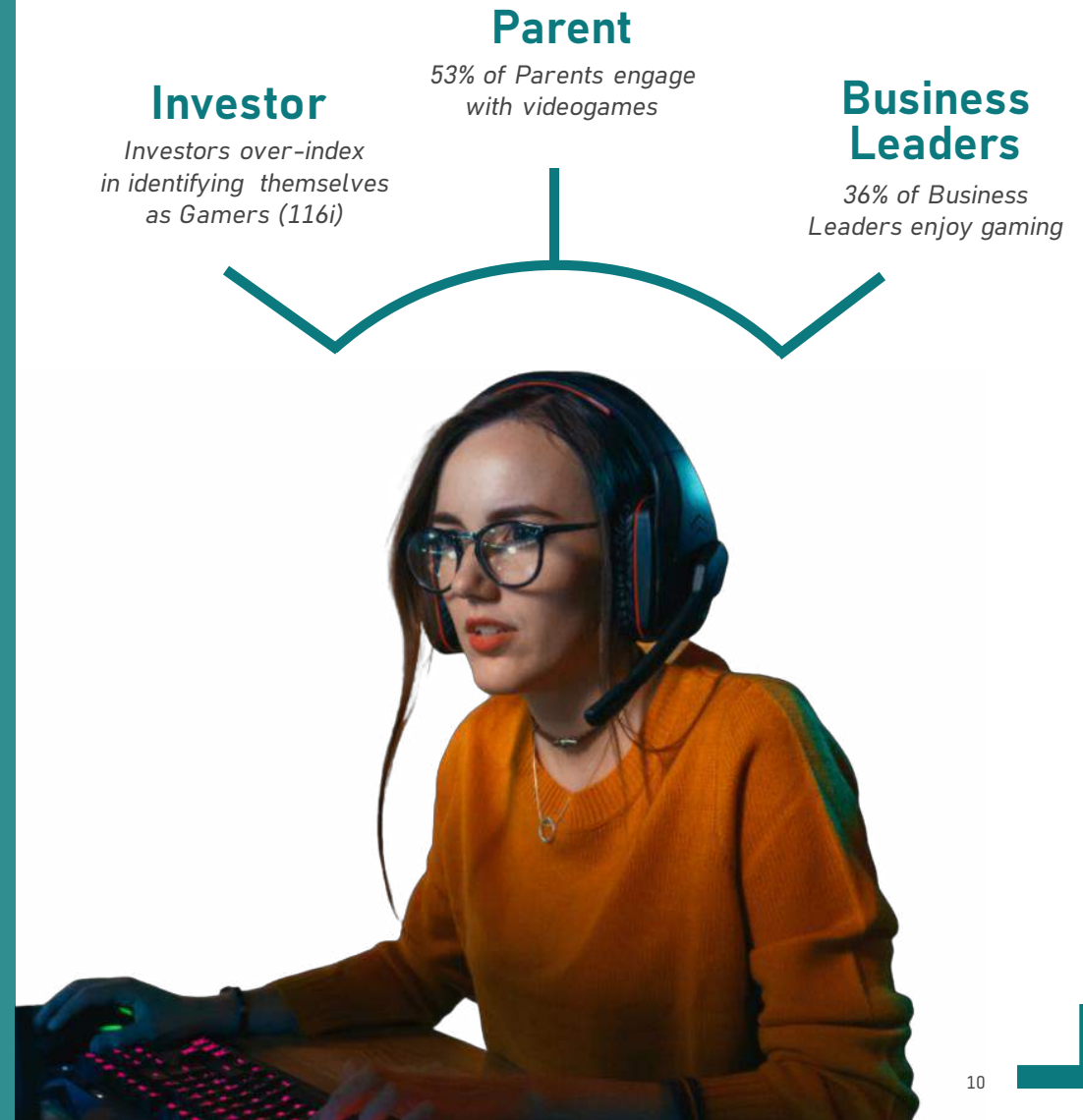
# This endemic-first approach limits the potential reach across gaming's ever-growing & diverse audience

## Today's Gamer Demographics

Total Global PC and/or Console Players



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



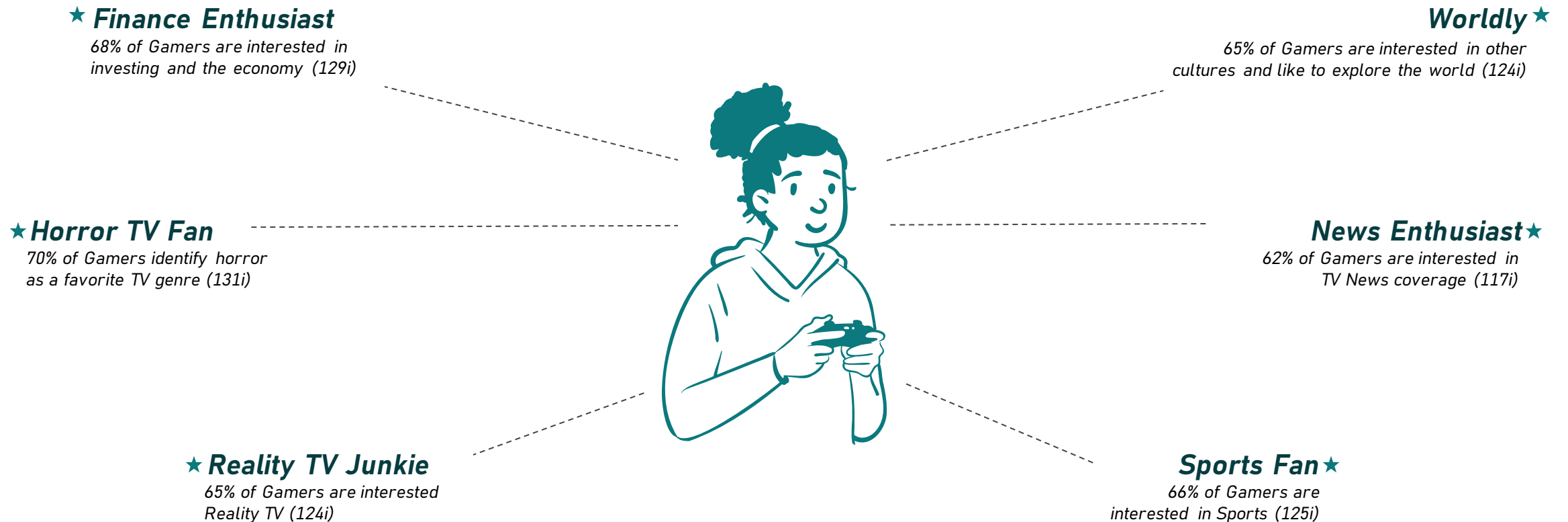
Grow Brand  
Cultural Relevance

**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







# 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





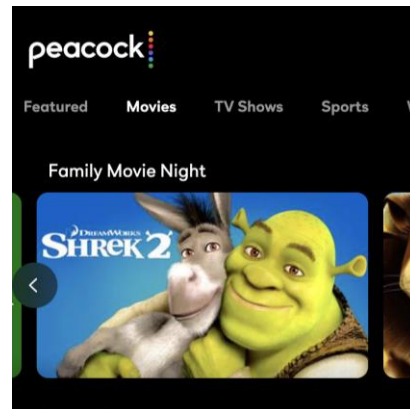
# AND WITH OUR MULTI-PLATFORM ECOSYSTEM, NBCU can craft a cohesive campaign to get the most out of fandom

## Puss in Boots: The Last Wish

Symphony Promotional Campaign centered around Shrek Fandom



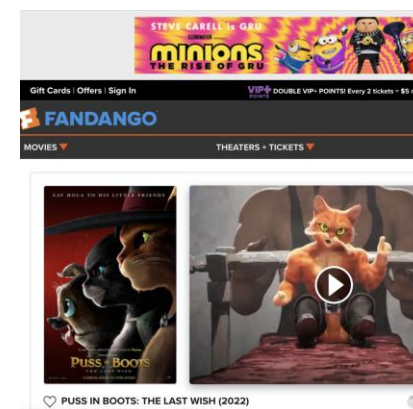
A Prime Time holiday  
family movie night  
event



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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Grow Brand  
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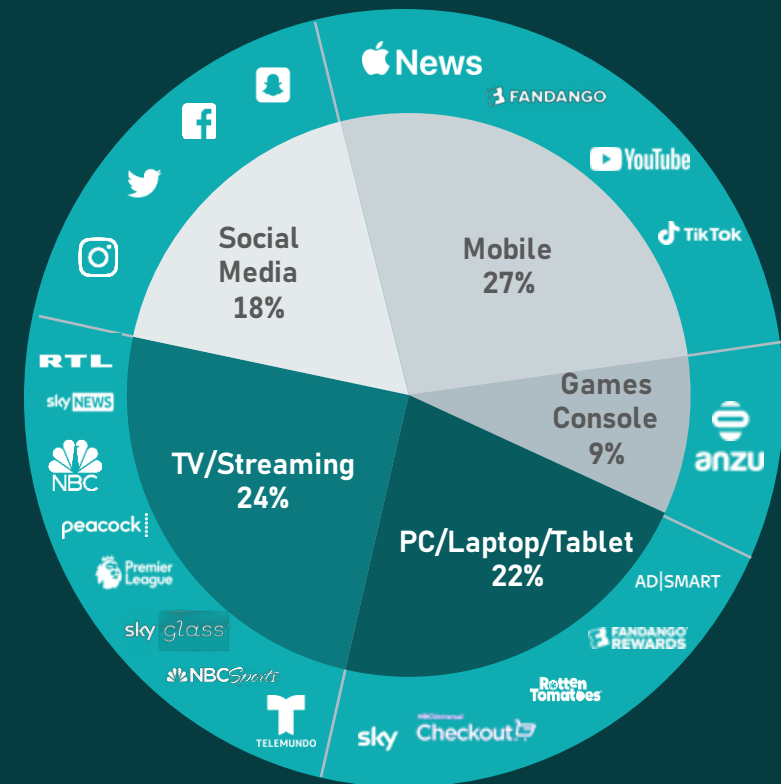


# Fragmentation has created new opportunities for more persistent reach & NBCU Global has built a portfolio to stay in front of consumers

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**

Global Adults Leisure Screentime 2022





# And across key global markets, we leverage the best of our content, platforms, IP & technology to drive unparalleled reach

Monthly Reach<sup>1</sup>  
All platforms

Top markets

Partnerships  
& Platforms<sup>4</sup>

Multi-market  
tentpoles & IP<sup>2</sup>

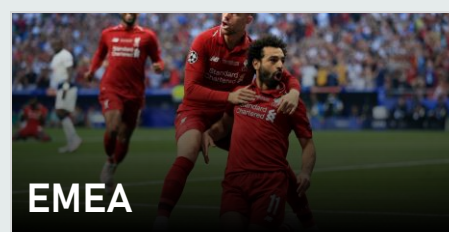


North America

299M

United States, Canada

NBCUniversal Apple News anzu  
YouTube reach tv Twitter Snapchat TikTok

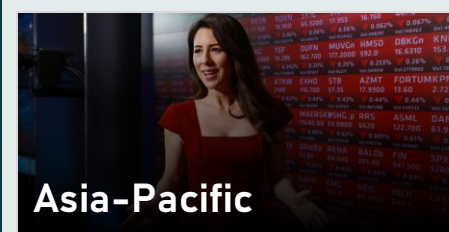


EMEA

417.2M

UK, Italy, Germany, France,  
Spain, Middle East<sup>3</sup>

NBCUniversal Apple News sky Twitter  
RTL AdConnect YouTube

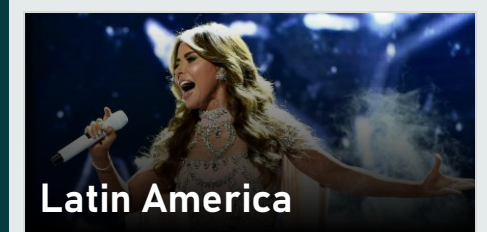


Asia-Pacific

124.6M

Australia, Philippines, India,  
Indonesia, Singapore

NBCUniversal YouTube Twitter



Latin America

157M

Brazil, Mexico, Colombia,  
Argentina, Peru, Chile

NBCUniversal YouTube Twitter  
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

## GOAL #1



Drive Excitement &  
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**A Dynamic  
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## GOAL #3



Grow Brand  
Cultural Relevance

**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

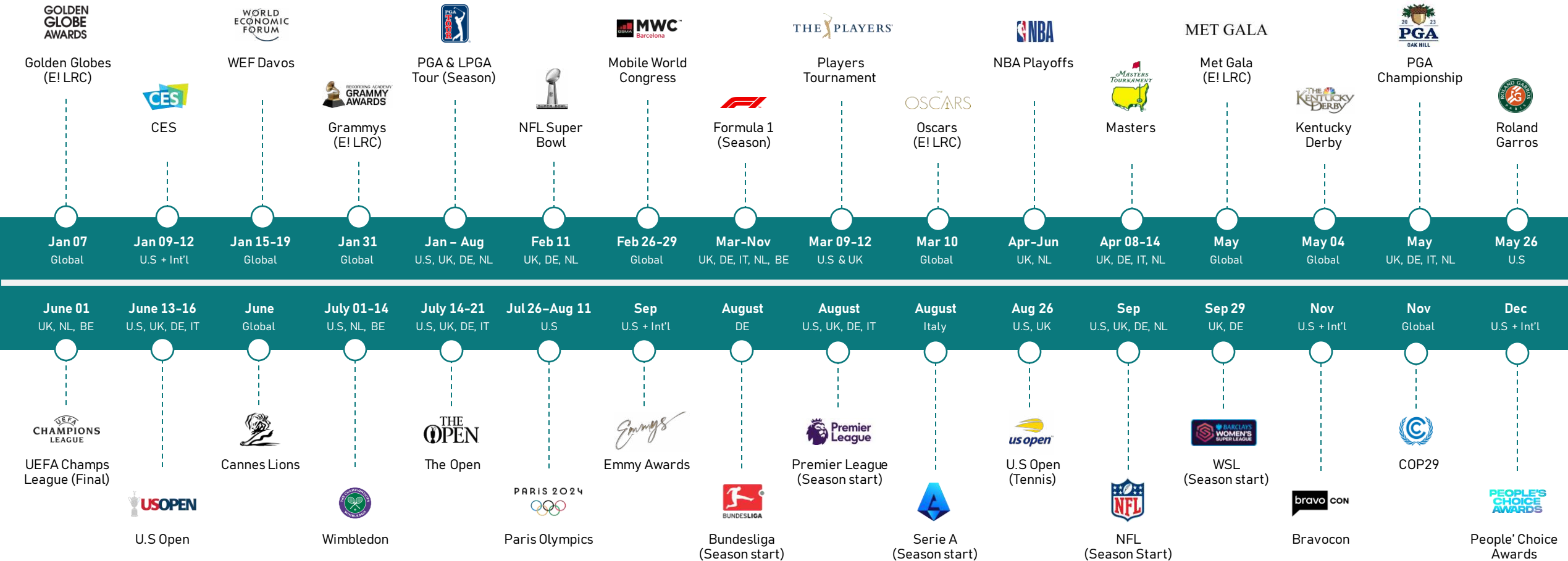
## Saturated Content Landscape



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. 67+ 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

## GOAL #1

Drive Excitement & Awareness In Key Markets



## PRINCIPLE #1

**A Dynamic Approach To Fandom**

## GOAL #2

Expand To New Categories and Cultural Audiences



## PRINCIPLE #2

**Stay In Front Of Consumers**

## GOAL #3

Grow Brand Cultural Relevance



## 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

Global Gaming  
Client Strategy Team

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Director, Client Strategy

**David Curley**

Manager, Client Strategy