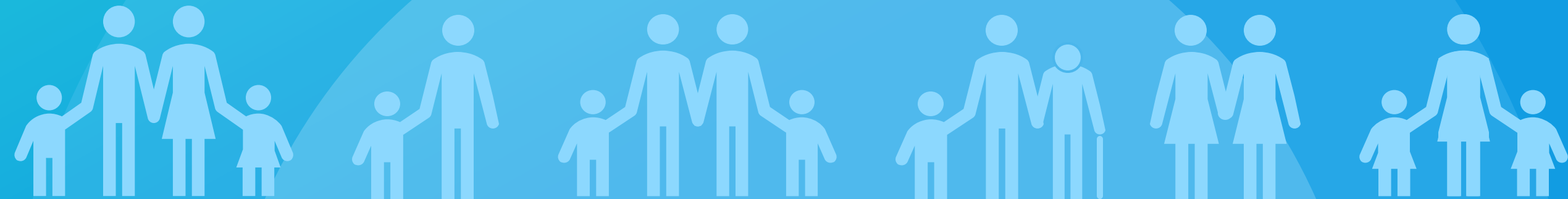


ADDRESSING NEW REALITIES

Embracing & Connecting with Today's American Family

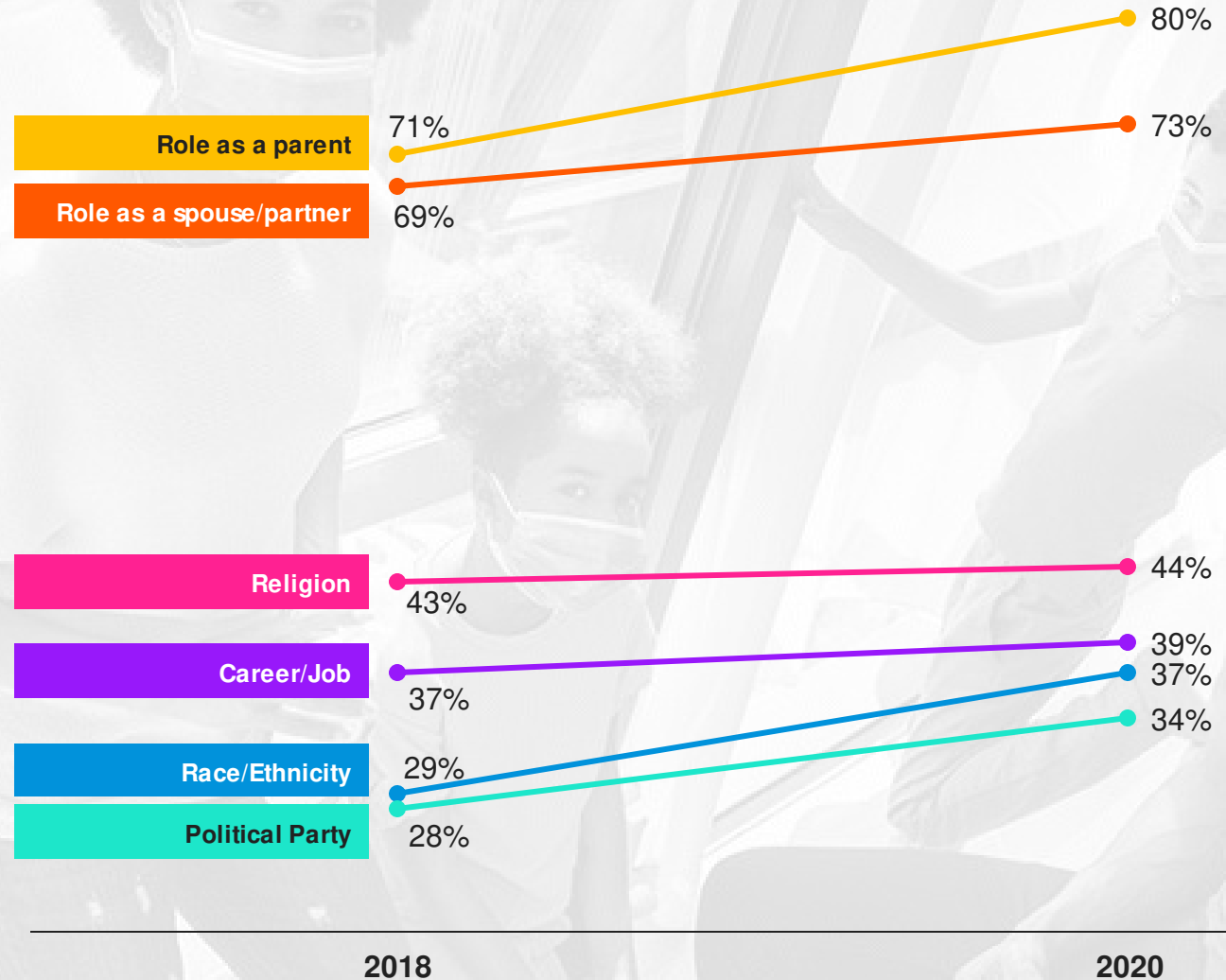
NBCUniversal



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.

How important are the following to your personal identity? %very/extremely important



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.”

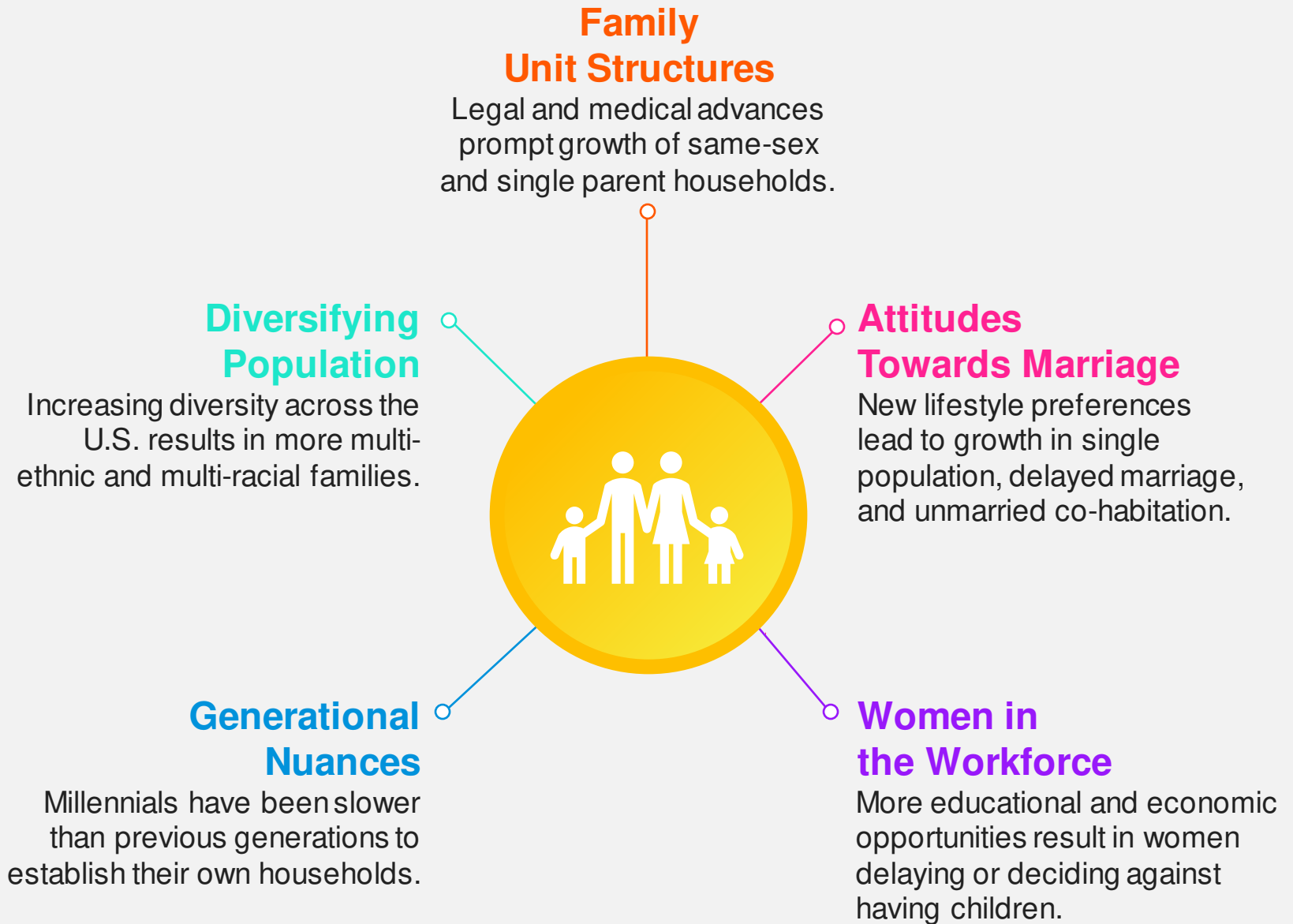
“Family is people who are very close to me and **share certain commonalities.**

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.”

The structure and composition of 'family' has changed to reflect shifting social, cultural, and demographic norms



There is no longer one dominant family unit in America

New family realities exist

Parenting
Postponed

26

The average age of first-time mothers in America, up from 21 in 1972¹

Missing
Middle Children

1.93

The average number of children in a family in 2020, down from 2.33 in 1960²

Minors Growing
Up Multicultural

53%

Of U.S. residents younger than 18 identify their race as Non-White³

Married
Nearing Minority

38%

Of adults 25-54 are unpartnered (neither married nor living with a partner) up from 29% in 1990⁴

No Longer Leaving the Nest

52%

Of 18-29 year-old are living with their parents⁵

The More (Generations)
The Merrier

20%

Of Americans live with multiple generations under one roof⁶

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.”

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.

Brands have an opportunity & responsibility
to go beyond the traditional family mold
& strengthen connections
based on new family realities.



As brands endeavor to strengthen their connection with families, here are five cultural considerations

Consumers Demand Diversity & Authentic Depiction

How can brands authentically connect with diverse families?

Family Members Adopt New Shared Interests

How do brands become a part of new family interests and lifestyles?

Modern Family Issues Prompt New Brand Expectations

How should brands navigate new priorities and challenges facing families?

Centering the Family Around a Single Device Is a New Challenge

How have families' relationships with technology changed the role brands can play?

New Household Dynamics Create More Influencers

How can brands drive intent and influence family choices?

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.

Sources: 1. Common Sense Media: *The Inclusion Imperative: Why Media Representation Matters for Kids' Ethnic-Racial Development*. 2. *The Hollywood Reporter: 79 Percent Say More On-Screen Diversity Is Needed in Film/TV*. 3. NBCU Qualitative Research, November 2021.

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 own¹

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)²



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.**³



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.

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

Parents want to share their passions

64%

of parents choose content for children that reminds them of their own childhoods¹

44%

of parents are more likely to subscribe to sports channels / media¹

Kids are sharing their passions back

88%

of kids feel they have some influence on which streaming subscriptions are purchased²

>67%

of parents regularly play videogames with their kids³



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...⁴



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.



Modern families have modern priorities

Health & Wellness

"How to Discuss your Mental Health with Family Members who Don't Get it"

Inclusivity

"Parents Worry More About Bullying than Anything Else"

Education

"Going to College Should not Be a Financial Albatross"

Sustainability

"How to Raise Kids who Care About the Environment"

New issues prompt new brand expectations

90%

of global consumers feel **brands have a duty to respond** to current events with meaningful action¹



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.²



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.

Sources: 1. Deloitte Connectivity & Mobile Trends Survey 2021 2. GWI, Kids These Days 2021 3. NBCU Qualitative Research, November 2021



Family members are becoming more siloed as access to technology increases

25

is the average number of connected devices in a U.S. household¹

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 time²



Technology serves as a **distraction** in family settings and does not allow the family to interact together like they used to.³

VS.

Thanks to technology, living far away from others has not been a hindrance... [it has] been really helpful in **connecting family members.**³



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

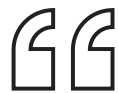
2.63

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



Responding to key cultural influences on families

Key takeaways for brands to strengthen connections with families

Consumers Demand Diversity & Authentic Depiction



Move Beyond Reflection

Family Members Adopt New Shared Interests



Create New Family Experiences

Modern Family Issues Prompt New Brand Expectations



Join the Conversation

Centering the Family Around a Single Device Is a New Challenge



Choose to Be a Connection Point

New Household Dynamics Create More Influencers



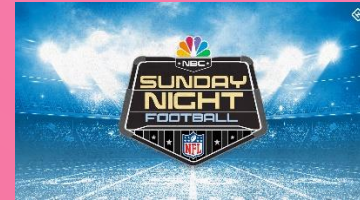
Engage the New Gatekeepers

As consumer behaviors and family values have evolved, so too has NBCUniversal content...

Modern Families



Entertainment Favorites



The New Nostalgia



Purpose-Led Moments



...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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