

NEVER

FOLLOW



Starcom™



You're paving the way

Open world – gives gamers total control and unlimited possibilities

Multiple protagonists and simultaneous storylines

Seamless online experience

Owned content sets the bar





The future of gaming is bright and complex

Channels and platforms bleeding together

More competition for share of leisure time

Stasis is death, but just being new isn't enough

You don't have a have a problem now, but you will

Strong position	Converging competition
Ground breaking product	Pressure on every title
Dedicated core	Mainstream with authenticity
Huge development investment	New revenue streams
Massive sales	Outdated marketing playbook



YOUR FUTURE DEMANDS A REVOLUTION

NEVER FOLLOW

WE BELIEVE EXPERIENCES MATTER
THEY ENHANCE LIVES AND BUILD BRANDS



THE HUMAN EXPERIENCE
COMPANY

We think and act differently

EXPERIENCE
DESIGN

FROM
MEDIA
PLANNING

FROM

- Buying static things
- Media driven
- Impressions, GRPs
- Media value

TO

- Designing dynamic interactions
- Idea driven
- Behaviors, Intensity
- Business value



Locally Informed, Global Approach

DEFINE
THE OPPORTUNITY

THE OPPORTUNITY
DRIVE SALES AND CONVERSION

DESIGN
THE IDEA

EXPERIENCE STRATEGY, IDEA

DELIVER
THE EXPERIENCE

GLOBAL TACTICS,
LOCALLY DESIGNED PLANS

MEASURE
THE PERFORMANCE

SALES AND CONVERSION



We intelligently leverage our scale

UNIQUE TRADING APPROACH

Planning Led
Buying
New Vendor
Engagement
Model

TECHNOLOGYBASED TRADING INNOVATION

AOD
Facebook API
Tardiis Multimedia
Link.d3
Discoverability

GLOBAL PARTNERSHIPS

Twitter
MSFT
Yahoo!
ShareThis
Kontera
Visible Measures

INVESTMENT DATA & INSIGHTS

Social Tools
POEM
Pathfinder
KPI Reporting
Continuous Value
Improvement

ENTERTAINMENT LAUNCHES ARE WHAT WE DO

A character in a blue suit and monkey mask is shown in profile, holding a large, futuristic gun. The background features a cityscape at night with a large fire or explosion in the sky.

**THEATRICAL
RELEASES**

**HOME
ENTERTAINMENT**

**TELEVISION
NETWORKS**

VIDEOGAMES

MUSIC

THEME PARKS



ESPECIALLY GAMING

XBOX

MOST SUCCESSFUL HALO
LAUNCH IN HISTORY

THQ

+10% EFFICIENCY

NINTENDO

10+ YEARS EXPERIENCE

We understand the hype cycle leading to launch

ANTICIPATION

9 months out

EXCITEMENT

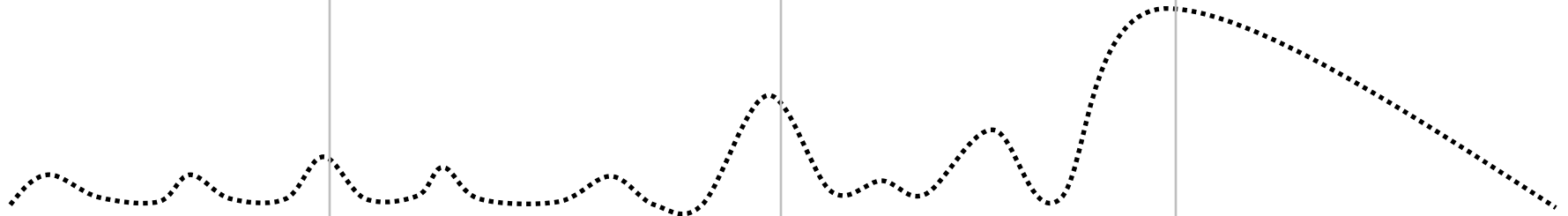
3 months out

IMPACT

Launch month

INVOLVEMENT

3 months after



PRE-ORDER

PURCHASE

Our roadmap for today

**DEFINE THE
OPPORTUNITY**

**DESIGN THE
PLAN**

**DELIVER THE
EXPERIENCE**



DEFINE THE OPPORTUNITY

We made some strategic assumptions

New title

Same Rockstar

Cross compatibility

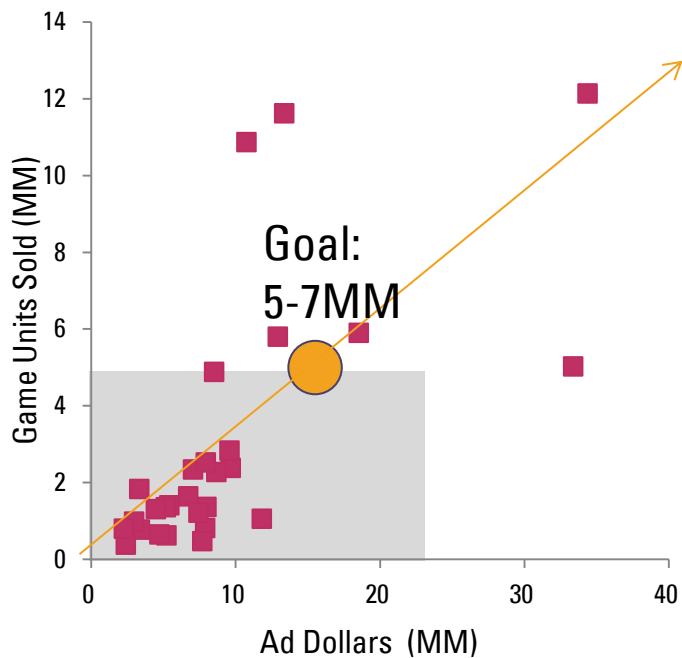
From the ground up

Compelling owned content

Broader opportunity

Selling 5 million units takes \$18.2 million

Ad Spend vs. Sales



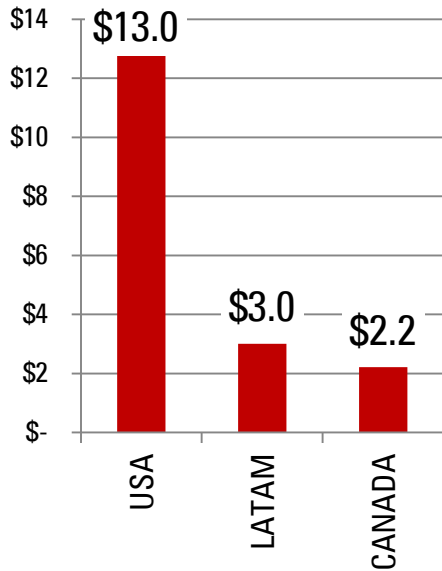
Methodology

Sales By Region	Console Install Base	Revenue By Region	Contagion Earned Projections
Cost Of Media	Cost Per Game Sold	Advertising Spend	Owned Content Assets



Local market nuance drives budget split by region

BY MARKET ALLOCATION



CANADA

17% smaller console to population rate vs. US

Media costs 21% more per person than in US

French & English language ads 10% of total sales

Same price per console (\$450) at 1% of average income

LATAM

69% smaller console to population rate vs. US

Price per console is higher percentage of average income – Brazil (12%), Mexico (3.3)

Growth market investment

Multi-country = fragmented media buy

Media costs less, but World Cup nets 50% cost premiums



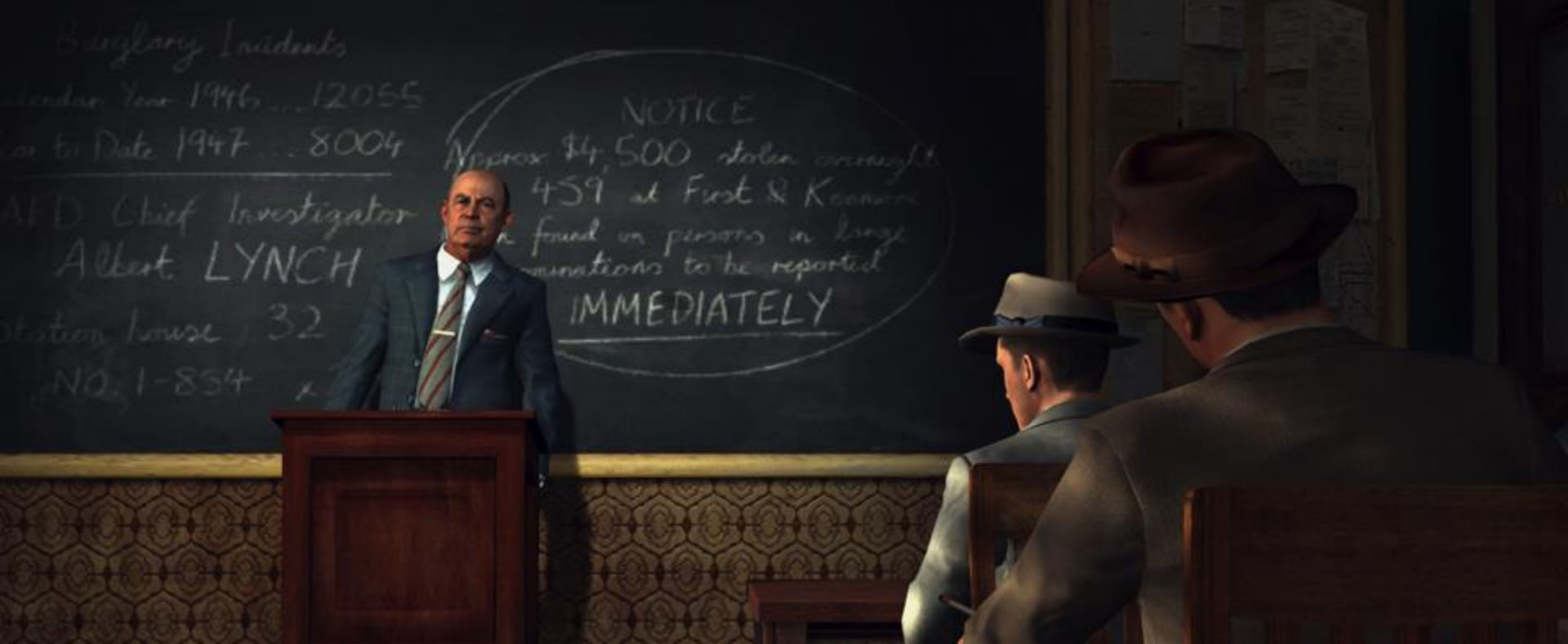
Experiences add 25% – 6.25 million units

EXPERIENCES

IMPACT

EFFICIENCY

CHAPTERS



GAMING REQUIRES DIFFERENT RULES FOR MEASURING SUCCESS

Measurement architecture enables short and long term learning application

PRE/POST CAMPAIGN APPLICATION OF BEST PRACTICES

POEM

**INCREASE
CONVERSION (CPI)**

**OPTIMIZE
ACROSS POE**

**INCREASE
SALES**

BEACON

PATHFINDER

CROSS MEDIA

RAPID OPTIMIZATION AND CONTINUOUS LEARNING



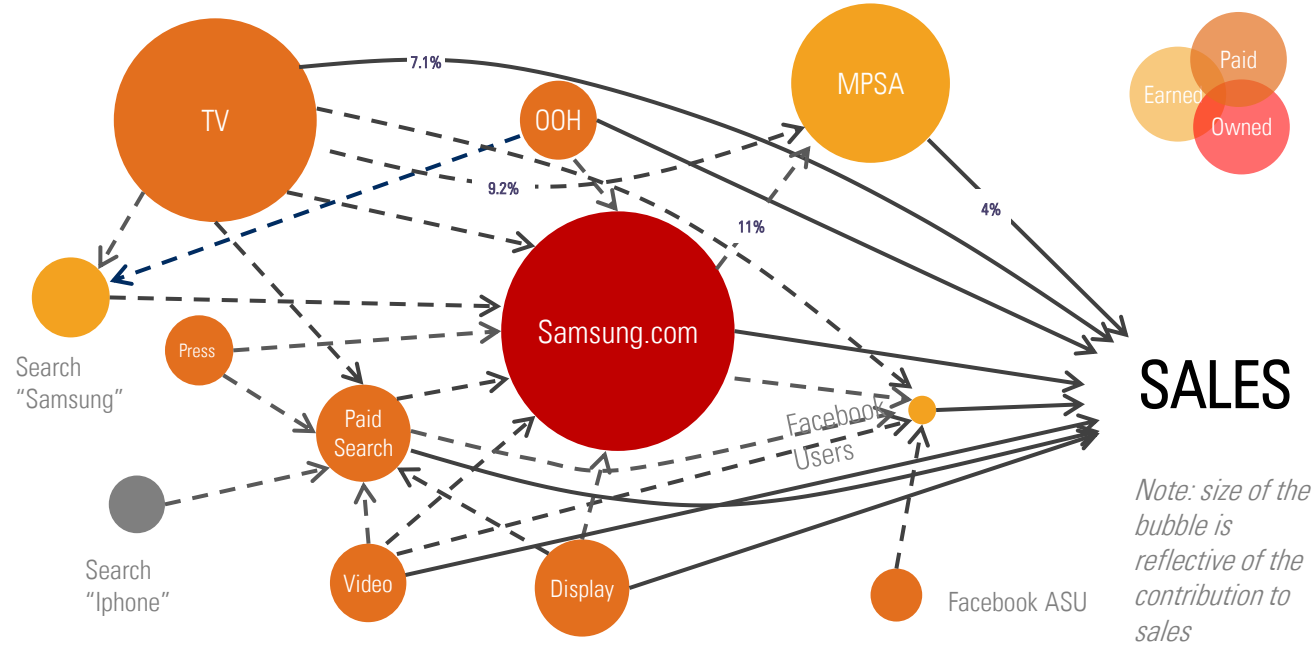
KPIs set on drivers of sales and pre-orders POEM™

Historical data and advanced analytics

Understand *system* of marketing effectiveness across POE

Heighten the impact of paid advertising

Prioritize KPI selection



And are tracked and optimized based on communication role

ROLE	ANTICIPATION	EXCITEMENT	IMPACT	INVOLVEMENT
KPI	Buzz/Sentiment	Pre-Orders	Week 1 Sales	Weekly Sales
DIAGNOSTICS	Search volume, interactions, search/display clicks, video views	Awareness, purchase intent, search volume, buzz/sentiment, interactions, video views	Purchase intent, search volume, buzz/sentiment, interactions, video views, GDEX ranking	Purchase intent, buzz/sentiment, interactions, earned video views, mentions, GDEX ranking
OPTIMIZATION & MEASUREMENT	BEACON SOCIALTOOLS	PATHFINDER CONTAGION	PATHFINDER CROSSMEDIA STUDY	PATHFINDER BENCHTOOLS



DESIGN THE PLAN

Connect to future growth



THE UNITED STATES

A18-34

**THRILL SEEKING
ENTHUSIASTS**
20.7M

**HARDCORE
GAMERS**
3.1M

81.74%
are
console
owners

CANADA



A18-34

**THRILL SEEKING
ENTHUSIASTS**
3.0M

**HARDCORE
GAMERS**
984K

LATAM



A18-34

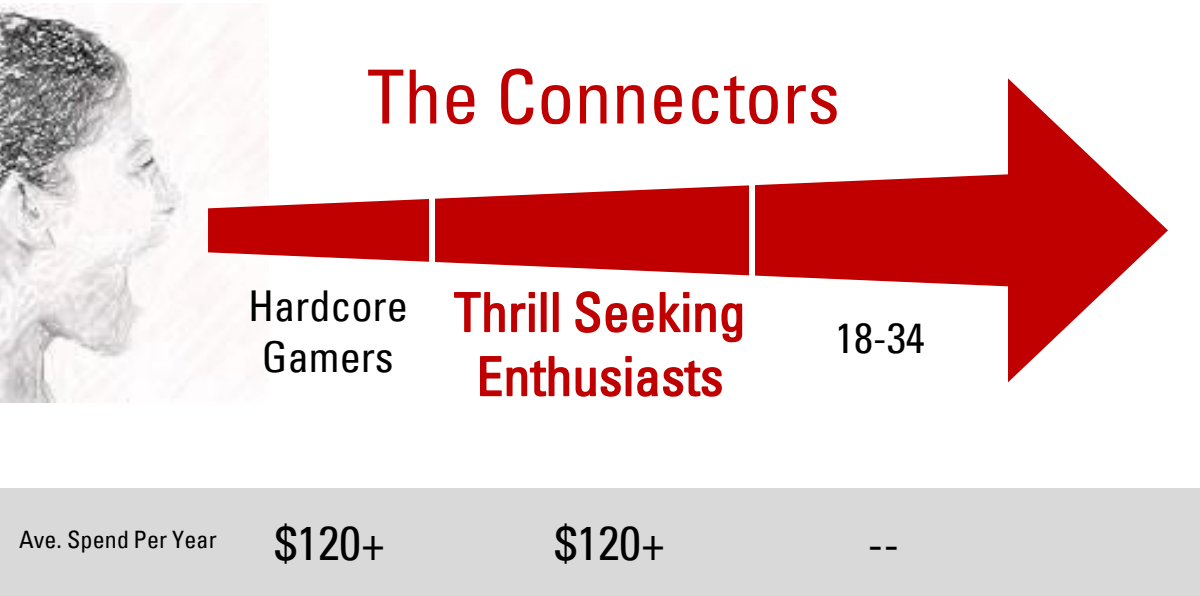
**THRILL SEEKING
ENTHUSIASTS**
10.1M

**HARDCORE
GAMERS**
2.3M



Thrill Seeking Enthusiasts act as social connectors

Differentiate phases of the hype cycle



Hardcore
Being
The "In"

vs.

TSE
Having
An "In"

AMPLIFY: Social to the core

Like Share Product Opinions Online **153**

Influenced by Celebrity **182**

People come to me for advice **145**

Tech Influencer **160**



The journey to purchase is quick and closed, influenced by earned more than paid

13.5 DAYS

**INTEREST
SPARKED**

13%

add a game to their consideration set during this phase

**TIME TO
INVESTIGATE**

9%

add a game to their consideration set during this phase

**REWARD
HUNTING**

8%

add a game to their consideration set during this phase

**GAME
PURCHASE**

4%

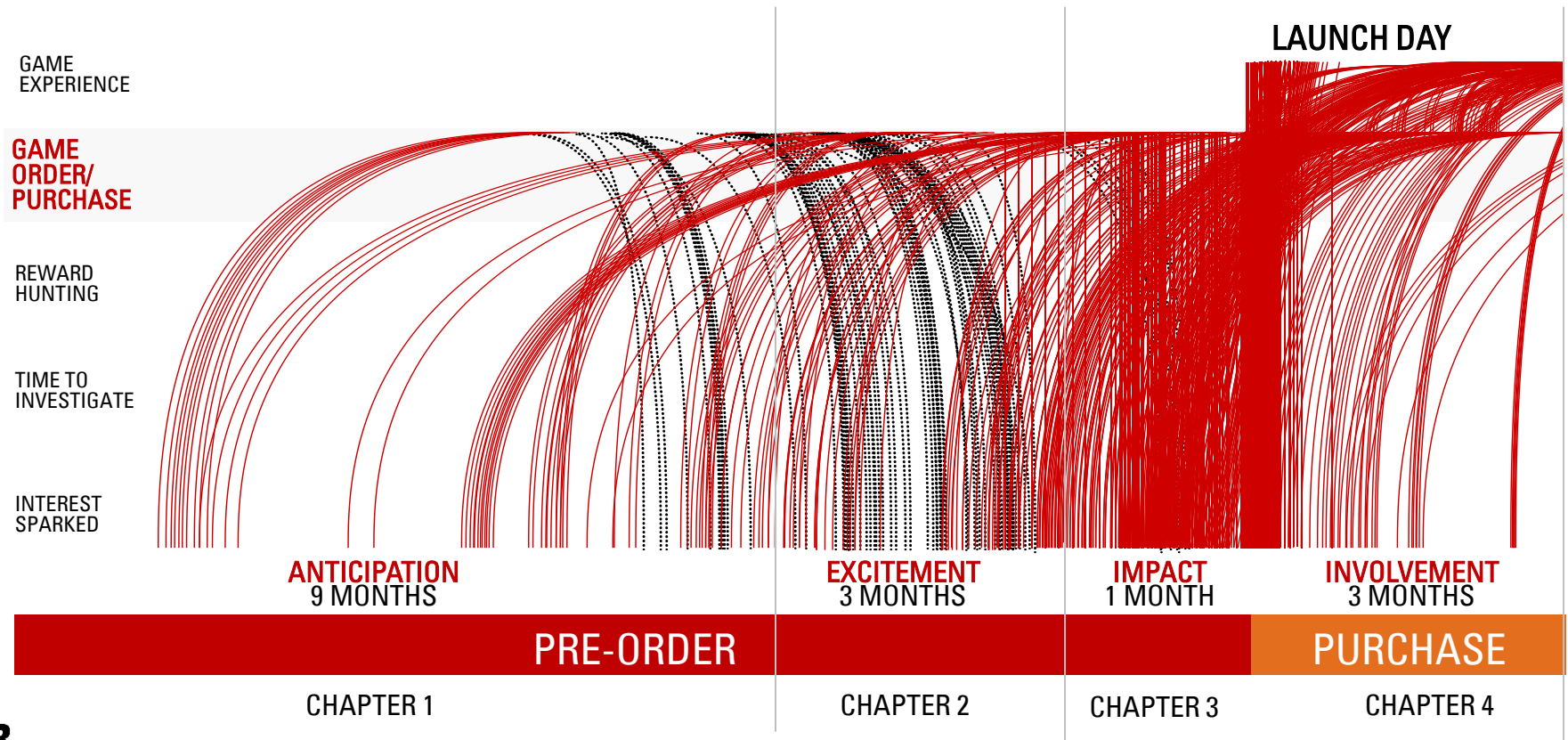
add a game to their consideration set during this phase

**GAME
EXPERIENCE**

5%

add a game to their consideration set during this phase

Sparked throughout the hype cycle



Conventional paid support is focused on launch awareness – leaving earned to fend for itself



HYPE CYCLE	ANTICIPATION	EXCITEMENT	IMPACT	INVOLVEMENT
TIME TO LAUNCH	3-9 MONTHS BEFORE LAUNCH	2-3 MONTHS BEFORE LAUNCH	3-5 WEEKS BEFORE	3-5 WEEKS AFTER
PAID MEDIA	MINIMAL	1 WEEK HIT (TV OR DIGITAL)	3-5 WEEKS TV+ STRONG DIGITAL	1 WEEK TV; LIGHT DIGITAL
%BUDGET	MINIMAL	15-30%	65-75%	5-10%
%CONVERSATION	40%	20%	20%	20%
%SALES (PRE-)	10%	15%	70%	5%





**MOVE FROM ONE BIG BANG TO
MONTHS OF CONTROLLED CHAOS**

EXPERIENCE STRATEGY

LET YOUR STORIES RUN WILD

This means changing the model

FROM

One time pulse
Led by paid media
Pay and pray
Gut and feel
Resulting KPIs

TO

Early and often
Led by earned media
Ignite and amplify
Systematic optimization
KPI Driven

With shifts in timing to capitalize on opportunity

Small investment
delivers big
amplification of pre-
launch conversation

35% PRE-ORDERS

Focus and efficiency
delivers the same
impact

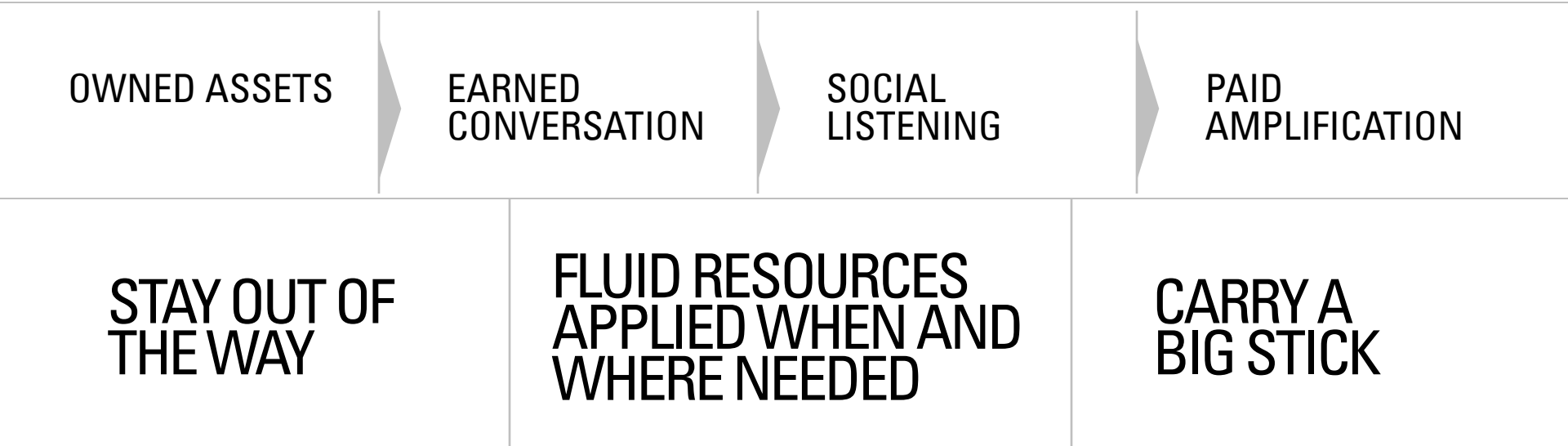
3MM IN WEEK ONE

Launch extension
slows decay and
moves beyond the
core

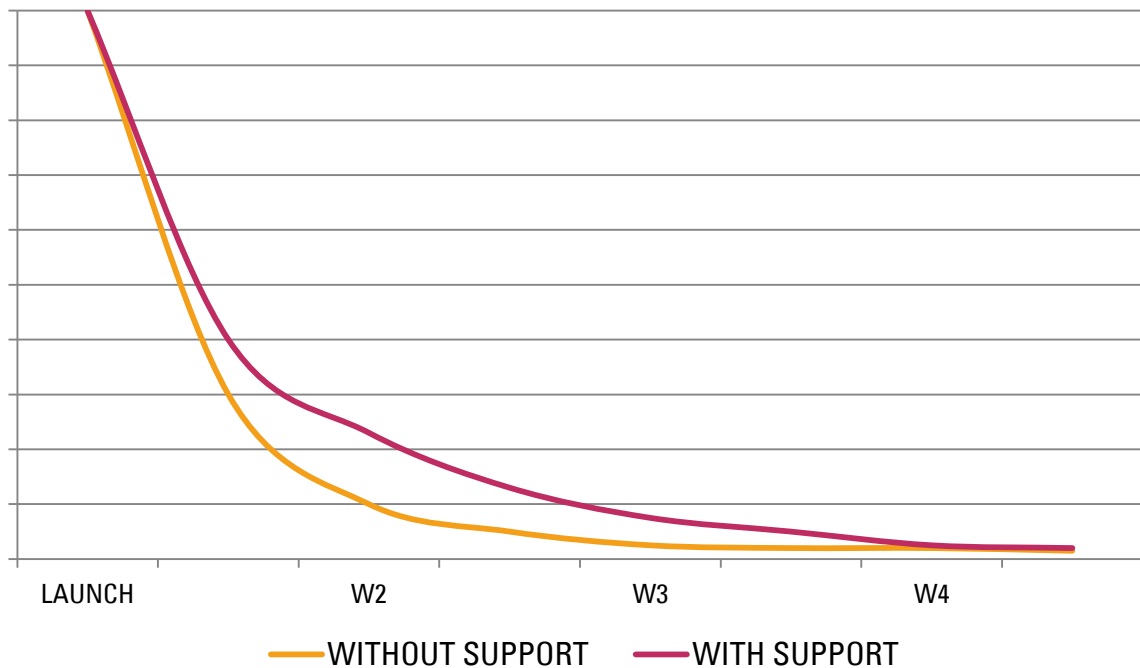
+25% POST LAUNCH



Waiting until launch misses 60% of conversations



Extend to drive 25% more sales post-launch



Don't accept the industry standard

Harness the gameplay wave of earned conversation

Focused, relevant paid activity will mitigate the rate of decay

Use buyer data to find and convert best prospects



Deliver experiences and the sales will follow

	CHAPTER 1	CHAPTER 2	CHAPTER 3	CHAPTER 4
MEDIA ROLE & TIMING	ANTICIPATION 3-9 MONTHS OUT	EXCITEMENT 2-3 MONTHS OUT	IMPACT LAUNCH MONTH	INVOLVEMENT 2-3 MONTHS AFTER
LEAD KPI	Buzz/Sentiment	Pre-Orders	Week 1 Sales	Weekly Sales
SALES GOAL	625M (10%)	1,562M (25%)	3,438M (55%)	625M (10%)
BUDGET	\$911M (5%)	\$3,642M (20%)	\$10,926M (60%)	\$2,731M (15%)
DIAGNOSTIC DELIVERY	60M Search Clicks 6MM Video Views	5MM+ Interactions	85% Reach (per country)	5MM+ Mentions 90+ Score GDEX
OPTIMIZATION & MEASUREMENT	BEACON SOCIALTOOLS	PATHFINDER CONTAGION	PATHFINDER CROSSMEDIA STUDY	PATHFINDER BENCHTOOLS



Leverage local market learnings to nuance our approach

USA

Gaming is universal
Dwarfs all other markets in size and clout – primary battlefront
First is not good enough

New recruits
Cause a commotion to create a conversation
Support extended journey
Speak to the digital native

LATAM

Higher console/game costs means smaller audience
“I CAN’T HEAR YOU, I’M WATCHING THE WORLD CUP”
Intra-region variance in category and media development

Focus on the core
Elevate Chapter 4 for more informed purchaser
Smaller pre-order opportunity
Thrill Seekers have \$CASH
Digital penetration variances

CANADA

USA’s little bro
Sports above all
“Bonjour, mon ami”

Emulate big bro
Deliver Quebecoise
VIDEO heavy
Splash at launch
Hockey Tonight





DELIVER THE PLAN

In **CHAPTER 1** sustain and support early stage conversations and activity

TOP TARGET

Hardcore Gamers

TOP PRIORITIES

Build anticipation among core
Support existing social conversations
Ensure content discoverability

TOP ASSETS

Trailers
Gameplay clips
Character profiles

APPROACH

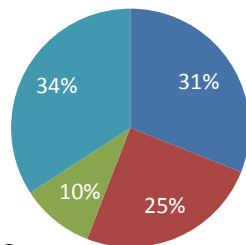
MEDIA MIX



KEY PARTNERS

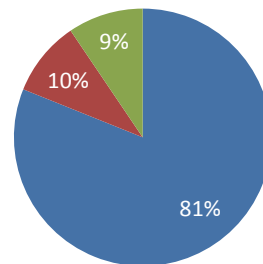
UNITED STATES

Full Release



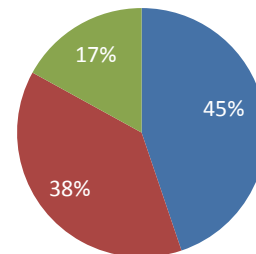
CANADA

Tease It Out



LATAM*

Just a Bit



*Brazil and Mexico only

AMA: Where hardcore enthusiasts meet their Rockstars



'Title X' Game Developers host a session on Reddit's 'Ask Me Anything' – and get crashed by their own game characters

- The most influential portal
- Highly sharable content
- Existing infrastructure and audience
- Massively popular online event series
- Extend the experience: IGN + Google Hangout

Hookup with Title X

Game characters flirt early engagement on Tinder

Provocative profiles live organically on Tinder

Both genders, more female

Friend them, follow them, try to hook up with them

Profile and behavior tells character back stories

Interaction drives direct to pre-sale & exclusive content



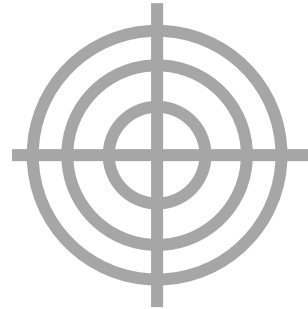
Surgical amplification of pre-release content and conversation



Data driven, continually optimized support for video launches



Opportunistic paid amplification of trending social chatter and Rockstar fanbases



Retargeting searchers with pre-order CTA



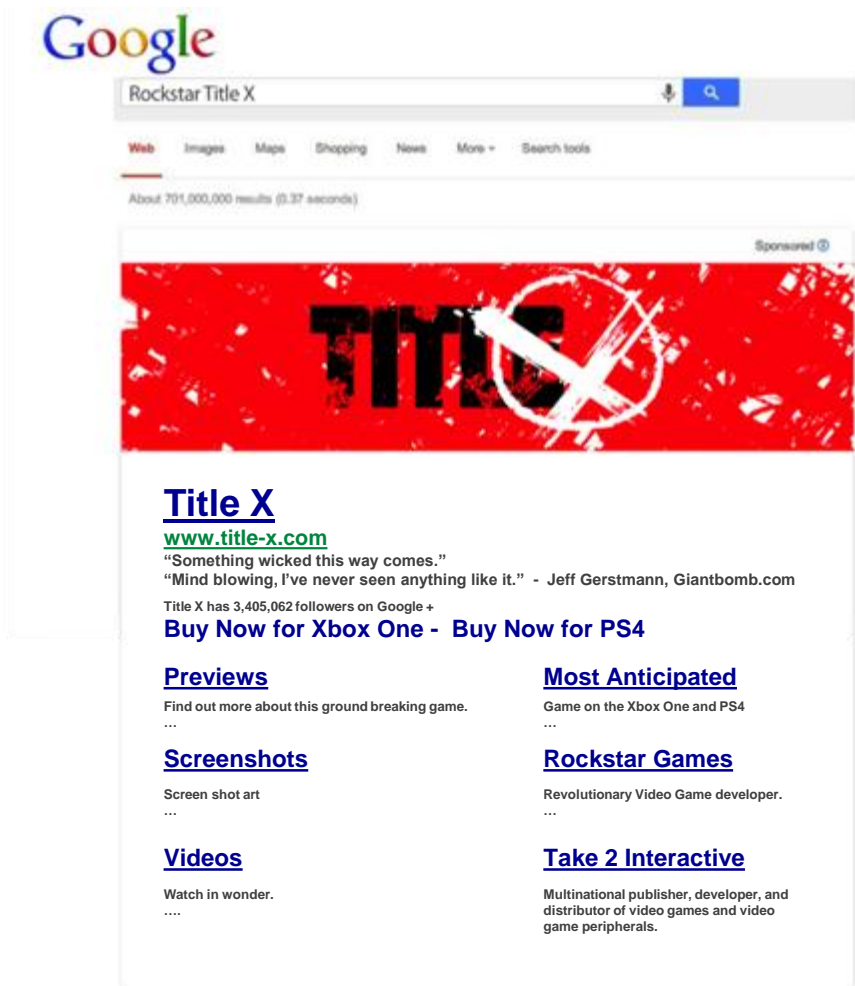
Whitelisted influencer tweets for guaranteed social reach

Search is the hero

DOMINATE THE LANDSCAPE

COMPELLING CONTENT

CLOSE THE SALE



The image shows a Google search result for "Rockstar Title X". At the top is the Google logo and a search bar containing "Rockstar Title X". Below the search bar are navigation links for "Web", "Images", "Maps", "Shopping", "News", "More +", and "Search tools". The search results indicate "About 791,000,000 results (0.37 seconds)". A large, red, textured banner with the word "TITLE" in black and a white "X" over it is prominently displayed. Below the banner, the search result for "Title X" is shown, including the URL "www.title-x.com", a quote from Jeff Gerstmann of Giantbomb.com, and the number of followers on Google+. There are also links for "Buy Now for Xbox One" and "Buy Now for PS4". Below these are sections for "Previews", "Screenshots", "Videos", "Most Anticipated", "Rockstar Games", and "Take 2 Interactive", each with a brief description and a "..." link.

Google

Rockstar Title X

Web Images Maps Shopping News More + Search tools

About 791,000,000 results (0.37 seconds)

Sponsored

TITLE

Title X
www.title-x.com
"Something wicked this way comes."
"Mind blowing, I've never seen anything like it." - Jeff Gerstmann, Giantbomb.com
Title X has 3,405,062 followers on Google +
Buy Now for Xbox One - Buy Now for PS4

Previews
Find out more about this ground breaking game.
...

Screenshots
Screen shot art
...

Videos
Watch in wonder.
...

Most Anticipated
Game on the Xbox One and PS4
...

Rockstar Games
Revolutionary Video Game developer.
...

Take 2 Interactive
Multinational publisher, developer, and distributor of video games and video game peripherals.



In **CHAPTER 2** increase pre-orders +30% by telling dynamic, personalized stories

TOP TARGET

Hardcore Gamers
Thrill Seeking Enthusiasts

TOP PRIORITIES

Make the game personally relevant
Drive efficient pre-orders

TOP ASSETS

Trailers
Rockstar Social Club
E3 announcements

APPROACH

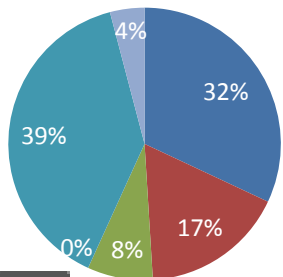
MEDIA MIX



KEY PARTNERS

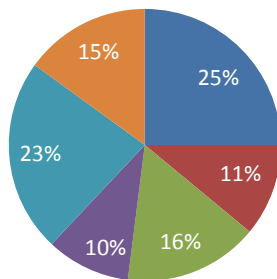
UNITED STATES

Connections



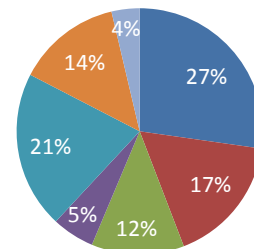
CANADA

Data driven delivery



LATAM

Core pre-orders



Personal Violations of Gameplay



Your name, hometown, job & photos are woven seamlessly and shockingly into the most ridiculous moments of game play.

Personal data accessed from:
Google+ Profile | Facebook Profile | Console Profile | 'Title X' Gamer Profile | Device Camera

'Title X' will provoke controversy by pushing the boundaries of acceptable use of personal info.

With or without permissions.
Age-restricted environments only
Logged-in personal data taken without consent
Additional personal data optional with consent

Google Chrome Experience
Never.no social to Addressable broadcast
YouTube Pre-Roll

TITIC FILMS

Multiple directors each use the game engine to create their unique style of game trailer

Content with extra social currency to drive sharing and cultural impact

Illustrates unlimited game experiences and storylines

Partner with directors/programs from our media plan

Buzz, audience, and environment from each director

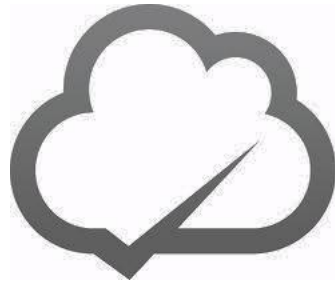
Ongoing new content to attract and maintain interest

Machinima facilitates collaborations

Combine big data with dynamic creative to create unique experiences for every person



Identify story-tellers through media partnerships



Building content platforms digitally to enable access



Leverage Rockstar Social Club database



Amplify UGC content through paid social tactics

Experiences driven by data, creating data

KEYWORD



SOCIAL SEARCH



DYNAMIC CREATIVE

TARGETING



DISTRIBUTION



EXECUTION



In **CHAPTER 3** create a massive launch atmosphere

TOP TARGET

Thrill Seeking Enthusiasts
Hardcore Gamers

TOP PRIORITIES

Make the title famous
Secure optimal reach and frequency

TOP ASSETS

Mini-game Video
Location aware Mobile

APPROACH

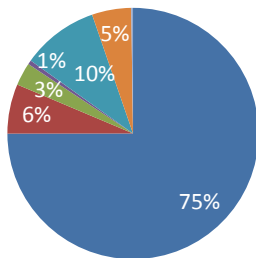
MEDIA MIX



KEY PARTNERS

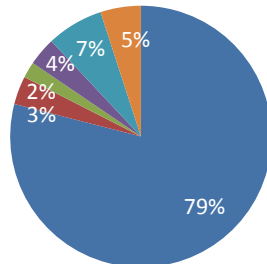
UNITED STATES

It's go time!



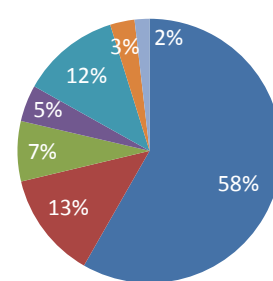
CANADA

It's go time...eh!



LATAM

¡Vamos!



Crash Late Night



Title X's most controversial characters crash late night TV

In-character live commercials and integrations

'Live' environments

Unscripted, out of control, unexpected

The world's first playable tweet



Bring game play directly in social feeds and unexpected environments, not replicating the sophistication of actual console gaming, instead creating shareable experiences around specific talk-worthy game features.

Custom Twitter Card Experience:

Play a specific buzz worthy feature from the game

Gameplay and retweets unlock rewards

In-card pre-sale/purchase

Pre-build gamer profile stats for Title X

A Playable Experienced Scaled:

Google Doodle | Facebook News Feed | Bing | OOH

Focused ignition at launch to drive conversion beyond awareness

TARDIIS

Create big moments under video neutral strategy, fueled by our partnerships



Close sale loop through behavioral segmentation and custom messaging using cookie data



Extend TV impact through Twitter TV targeting



OOH market stunts to generate attention

Reinvent launch media

Broad-reaching video **linked to pre-order Twitter cards**

Display and video deliver an actionable CTA **based on individual interests and behaviors**

Search captures hand-raisers **with drive to purchase**

Mobile connects in step with their lifestyle **and drives to the nearest retailer**



Impact in marketplace befitting an entertainment title launch

+85% reach/10+ frequency across seven markets

3.13 billion impressions

85 million views of video content

13% value improvement

NBDB executions across 10 publishers

In **CHAPTER 4** ride the post-launch wave of gameplay conversations to +25% sales

TOP TARGET

Thrill Seeking Enthusiasts

TOP PRIORITIES

Reward core player engagement
Recruit new players

TOP ASSETS

UGC
Reviews
Player chatter

APPROACH

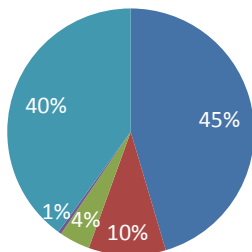
MEDIA MIX



KEY PARTNERS

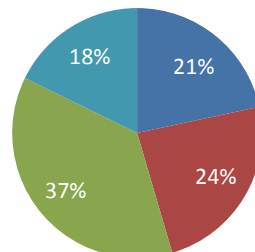
UNITED STATES

Reel them in



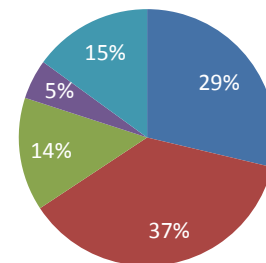
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Close the deal



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Sustained splash



Wish You Were Here!



Use media partnerships to keep the game world fresh through
Downloadable Content Modules

El Rey/Robert Rodriguez's badass females with equity

TMZ brings in celebrities from the 'real world' who match the
game's DNA

Discovery's Future Weapons gun import pack

Partners from our media plan use their talent, likeness, rights and
access to bring valuable content into the games. Each partnership has
potential to draw their unique audience to the game.



In Game Challenges, Real World Results



Sponsors make in-game challenges even more valuable through promotional partnerships

Best Stunt Jump: get the bike in the real world

Harley Davidson Partnership

Mugging @ the ATM: get \$\$ in your real bank account

Bank of America Partnership

Best Play Highlight: see your trick shot on TV

ESPN Partnership

Score in the Drive Through: get real world munchie vouchers

Burger King Partnership

Maintain launch momentum by extending relevance to new recruits

BuzzFeed

Buzzfeed Title X listicle series



Socializing gameplay through paid media

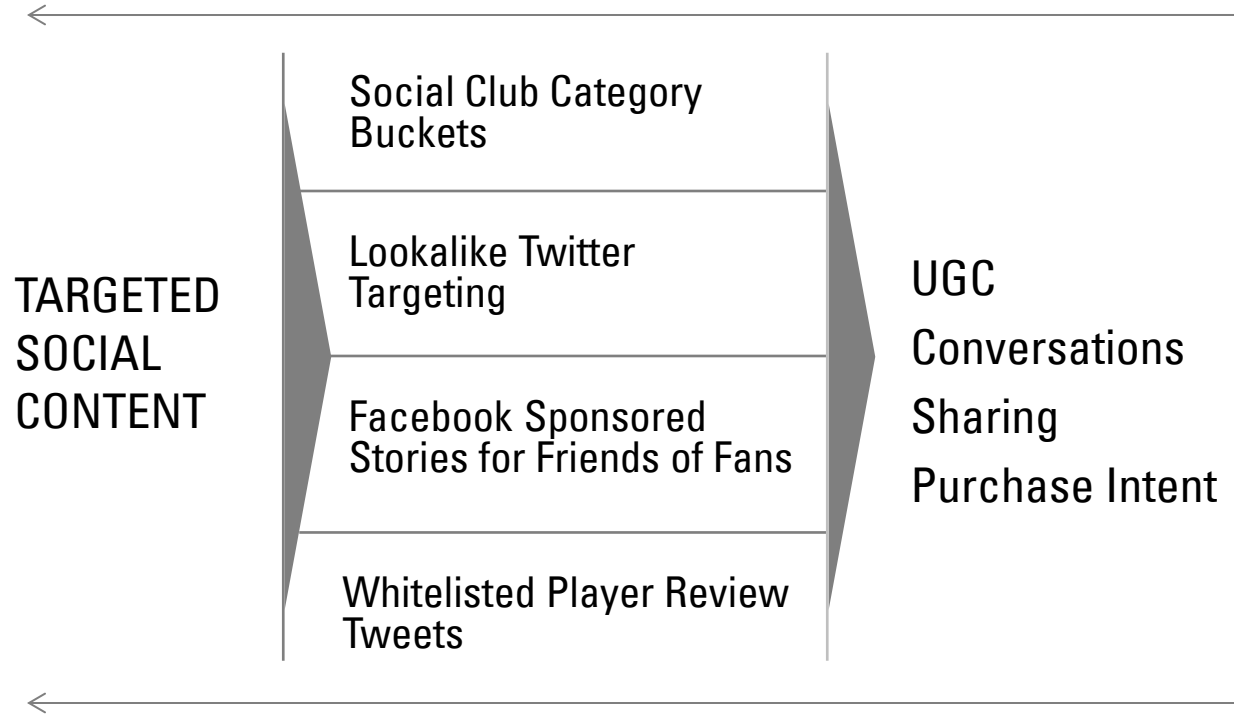
Google

Search results amplify positive reviews



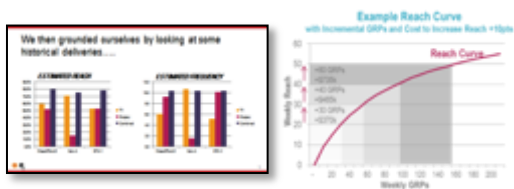
Access to SMG client roster for real life benefits

Amplify earned for those who didn't respond to paid



Plan routed in strategic rigor and analytics

Category/Historical

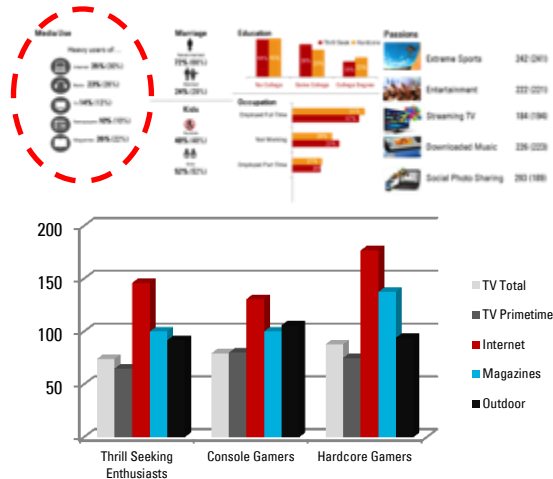


Reviewed Rockstar, competitive and best practices in setting R/F goals

- 70-80% AVG reach for recent games
- Much higher cost per reach after 85-100 TRPS/week

- Explored game conversation phasing
- 60% of total conversations occur pre-launch

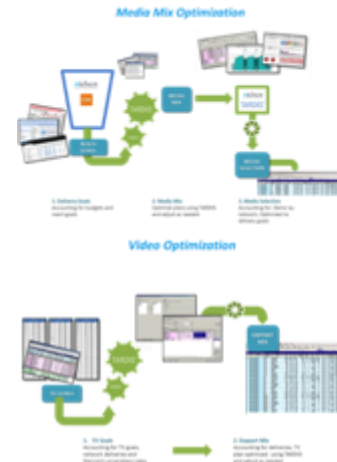
Customer



Evaluated full profiles of hard core gamers and attitudinally aligned Thrill Seeking Enthusiasts segment to identify growth opportunity

- Media usage data show heavy volume of digital consumption
- Digital video consumption is growing among light TV viewers (42% YOY)

Optimization

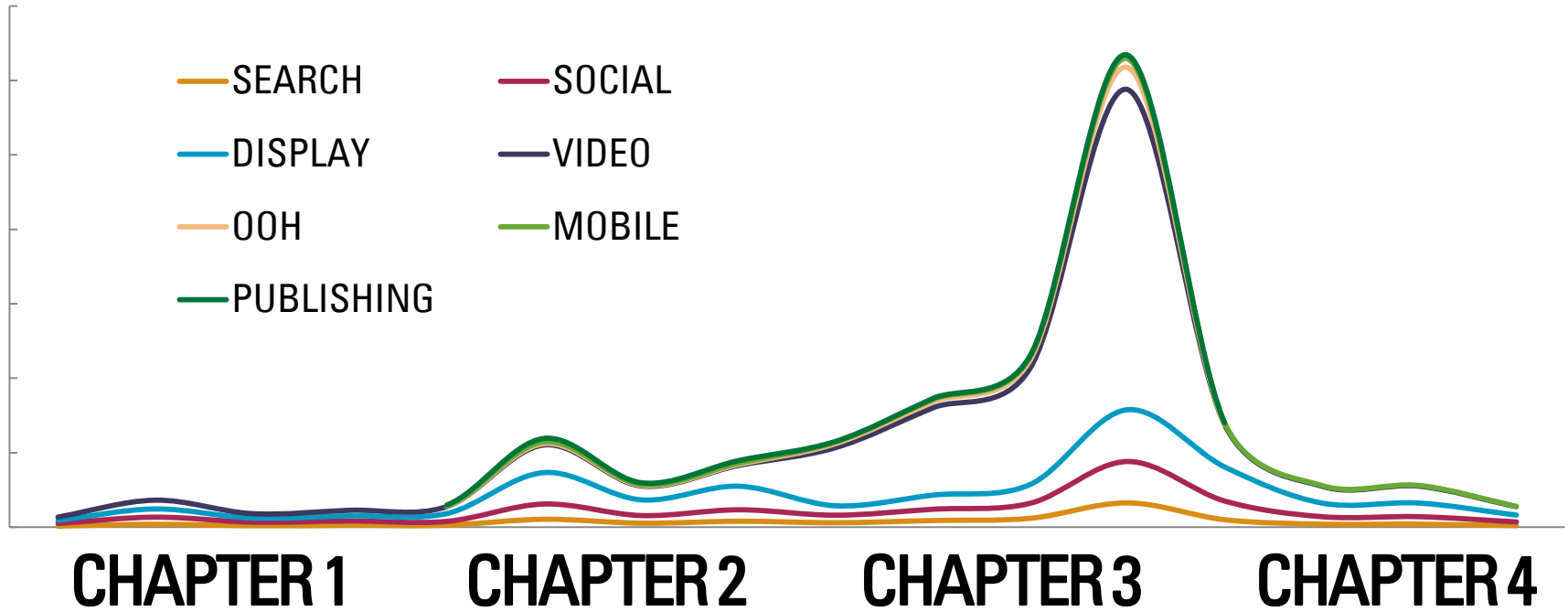


Increasing digital spend in Chapter 3 media mix, delivers reach 13% more efficiently, creating savings for Chapters 1,2 & 4

- Aligned to video neutral viewing of our target groups
- OLV contributes 15% reach towards overall video delivery at Chapter 3

~~TITLE~~

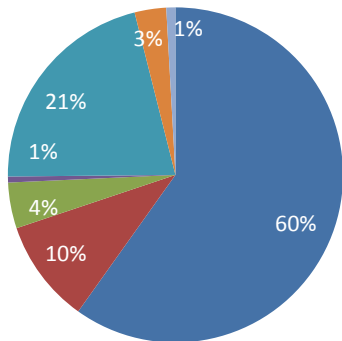
EXPERIENCE PLAN



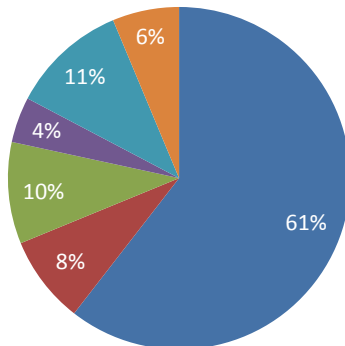


MEDIA MIX

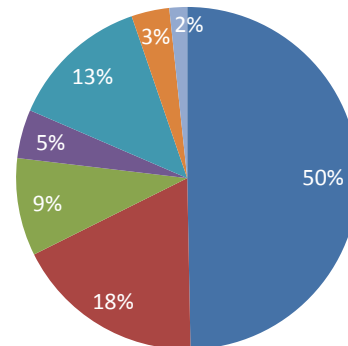
UNITED STATES



CANADA



LATAM



■ Video ■ Social ■ Search ■ Mobile ■ Display ■ Experiential/OOH ■ Publishing



Delivering the goods; Never Follow

+30%
pre-orders

Create energy early
to increase demand
and stay connected

+45%
engagement

Increase sharing and
conversations to
multiply engagement

+25%
sales lift

Experience based
approach fuels sales
growth to 6.25MM units

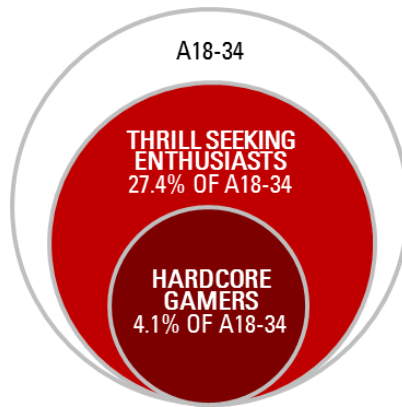


**WE ARE EXCITED
TO GET STARTED**



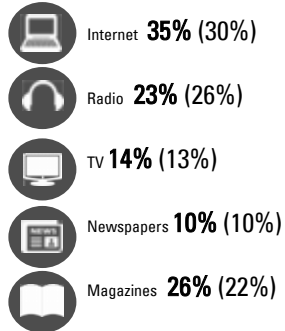
PLAN DETAILS

UNITED STATES



Media Use Thrill Seekers (Core)

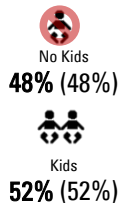
Heavy users of...



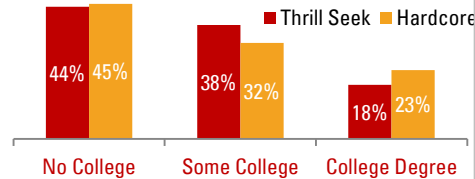
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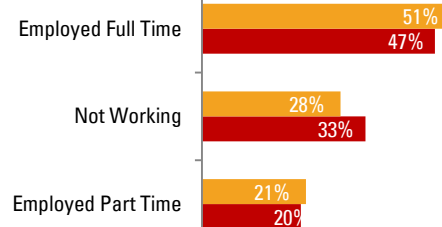
Kids



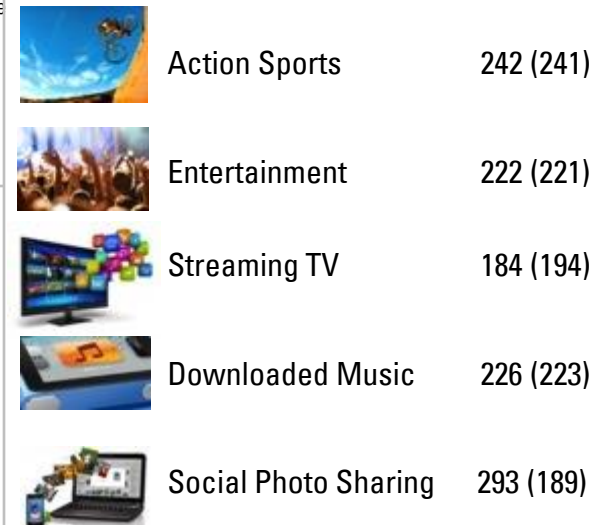
Education



Occupation



Passions



US Experience Plan

ANTICIPATION

EXCITEMENT

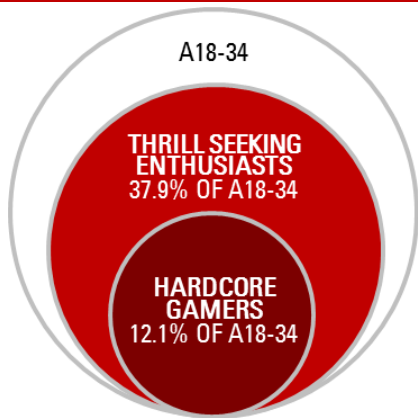
GRATIFICATION

INVOLVEMENT

	Anticipation					Excitement			Gratification	Involvement			
Vehicle	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Cost
Video													\$ 7,980,922
Social													\$ 1,200,000
Search													\$ 574,712
Mobile													\$ 75,000
Display													\$ 2,159,303
Experiential/OOH													\$ 896,000
Publishing													\$ 114,064
Total													\$ 13,000,000



CANADA



Media Use:

Thrill Seeker (Hardcore)

 Internet **21 (20)**
hours/week

 Radio **12 (14)**
hours/week

 TV **20 (22)**
hours/week

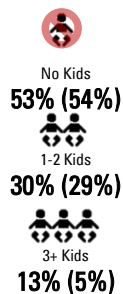
 Newspapers **3 (3)**
issues/week

 Magazines **2 (2)**
hours/month

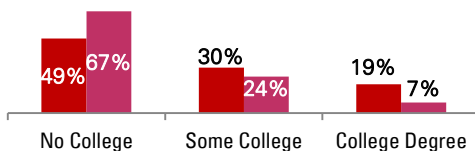
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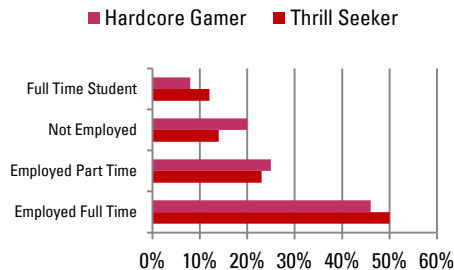
Kids



Education



Occupation

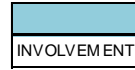
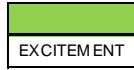


Market Nuances

- Both targets tend to be more socially progressive than the general population (and similar populations in other countries). Both are in favor of things like "Alternative Lifestyles", same-gender marriage, and marijuana legalization
- Both groups are impulsive and spontaneous, particularly when it comes to spending on entertainment and recreation
- Hardcore gamers place a particular emphasis on status, personal advancement and material success, at the expense of family. These tendencies are less pronounced among the thrill-seekers
- Both groups prefer to entertain and socialize outside the home- however, this does not account for online and in-game socialization

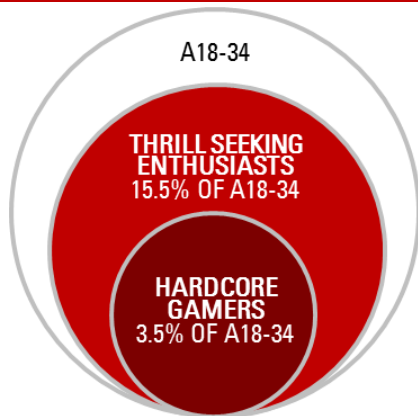


Canada Experience Plan

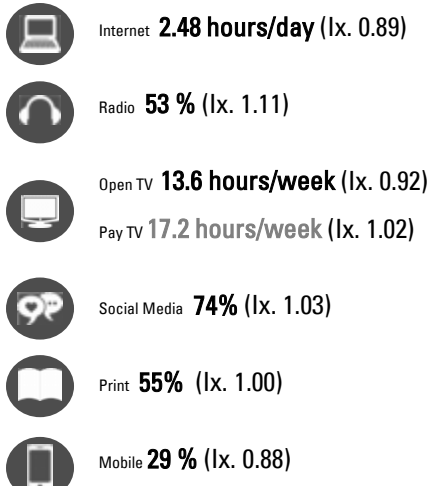


	Anticipation					Excitement			Gratification	Involvement			
Vehicle	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Cost
Video			Anticipation				Excitement	Excitement	Gratification	Involvement			\$1,337,149
Social			Anticipation	Anticipation	Anticipation	Excitement	Excitement	Excitement	Gratification	Involvement	Involvement	Involvement	\$183,230
Search			Anticipation	Anticipation	Anticipation	Excitement	Excitement	Excitement	Gratification	Involvement	Involvement	Involvement	\$212,152
Mobile							Excitement	Excitement	Gratification	Involvement			\$95,251
Display						Excitement	Excitement	Excitement	Gratification	Involvement			\$242,987
Experiential/OOH								Excitement	Gratification				\$139,230
Total													\$2,210,000

LATAM



Media Use

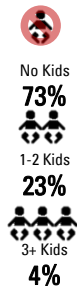


Radio: % listened any station yesterday, Social media: % visited any social media platform past 30 days, Print: % read last edition of any publication, Mobile: % used any mobile device for Internet access, Index against Hard Core gamers

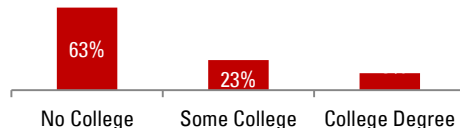
Marriage



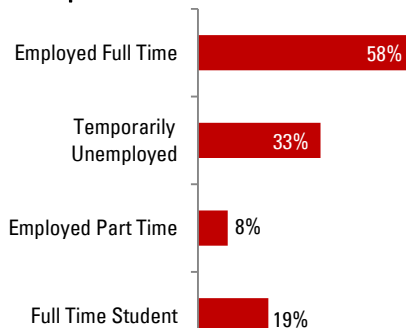
Kids



Education



Occupation

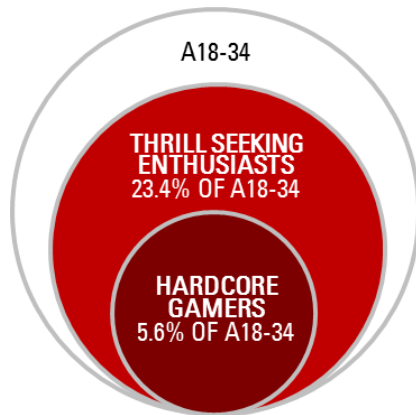


Market Nuances

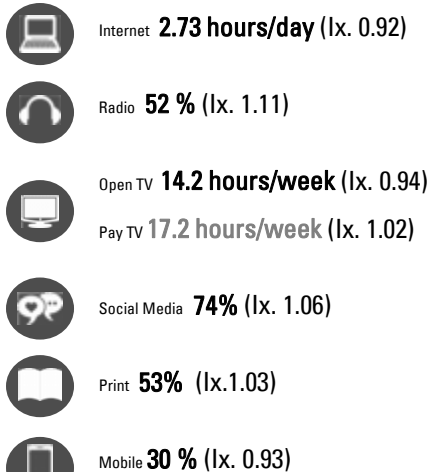
1. A growing Middle Class gives more and more Latin Americans access to higher disposable incomes and triggers an aspiration fueled shopping culture.
2. With growing penetration of banking services and more and more retail store cards being issued more financing options get available to pursue desired (entertainment / technology) products
3. With constantly better infrastructure – growing internet/broadband and smartphone penetrations – gaming options get amplified: Digital Gaming has grown and is forecasted to keep on growing above total video game market growth rates.
4. Latin America's population ranks 2nd (behind MENA) for the highest proportion of residents age 30 and below (a segment making up over 50% of the region!). This sets emerging markets at the forefront of predictions for the future of the video game industry.



BRAZIL



Media Use

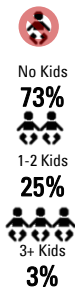


Radio: % listened any station yesterday, Social media: % visited any social media platform past 30 days, Print: % read last edition of any publication, Mobile: % used any mobile device for Internet access, Index against Hard Core gamers

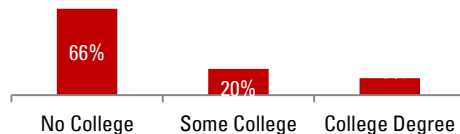
Marriage



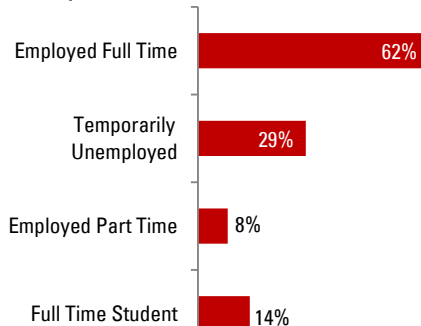
Kids



Education



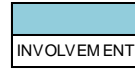
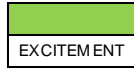
Occupation



Market Nuances

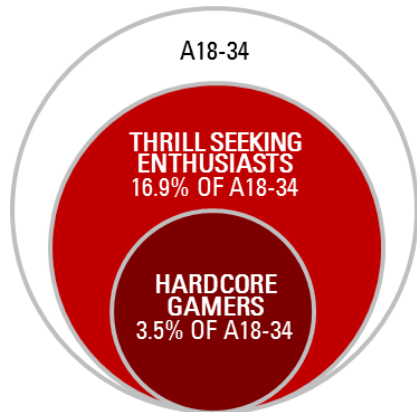
1. Brazil leads the adoption of new Middle Class consumption patterns, perceived lifestyle improvement and economic outlook
2. Brazilians are keen on achieving and maintaining such new lifestyles and tend to prefer to cut spending in less prestigious categories if needed. Brazilian gamers overindex in statements such as "I enjoy owning good quality things".
3. Brazil leads tech adoption: E.g. Tablets, web enabled mobile phones and Playstation 3 have highest incidences in Brazil and the average time spent on the Internet is highest among Brazilian gamers vs. other LatAm markets.
4. With a large population and high internet penetration Brazil leads the (Digital) Gaming market in LatAm

Brazil Experience Plan

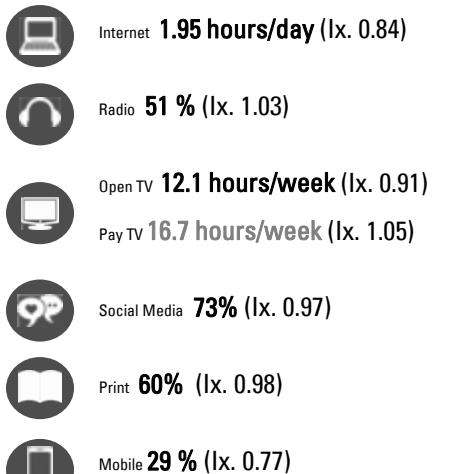


	Anticipation					Excitement			Gratification	Involvement			
Vehicle	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Cost
Video			Anticipation					Excitement	Gratification	Involvement			478,890
Social			Anticipation	Anticipation	Anticipation	Excitement	Excitement	Excitement	Gratification	Involvement	Involvement	Involvement	184,212
Search			Anticipation	Anticipation	Anticipation	Excitement	Excitement	Excitement	Gratification	Involvement	Involvement	Involvement	100,368
Mobile							Excitement	Excitement	Gratification	Involvement			66,198
Display							Excitement	Excitement	Gratification	Involvement			129,540
Experiential/OOH								Excitement	Gratification				34,374
Publishing								Excitement	Gratification				26,418
Total													1,020,000

MEXICO

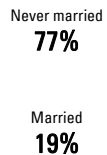


Media Use

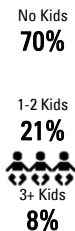


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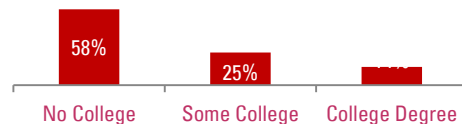
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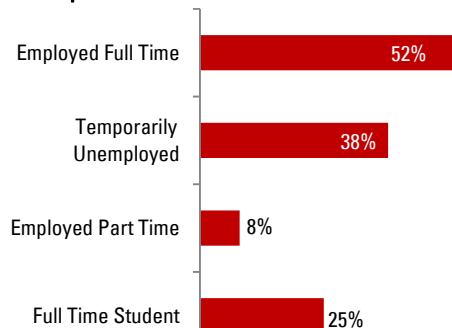
Kids



Education



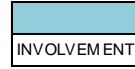
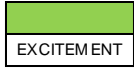
Occupation



Market Nuances

- Mexico experienced a stronger impact of the global/US economic downturn which affected incomes and caused a more hesitant spending culture.
- Still, the video game category kept on growing as part of an entertainment spending priority. Mexican gamers overindex in the statement "I would pay anything for the electronic equipment I really want". Even 50% of Mexican Middle Class consumers declared to have contracted additional home entertainment services vs. last year.
- A common strategy in Mexico to promote the purchase of non-basic products are attractive (aspirational) promotions, video game titles e.g. are promoted together with prizes like cars, travel, consoles or attractive bundlings.
- In addition, nonetheless, YOUNG Mexicans (9-30 y/o) were found to be the happiest in the world (93% stated they were "happy" in a survey early this year) with strong family ties, optimism with regard to their future prospects and regional development all playing a role in this

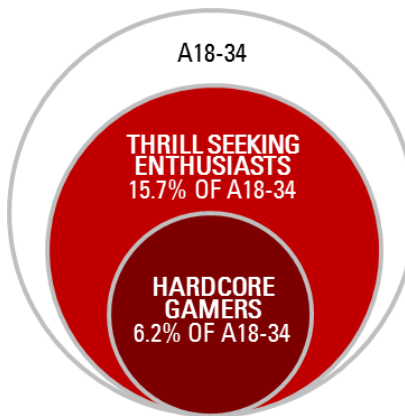
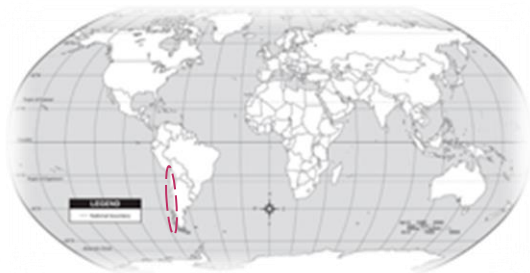
Mexico Experience Plan



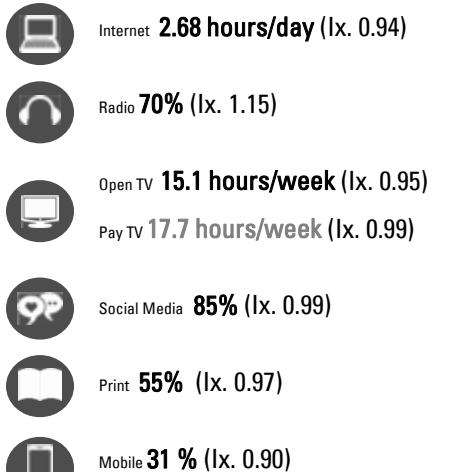
	Anticipation					Excitement			Gratification	Involvement			
Vehicle	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Cost
Video			Anticipation					Excitement	Gratification	Involvement			389,592
Social			Anticipation	Anticipation	Anticipation	Excitement	Excitement	Excitement	Gratification	Involvement	Involvement	Involvement	149,604
Search			Anticipation	Anticipation	Anticipation	Excitement	Excitement	Excitement	Gratification	Involvement	Involvement	Involvement	96,432
Mobile							Excitement	Excitement	Gratification	Involvement			40,740
Display							Excitement	Excitement	Gratification	Involvement			111,384
Experiential/OOH								Excitement	Gratification				28,308
Publishing								Excitement	Gratification				23,940
Total													840,000



CHILE



Media Use

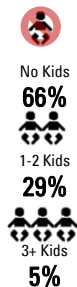


Radio: % listened any station yesterday, Social media: % visited any social media platform past 30 days, Print: % read last edition of any publication, Mobile: % used any mobile device for Internet access, Index against Hard Core gamers

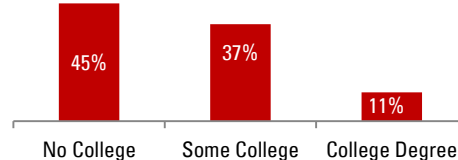
Marriage



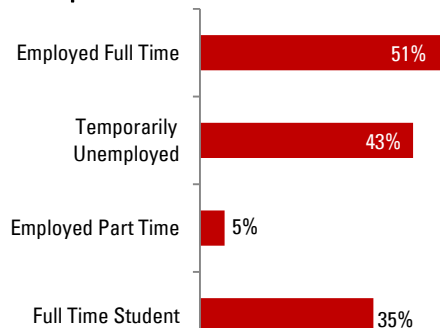
Kids



Education



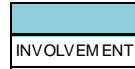
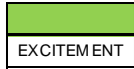
Occupation



Market Nuances

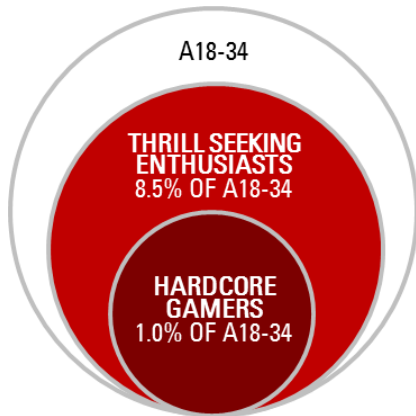
- Following the steps of Brazil, Chile is undergoing a vibrant consumption & lifestyle momentum. Encouraged by relatively low interest rates Chileans feel increasingly comfortable using credit cards, they have even become a way to express social standing. Constantly higher levels of consumer debt might affect discretionary spending levels in the future though
- Higher credit card usage also pushed e-commerce and started influencing Chileans' consumer journeys.
- Local retailers have responded to growing Gaming demand and have specialized sales departments and financing options.
- Chilean gamers tend to be pragmatic, thriving (which matches with highest full time student rates) and enjoyment seeking.

Chile Experience Plan

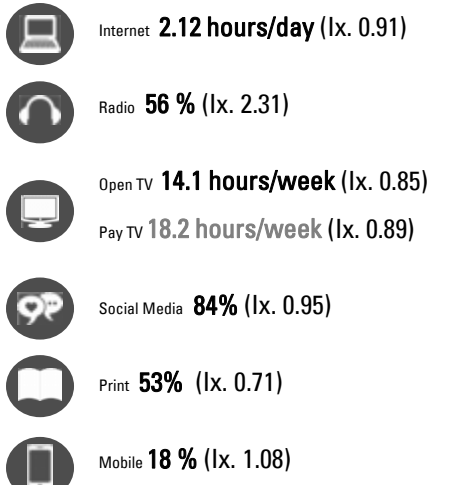


	Anticipation					Excitement			Gratification	Involvement			
Vehicle	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Cost
Video								Excitement	Gratification	Involvement			293,112
Social						Excitement	Excitement	Excitement	Gratification	Involvement			96,876
Search						Excitement	Excitement	Excitement	Gratification	Involvement			39,690
Mobile								Excitement	Gratification	Involvement			14,796
Display								Excitement	Gratification	Involvement			74,250
Experiential/OOH								Excitement	Gratification				21,276
Total													540,000

ARGENTINA



Media Use

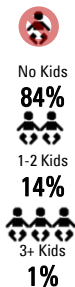


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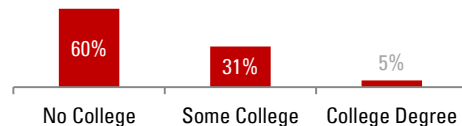
Marriage



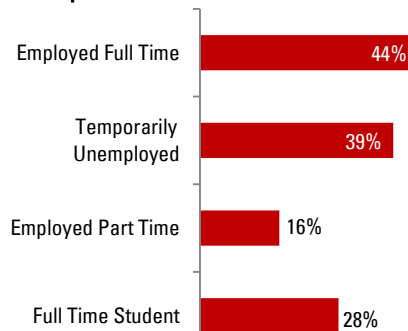
Kids



Education



Occupation

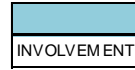
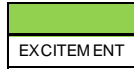


Market Nuances

1. Import restrictions as part of a closed foreign trade policy have negatively impacted a range of categories, including the video game industry.
2. This also keeps piracy rates high: Currently highest among the four LatAm markets at 69%. Local developers and distributors even agreed that at the end of 2012, 85% of games being used were illegal. Informal channels such as mercado libre or purchasing abroad are common purchase solutions.
3. Argentinean gamers are control, curiosity and novelty driven.



Argentina Experience Plan



	Anticipation					Excitement			Gratification	Involvement			
Vehicle	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Cost
Video						Excitement	Excitement	Excitement	Gratification	Involvement			\$329,280
Social						Excitement	Excitement	Excitement	Gratification	Involvement	Involvement		\$107,640
Search						Excitement	Excitement	Excitement	Gratification	Involvement	Involvement		\$40,500
Mobile							Excitement	Excitement	Gratification	Involvement			\$16,440
Display							Excitement	Excitement	Gratification	Involvement			\$82,500
Experiential/OOH								Excitement	Gratification				\$23,640
Total													\$600,000

{FOR CHARACTER PROFILES VISIT}
www.rockstar.com.com



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