



BPC Playbook

Beauty + Personal Care



BPC Playbook Overview

Explore NBCUniversal's latest perspectives & insights into the BPC industry.

Our Approach

At NBCUniversal, we have a legacy of working with a diverse range of BPC partners to build their brands & businesses. In 1H 2025, NBCU worked with 170+ BPC advertisers across the below sub-categories.



Cosmetics



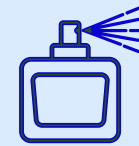
Personal Hygiene



Haircare



Skincare



Fragrance



Beauty Tech & Devices

This playbook has been created based on NBCU's:

- Ongoing industry evaluation
- Conversations with BPC advertisers & agencies
- Proprietary category intelligence
- Continual marketplace analysis
- Examination of consumer attitudes towards the BPC industry

BPC Playbook Contents

An overview

of NBCUniversal's latest BPC perspectives, insights, and strategic considerations.

Marketplace Dynamics



Media Trends & Observations



Brand & Business Imperatives



NBCUniversal Playbook





'25 BPC Industry Dynamics

While navigating elevated costs and inflationary pressures,
BPC brands & portfolios seek to protect margins, drive growth, and maintain consumer demand through product novelty & innovation








Headwinds

- **Economic pressures & value shifts**
are impacting discretionary spending and trade-down behavior
- **Retail channel volatility**
spurred by the rise of online and DTC shopping
- **Consumer fragmentation**
driven by the rise of indie & private label brands, forcing established brands to fight for relevance
- **Rising demand for transparency & ethics**
as brands face new expectations to disclose ingredient sourcing, sustainability efforts, and social responsibility

Tailwinds

- **Premiumization remains prominent**
as consumers trade up for higher-quality, with clinically proven ingredients fueling growth in prestige and “masstige” categories
- **Omnichannel acceleration**
Online, social, and DTC channels are capturing a larger share of revenue, leading to changes in discovery and purchase patterns
- **Sustainability & clean beauty**
Eco-friendly formulations & products and refillable packaging are propelling innovation and loyalty among younger consumers
- **Diversity, inclusion, and personalization**
from brands investing in inclusive products and hyper-personalized experiences are fueling connection and growth.

As consumer lifestyles & preferences evolve,
**brands across BPC sub-categories focus on
brand and product relevance + differentiation**

<div>Personal Hygiene</div> <div></div>	<div>Skincare</div> <div></div>	<div>Cosmetics</div> <div></div>	<div>Haircare</div> <div></div>	<div>Fragrance</div> <div></div>
<p>Steady growth driven by an increased consumer focus on health, wellness, and daily self-care routines has demand shifting towards natural and sustainable formulations, prompting innovation and portfolio expansion. Prolonged category growth will rely on brands' abilities to align with consumer priorities.</p>	<p>Skincare continues to outperform, fueled by strong consumer demand for science-backed, multi-step routines and products. Growth is also being driven by derm-backed & clinical brands, social media-fueled trends, and a rising interest in preventative care among younger consumers.</p>	<p>Renewed consumer interest in color cosmetics driven by social media trends, celebrity-owned brands & endorsements, and special occasions. Innovation in long-wear, skin-enhancing formulas and bold, expressive looks is resonating, especially with Gen Z and multicultural shoppers seeking both creativity and performance.</p>	<p>Haircare is being reshaped by new routines and science-backed innovation, leading consumers to treat their scalp and hair like an extension of skincare. Personalization powered by AI and biotech is accelerating growth in customized formulas, diagnostics, and smart tools that adapt to individuals.</p>	<p>Use remains stable, with nearly half of U.S. adults applying fragrance daily⁵, but brands must cater to consumers' evolving needs toward skin-friendly inclusions, safety, wellness and sustainability and offer evidence of product benefits and efficacy.</p>
<div><div>31%</div><div>of consumers rank natural ingredients as a top purchasing factor for body care and APDO products¹</div></div>	<div><div>77%</div><div>of skin care enthusiasts are now taking a preventative approach to their skin care²</div></div>	<div><div>57%</div><div>of shoppers use social media as an information resource for purchasing cosmetics³</div></div>	<div><div>80%+</div><div>of adults reported either maintaining or increasing their spend on at-home hairstyling products over the past year⁴</div></div>	<div><div>28%</div><div>of all prestige beauty sales in 2024 were from fragrances, making it the fastest growing prestige beauty category⁶</div></div>

BPC Media Trends To Watch

BPC brands are combining mass media moments with data-driven targeting to optimize reach, engagement, and sales impact in a highly competitive market

The Rise of Retail Media Networks



+40%

Increase in BPC Retail Media ad spend in 1H '25, with spend volume now accounting for 37% of all CPG Retail Media ad spend, an +11pp increase in share YoY¹

A Shift in the CPG Landscape



29%

Of CPG media spend was driven by BPC in 1H '25, surpassing Household Supplies as the largest share sub-category within CPG¹

A Continued Emphasis On Digital & Targeted Channels



57%

Of BPC 1H '25 media spend was in digital channels vs. 45% across CPG¹

As media habits evolve, BPCs prioritize targeted, digital channels to connect with priority audiences

Constantly Evolving Brand Landscape



1,200+

New BPC spenders in 1H '25 as new products, innovations, and entrants are constantly evolving and vying for consumer attention²

As a result of these industry dynamics, **we are seeing BPC brands & portfolios prioritize a few key objectives**

AMPLIFY

Brand & Product Discovery



REINFORCE

Brand Relevance & Roles



DEEPEN ENGAGEMENT

With Key Audiences



PROMPT

Trial & Action *(Engagement, Sales, etc.)*





'25/26 BPC Playbook

Leverage the power of NBCUniversal's **content & audiences** to drive brand and business impact.

Amplify brand & product discovery

Reinforce brand relevance

Deepen audience engagement

Prompt trial & action

NBCUniversal's BPC Playbook

01.
Maximize reach across platform
with a data-fueled approach

02.
Build cultural
relevance & drive engagement

03.
Ensure right message, audience, & context via data-led strategies

04.
Deliver measurable outcomes through **RMN partnerships**

05.
Amplify your message & **drive engagement via social**

POWER OF

Linear + Streaming

Premium Content

Strategic Audiences

Strategic Audiences

Social

IP & Talent

Premium Content

Full Funnel Measurement

IP & Talent

Ad Innovations



Each month,
NBCUniversal
content
reaches

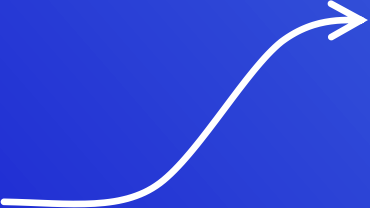
286M

P2+ Proj. 2026



Across
80M
Households

*the audiences
that matter to you*



65M

Beauty Mavens



62M

Health & Beauty Aid
Purchasers



55M

Eco-Friendly
Product Seekers



50M

Skin-Conscious
Consumers



Source: Based on NBCU's in-house audience insights using 1P and 3P data; date range: May 2025; base: HH; Audience segments derived from MRI audience comps from May 2025 Cord Evolution (SP25 USA) study applied to P18+ NBCU Crossplatform Reach.

Based on household reach

Maximize Reach Across Platforms with a Data-Fueled Approach

Find the audiences who matter most and serve them the right message at the right time, ensuring your reach is not just wide, but strategic and unduplicated

Source: Based on NBCU's in-house audience insights using 1P and 3P data; date range: June 2025; base: HH; Audience segments derived from MRI audience comps from August 2025 Cord Evolution (SP25 USA) study applied to P18+ NBCU Crossplatform Reach.

Leveraging our cross-platform scale is essential to maximize your full-funnel results

Skincare & Beauty Buyers
57M Monthly Households

Linear

Streaming

Only 18% Duplication

Measure what matters

- Incremental & target reach
- Brand recall & familiarity
- Search engagement
- Incremental brand sales

Makeup & Cosmetics Interest
60M Monthly Households

Linear

Streaming

Only 22% Duplication

Cross-Platform Impact for CPG brands

+14%
Unaided
Brand Recall

+57%
Search
Engagement

+7%
Purchase
Intent

NBCU Multi-Platform Campaign Performance v. Single-platform campaigns (exposed only)

Sources: 1. NBCU internal analysis using internal and external reporting sources

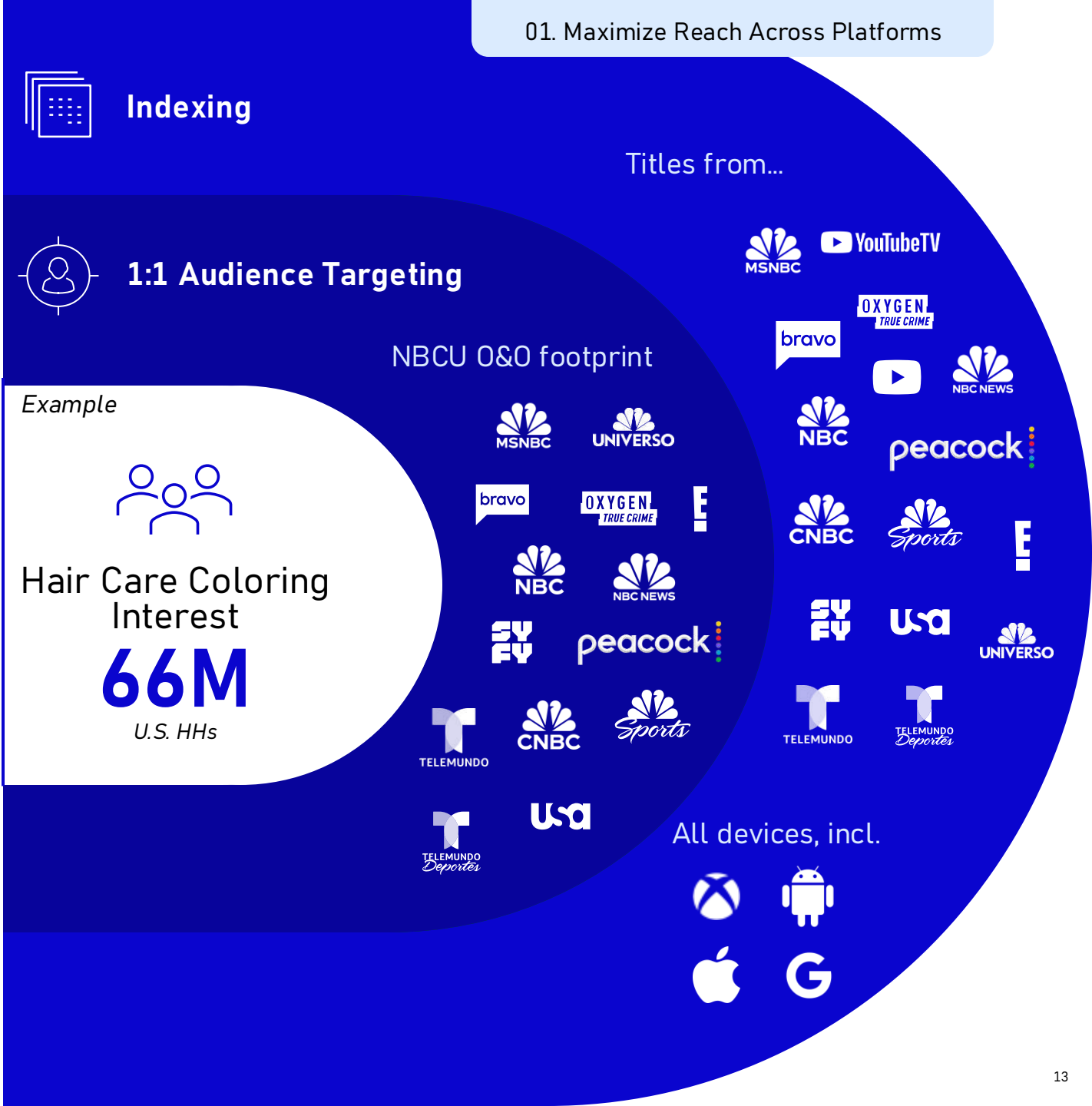
12

Future-proof performance
& drive incremental reach with
strategic targeting

- 0.1 Start with precision
- 0.2 Extend with scale to NBCU programs proven to over-index
- 0.3 Capture incremental reach

30%

more targetable
inventory, which means
**maximum reach
for your audience-
based campaigns**



Build Cultural Relevance & Drive Engagement

Maintain consistent top-of-mind salience and brand affinity during key moments throughout the year, fostering deeper emotional connections with BPC shoppers

Measure What Matters

- Brand impact & biometric engagement
- Accelerated audience reporting
- Search engagement

Unique Sponsorship Opportunities





Help Your BPC Brand Make A Grand Entrance!

From *turnkey to custom solutions*, *Live From E!* ensures your brand is red carpet ready!



LFE Interviews
with Red Carpet Hosts



Glambot Videos With Cole



Backstage Photos



Red Carpet Arrivals



Red Carpet
Livestream Interviews



On Stage Moments



E! Fashion
Unfiltered Livestream

Delivering
**Full-Funnel
Brand Impact**

+27%

Ad
Recall

+51%

Search
Engagement

+37%

Purchase
Intent

Best-in-Class Showcase

How BPC brands are executing custom storytelling with NBCU premium content

Proven Impact
Likeability Lifts for BPC

Official Sponsors

+27%

In-Show Integrations

+37%

Source: MediaProbe



Capturing Attention Live in Late Night
SNL 50 Custom Content



Creating a Social Stir for a Summer Launch
Bravo Talent Crossover Custom Content



Standing Out via a Live Event Spotlight
Premios Billboard de la Música Latina 360 Integration



Differentiating with Talent-led Custom Content
Bravo Integrations with Talent and Social Amplification



Showcasing Product Through In-Show Integration
TODAY's Jenna & Friends On-Air Integration

Ensure the right message, audience, & context via data-led strategies

Keep your brand top of mind by placing BPC products alongside relevant content, reaching shoppers at their most receptive moments and sparking inspiration-driven connections

On average

77%

of viewers become **more open to advertising & more aware of brands**



Genre

Deliver ads within genres of editor-curated VOD content from across NBCU's premium streaming portfolio

✓ Direct IO ✓ PG ✓ PMP



Industry

Align your brand with industry-relevant themes in curated VOD content from NBCU's premium streaming portfolio to drive deeper viewer connection.

✓ Direct IO ✓ PG



New!

Custom inputs

Powered by AI

Align your brand's creative cues with key moments in premium NBCU content to boost relevance and drive action

✓ Direct IO ✓ PG



New!

Emotional alignment

Powered by AI

Build connections by aligning your brand's emotional tone with key moments in premium content

✓ Direct IO ✓ PG

Contextual targeting by...

GENRE

Deliver Beauty & Personal Care ads in editor-curated genres across NBCU's premium streaming portfolio—serving relevant messaging that resonates with viewers and boosts campaign impact.

Relevant genres:



Reality

- Love Island: Beyond the Villa
- The Real Housewives of Miami



Comedy

- Happy Place
- Resident Alien



Drama

- Long Bright Summer
- The Vampire Diaries



Entertainment

- American Ninja Warrior
- America's Got Talent



News

- The Briefing with Jen Psaki
- The 11th Hour with Stephanie Ruhle



Sports

- NASCAR Cup Series
- PGA

INDUSTRY

Align your brand with the Beauty & Personal Care industry-relevant themes in curated VOD content from NBCU's premium streaming portfolio to drive deeper viewer connection.

Relevant categories:



Travel

- Air travel
- Destination - beaches



Business & finance

- Finance decision makers
- Mobile banking app users



Attractions:

- Film festival goers
- Concert Goers



Shopping

- Bargain hunters
- Holiday shoppers



Technology

- Fitness and health tech users
- Solar energy owners



Hobbies & Interests

- Concert goers
- Halloween enthusiast



SNL50



EMMYS



AI-powered Contextual targeting by...

CUSTOM

Align your brand's creative with thematically relevant moments for Beauty & Personal Care across NBCU's premium content portfolio to drive meaningful engagement and inspire action.

Overview:

0 1 .

Using AI, scan Peacock content for thematically relevant moments

- AI-powered technology scans for *bespoke inputs* (video, audio, and images) at a frame-level to identify episodes

0 2 .

Deliver specific creative with **episode-level targeting** of thematically relevant moments

- **Shows include:** *The Real Housewives of Orange County*, *The Valley*
- **Genres include:** Reality, Drama, Sports

EMOTIONAL ALIGNMENT

Build authentic connections by matching the Beauty & Personal Care emotional tones/themes to resonant key moments across NBCU's premium streaming content that inspire engagement and action.

Overview:

0 1 .

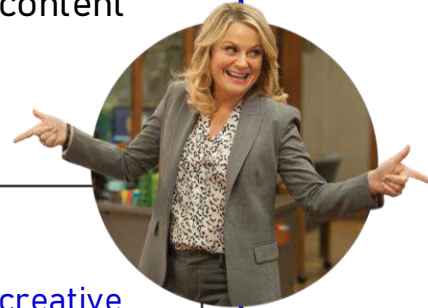
Using AI, NBCU ingests your brand's creative to identify emotional cues to match across NBCU content

- AI-powered technology analyzes ad creative and metadata (themes, tones, values) to find aligned NBCU content

0 2 .

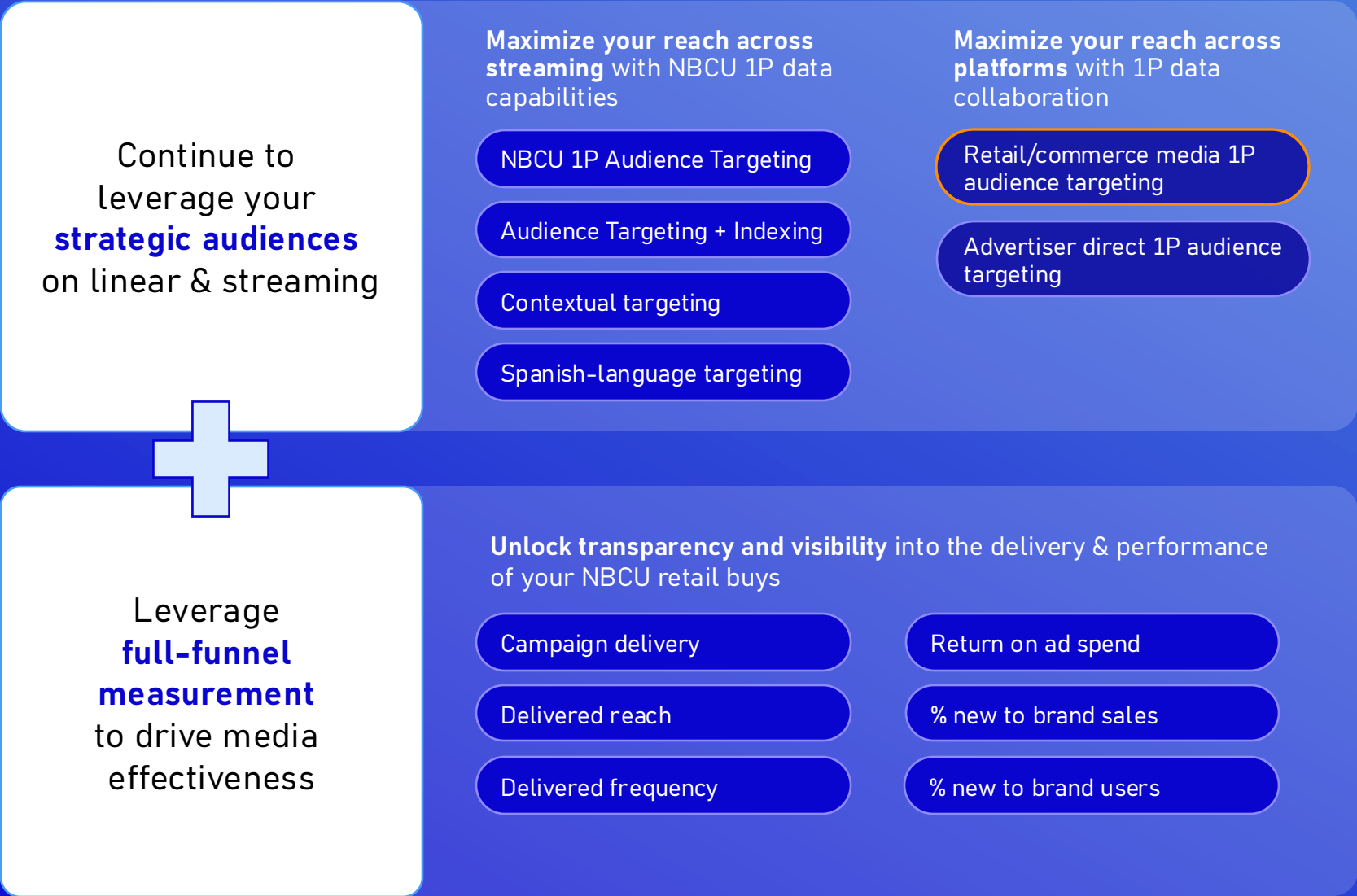
Deliver specific creative with **program-level targeting** thematically aligned to your ad creative

- **Shows include:** *Today 3rd Hour*, *Below Deck*, *Vampire Diaries*
- **Genres include:** Reality, Drama, Entertainment



Deliver Measurable Outcomes Through RMN Partnerships

Make the most of your data-driven investment with unique capabilities to reach omni-channel shoppers with outcome-based measurement



Maximize your offsite retail investment with NBCU

Access and activate retailers' first-party data across our premium streaming environment

Why retail media with NBCU

Full-funnel growth—from brand building to sales

Reaching the right shoppers with 1P retail data

Proving ROI with closed-loop measurement

Engagement via commerce-enabled ad innovations

Privacy-minded advertising strategy

Key activation opportunities

1P Data Targeting & Attribution

Leverage Instacart's 1P retail data to reach audiences across NBCU streaming and linear, activated through direct IO and PG, with full-funnel measurement powered by transactional insights



Live Sports Targeting with In-flight Measurement

Available as a closed alpha, reach audiences in NBCU's premium live sports with Walmart Connect's 1P data via two paths: 1) **Targeting + measurement** across NBCU's streaming footprint; 2) **Measurement-only** for cross-platform NBCU buys



Enhance your retail buys with turnkey audience packages & commerce-enabled ad innovations



Audience Packages

Activate NBCU's turnkey packages to reach Instacart shoppers seamlessly across our premium programming as they stream their favorites via direct IO and PG buys

Relevant programming:

Fall Football



- SNF
- Twisted Metal

Halloween Celebrators



- Wicked
- The Miniature Wife

Thanksgiving Celebrators



- Thanksgiving Parade
- WWHL

Stocking Stuffers



- Love Island All Stars
- Real Housewives

New Year's Celebrators



- The Traitors
- Love Island USA

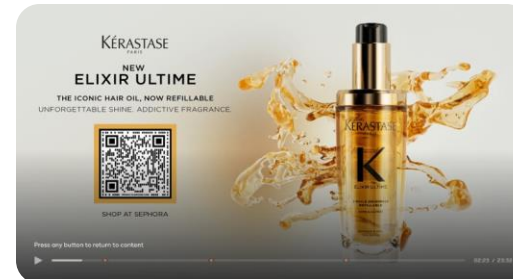
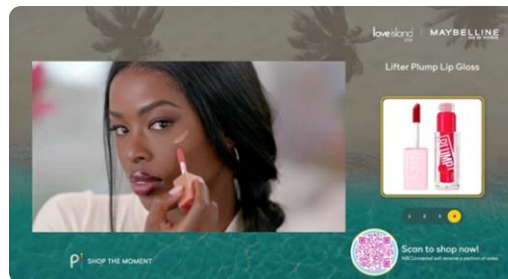
Holiday Sips



- The Voice
- The Grinch

Commerce Ad Innovations

Brands can leverage Instacart's first-party audience data and our commerce-enabled innovations to drive maximum incrementality. Units such as shoppable canvas carousel ads, shoppable pause ads, and virtual concessions for select content



2-in-3

Peacock streamers are likely to order while watching live sports or movies



Amplify your message & drive engagement via social

Social plays a critical role for BPC brands, driving trends and education consumers.

Tap into fandoms to build community, partner with influencers and enable direct to consumer interactions

NBCU Fandom Extends to Every Platform

1.3B

total followers across big 5 social platforms



6.9B

average video views monthly

445M

monthly engagements

Social Lifts Across NBCU Sponsorships



NBCU Portfolio View Rate

+34%

YoY Growth (2024 vs 2023)



NBCU Portfolio View Rate

+10%

YoY Growth (2024 vs. 2023)

Custom Content Partnerships

+19%

Lift in Ad Recall

Measure What Matters

✓ Brand Recall

✓ Brand Favorability

✓ Purchase Intent

Two ways to partner on NBCU social to **amplify** existing connections and **forge** new ones

Ads   

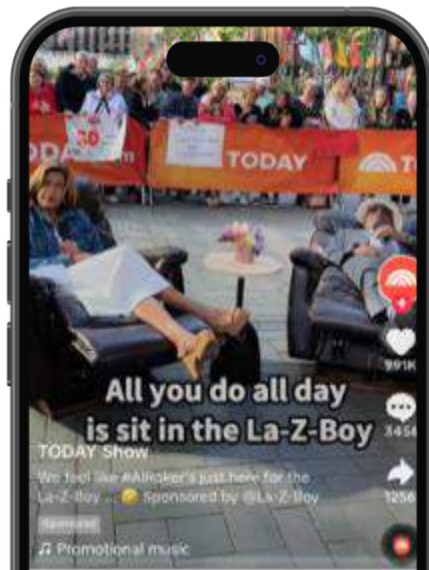


Turn-key ads

- TikTok Pulse Premiere *post-roll*
- X amplify *pre-roll*
- Snap Shows

Run *YOUR* ad against our NBCU content
(ads from advertiser's handle)

Custom Content       



Show/Event Integration

- In-show, live event integration
- Sponsored segments



Custom content

- Bespoke content
- Talent / Creators

Integrate your brand with NBCU content
(ads from NBCU handles)



Franchise sponsorships

- Custom open
- Presented by mention



BPC
Impact at
NBCU



BPC Proven impact across client KPIs

NBCU BPC Campaigns – *Test vs. Control*
(Beauty & Personal Care)

Upper Funnel

Aided Brand Recall
+34%

Brand
Familiarity
+9%

Mid Funnel

Avg. Search Engagement
2x

Lower Funnel

Consideration Intent
+10%

New to Brand
Buyers*
30%+

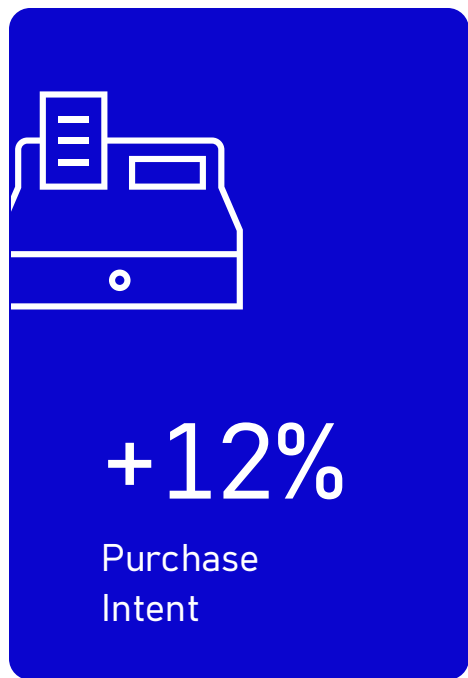
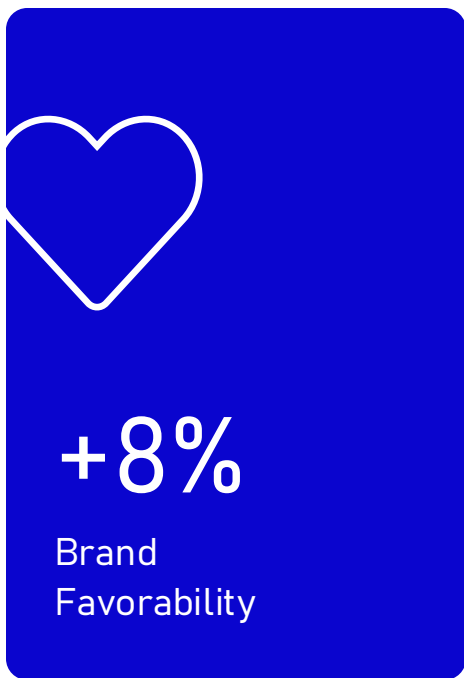
Source: NBCU Ad Impact Database 2017–2025, 18 Campaigns across 16 Brands NBCU measured Beauty and Personal Care campaigns
Custom research, vendors vary. Average of exposed vs. control cells for NBCU. Top 2 box
Search Engagement (SER Index): EDO, Volume in five minutes following ads airing on NBCU vs. same brand competitive averages expressed as an index (100).
Based on Instacart x NBCU Beta as of Dec 2024



Beauty & Personal Care

Proven **Peacock** impact across client KPIs

NBCU BPC Peacock Campaigns – *Exposed vs. Control*
(Beauty Personal Care)



Source: NBCU Ad Impact Database 2020–2025, 6 Campaigns across 6 Brands Peacock measured Beauty & Personal Care campaigns Custom research, vendors vary. Average of exposed vs. control cells for NBCU. Top 2 box

NBCU offers measurement opportunities providing full-funnel insights for Beauty & Personal Care

	Buy Side Activation	Clean Rooms	NBCU Measurement Opportunities (Sell-Side Measurement)	
Awareness	✓		Brand Lift Study <i>Brand Favorability</i> <i>Ad Awareness</i> <i>Purchase Intent</i>	
Consideration	✓	✓	Search Engagement	
Conversion	✓	✓	Sales Lift (RMN, 3P)	

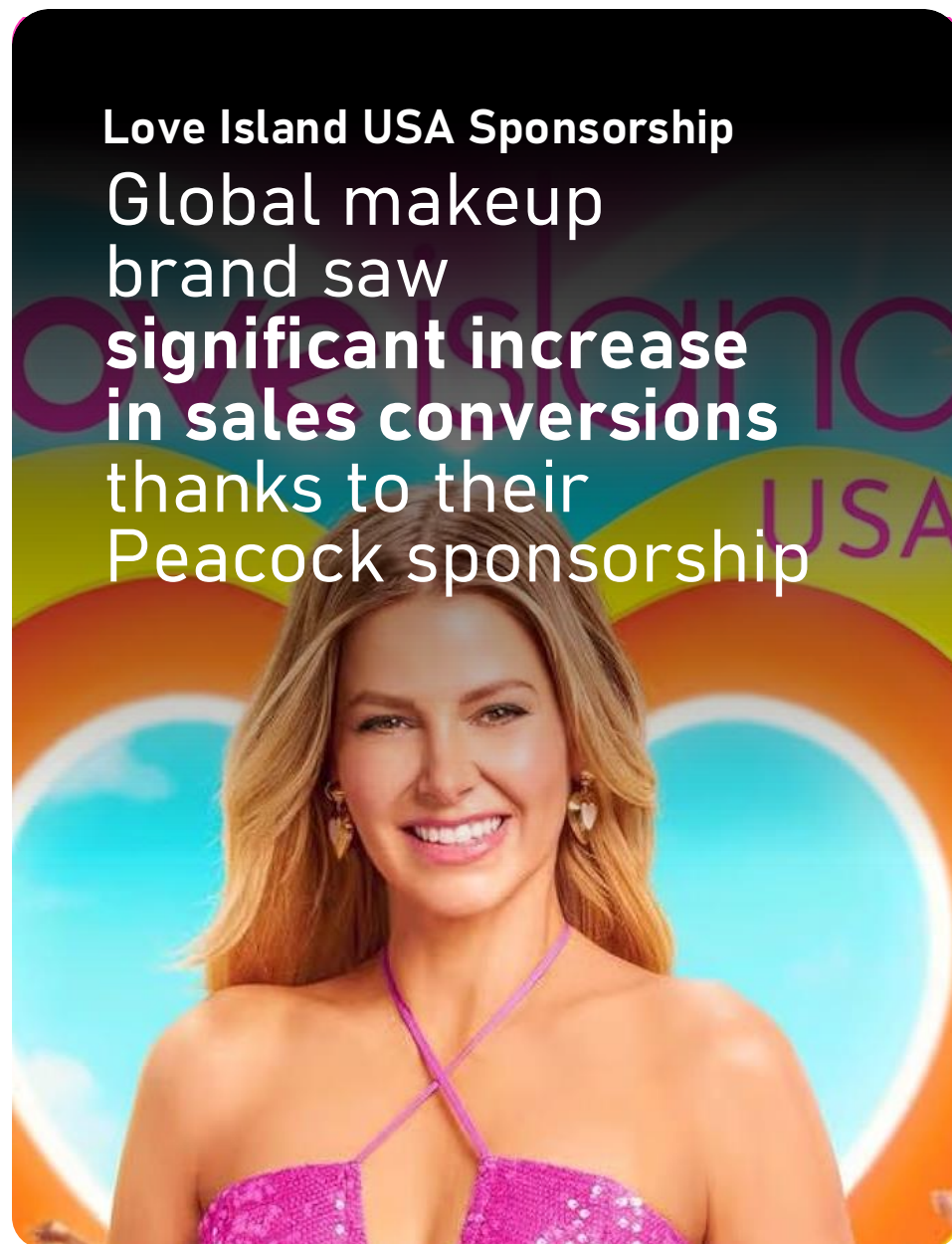
Dedicated NBCU Insights Team provide:

- Beauty & Personal Care category consultation and recommendations
- Sponsorship and audience impact analysis

*Requires client to permission data



BPC Case Studies



Love Island USA Sponsorship
Global makeup
brand saw
**significant increase
in sales conversions**
thanks to their
Peacock sponsorship

+39%

increase in **sales conversion rate**

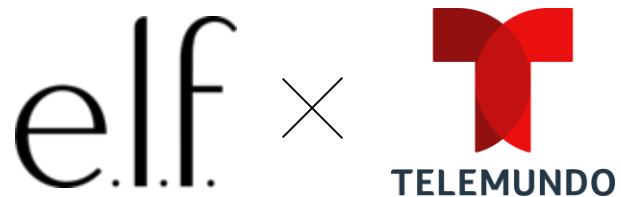
2.3K

checkouts on Shop The Villa

+733%

**QR code scan rate for contextual
Pause Ad**

vs. Flowcode beauty category



The Challenge

Build a stronger connection with the Latine makeup aficionadas community.

The Insight

Latine consumers choose to engage Spanish-language and in-culture content to feel more connected to their identity. This consumer also is very influenced by the preferences and word of mouth shared by their favorite talent.

The Solution

Create a campaign leveraging Telemundo's Latina beauty influencer Gabby Cataño in a social video makeup tutorial to authentically connect with Spanish-speaking fans.

4.2M

Total Impressions

+75%

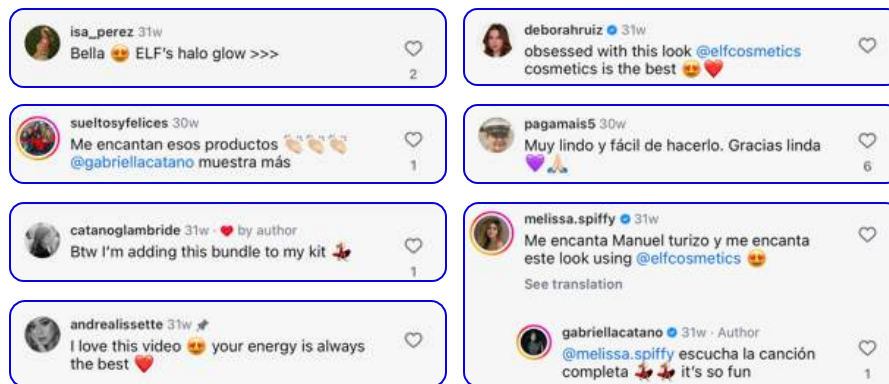
Outperformed NBCU VVR Benchmark


4x

Instagram Post Exceeded Telemundo CTR Benchmark

+66%

Exceeded Telemundo Engagement Rate Benchmark





Streaming (Peacock AX)
Global cosmetics
brand saw **significant
ROAS** and **lift in brand
awareness** thanks to
their NBCU + Instacart
campaign

\$2.06

**return on every dollar spent on
the targeted campaign**

+64%

lift in **buyers new to the brand**

+56%

of all **attributed sales** came
from **new buyers**



BPC Category Resources

BPC Category Resources

Category Trends & Strategic Recommendations	Strategic Media Insights & Opportunities	Thought-Leadership & Insights
<div><p>BPC Playbook Beauty + Personal Care</p></div> <div><p>Annual Playbook Category trends, opportunities, and recommendations based on learnings at NBCU</p></div>	<div><p>Retail Media Capabilities Maximizing brand retail investments with 2P shopper data and insights across NBCU premium video content</p></div> <div><p>CPG RMN Capabilities Maximizing retail investments with 1P shopper data across NBCU premium video</p></div>	<div><p>The Future of Advertising: Entertainment Ads</p></div> <div><p>The Future of Advertising Why and how entertaining ads create impact, principles for creating content, and brand showcase</p></div>
<div><p>CPG Quarterly Update 1H'25 Heavy highlights and media trends</p></div> <div><p>Regularly Updated Category Highlights Latest trends and opportunities based on learnings at NBCU</p></div>	<div><p>The Power of LIVE NBCUniversal</p></div> <div><p>The Power of Live Leveraging live events to place your brand at the center of cultural conversation</p></div>	<div><p>Reaching & Engaging Gen Z Understanding Gen Z's Passion for Premium Video</p></div> <div><p>Gen Z Insights for reaching and engaging Gen Z through their passion for premium video</p></div>
<div><p>CPG Earnings Summary Package Goods & Personal Care</p></div> <div><p>Quarterly Earnings Summary of key learnings from earning season</p></div>	<div><p>Luxury & Streaming NBCUniversal</p></div> <div><p>Luxury & Streaming A deep dive into luxury audiences and their relationship with streaming</p></div>	<div><p>Maximize Marketing Success by Understanding The Role of Language</p></div> <div><p>Role of Language Study Insights for maximizing marketing success by understanding the role of language</p></div>

BPC Playbook

NBCU BPC Category
Strategy Team:

Dominique Folacci
Nick Cafiero
Ben Cohen





BEAUTY & PERSONAL CARE

The Power of Ad Innovations

Drive Effective Results through Strategic Application and Category Best Practice

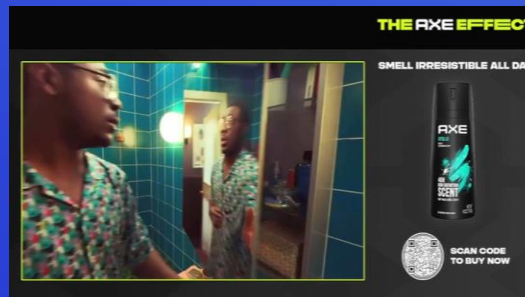
Genre-Targeted Pause Ad



Elevate your pause ad to highlight new products or self-care essentials during a viewer's break, with genre-specific targeting to reach the right audience

+55% Ad Memorability vs. Midroll for Category

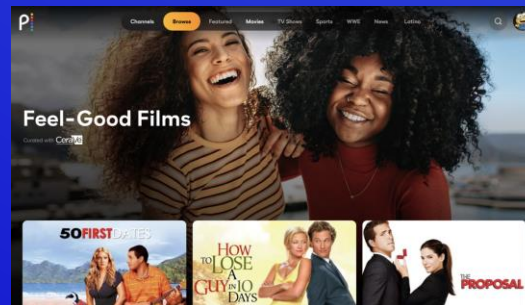
Engagement Ad



Fuel discovery of new product releases paired with shoppable opportunities during the commercial break

+39% Brand Memorability vs. Midroll for Category

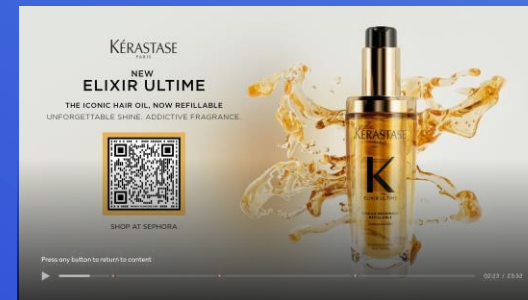
Curator Ad



Align your brand with curated collections of shows and movies—matched by mood, genre, or theme—to inspire self-care moments and drive brand identity

+41% Ad Memorability vs. Midroll for Category

Pause Ad



Beauty break? Push the viewer to shop your brand during their paused state, and offer a scannable code for instant shopping

+23% Ad Memorability vs. Midroll for Category

Spotlight Ad



Align your content with cultural moments, offering the first impression on notable category holidays or key campaign dates, etc.

+22% Message Memorability vs. Midroll for Category