



CPG Playbook

Packaged Goods + Personal Care



CPG Playbook Overview

Explore NBCUniversal's latest perspectives & insights into the CPG industry

Our Approach

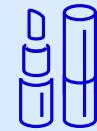
At NBCUniversal, we have a legacy of working with a diverse range of CPG partners to build their brands & businesses. In 1H 2025, NBCU worked with 250+ CPG advertisers across the below sub-categories.



Packaged Food



Household Supplies



Beauty & Personal Care



OTC



Pet Care

This playbook has been created based on NBCU's:

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

CPG Playbook Contents

An Overview

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

Marketplace Dynamics



Media Trends & Observations



Brand & Business Imperatives



NBCUniversal Playbook





'25 CPG Industry Dynamics

While navigating elevated costs and pricing pressures,
CPG brands & portfolios seek to protect margins, defend share, and maintain consumer demand through product innovation



Headwinds

- **Raw materials costs remain volatile** due to supply chain complexities, global trade disruptions, and climate-linked instability, making cost management a key concern
- **Fragmented consumer behavior** stemming from weak consumer confidence, private label growth, and rising popularity of GLP-1s and changing spending habits
- **Geopolitical and regulatory uncertainty** adding operation hurdles, that along with tariffs are putting further pressure on CPG margins

Tailwinds

- **Omnichannel and digital acceleration** as online CPG sales are outpacing brick-and-mortar growth
- **Consumer appetite for novelty and innovation** is driving category expansion to meet demand for better-for-you options, specialty brands, bold flavors, niche segments, and premium offerings
- **Live sports & entertainment events** serve as valuable cultural connectors and mass-reach vehicles, for brands to launch products, innovations, and key messaging

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

Packaged Food	Beauty & Personal Care	Household Care	OTC	Pet Care
<p>Brands are adapting to consumer demands for convenient, healthy, globally inspired flavors, and diverse protein options. This is amplified by the expanding reach of e-commerce and DTC models, requiring agile innovation to meet varied tastes and shopping preferences.</p> <p>47% of US snackers are motivated by healthy snack options, and 39% by convenient packaging¹</p>	<p>BPCs are focusing on evolving consumer demands and technological advancements, increasingly catering to holistic health, personalization, "skinification", and leveraging viral social media-driven product launches.</p> <p>62% of US BPC buyers are interested in hyper-personalized products, and 28% would be willing to pay more for them²</p>	<p>Household care is evolving beyond basic cleaning, with consumers seeking eco-friendly ingredients and convenience through subscription services. Brands must prioritize education and align with stable cleaning routines to resonate in this shifting market.</p> <p>69% of users of natural homecare products cite "better for the environment" as a reason for increased use²</p>	<p>The OTC vitamin and supplement industry is expanding as consumers increasingly seek natural and personalized nutrition solutions. Digital health integration is also driving innovation, allowing brands to better meet evolving individual health needs.</p> <p>\$43B The US VMS market is forecasted to grow to \$43B by 2028, with a projected 9% growth rate³</p>	<p>The pet care market continues to grow, driven by a strong focus on pet wellness and a demand for premium nutrition. This landscape is increasingly shaped by tech integration, offering advanced solutions for monitoring and enhancing pet well-being.</p> <p>77% of pet owners agreed that it's worth paying more for healthier pet food⁴</p>

CPG Media Trends To Watch

CPG brands are combining mass media moments (i.e., live events) with data-driven insights and targeting to optimize reach, engagement, and sales impact in a highly competitive market

An Emphasis on Performance-Driven Digital



+19%

Increase in RMN spend for the CPG category in 1H '25¹, with **nearly two-thirds of CPG marketers expect to increase** their RMN spending in 2H²

45%

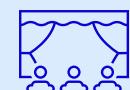
Of CPG category spend 1H '25, was in **social and short-form video**, as brands demand targeting, effective engagement, and measurable ROI¹

Bolstering Brand-Building Efforts



In a fiercely competitive market, CPG brands are **fighting off private-label competitors and justifying premium prices** to value-conscious consumers by strengthening their core brands

Standing Out with IP & Talent



In a saturated market CPGs are using IP and talent-based marketing to stand out, leveraging their established fan bases and cultural relevance to **create connection and on-shelf differentiation**

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

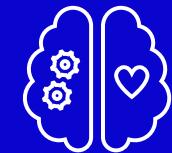
EXPAND REACH

To Diverse, Incremental Audiences



BUILD

Brand Awareness & Salience



REINFORCE

Brand Relevance & Loyalty



INFLUENCE

In-Market Intent & Sales





'25/26 CPG Playbook

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

Expand reach



Build awareness & salience



Reinforce relevance & loyalty



Influence intent & sales



NBCUniversal's **CPG** Playbook



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

02.
Build cultural relevance & drive engagement

03.
Leverage the high-impact of **live sports & cultural events**

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

← POWER OF →

Linear + Streaming

Premium Content

Sports & Live

Strategic Audiences

IP & Talent

Full-Funnel Measurement

Ad Innovations

Each month,
NBCUniversal
content
reaches

286M

P2+ Proj. 2026

Across
80M
Households

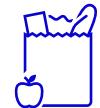
*the audiences
that matter to you*



66M
Health & Fitness
Enthusiasts



66M
Primary Grocery
Shoppers



61M
Home Chefs



36M
Heavy Snack
Food Buyers



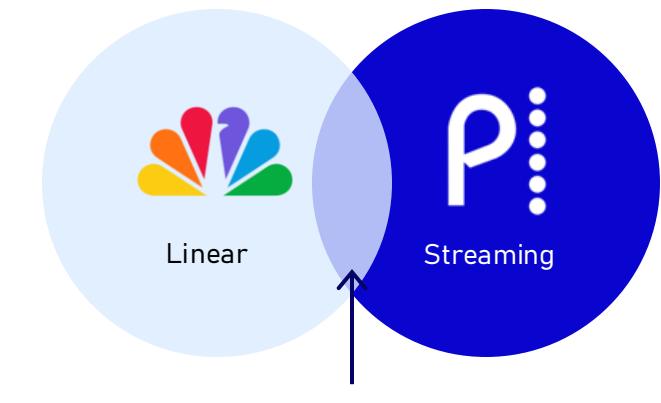
Maximize Reach Across Platforms with a Data-Fueled Approach

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

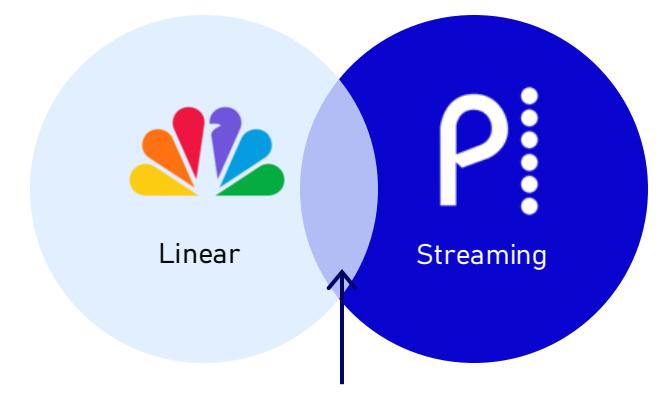
Source: Based on NBCU's in-house audience insights using 1P and 3P data; date range: June 2025; base: HH; Audience segments derived from MRI audience comps from August 2025 Cord Evolution (SP25 USA) study applied to P18+ NBCU Crossplatform Reach.

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

Frozen Food Buyers
59M Monthly Households



Laundry Detergent Buyers
42M Monthly Households



Measure what matters

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

Cross-Platform Impact for CPG brands

+14%	+57%	+7%
Unaided Brand Recall	Search Engagement	Purchase Intent

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

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



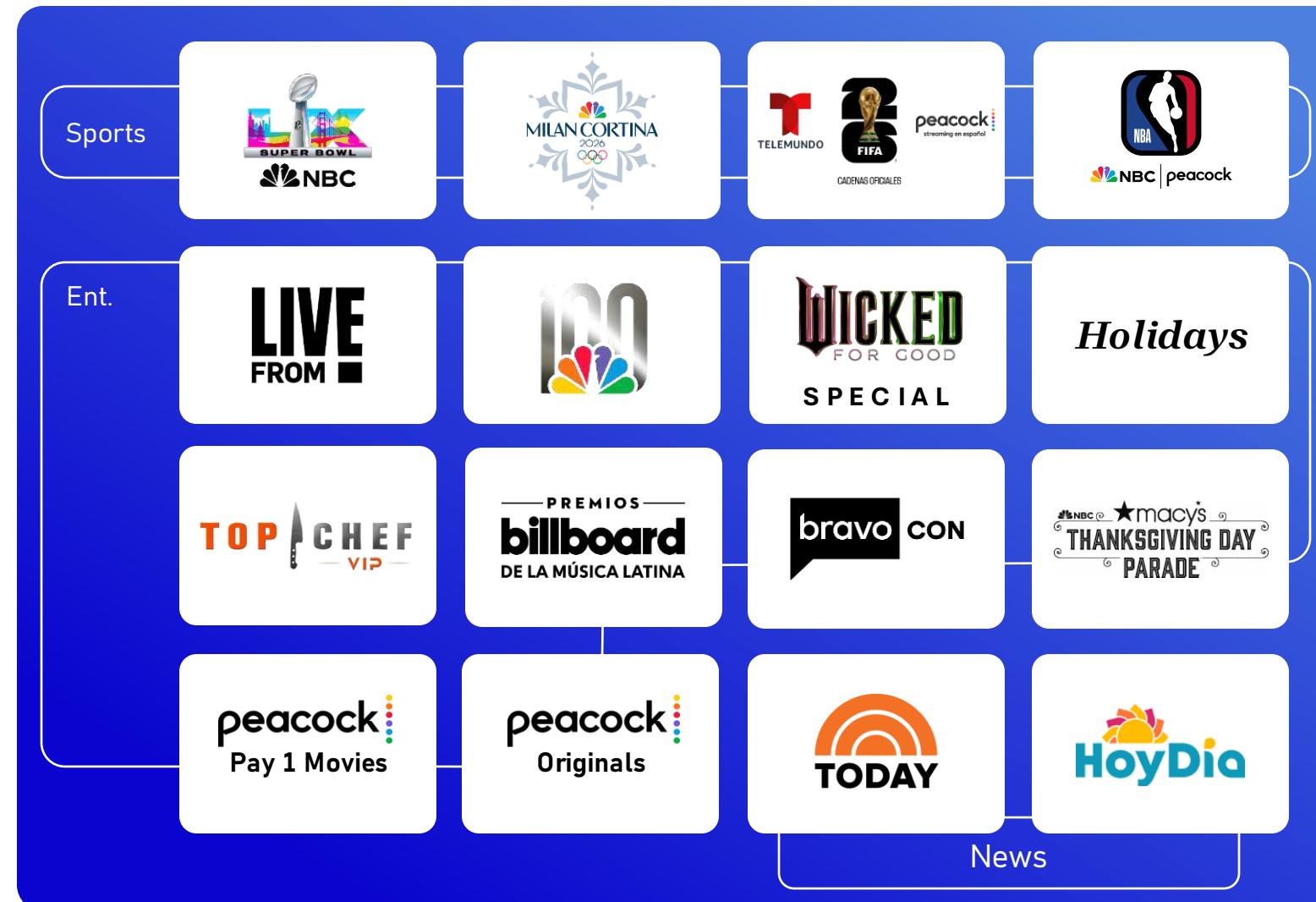
Build Cultural Relevance & Drive Engagement

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

Measure What Matters

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

Unique Sponsorship Opportunities



Best-in-Class Showcase

How CPG brands are executing custom storytelling with NBCU premium content

Proven Impact

Likeability Lifts for CPG

Official Sponsors

+85%

In-Show Integrations

+46%



Capturing Attention Live in Late Night SNL50 Custom Content



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



Engaging Strategic Audiences with Custom Content Custom Content aligned with Premios Billboard de la Música Latina



Differentiating with Talent-led Custom Content Bravo's The Real Housewives Custom Content with Talent



Showcasing Product Through In-Show Integration TODAY Halloween Integration and Social Amplification

Leverage the High-impact of Live Sports & Cultural Events

Reach highly attentive live audiences across screens during key cultural moments

Source: Nielsen Program Live+SD, Persons 2+, All Sports Genre Viewership, 1/1/24-12/31/24 vs. 1/1/23-12/31/23

Key CPG Audiences are Flocking to Sports



Women

+14%



Gen Z

+12%



Multicultural

+7%

Sports Viewership
Viewership 2024 vs. 2023

Measure what matters

- Brand awareness & consideration
- Brand recall & favorability
- Sponsorship impact
- Sales impact & ROAS

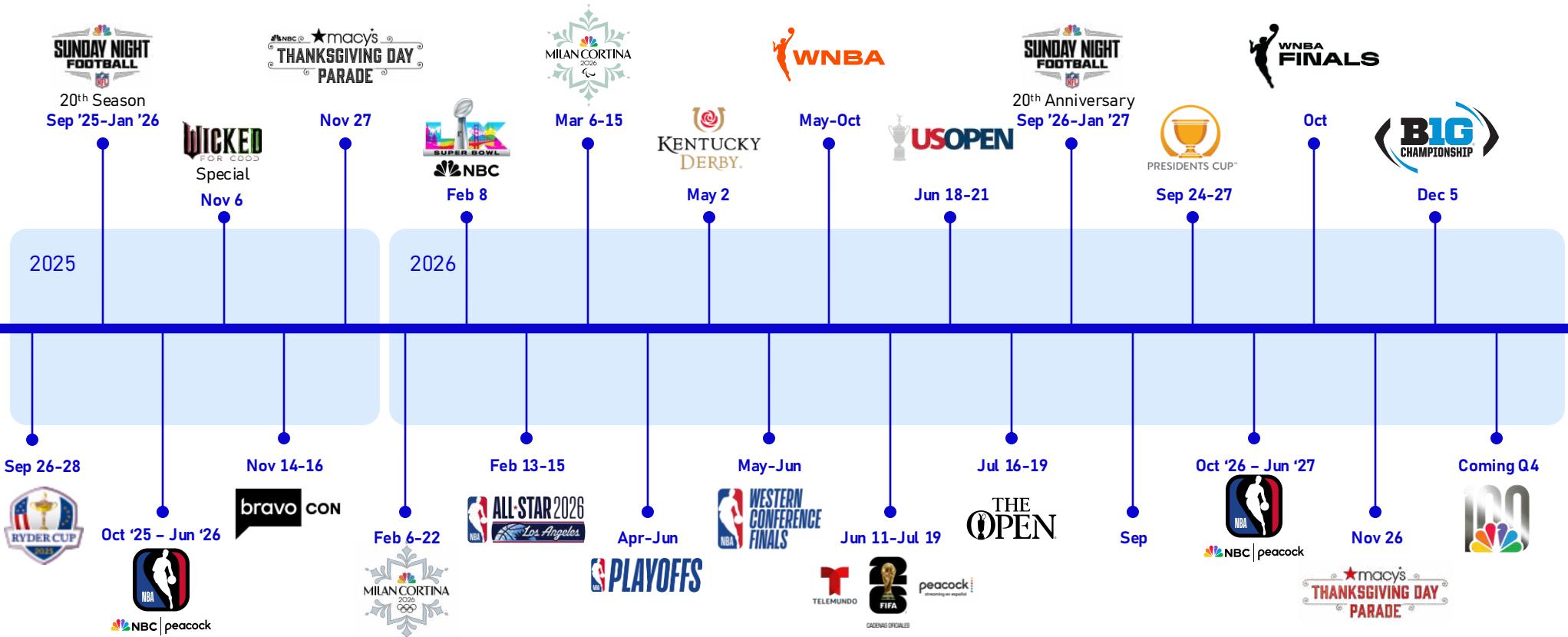
Power of Live for CPG

+27%	22x	+26%
Unaided Brand Recall	Sponsorship Favorability	Purchase Intent

NBCU CPG Live Events + Sports programming (exposed v. control)

Maximize Impact with Live Sports & Cultural Events

Connect with consumers during key buying seasons and product launches by leveraging the high reach of premier live sports and cultural events



Align with Key
CPG Themes
& Events



Halloween



Holidays



Cold & Flu



Easter



Spring Cleaning



Grilling



Back-to-School



Fall Football



Hosting

Creative Marketing across NBCU

How CPG brands are aligning with Live Sports to tell their brand story



Leveraging Talent for Custom Content

Oral-B partnered with Sunday Night Football to create custom, shoppable content featuring talent from Football Night in America.



Capitalizing on Peak Race Day Attention

Freshpet sponsored the Jockey Lineups at the 150th Preakness Stakes, securing massive exposure during a high-attention moment.



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

Continue to leverage your **strategic audiences** on linear & streaming



Leverage **full-funnel measurement** to drive media effectiveness

Maximize your reach across streaming with NBCU 1P data capabilities

NBCU 1P Audience Targeting

Audience Targeting + Indexing

Contextual targeting

Spanish-language targeting

Maximize your reach across platforms with 1P data collaboration

Retail/commerce media 1P audience targeting

Advertiser direct 1P audience targeting

Unlock transparency and visibility into the delivery & performance of your NBCU retail buys

Campaign delivery

Delivered reach

Delivered frequency

Return on ad spend

% new to brand sales

% new to brand users

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:



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

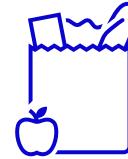


2-in-3

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



CPG
Impact at
NBCU



CPG

Proven impact across client KPIs

NBCU CPG Campaigns – *Test vs. Control* (Packaged Goods, Personal Care)

Upper Funnel

Unaided Brand Recall
+23%

Aided Ad Recall
+27%

Sponsorship Association
+50%

Mid Funnel

Sponsorship
Favorability
+140%

Avg. Search
Engagement Index
170

Message
Association
+15%

Lower Funnel

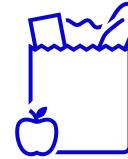
Consideration
Intent
+18%

Purchase
Intent
+16%

New to Brand
Buyers*
30%+

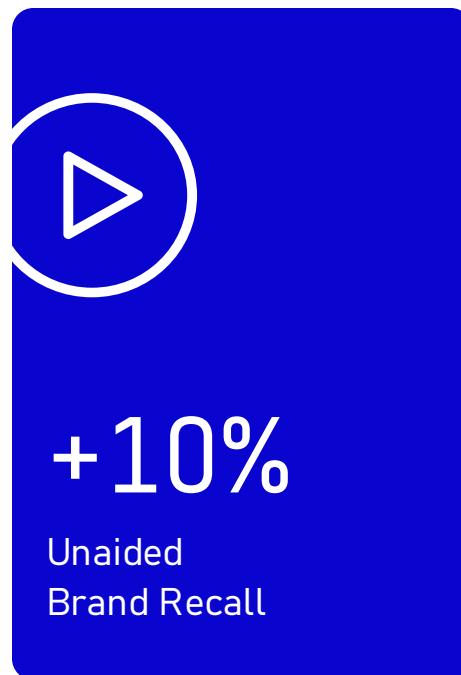
Source: NBCU Ad Impact Database 2017-2025, 260 Campaigns across 131 Brands NBCU measured CPG campaigns Custom research, vendors vary. Average of exposed vs. control cells for NBCU. Top 2 box Search Engagement (SER Index): EDO, Volume in five minutes following ads airing on NBCU vs. same brand competitive averages expressed as an index (170)

*Based on Instacart x NBCU Beta as of Dec 2024

**CPG**

Proven Peacock impact across client KPIs

NBCU CPG Peacock Campaigns – Exposed vs. Control
(Packaged Goods, Personal Care)



NBCU offers measurement opportunities providing full-funnel insights for CPG

	Buy Side Activation	Clean Rooms	NBCU Measurement Opportunities (Sell-Side Measurement)	
Awareness	✓		Brand Lift Study <i>Unaided Brand Awareness</i> <i>Brand Favorability</i> <i>Ad Awareness</i>	Dedicated NBCU Insights Team provide: <ul style="list-style-type: none"> – CPG category consultation and recommendations – Sponsorship and audience impact analysis
Consideration	✓	✓	Search Engagement	
Conversion	✓	✓	Sales Lift (RMN, 3P)	

CPG Case Studies



NBCUniversal x Instacart

Jif saw **significant ROAS** and brand penetration

thanks to data collaboration between NBCU and Instacart



15X
return on ad spend

6x the ROAS of Jif's standard demo buy!

43% of buyers were new to Jif
+30% vs. standard demo

30% of sales were from new buyers
+3% vs. standard demo



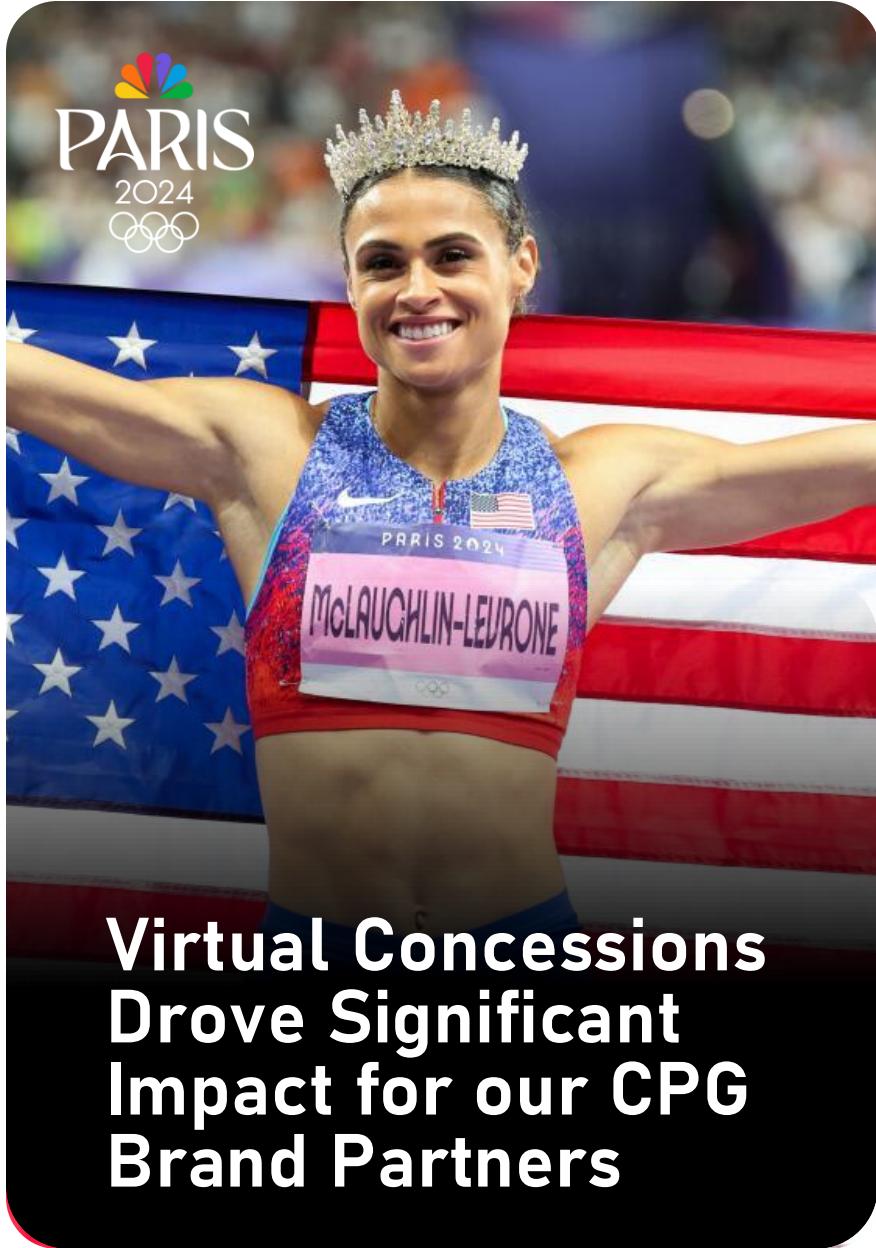
NBCUniversal x Instacart

Resolve saw significant ROAS and brand penetration thanks to data collaboration between NBCU and Instacart

8X
return on ad spend

50% of buyers were new to the brand

49% of sales were from new buyers



**Virtual Concessions
Drove Significant
Impact for our CPG
Brand Partners**

Up To

+60%

**Increase in total sales for our CPG partners
vs. prior year sales**

+48%

Lift in Brand Recall
vs. prior year brand

+20%

Lift in Brand Consideration
vs. the control

+2.4pts

Lift in Category Market Share
vs. prior month brand norms

CPG Category Resources



CPG Category Resources

Category Trends & Strategic Recommendations



Annual Playbook

Category trends, opportunities, and recommendations based on learnings at NBCU



Regularly Updated Category Highlights

Latest trends and opportunities based on learnings at NBCU



Quarterly Earnings

Summary of key learnings from earning season

Strategic Media Insights & Opportunities



CPG RMN Capabilities

Maximizing retail investments with 1P shopper data and insights across NBCU premium video

Pet Care Toolkit

Pet care sub-category trends, audience intel, marketing opportunities

Older Audiences & Streaming

A deep dive into older audiences and their relationship with streaming

Thought-Leadership & Insights



The Future of Advertising

Why and how entertaining ads create impact, principles for creating content, and brand showcase

Gen Z

Insights for reaching and engaging Gen Z through their passion for premium video

Role of Language Study

Insights for maximizing marketing success by understanding the role of language

CPG Playbook

NBCU CPG Category
Strategy Team:

Dominique Folacci
Nick Cafiero
Ben Cohen





CPG

Deepen engagement with Peacock Ad Innovations

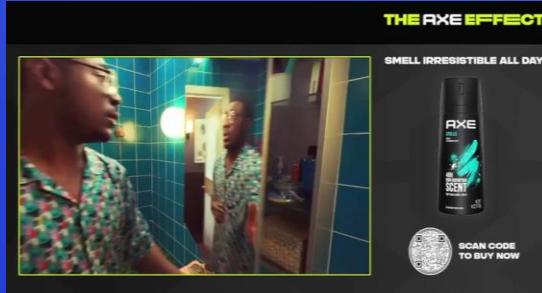
Genre-Targeted Pause Ad



Spotlight everyday essentials or seasonal favorites during a viewer's break, with genre-specific targeting to reach the audiences most likely to stock up.

+47% Ad Likeability vs. Midroll for Category

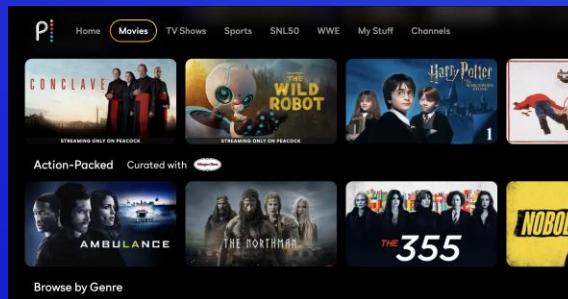
Engagement Ad



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

+30% 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 stay top of mind and drive everyday brand preference.

+46% Brand Memorability vs. Midroll for Category

Pause Ad



Push the viewer to choose your brand during their paused state, and offer a scannable code for those that need to replenish on it

+39% Ad Memorability vs. Midroll for Category

Spotlight Ad



Align your content with cultural moments, offering the first impression on notable category holidays such Mother's Day, Thanksgiving, etc.

+17% Message Memorability vs. Midroll for Category