



Tech Playbook

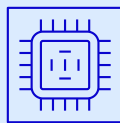
Electronics + Software/SaaS/Cloud +
Social/Apps/Websites + B2B + Emerging

Tech Playbook Overview

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

Our Approach

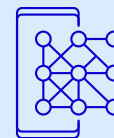
At NBCUniversal, we have a legacy of working with a diverse range of Tech partners to build their brands & businesses. In 2024, NBCU worked with Tech advertisers across the below sub-categories.



Electronics



Software, SaaS,
Cloud



Social, Apps,
Websites



B2B



Emerging

This playbook has been created based on NBCU's:

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

Tech
Playbook
Content

An Overview

of NBCUniversal’s latest Tech perspectives, insights, and strategic considerations.

Marketplace Dynamics



Media Trends & Observations



Brand & Business Imperatives



NBCUniversal Playbook





'25 Tech Industry Dynamics



While navigating volatile macroeconomic & competition challenges,
Tech continues doubling down on AI to drive business momentum





Headwinds

- **Geopolitical & trade/tariff policy tension** causing uncertainty around consumer spending, supply chain, & manufacturing¹
- **Cybersecurity & regulatory challenges** may reshape category re: data governance, privacy, antitrust, copyright, & ethics¹
- **Escalating AI pressure** to offset costs, improve investor confidence, generate results, outperform competitors, navigate regulation & societal concerns, & recruit talent²
- **Softer electronics rebound than expected** as consumers opt for lower-priced options, or delay purchases/upgrades^{1,3}

Tailwinds

- **Megadeal values growing** +15% YoY as category prioritizes more transformational M&A/partnerships for scale & competitiveness, especially in AI⁴
- **AI continues invigorating subcategories** as investment & adoption drive demand, faster product cycles, & innovation^{1,4}
- **Data & cloud infrastructure investments** fueled by AI will drive enhanced B2B capabilities & demand⁴
- **Ad tech momentum** continues with new AI-powered tools, programmatic offerings, data capabilities, retail media integrations, & CTV/premium video innovations⁵

As the world grows increasingly digital & tech-forward,
Tech sub-categories embrace AI to drive adoption & perception

Electronics 	Software, SaaS, Cloud 	Social, Apps, Websites 	B2B 
<p>New integrations (ex. AI-powered wearables & devices, AR/VR, smart glasses, foldable smartphones) re-invigorating innovation & sales</p>	<p>Demand for more operational integration, customization, & AI capabilities (ex. superapps, flexible payment models, & AI automation) fueling growth</p>	<p>AI continuing to boost social's & retail media's disruption of traditional search platforms, user behaviors & ad dollars</p>	<p>Growing AI adoption (ex. in personalized outreach, CRM integrations, & workflows) accelerating B2B sales performance</p>
<p>114M+ AI-powered PCs estimated to ship in 2025, equivalent to 40% of total sales ¹</p>	<p>+20% global SaaS market annual growth rate²</p>	<p>2/3 of U.S. consumers use social for search³</p> <p>+26% YoY growth in retail media share of search ad dollars³</p>	<p>56% of B2B sales employees use AI daily & are 2x more likely to exceed revenue targets⁴</p>

Sources: 1. Statista; 2. Zylo SaaS Index; 3. eMarketer; 4. LinkedIn

Tech Media Trends to Watch

Tech brands are prioritizing flexibility and advanced targeting with increasing investments across efficient, premium channels to optimize multiplatform reach and drive full funnel impact

An Emphasis on Performance Video



62%

Of Tech category spend 1H '25, went towards **social and shortform video**, as brands seek targeted reach and measurable ROI¹

The Rise of Retail Media Networks



+27%

Increase in RMN spend for the Tech Category in 1H '25¹, with retail media **search forecasted to comprise over half of total RMN spend** in FY 2025²

A Continued Shift towards Programmatic



71%

Of Category Streaming share in 1H '25 was Programmatic, up +2% (\$7M) vs. STLY¹, reflecting a broader industry trend: **70% of all streaming revenue will be programmatic by 2030**³

Standing Out with Sports



In a highly competitive, top-heavy market Tech brands are using sports tentpoles to drive differentiation, reaching captive audiences and generating cultural relevance to **inspire brand love and loyalty**

As a result of these industry dynamics, **we are seeing Tech prioritize a few key objectives**

BREAKTHROUGH
via Cultural Moments



SHAPE
Perception + Sentiment

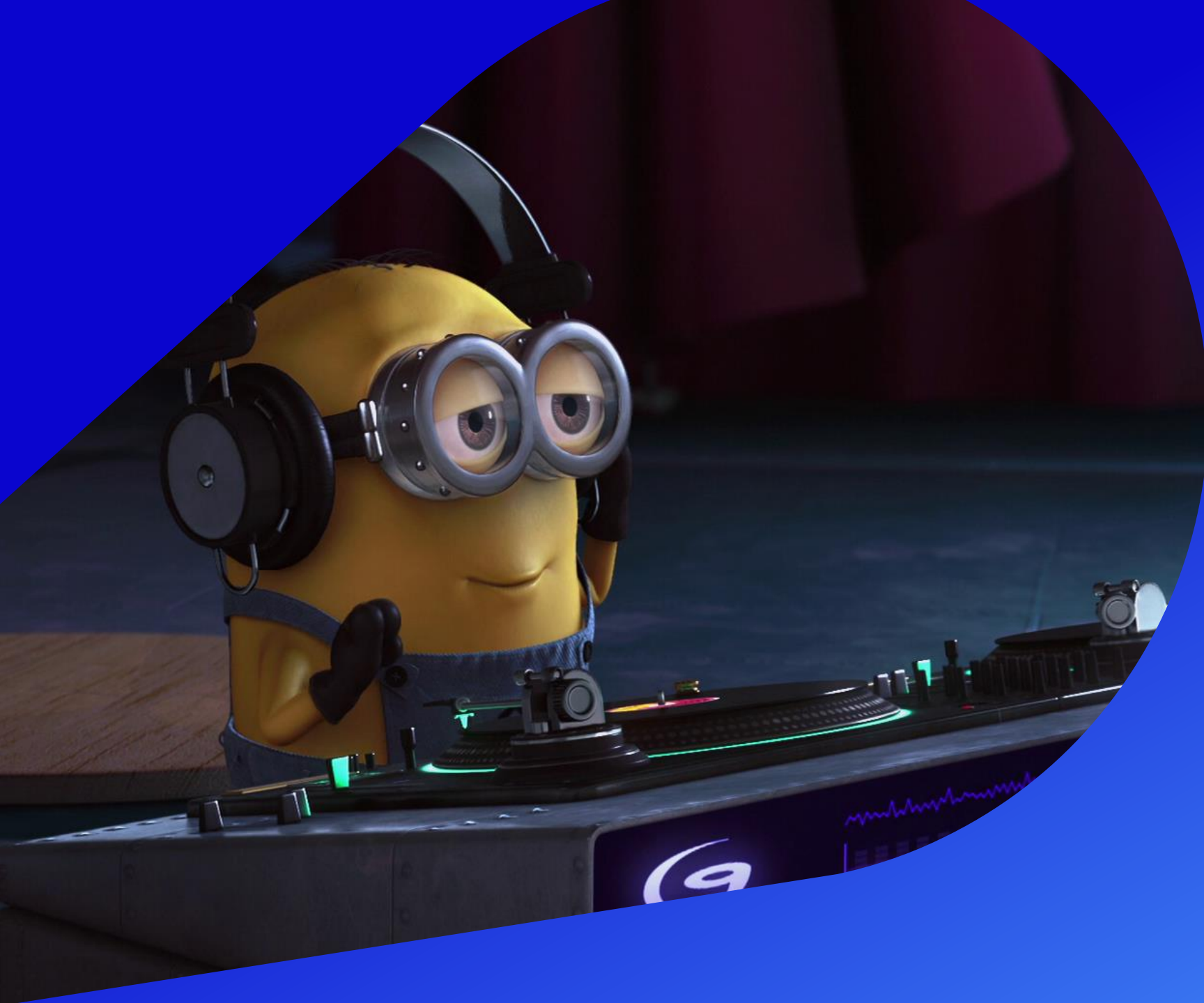


INSPIRE
Action *(sales, time spent, adoption, etc.)*



INCREASE
Market Share & Loyalty





'25/26
Tech
Playbook

Each month,
NBCUniversal
content
reaches

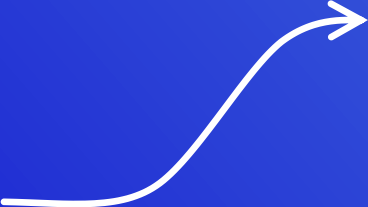
286M





P2+ Proj. 2026



Across
80M
Households


*the audiences
that matter to you*




47M	
Tech Enthusiasts	
54M	
Heavy Mobile Users	
36M	
Tech Early Adopters	
35M	
Business Decision Makers	


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.

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

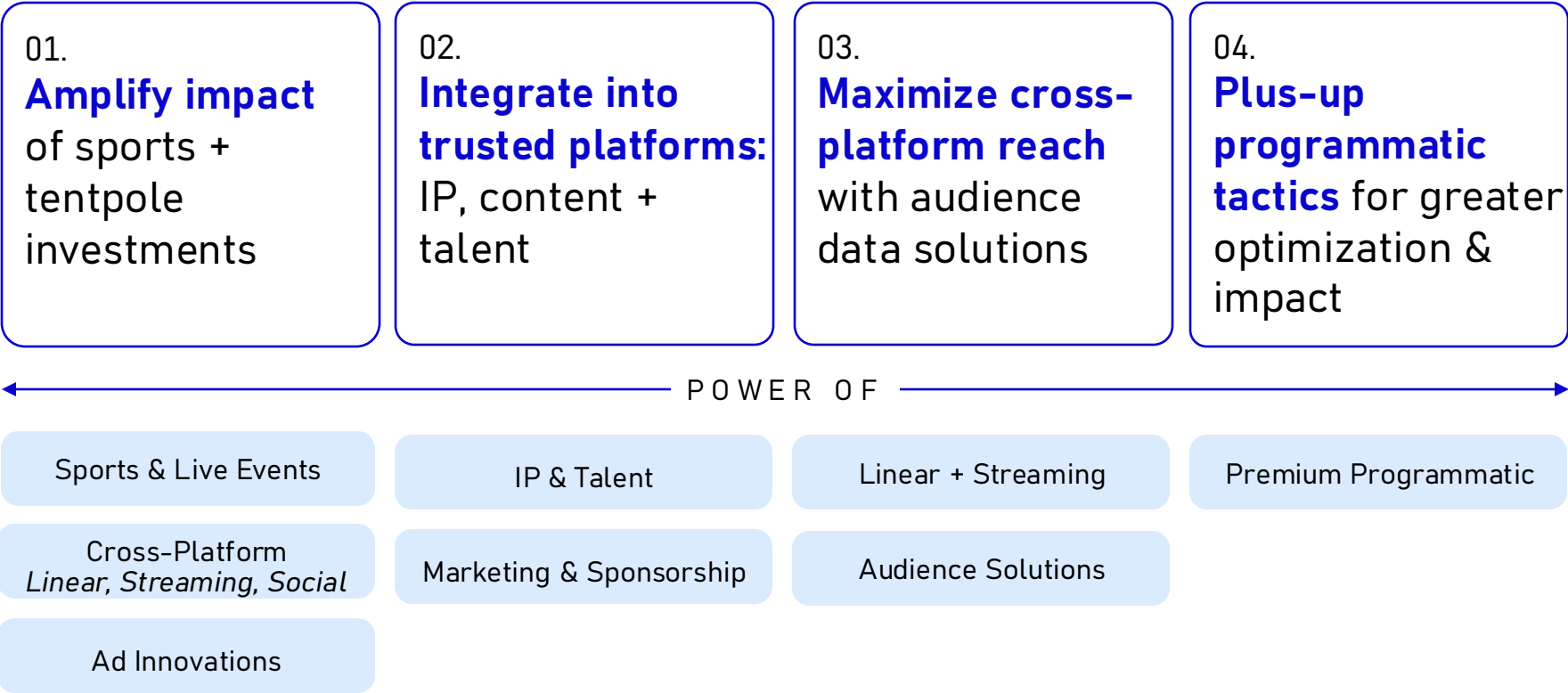
Breakthrough via  cultural moments

Shape perception +  sentiment

Inspire action 
(sales, time spent, etc.)

Increase market share + loyalty 

NBCUniversal's **Tech** Playbook



01. Amplify impact of sports + tentpole investments

Maximize the value of live programming's ever-growing reach & influence with 360° campaigns

Sources: 1. NBCU Ad Impact Database 4Q23-2025; 2. NBCU Ad Impact Database 2017-2025; 3. Listenfirst. 2024 (1/1/24-12/31/24); 4. Statista, "Social Media and Sports Viewership" (2023)

Tap into ownership opportunities

NBCU's live programming drives **+67%** purchase intent for Tech brands¹



Invest cross-platform

22x Search Engagement for NBCU Tech multi-platform vs. single platform campaigns²



Extend impact across social

Live events drive **96B Social Video Views** +43% YoY³



Complement to league, team, or talent partnerships

47% of sports fans more likely to watch an event if promoted by an athlete on social⁴

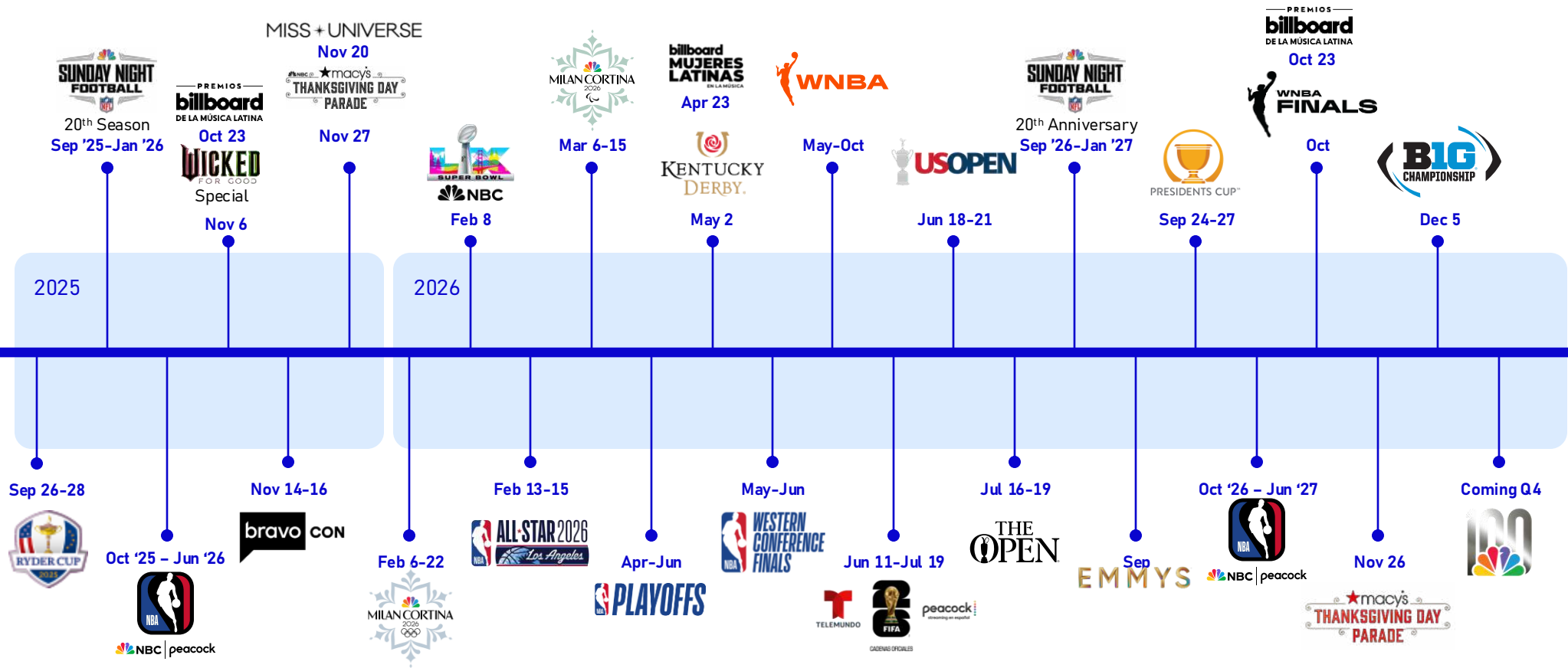


Measure what matters

- Ongoing campaign reach & frequency
- Brand impact or attribution

Tap into ownership opportunities

Leverage available exclusivity sponsorships and/or ad units within tentpoles aligning with target audiences & time periods



Align with new product launches, key shopping periods, & target audiences' top programming

Then maximize your tentpole presence across additional tactics



Invest in Cross-Platform: Live Ad Innovations



Multiview
with
Sponsor



Live in
Browse
with
Sponsor



Pause Ad
on Live



Extend Impact with Social: NBCU Toolkit

Turn-key ads



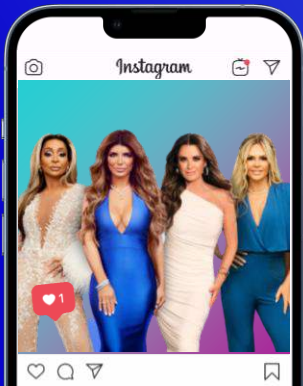
Show & event integrations



Custom content



Franchise sponsorships



1.3B

total followers
across NBCU big 5
social platforms



Complement to League, Team, & Talent Partnerships



Samsung Galaxy S25 Ultra x 2025 Met Gala
E!'s Met Gala CreatorCam Livestream
sponsorship & fashion designer LaQuan
Smith partnership



**Google Consumer Apps x
2024 Paris Olympics**
NBCU custom broadcast integrations
& Team USA sponsorship

02. Integrate into trusted platforms

Demonstrate products contextually in fan-favorite programming, differentiate from competitors, & drive brand KPIs

Measure What Matters

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

Unique Sponsorship Opportunities



Best-in-Class Tech x NBCU Showcase

Proven Impact

Likeability Lifts for Tech

Official Sponsors

+50%

Custom Billboards

+60%

In-Show Integrations

+21%

Source: MediaProbe (more details in notes)

02. Integrate into trusted platforms



audible



Capitalizing on Humor in Late Night

Jimmy Fallon Custom In-Show Content & Social Amplification



love island
USA

Spotlighting Product via Show Sponsorship

Love Island USA Official Smartphone Partner & Integrations



Ray-Ban
Meta



Demonstrating & Contextualizing Tech Features

Late Night with Seth Meyers Custom In-Show Content



Audience-Targeted Experiential & Thought Leadership

CNBC Technology Executive Council Sponsorship



ECOLAB
PROTECTING WHAT'S VITAL



Building Credibility with Trusted Platforms

News Brand Studio Custom Content

03. Maximize cross-platform reach with audience data solutions

Reach target audiences with the right message at the right time, ensuring strategic, wide, & unduplicated reach

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**

Tech Enthusiasts

32M Monthly Households

Linear

Streaming

Only 17% Duplication

Measure what matters

- Incremental & target reach
- Brand recall & familiarity
- Search engagement
- Purchase intent

Video Gamers

45M Monthly Households

Linear

Streaming

Only 19% Duplication

Proven Tech Cross-Platform Impact

+38%

Brand Favorability

+35%

Message Association

+10%

Purchase Intent

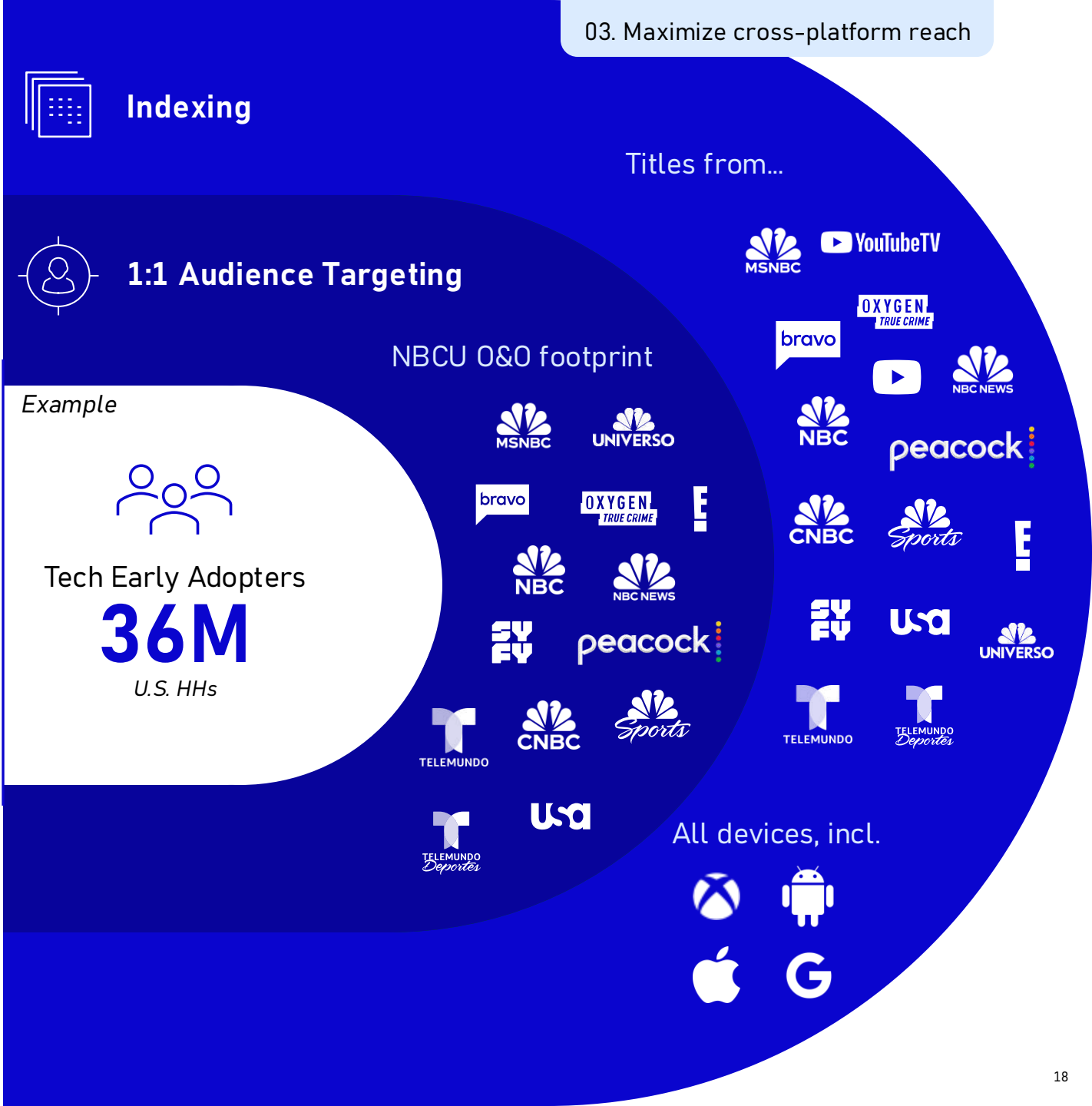
NBCU Multi-Platform Campaign Performance v. Single-platform campaigns (exposed only)

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**



04. Plus-up programmatic tactics for greater campaign optimization & impact

Why NBCU programmatic for Tech

Our premium programmatic experience is designed to address Tech's media-buying preferences & priorities as product launches, campaigns, KPIs, & budgets shift in real-time

Premium content & environments

Flexible options & easy activation

Huge in-demand audience reach

Addressable omnichannel delivery

Full funnel impact & transparent real-time reporting

NBCU programmatic activation paths

Flexible activation across PG and PMP

peacock Premier

Peacock only

peacock AX

Peacock + core digital video
(NBCU's TVE apps, NBCU streaming on MVPDs/vMVPDs)

NBCU Streaming

Core digital video
(NBCU's TVE apps, NBCU streaming on MVPDs/vMVPDs)

Live Sports

Sunday Night Football, NBA, Olympics, B1G Football, Notre Dame, Olympics, Premier League, Golf and many more...

Opportunities to enhance programmatic buys across NBCU's premium programmatic portfolio

Live Sports & Events



Curated Content Packages

Popular on Peacock

ex. the office loveisland USA YELLOWSTONE

Peacock Shows

ex. voice POKER FACE Real Housewives

Peacock Films

ex. LOVE HURTS WICKED

NBCU Shows/Networks

ex. NBC barndio E

Peacock Top 10 Rail

ex. Top 10 Shows or Movies Today

Premium Live Events

ex. CHRISTMAS IN ROCKEFELLER CENTER PREMIOS billboard DE LA MÚSICA LATINA LIVE FROM

Contextual Targeting

Drive authentic connections and actions by aligning your brand messaging with positive, brand-suitable moments with new contextual solutions powered by AI

Custom contextual

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

Emotional alignment

via direct IO and PG
Build connections by aligning your brand's emotional tone with key moments in premium content

Programmatic-enabled Commerce Innovations

PMP with upfront investments

Burned-In Ad

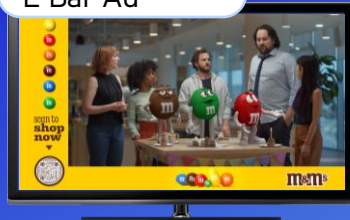
Immersive Ad

Canvas Ad

Canvas Carousel Ad

PG deals

L Bar Ad



Retail Media



Automated access to NBCU programmatic streaming, including live sports and tentpoles, reaching Walmart Connect's high-value consumers with full-funnel outcome measurement



DATE WEEKEND UPDATE WEEKEND UPDATE WEEKEND UPDATE

A DRONE

Tech
Impact at
NBCU



Tech

Proven impact across client KPIs

NBCU Tech Campaigns – Test vs. Control

Upper Funnel

Unaided
Brand Recall
+30%

Aided Ad
Recall
+18%

Brand
Familiarity
+13%

Mid Funnel

Avg. Search Engagement Index
168

Message Association
+21%

Lower Funnel

Consideration Intent
+12%

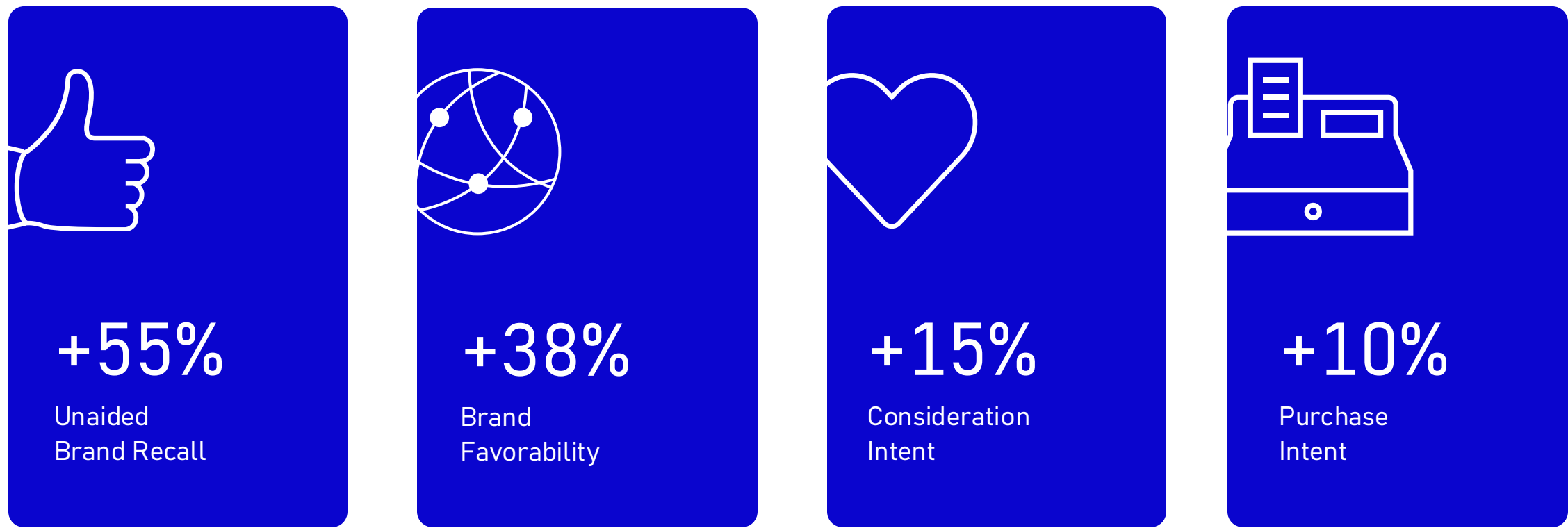
Purchase Intent
+20%

Recommendation Intent
+10%

Tech

Campaigns across more than one platform are more effective

Tech Category NBCU Campaigns: Multi-Platform vs. Single Platform % Lift

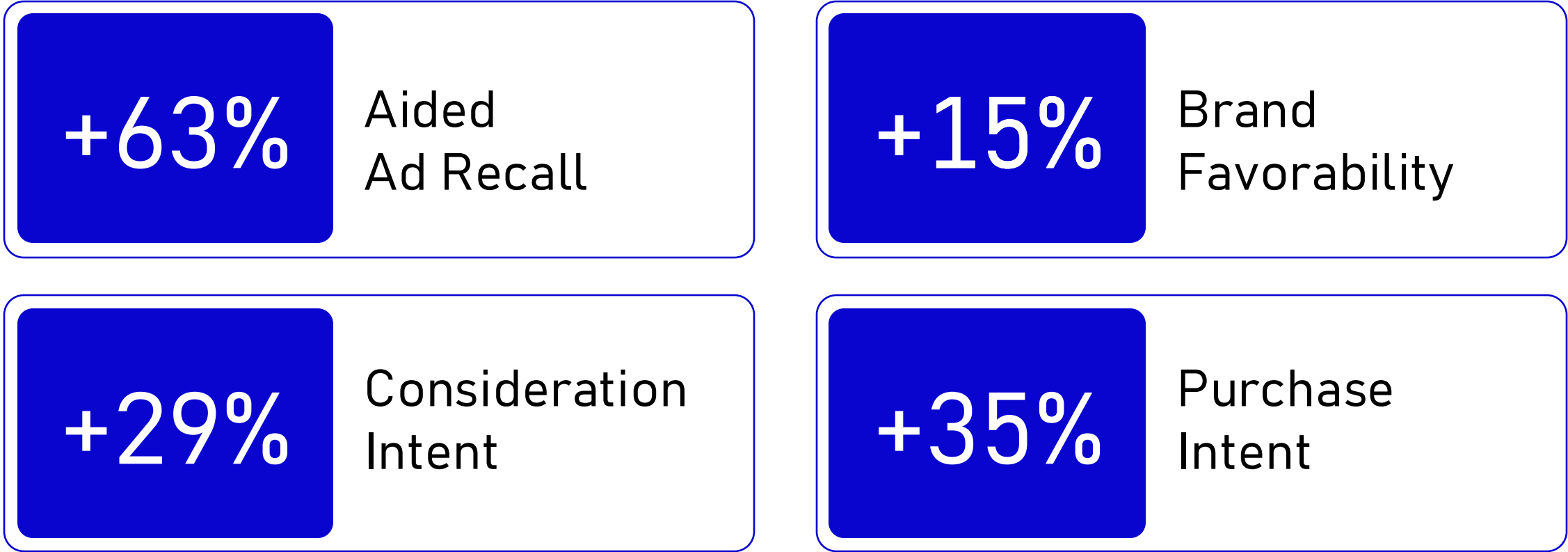


Source: NBCU Ad Impact Database 2017-2025, 100 Single Platform Campaigns v. 56 Multi-Platform Campaigns
Custom research, vendors vary. Average of test cells for 2+ platforms vs. single platform campaign

Tech

Proven **Peacock** impact across client KPIs

NBCU Tech Campaigns – *Test vs. Control*



Source: NBCU Ad Impact Database 2020-2025, 29 Campaigns across 17 Brands Peacock measured Tech 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 Tech

	Buy Side Activation	Clean Rooms	NBCU Measurement Opportunities (Sell-Side Measurement)	
Awareness	✓		Brand Lift Study Ad Recall Brand Sentiment Product Consideration	
Consideration	✓	✓	Search Engagement Real-Time Outcomes Measurement (Attribution) Site / App Visitation (Incrementality)	
Conversion	✓	✓	Real-Time Outcomes Measurement (Attribution) Site / App Visitation (Incrementality)	

Dedicated NBCU Insights Team provide:

- Tech category consultation and recommendations
- Sponsorship and audience impact analysis

**Requires client to permission data
Vendor partners are a sample*



Tech Case Studies

Tech x NBCU Olympics Case Study

NBCU's collaboration with a technology company brought the Paris Olympics to life for millions of viewers



16.4M

social delivery **total**
impressions

13M

total **linear impressions**

9.7M

total **CNBC Custom Content**
Digital Media impressions

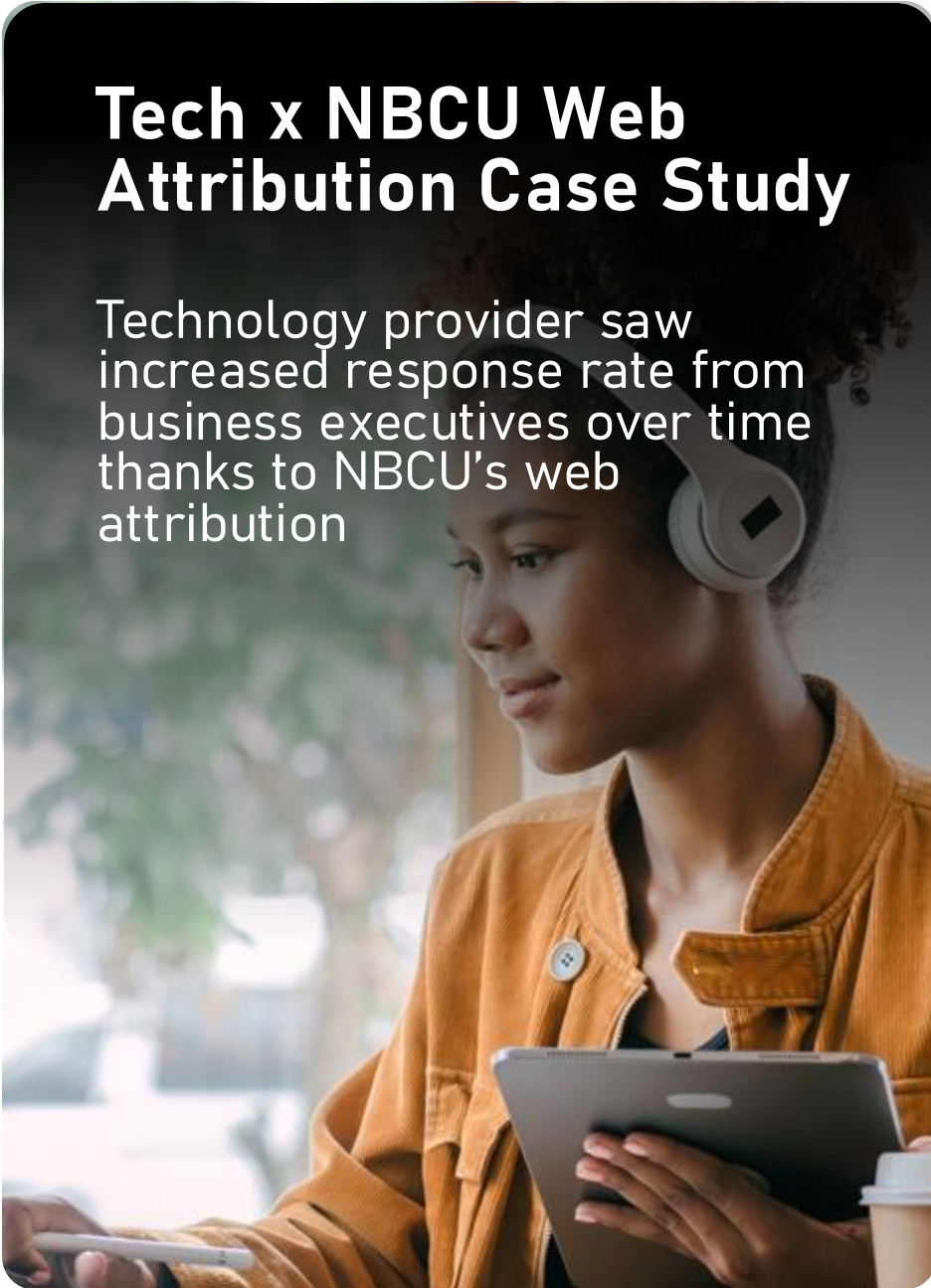
Tech x NBCU Web Attribution Case Study

Technology provider saw increased response rate from business executives over time thanks to NBCU's web attribution

4.0%
avg. response rate

283K attributed web visits

52% of responses came within the first two days after the ad was served



Tech x NBCU Data Targeting Case Study

Combined tech brand's customer data with NBCU 1p data to apply unique behavior-informed targeting, ultimately driving conversions

2x

better efficiency
vs. other publishers

(same conversion rate in half the time)



Tech Category Resources

Tech Category Resources

Category Trends & Strategic Recommendations



Annual Playbook

Trends, opportunities, and recommendations based on learnings at NBCU



Regularly Updated Category Highlights

Latest industry news, tailwinds & headwinds, and media and marketing trends



B2B Toolkit

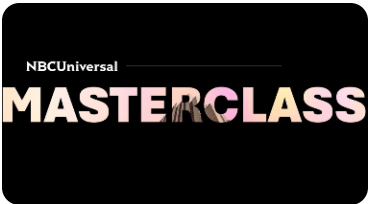
Deep dive into B2B dynamics & audiences plus NBCU solutions & recommendations

Thought-Leadership & Insights



The Future of Advertising

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



NBCUniversal Masterclass

How NBCU invests in cultural strategy & builds for connection/engagement



Gen Z

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

Tech Playbook

NBCU Tech Category
Strategy Team:

Dominique Folacci
Nicole Lee
Savannah Stephens

