

NBCUniversal

A woman with dark curly hair, wearing blue-rimmed AR glasses and a denim jacket, is sitting on a brown sofa in a modern living room with blue walls. Several translucent digital screens are floating in the air around her. One screen shows a video call with a woman. Another screen displays a grid of app icons including YouTube, Google, Meta, Spotify, Wikipedia, ESPN, Pinterest, TechCrunch, and NYTimes. A third screen shows a text-based interface. The room includes a wooden coffee table, a potted plant, and a framed picture on the wall.

TECH QUARTERLY UPDATE 3Q'25

Industry *Highlights* & Media Trends

Agenda

1

Tech Landscape

Current Landscape & 3Q'25 Media Trends

2

Tech @ NBCU Update

Media Trends & Creative Showcase

3

Tech Upcoming Opportunities At NBCU



Current **Tech** Category Dynamics

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

Headwinds:

- Category confronted by **data-sovereignty & antitrust concerns** amidst escalating cybersecurity threats & pending global regulation¹
- **Supply chain resilience, export controls, & operational agility at risk** based on fluidity of latest geopolitical trade dynamics¹
- **Escalating AI pressure** to offset costs, improve investor confidence, generate results, outperform competitors, navigate regulation & societal concerns, & recruit talent²
- With new tech **CAPEX levels rising**, category still pressured to generate stable revenue growth amidst a modest hardware/consumer electronics market^{1,3}

Tailwinds:

- **Megadeal values growing** +15% YoY as category prioritizes more transformational M&A/partnerships for scale & competitiveness, especially in AI⁴
- **AI, cloud, software, & edge compute** continue invigorating category growth, with AI especially driving hardware & semiconductor markets as AI investment & adoption drives demand, faster product cycles, & innovation^{1,4}
- **Modernizing business models & platforms** (ex. integrated AI, cloud-native architectures, etc.) from legacy systems have positioned category for future growth & faster innovation⁴
- Rise in **supply chain diversification** building competitive & resilient domestic manufacturing, sourcing, & market access vs. geopolitical risks¹



Tech Category Round Up



Industry Marketplace Intelligence

AI prioritized

across subcategories to drive market share, revenue, & perception



114M+ AI-powered PCs estimated to ship in 2025, equivalent to 40% total sales
([Statista](#))

56% of B2B sales employees use AI daily and are 2x more likely to exceed revenue targets
([LinkedIn](#))

AI has further accelerated social & retail media's disruption of traditional search ad dollar revenues & user behavior
([eMarketer](#))

Latest News

AI dominates headlines

amidst continual competitive & efficiency pressures



Tech laid-off approx. 33K employees in Oct, citing restructuring around AI integration & investment and efficiency needs
([Gizmodo](#))

OpenAI signed cloud deals with Amazon & Oracle (alongside its Microsoft deal) & computing power deals with Nvidia & AMD
([Microsoft](#))

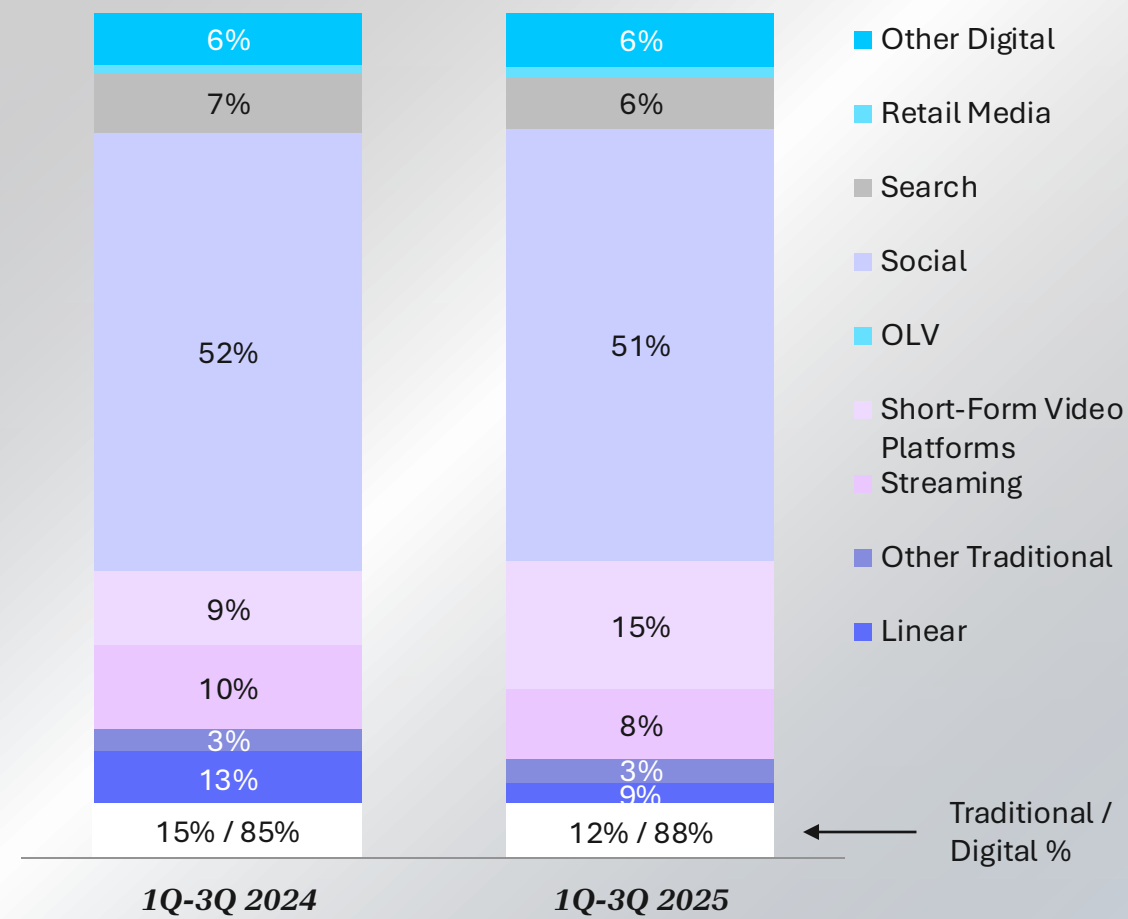
Google, Microsoft, Meta, & Amazon announced further acceleration and/or aggressiveness in AI spending during Q3 earnings reports
([New York Times](#))

Tech | Marketplace Spend

Tech continues to prioritize digital with 9-figure increases in Shortform & Social

- Total spend grew +11% driven by gains in digital (+16%) vs. 1Q-3Q'24
- Social accounted for half (51%) of digital spend, ranking 1st in media subtype share across all platforms
- Shortform increased by \$815M (+92%) vs. STLY, ranking 2nd in share across all platforms

Tech Category Media Mix *Share of Spend*

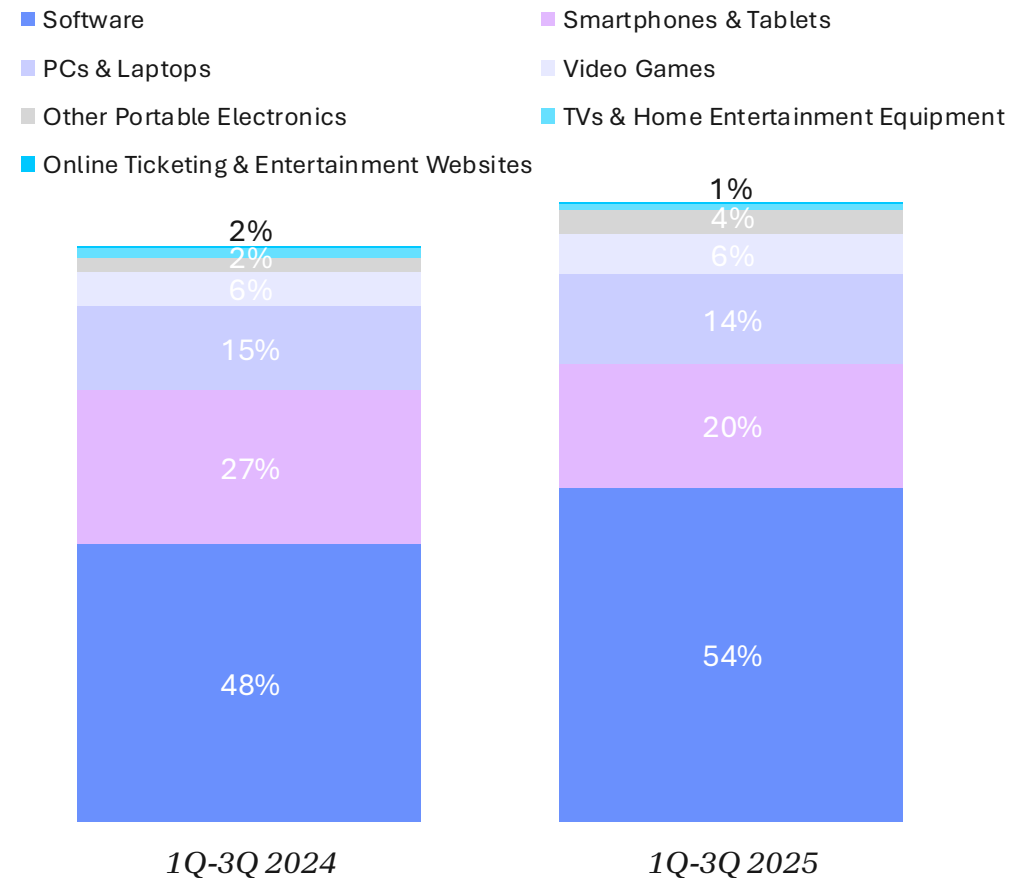


Tech Subcategory Marketplace Media Spend

Media growth was fueled by **Other Portable Electronics** (+81% vs. STLY) & **Software** (+20%), reflective of ongoing demand + momentum for wearables & AI

- **Software** saw the most volume growth vs. STLY & ranks first in share (54%)
- **Smartphones & Tablets** (2nd highest share, 20%) **cut spending** by -20% as the industry navigates slower purchases/upgrades
- **Other Portable Electronics** (14%) and **PCs & Laptops** (4%) remain steady – need for differentiated messaging

Tech Subcategory Media Mix *Share of Spend*



Tech NBCU Spend

At NBCU, our Tech partners are leaning into premium environments, innovative products, & growth audiences



News & Broadcast

spend increased as Tech brands turn to linear to grow brand awareness by aligning with trusted platforms / programming

News grew +69% &
Broadcast grew +29% vs. STLY



Advanced Audiences

remain important as Tech brands look to optimize reach and engagement through efficient targeting solutions

1Q-3Q'25 Advanced Audience spend
up +95% vs. STLY



Streaming

continues as a key channel to reach engaged audiences as brands tap into Peacock Premier & AX to seek out premium content opportunities

Peacock AX investment rose +78% &
Peacock Premier grew +19% vs. STLY



Ad Innovations

amplified advertiser reach & engagement via Pause, Spotlight, & Engagement ads

Ad Innovation spend grew +95% vs. STLY

Creative & Innovation

Across The Marketplace & NBCU

Marketplace

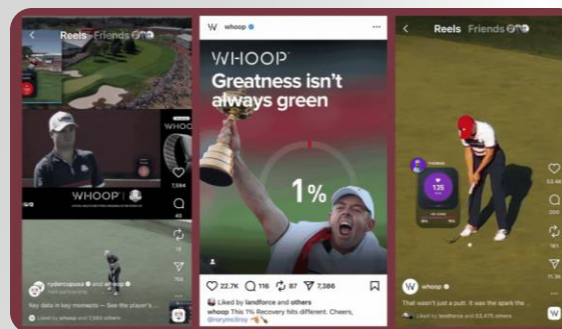


Anthropic's First Large-Scale Brand Campaign for Claude AI

The “Keep thinking” campaign prioritized awareness, positive affinity, and positioning Claude as a responsible AI tool built to help today’s problem solvers vs. replace them



NBCU Spotlight

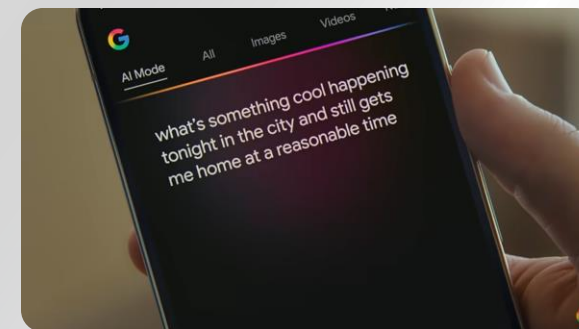


Ryder Cup x WHOOP

As an official partner of the Ryder Cup, WHOOP activated throughout the event and NBCU coverage to elevate the storytelling around the heated competition, such as featuring the pros’ heart rates during the broadcast



NBCU Spotlight



Contextual Beta x Google

The “Just Ask Google” campaign validated AI contextual strategy via targeted video and pause ads with genre-based custom creative, making Google the first Tech account to participate in the Contextual Beta



Leverage the power of NBCUniversal's

Content & Audiences to drive impact for your brand & business

2026 Opportunities On The Horizon For The Tech Category

Premium Programmatic



Premium Content



Contextual



Q4'25 Scatter



NBC 100



Emmy's 2026



NBCUniversal

THANK YOU

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