

NBCUniversal

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](#))

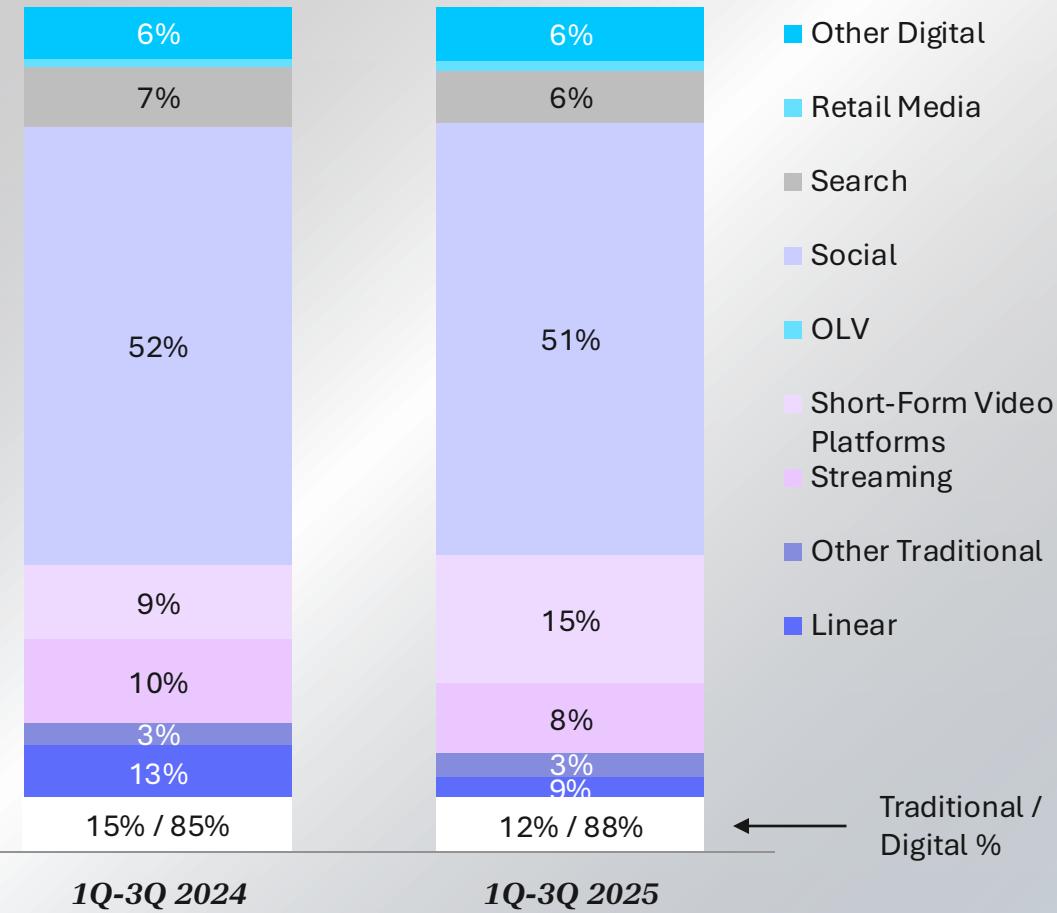
Tech |

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*

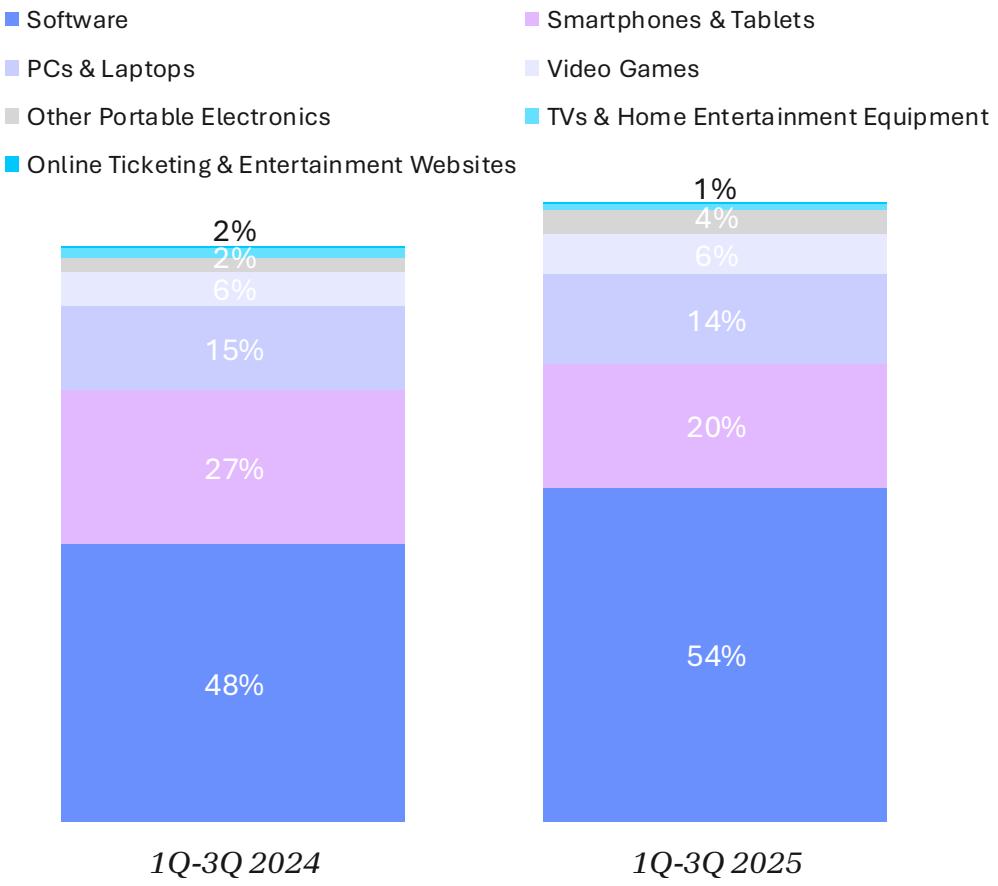


Tech Subcategory Marketplace Media Spend

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*

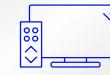


Tech NBCU Spend

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

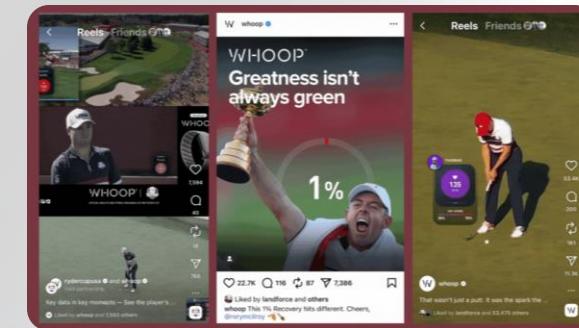
Marketplace



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

 Claude
ANTHROPIC

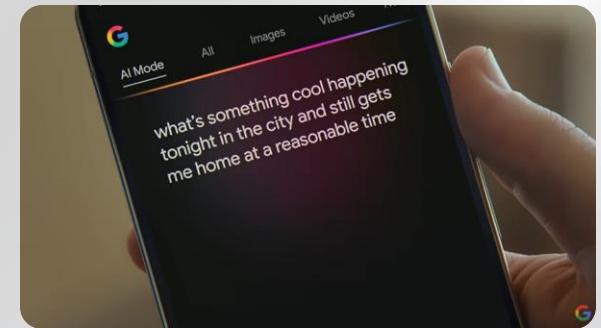
NBCU Spotlight



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

WHOOP®

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

Google

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

NBCUniversal
PREMIUM PROGRAMMATIC

PMP & PG Buying Opportunities
Across NBCU streaming



Premium Content

NBCUniversal
PREMIUM CONTENT

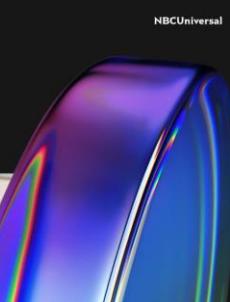
Delivering Scale Across
Every Genre & Screen



Contextual

CONTEXTUAL ADVERTISING

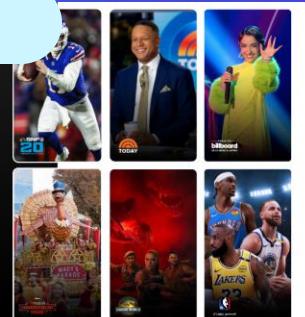
Innovative Ad Tech For Better Consumer Engagement



Q4'25 Scatter

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Q4'25

Scatter Strategy & GTM



NBC 100



Join a yearlong celebration of
ICONIC STORYTELLING & CULTURE-DEFINING MOMENTS



Emmy's 2026

EMMYS
2026 Award Show GTM



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THANK YOU

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