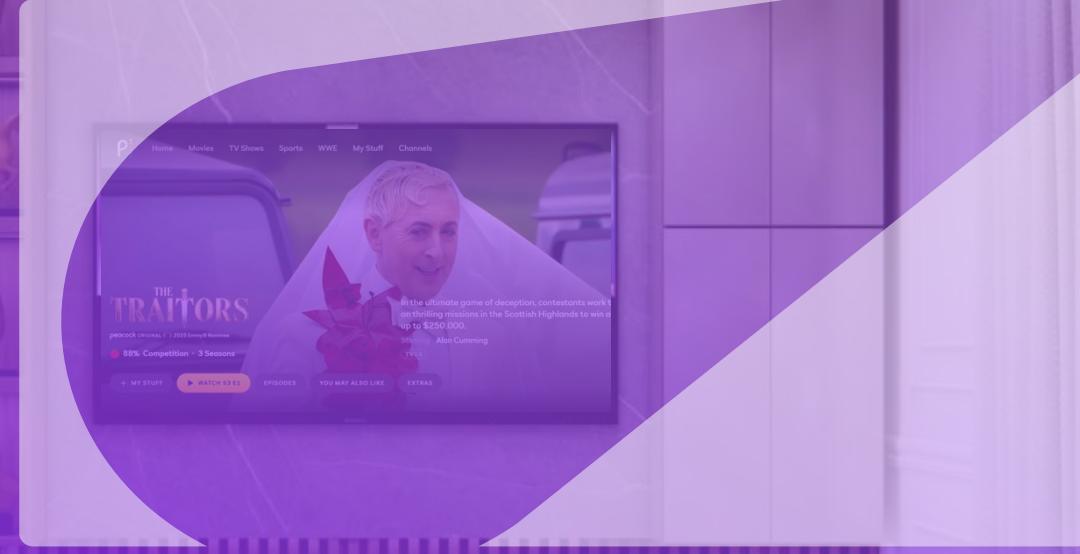


September 2025

Luxury & Streaming

NBCUniversal



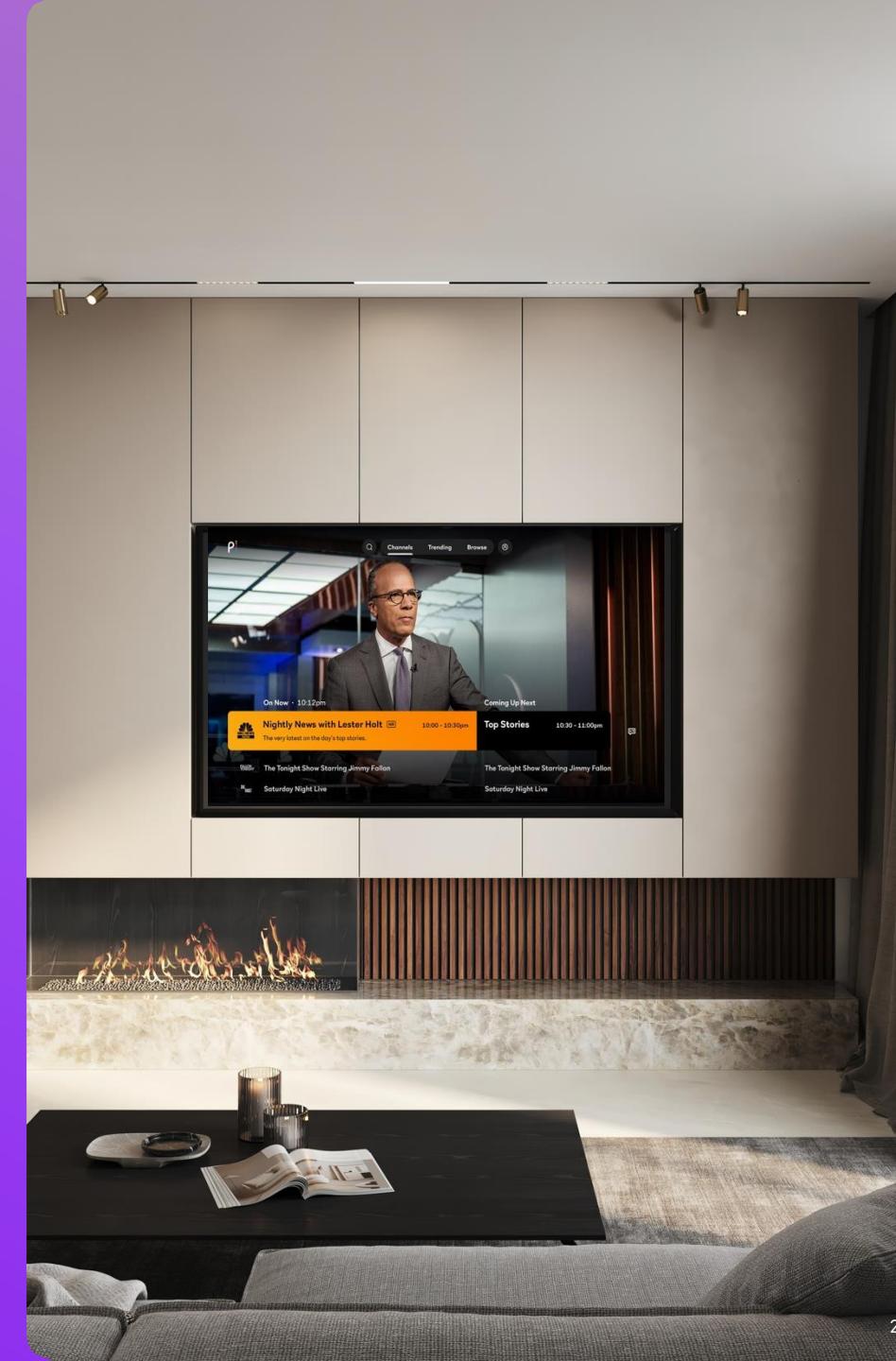
Contents

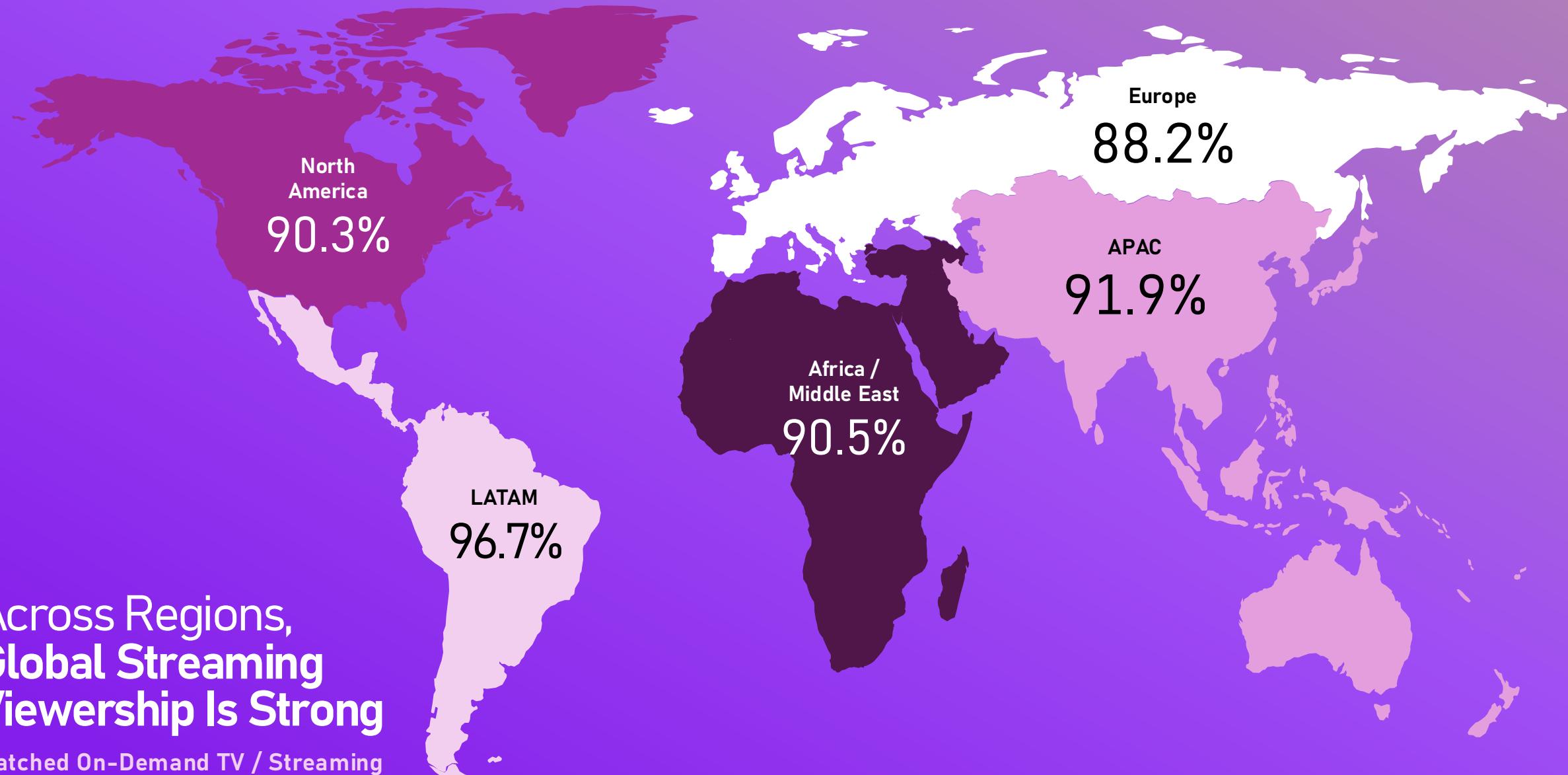
3 Key Areas of Focus

Streaming Landscape

Streaming From A Luxury Lens

NBCU & Streaming





**Across Regions,
Global Streaming
Viewership Is Strong**

Watched On-Demand TV / Streaming
in the Last Month By Region Among
Internet Users

In the US,

96%

of HHs (125M) subscribe to at least one service, a near total market saturation¹

& Did You
Know?

Streaming Share Outpaced Linear For the First Time

45%

streaming share of total TV usage in May 2025, vs. 44% for broadcast/cable²

U.S. Adults Are Spending More Time With CTV

+11%

increase in time spent streaming in '24 vs. '23

Ad-Supported Tiers Are Driving Streaming Growth

71%

of new streaming subscribers chose an ad-supported tier over the past 9 quarters⁴



What Draws Them To The Streaming Experience

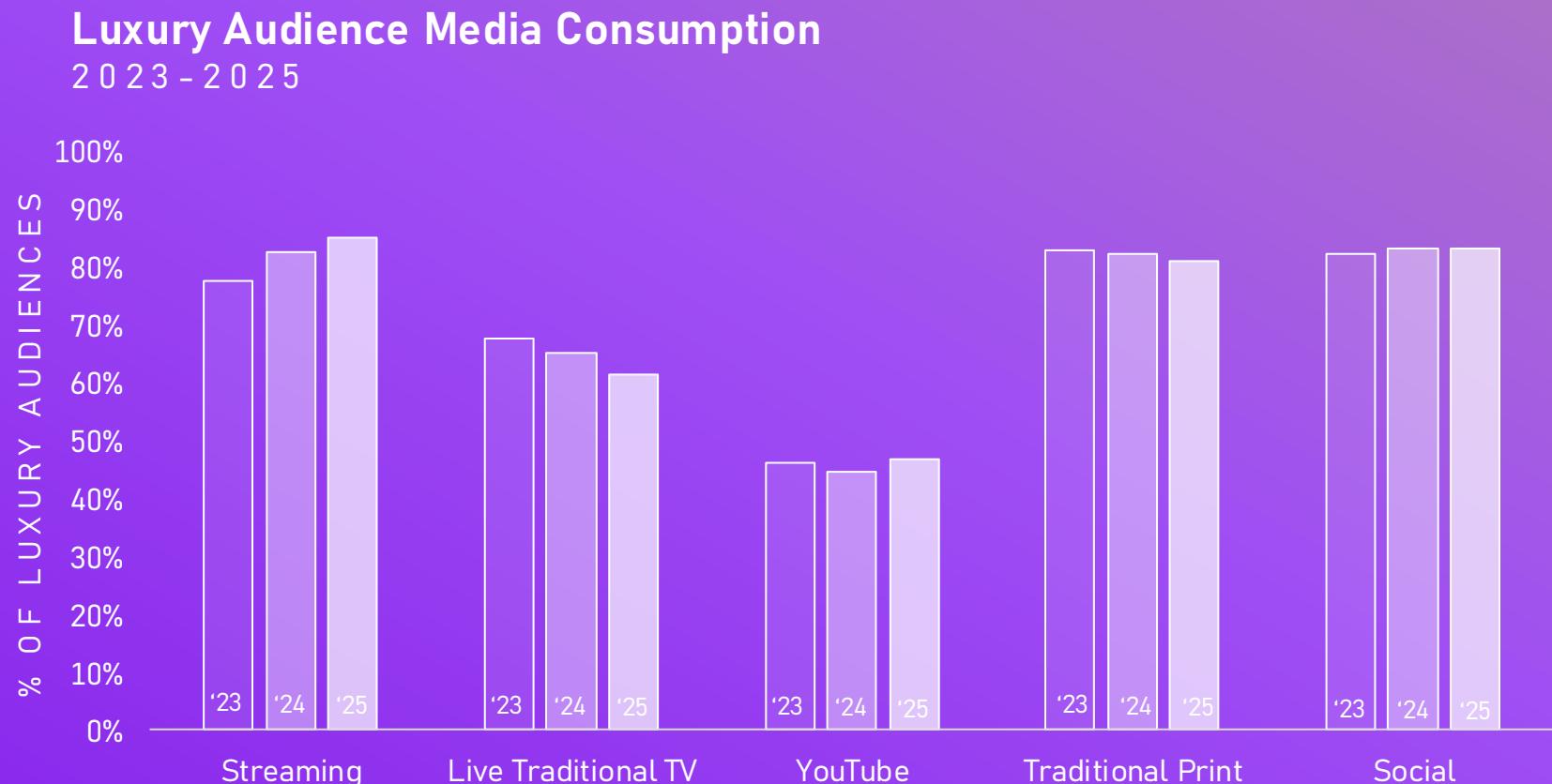
*Unpacking the Luxury Audience's
Motivations & Attitudes Towards
Streaming*



Luxury Audience Media Behaviors Continue To Evolve

Streaming viewership continues to grow

Print, Social, and YouTube usage remain flat



Note: Audience is \$250K HHI and HH Net worth \$500K+, additional details in Notes. Source: MRI-Simmons Cord Evolution Study Trend Analysis March 2023-2025 Studies. Streaming is defined as "watch 1+ hours of live or time-shifted streaming per week." Live Traditional TV is defined as "watch 1+ hours of live traditional TV per week." YouTube is defined as "watched YouTube in the past 7 days." Print is defined as "read 1+ magazine issues/avg month OR read 1+ newspaper issues/avg 28 days." Social is defined as 1+ Hours/avg week of social media usage.

For more detail on audiences, access the full *Connecting with Luxury Audiences* deck here.



While Audiences Across The Luxury Spectrum Are Streaming, Levels Of Viewership & Access Vary

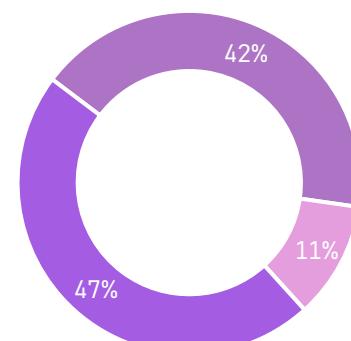
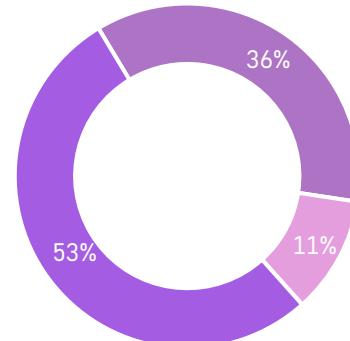
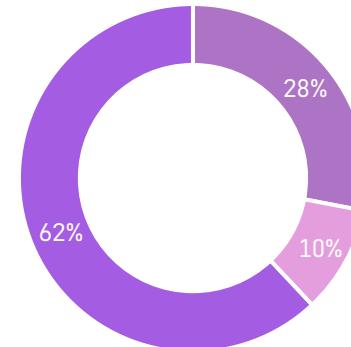
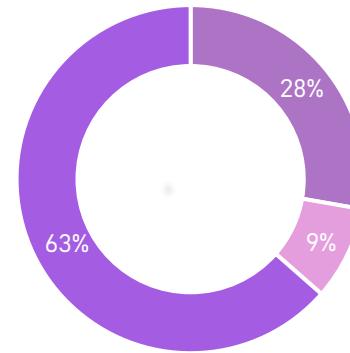


The **most receptive to ads seen while streaming**, finding them both memorable and relevant to them

Defines TV as **anything they can watch on a TV set**, regardless of the source

How They Watch

- Cordless
- Cord Loyalists
- Cord Shaver/
Cutter Intenders



% Streaming
Weekly

83%

85%

80%

79%

What Makes It Worth The Stream For The Luxury Audience?

CONTENT

Originals & New Releases

driven by content that's exclusive to the streamer and being one of the first to watch



52%

of luxury audiences are driven to use a new streaming service for an exclusive original series

Binge-Worthy with Limited Interruption

apt to watch consecutive episodes of content because they can



Luxury audiences are

9%

more likely to say they like streaming because it's easier to binge watch shows



Remote Control & Endless Choice

access whatever content whenever and wherever they want

46%

of luxury audiences like streaming because it's easier to catch up on shows and watch on their own schedule

Streaming Fits With Their Lifestyle

Their attitudes correspond with their three main reasons for streaming



80%

say having **movies that were available in the theater** makes a streaming service more valuable

17%

more likely to say they like that streaming services have **fewer ads / commercials**

19%

more likely to say **sports events** drive them to use a streaming service

44%

want to watch content that's **only available through streaming**

47%

like the **large selection** of TV, movies, and videos that streaming offers

45%

see streaming as **convenient** since it can be watched anywhere, on any device

DID YOU KNOW?

More luxury consumers subscribe to AVOD than SVOD services

Viewership on AVOD services continues to grow while declining for SVOD

90%

*used an **ad-supported** streaming service in past 30 days (+3pp vs. '24)*

69%

*used a **non-ad-supported** streaming service in past 30 days (-14pp vs. '24)*



Yet A Disconnect Exists Between Consumer Behavior And Ad Spend

Luxury Industry Media Mix (incl Auto)

1H'25 vs. 1H'24



Source: MediaRadar, Luxury Brands (including Auto)

While the majority of the luxury audience is streaming, media spend is slow to catch up

85%

of the luxury audience streams weekly



1%

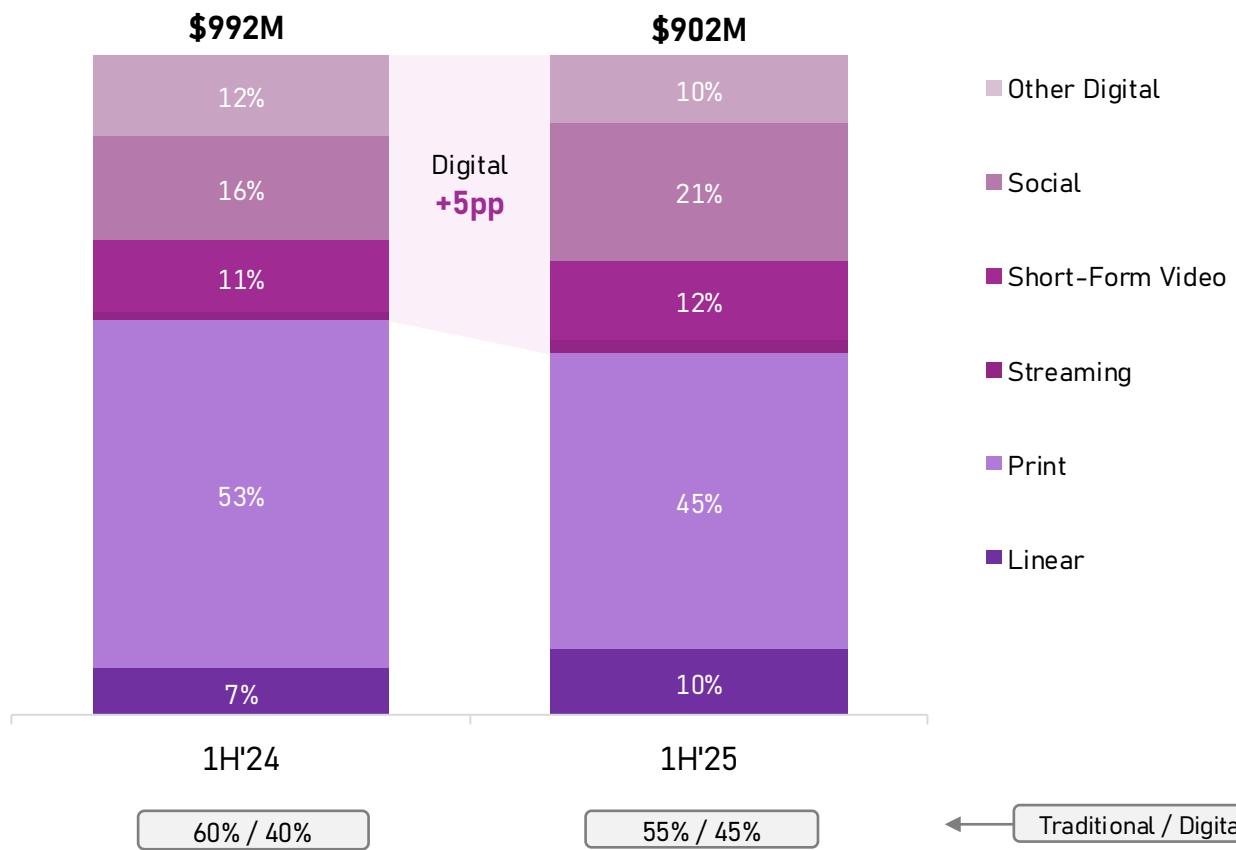
1H'25 Streaming SoS



Yet A Disconnect Exists Between Consumer Behavior And Ad Spend

Luxury Industry Media Mix (excl Auto)

1H'25 vs. 1H'24



Source: MediaRadar, Luxury Brands (excluding Auto)

While the majority of the luxury audience is streaming, media spend is slow to catch up

85%

of the luxury audience streams weekly



1%

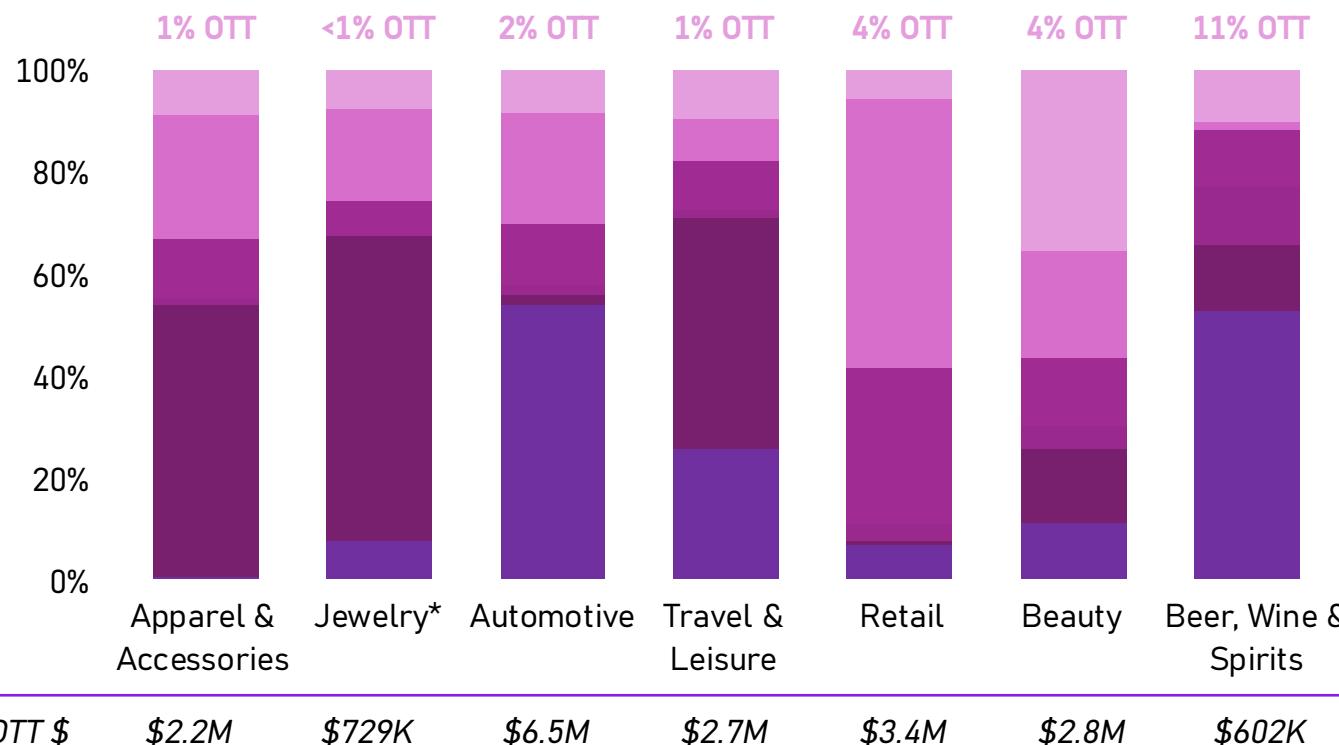
1H'25 Streaming SoS



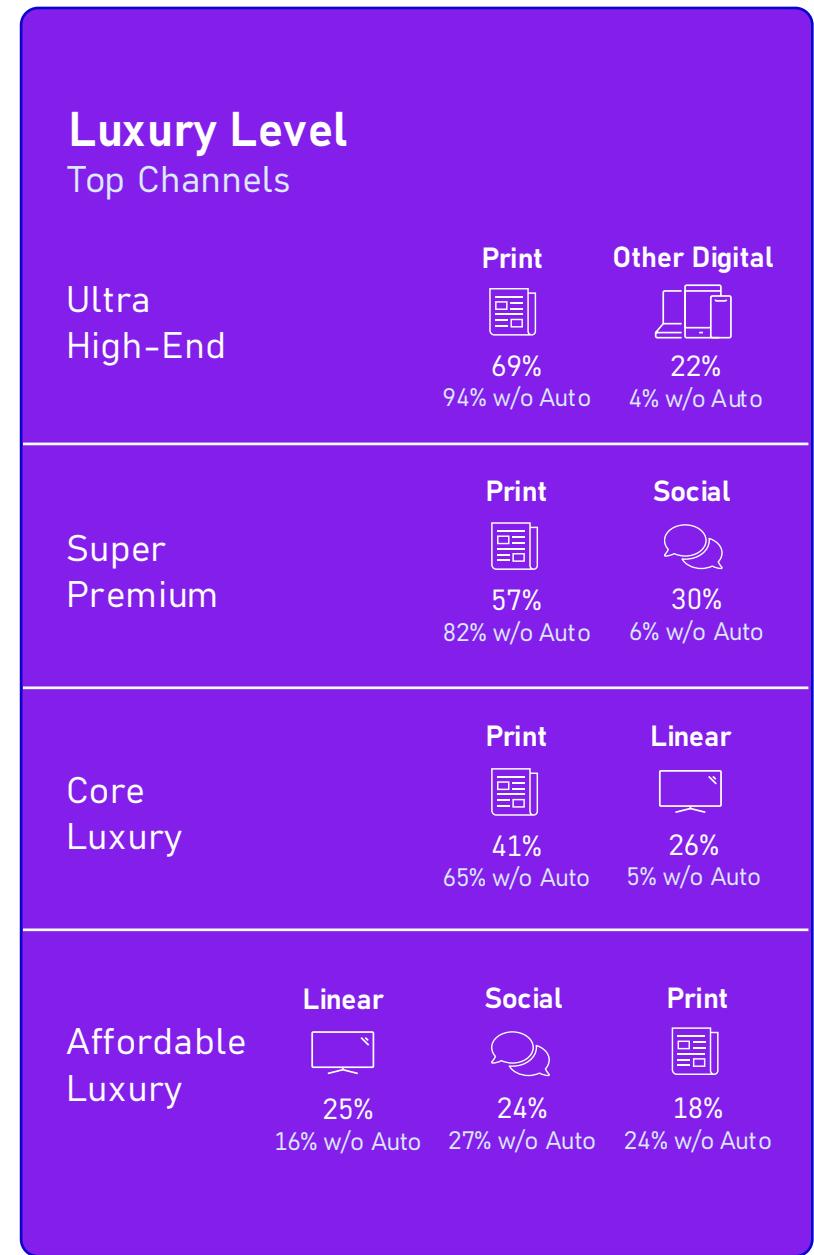
Streaming Remains A Growing Opportunity Across Luxury Sub-Categories

Top Luxury Sub-Category Media Mix

1H '25



Source: MediaRadar, Luxury Brands only; *Jewelry subcategory includes jewelry & watches & timepieces
 Traditional = Linear, Print / Digital = Streaming, Short-form, Social, Other Digital



Peacock Is The Streaming Home Of NBCU Fandom

And the leader for
ad-supported streaming



Peacock Makes A Mark

MAR 28, 2025

DEADLINE

'Wicked' Still Very Popular: No. 1 Pic Among All Streamers For March 17-23; Record Pay 1 Film Debut On Peacock

JUN 19, 2025

yahoo!

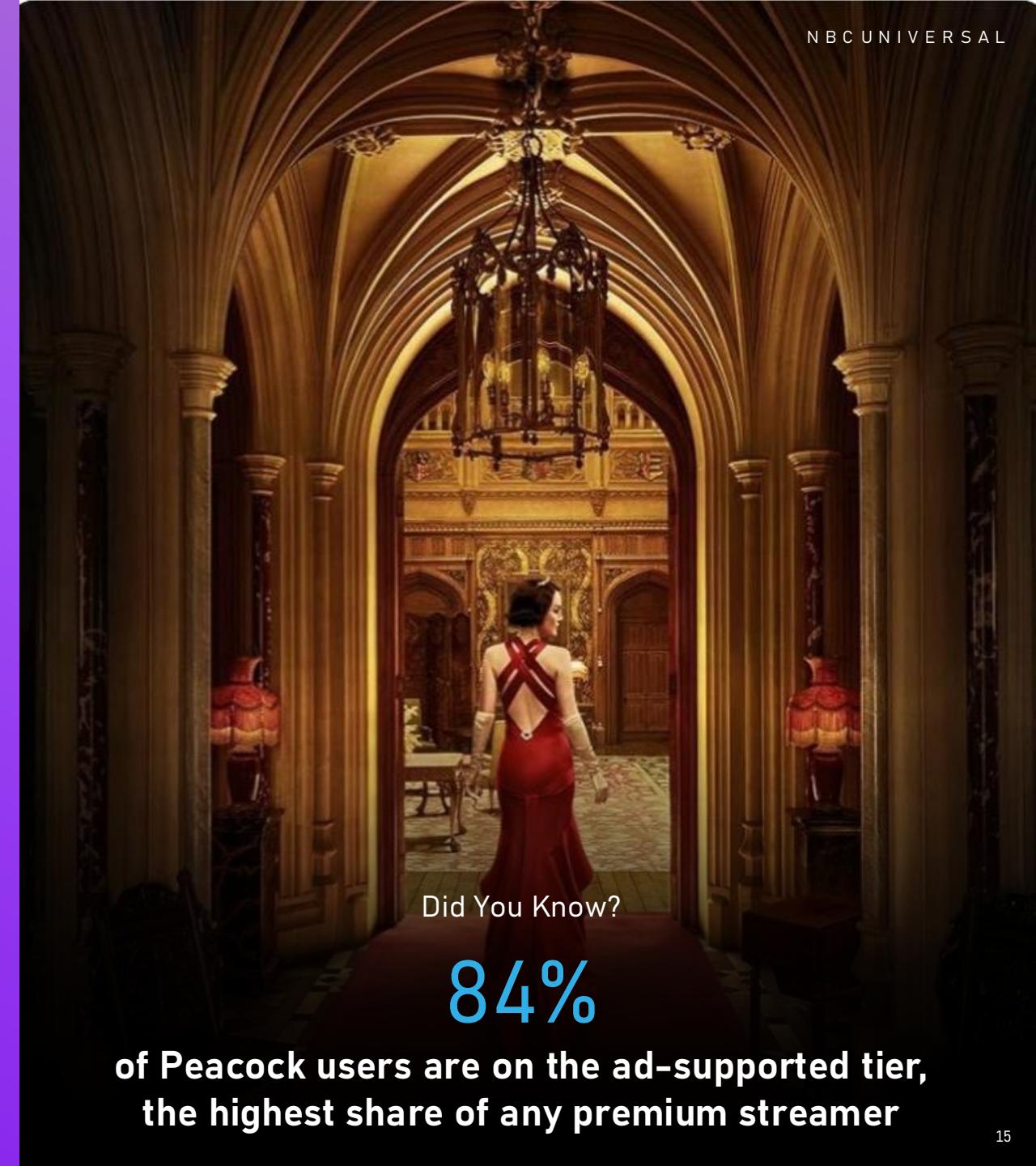
Love Island USA Season 7 Claims Over 1 Billion Minutes Streamed

JUL 15, 2025

THE WRAP

'SNL' Breaks Its Own Emmys Record Following 50th Season

Source: Nielsen Streaming Content Ratings, P2+ Audience Duplication, 11/1/23-11/30/23.
Ad-Supported/Ad-Free Estimates based on Antenna AVOD % Data / Marketplace Intel.



Did You Know?

84%

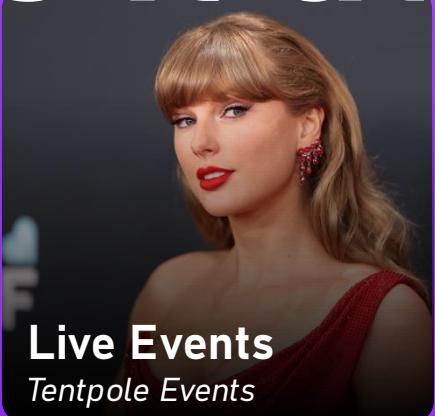
of Peacock users are on the ad-supported tier,
the highest share of any premium streamer



has it all



Originals
Award-winning



Live Events
Tentpole Events



Live Sports
7,500+ Hours



Timely News
Local, National & Global



Diverse Stories
Investing in Multicultural Programming



Library Favorites
Bingeworthy Classics



Movies
Original & Pay One Movies



Current TV
NBC, Bravo, Telemundo & More

with a unique content strategy that works hard for your brand

peacock

continues
to drive
significant
scale



Peacock P2+ MAUs – Millions

(via Comscore Videometrix)

96

90

74

59

31

Paris 2024
Oppenheimer
Love Island USA
Wild Card Exclusive
São Paulo Game
Despicable Me 4
Fall Guy

Beijing 2022
Fifa World Cup Qatar 2022
Super Bowl LVII
Twisted Metal
Five Nights at Freddy's
Puss in Boots: The Last Wish

Dr Death
Halloween Kills
Bel Air
Jurassic World: Dominion
Minions: The Rise of Gru

Poker Face
Holiday Exclusive
NFL
Despicable Me 4
Fall Guy

Super Bowl LIX
Milan Cortina 2026
FIFA

the office
Yellowstone
WWE
Modern Family

With so
much more
to come...





The Luxury Audience Streams Peacock's Content Across Genres

Sports, Entertainment, and News all over-index compared to gen pop



Sports
139i



Entertainment
130i



News
143i

Note: Audience definition in Notes.

Source: MERKLE/M1, 1P/3P data pulled as of 7.28.25, HMID Counts, luxury segments custom defined, base P18+

A Closer Look At What Luxury Audiences Are Watching: Connecting With Them In Their Interests & Passions

Binge-Worthy Indulgence



E NEWS

Reality
Entertainment
Comedy
Drama
Food

Endless Choice, Endless Cheering



Originals & New Releases, First in Queue

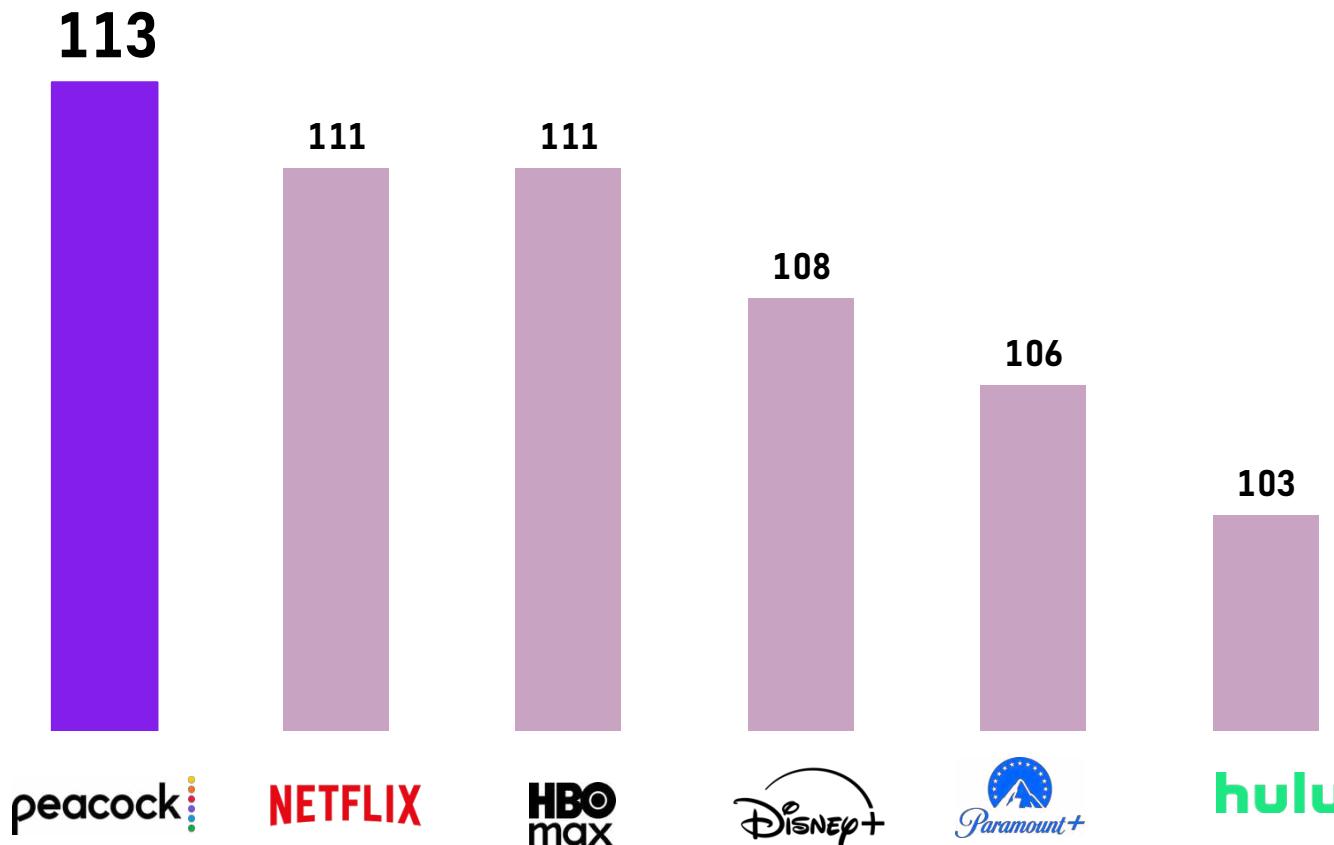


Remote Control, Staying Informed

Peacock Has Strong Delivery Against The Luxury Audience

Luxury Audience Index by Streaming Platform

Compared to Gen Pop



Ad-Supported Peacock viewers are

13%

more likely to be luxury consumers,
beating out other streamers

Peacock reaches

19%

of the luxury audience, more than
Hulu, Paramount+ and HBO Max

Peacock Delivers For The Luxury Audiences

While providing a canvas that spotlights your brand

What They Want¹

Movies that are in theaters
make a streaming service more valuable

TV shows, movies, or videos that are
only available through streaming

Large selection
of TV shows, movies, and videos that streaming offers

Premium experience
Across the platform

What Peacock Has

84% of viewers
agree the cinematic experience is superior
to interruptive movie experience²

Peacock's exclusive and original titles include
The Five-Star Weekend, Poker Face,
& The Traitors

15M+ avg ad-supported hours viewed daily
across Originals, Current TV, Major Sports, Live Events,
News, Spanish Language, and more³

67% feel the Peacock experience is better than
other streamers for Current TV⁴, and
74% agree cinematic sponsors are
more likely to get their attention⁵

Bringing To Life

Storytelling That Aligns To Core Tenants Of Luxury

Understanding how the industry is transforming and audience behaviors are shifting

01. Creating Emotional Connections

Between your brand and your audience.

e.g., contextual targeting



02. Centering Around Premium Environments

At the intersection of your brand and the audience, cultivating relevance and lasting impressions.

e.g., thematic collections & packages



03. Crafting Immersive Experiences

Paving a pathway for your audience into your world / brand.

e.g., ad innovations





LUXURY

The Power of Ad Innovations

Drive Effective Results Through Strategic Application And Category Best Practice

Spotlight Ad



Owning the first impression with a Spotlight Ad on key category holidays or seasons (ex. Black Friday, Valentine's Day)

+57%

Message Memorability vs. Midroll for Category

Curator Ad

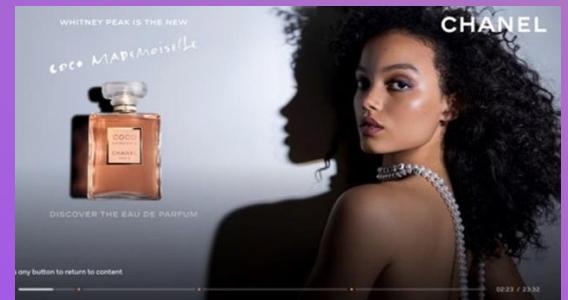


Align your brand with hand-picked collections of shows and movies—curated by mood, genre, or theme—to elevate brand prestige

+31%

Brand Memorability vs. Midroll for Category

Pause Ad



Just like your luxury product, time is precious... recognize the break the user needs and encourage off-platform browsing before they tune back in

+45%

Ad Memorability vs. Midroll for Category

Solo Ad



Luxury brands are exclusive just like their audience. Reinforce their special-factor by offering a limited commercial viewing session.

+30%

Message Memorability vs. Midroll for Category

Driving Luxury Conversions: Seamless, Elevated Ad Experiences for Premium Brands



Source: Internal NBCU data; luxury brands excluding auto

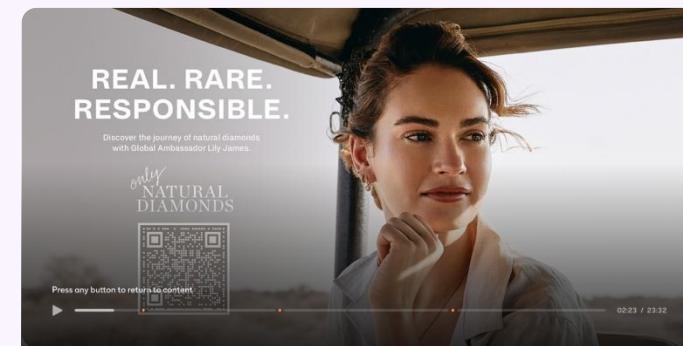
Shoppable Immersive Unit



Buying Path: Direct IO, PG, PMP caveats

Turn static assets into a dynamic shoppable unit with a 30s animated creative featuring an integrated QR code, perfect for brands without video content.

Shoppable Pause Ad



Buying Path: Direct IO only

When viewers pause their viewing experience, a static ad appears, encouraging them to scan to learn more about your product during their break.

Shoppable Burned-In Unit



Buying Path: Direct IO, PG, PMP caveats

Engage a premium audience with a sleek shoppable unit, featuring a QR code and CTA for a subtle, luxurious feel.

Social Commerce



Buying Path: Direct IO only

Drive seamless luxury purchases across social, reaching millions through our network handles.



4 Key Takeaways

NBCU is uniquely positioned to unlock premium environments for our luxury partners through our:

Luxury Industry Expertise

Ability to Engage Your Audience

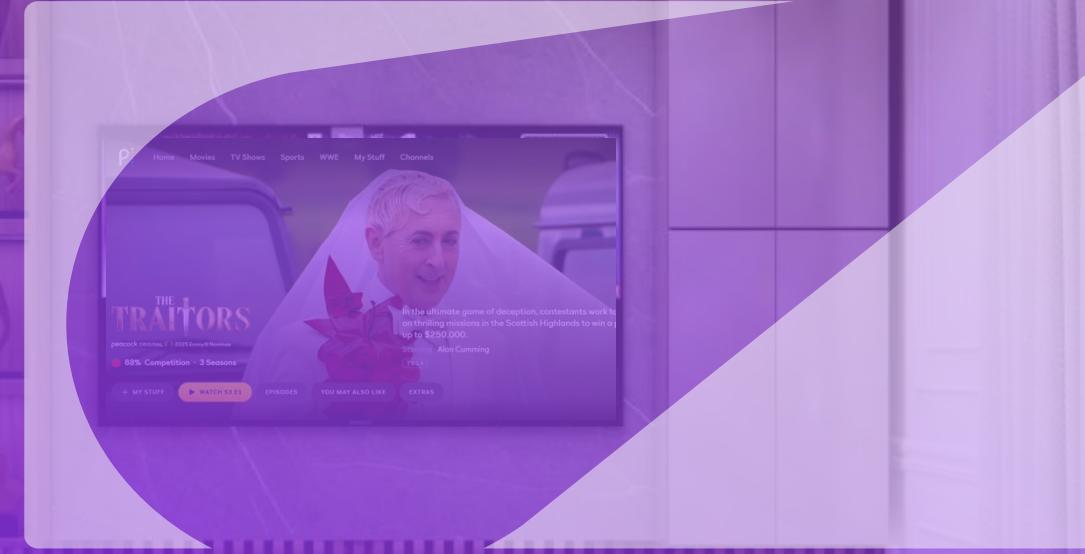
Innovation Leadership

Premium Content Environments

S e p t e m b e r 2 0 2 5

Thank You

CATEGORY STRATEGY LUXURY TEAM:
Megan Ryan, Nikita Tolani, Melissa Perron



Defining Attributes:

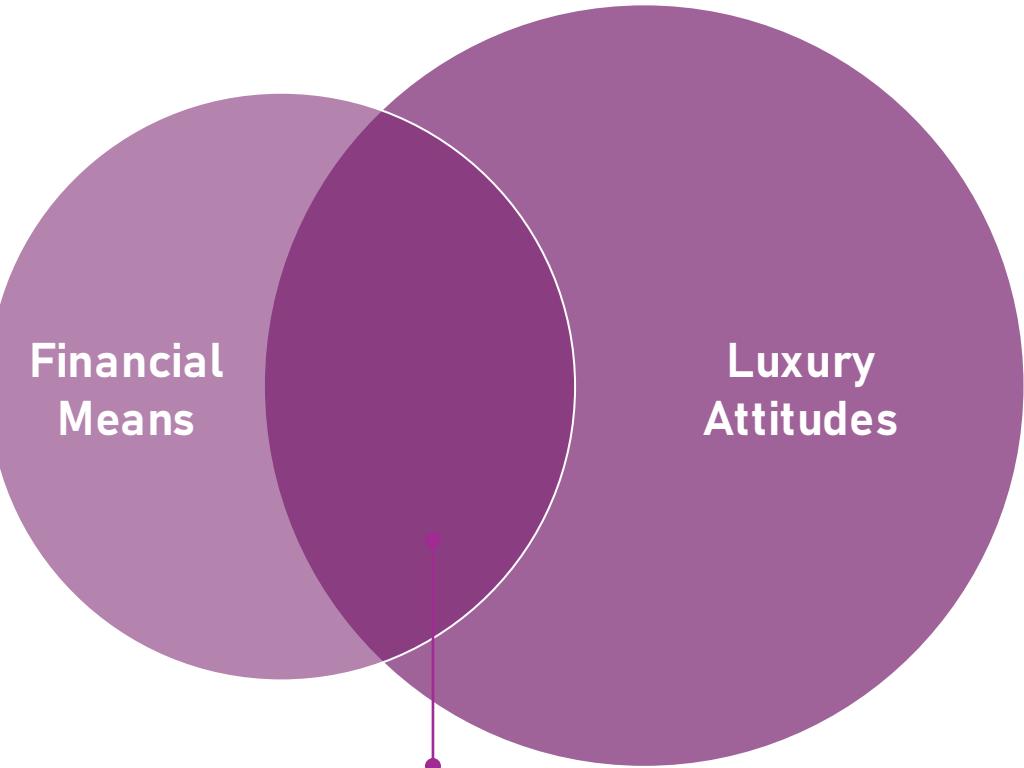
Any agreement with any of these statements:

- “I prefer driving a luxury vehicle.”
- “I buy based on quality, not price.”
- “I would pay extra for a product that is consistent with the image I want to convey.”
- “Maintaining a youthful appearance is important to me.”
- “My budget allows for me to buy expensive designer clothes.”
- “Most everything I wear is of the highest quality.”
- “I like other people to think I’m a financial success.”
- “I’m willing to spend more for a quality bottle of wine.”
- “I strive to achieve a high social status.”
- “I like to live a lifestyle that impresses others.”
- “It’s worth it to me to pay more for high quality hotel accommodations.”

Luxury Audience Definition

Defining Attributes:

HH Net Worth:
\$500K+
AND HH
Income: \$250K+



Luxury Audience

12M

Across Platforms

Luxury Partner Activations On Peacock

Examples Across Subcategories

Video Asset Distribution



Jewelry

Winning audiences over with big culture

Tiffany & Co. teamed up with Hailey Bieber for a **30s spot** that aired on Peacock to spark emotion by celebrating a collection inspired by a timeless artist, Andy Warhol



Travel

Showing what's possible in paradise

Ritz Carlton Grand Cayman invited Peacock viewers to elevate their travel experience through **15s and 30s creative spots**



Spirits

Tapping into your senses

Woodford Reserve aimed to evoke feeling among the Peacock audience through vibrant sights and sounds of flavor via **30s ad creative**

Dynamic Ad Innovations



Fragrance

Sparking curiosity and engagement

Paco Rabanne partnered with Elle Fanning on a **Peacock Ad Innovation** promoting the brand's new fragrance while driving customers to explore more through a **QR code**



Retail

Inspiring action over the holidays

Saks Off 5th crafted an immersive experience for consumers to browse Black Friday gifting ideas paired with **15s and 30s video creatives** through the **Peacock Engagement Ad**



Auto

Giving limited-interruption viewing

BMW rewarded viewers with an **ad-free viewing experience** messaged via the **Peacock Binge Ad bumper**, aligning its **premium brand** with our **premium content**