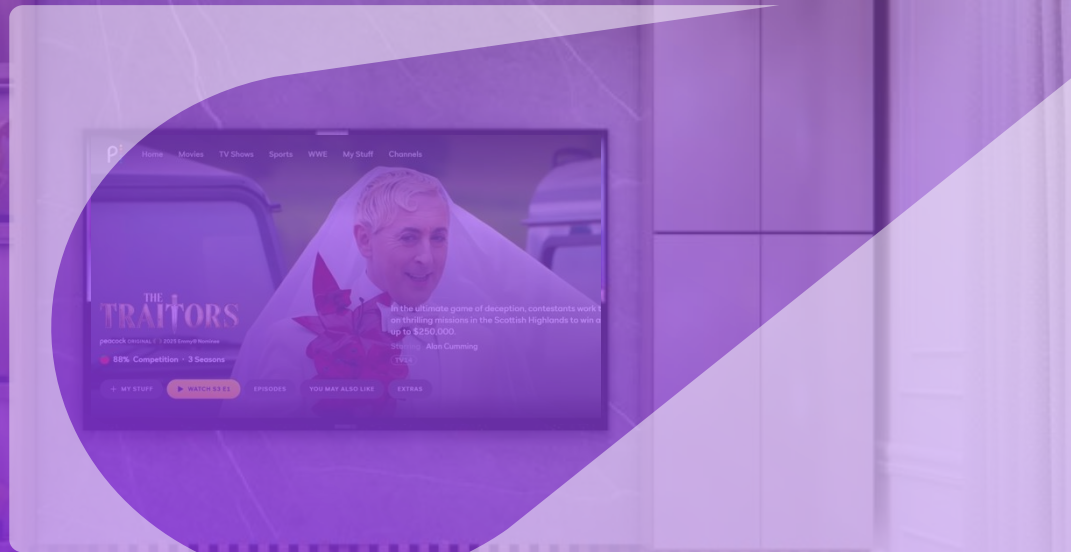


September 2025

# Luxury & Streaming

NBCUniversal



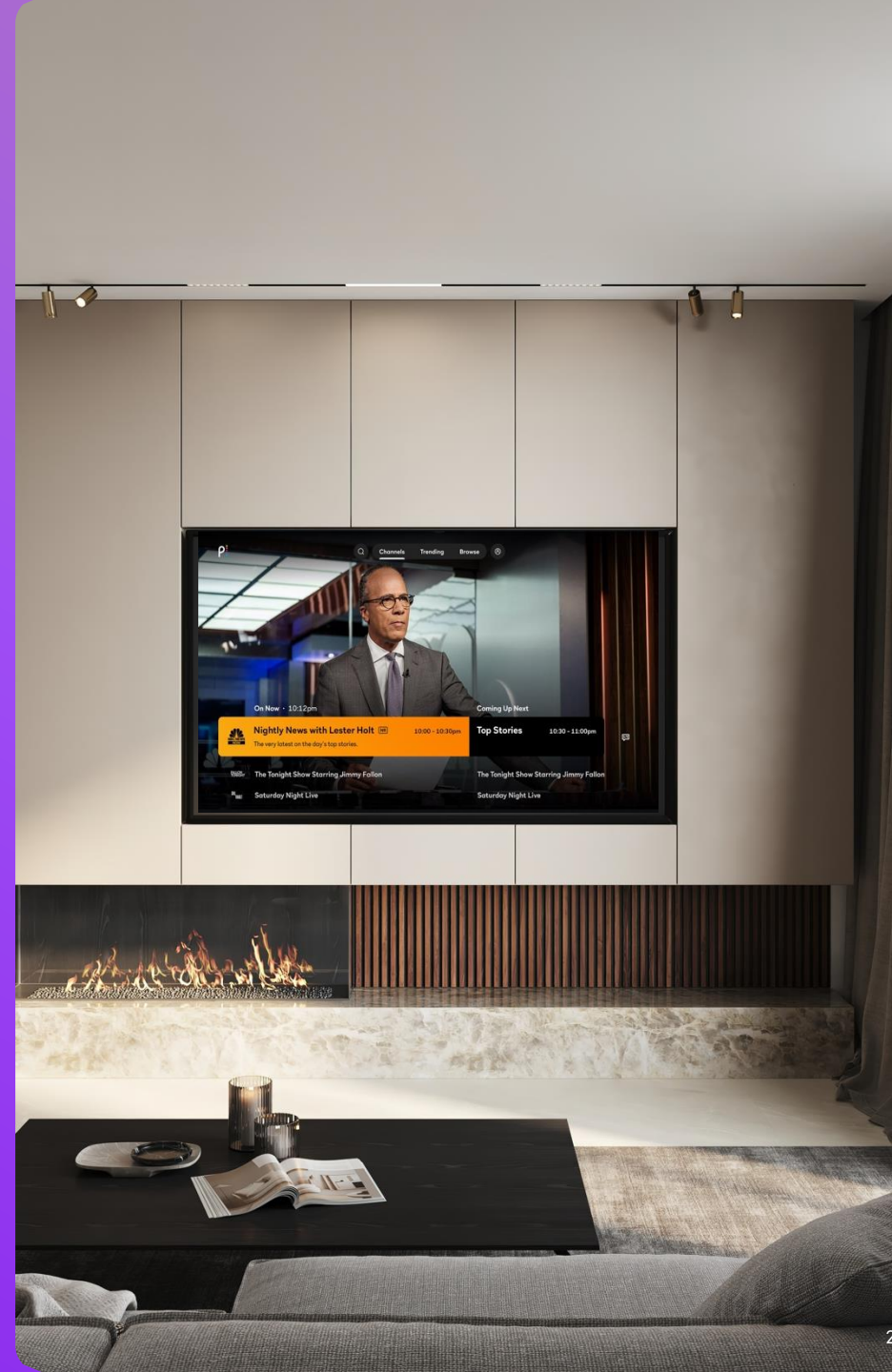
# Contents

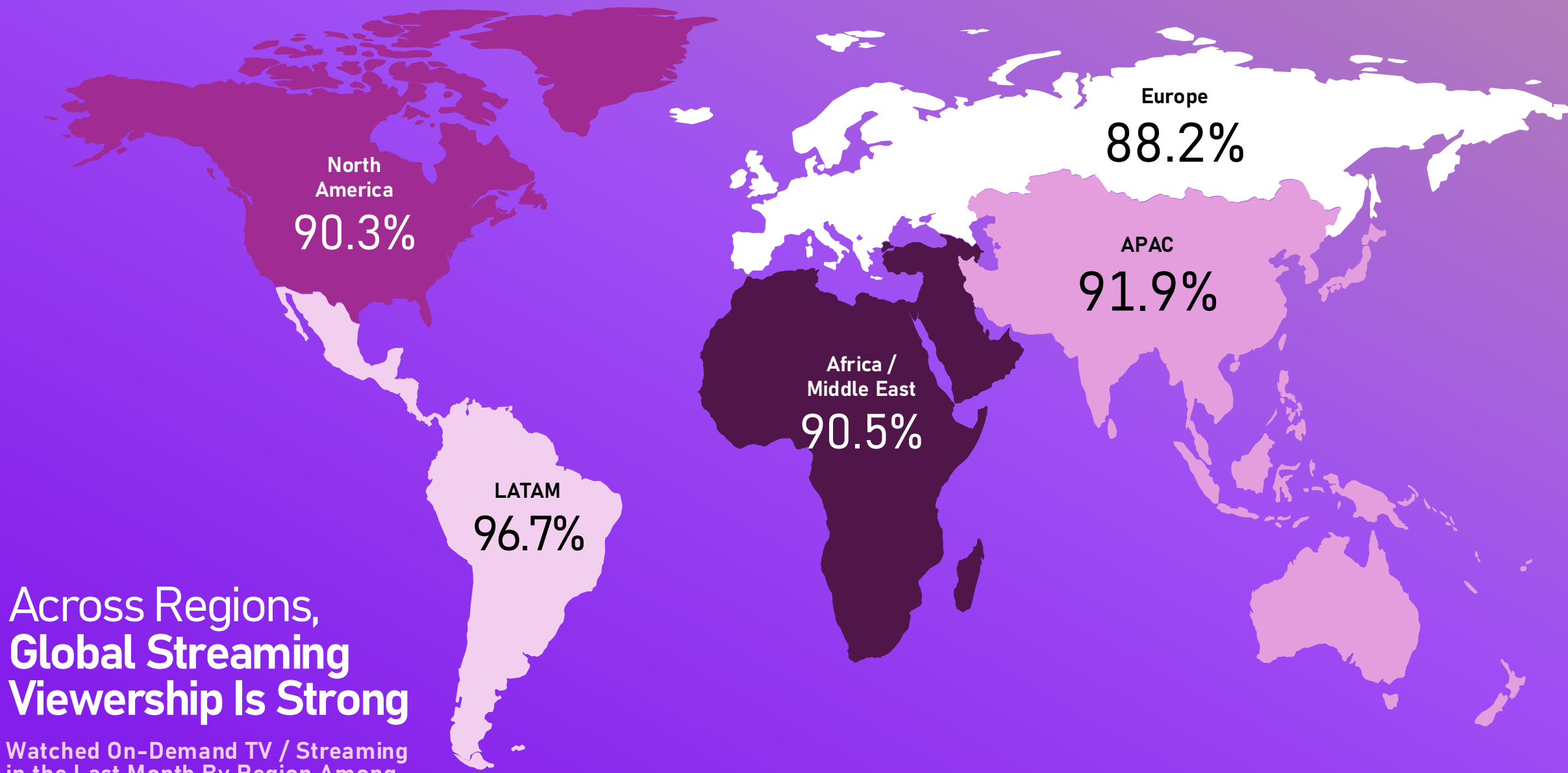
## 3 Key Areas of Focus

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 saturation<sup>1</sup>

## Streaming Share Outpaced Linear For the First Time

# 45%

streaming share of total TV usage in May 2025, vs. 44% for broadcast/cable<sup>2</sup>

## U.S. Adults Are Spending More Time With CTV

# +11%

increase in time spent streaming in '24 vs. '23<sup>3</sup>

## Ad-Supported Tiers Are Driving Streaming Growth

# 71%

of new streaming subscribers chose an ad-supported tier over the past 9 quarters<sup>4</sup>

& Did You  
Know?

# What Draws Them To The Streaming Experience

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



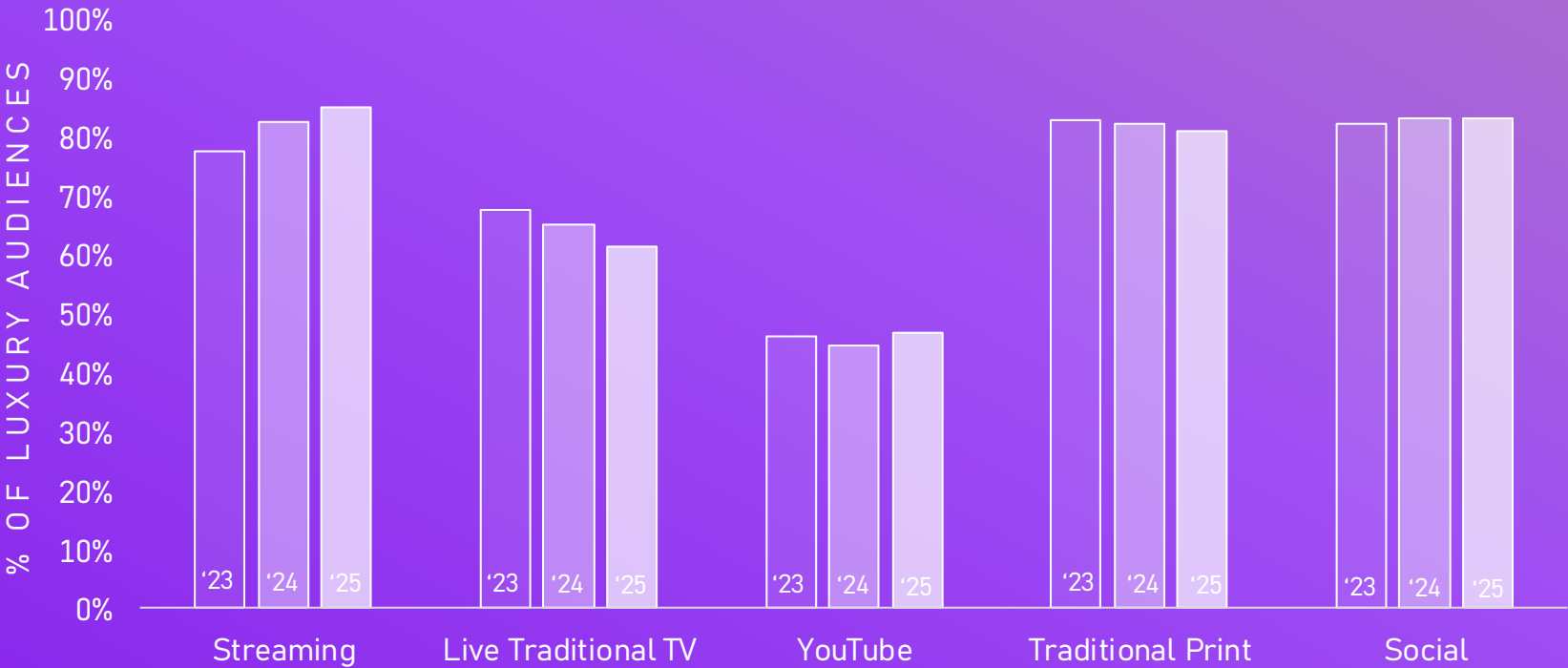
# Luxury Audience Media Behaviors

## Continue To Evolve

Streaming viewership continues to grow

Print, Social, and YouTube usage remain flat

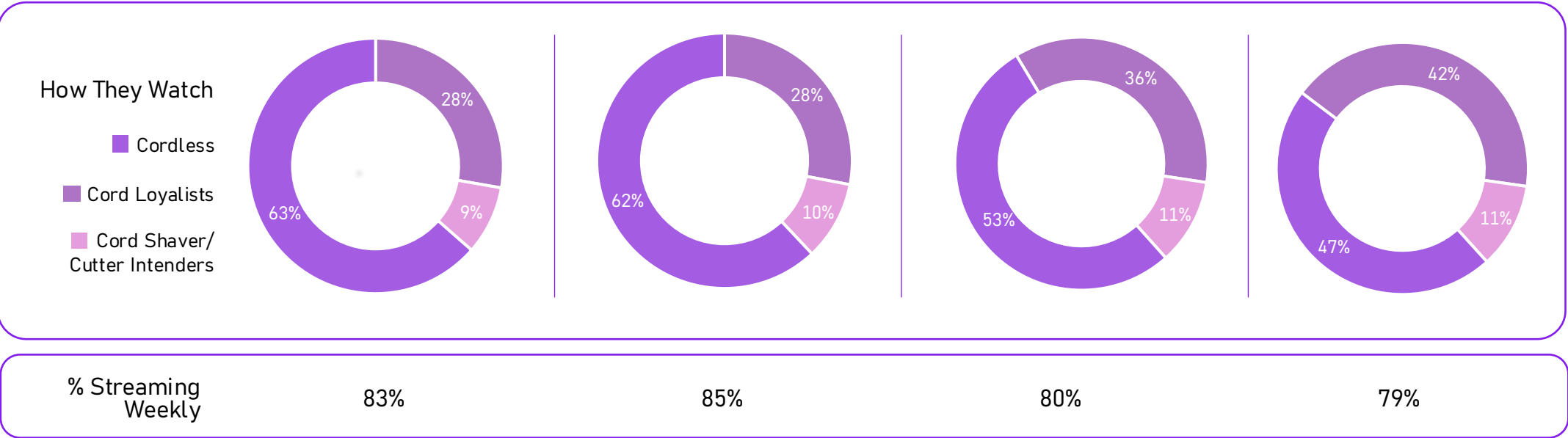
Luxury Audience Media Consumption  
2023 - 2025



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



# 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



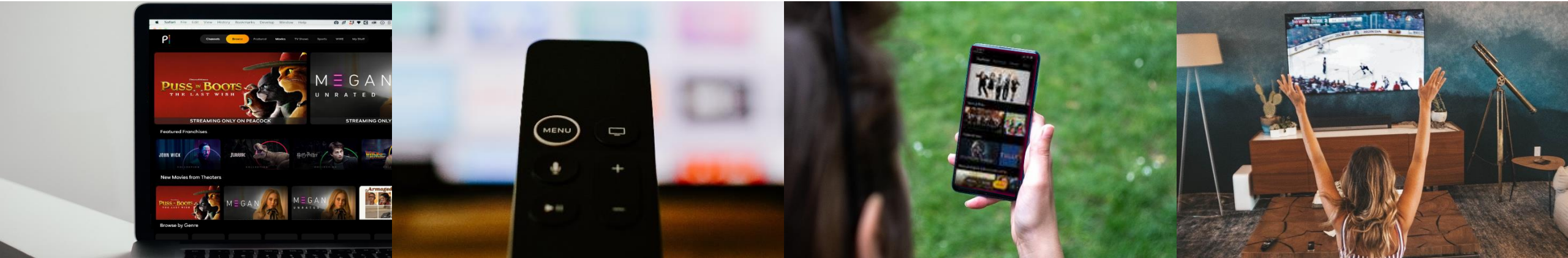
46%

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

CONTROL

# 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%

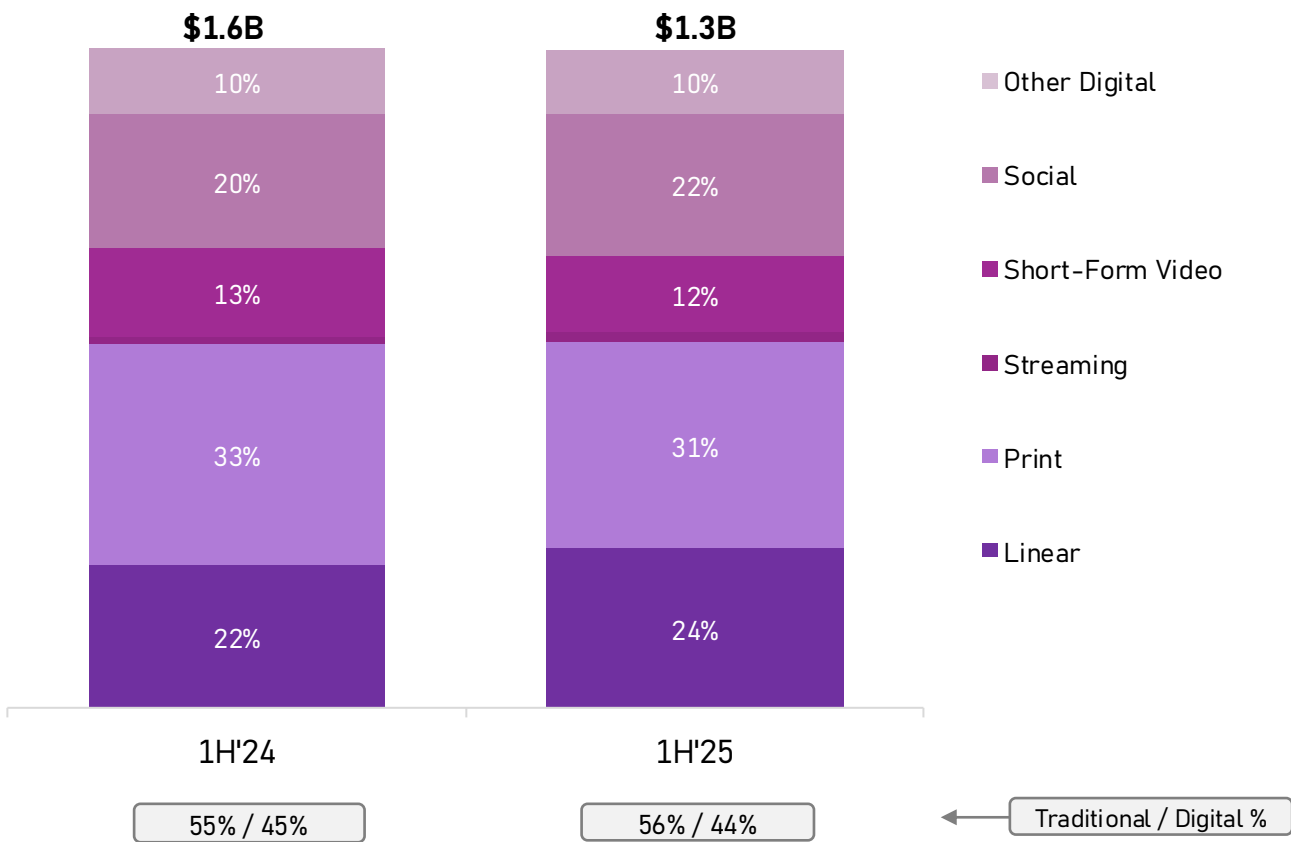
used an **ad-supported** streaming service in past 30 days (+3pp vs. '24)

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 v s. 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



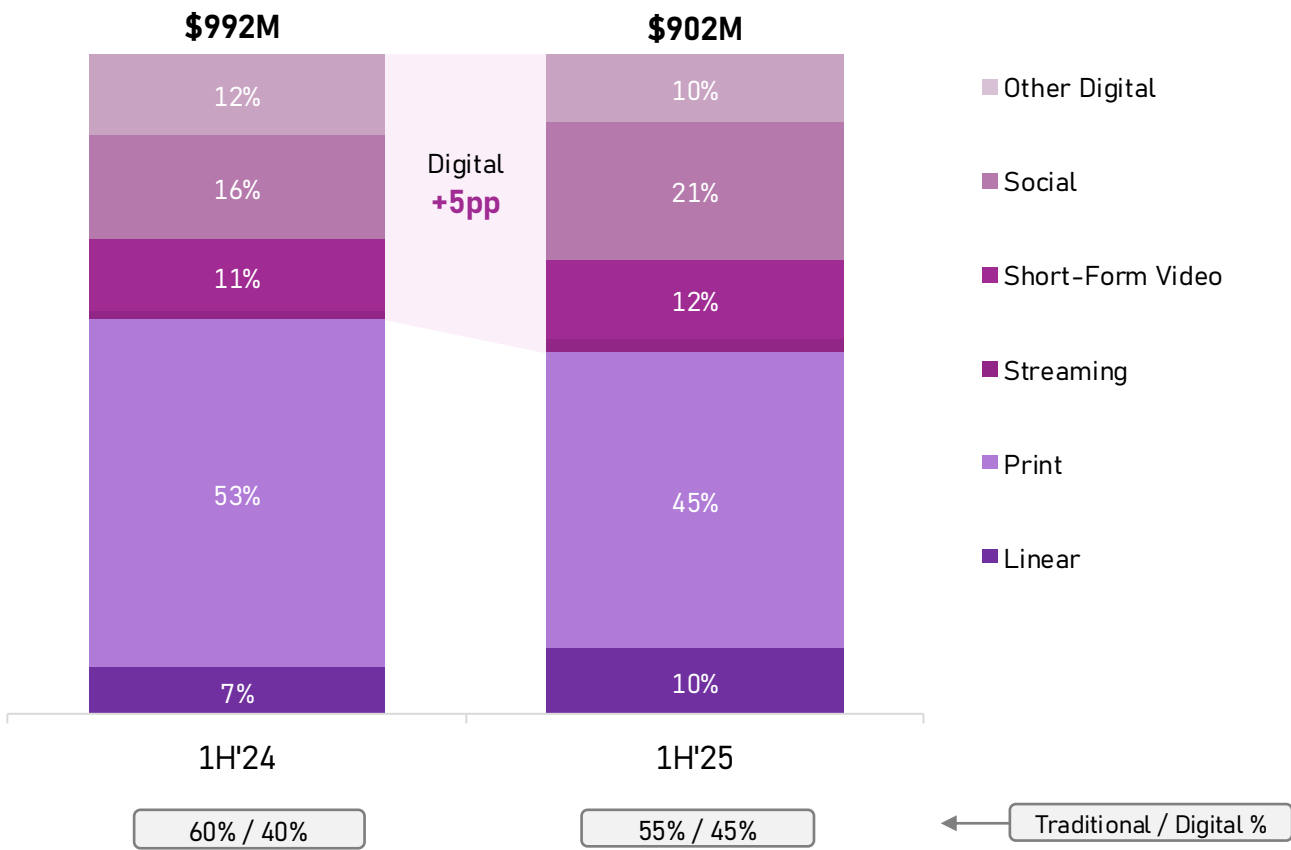
1%

1H'25 Streaming SoS



# Yet A Disconnect Exists Between Consumer Behavior And Ad Spend

Luxury Industry Media Mix (excl Auto)  
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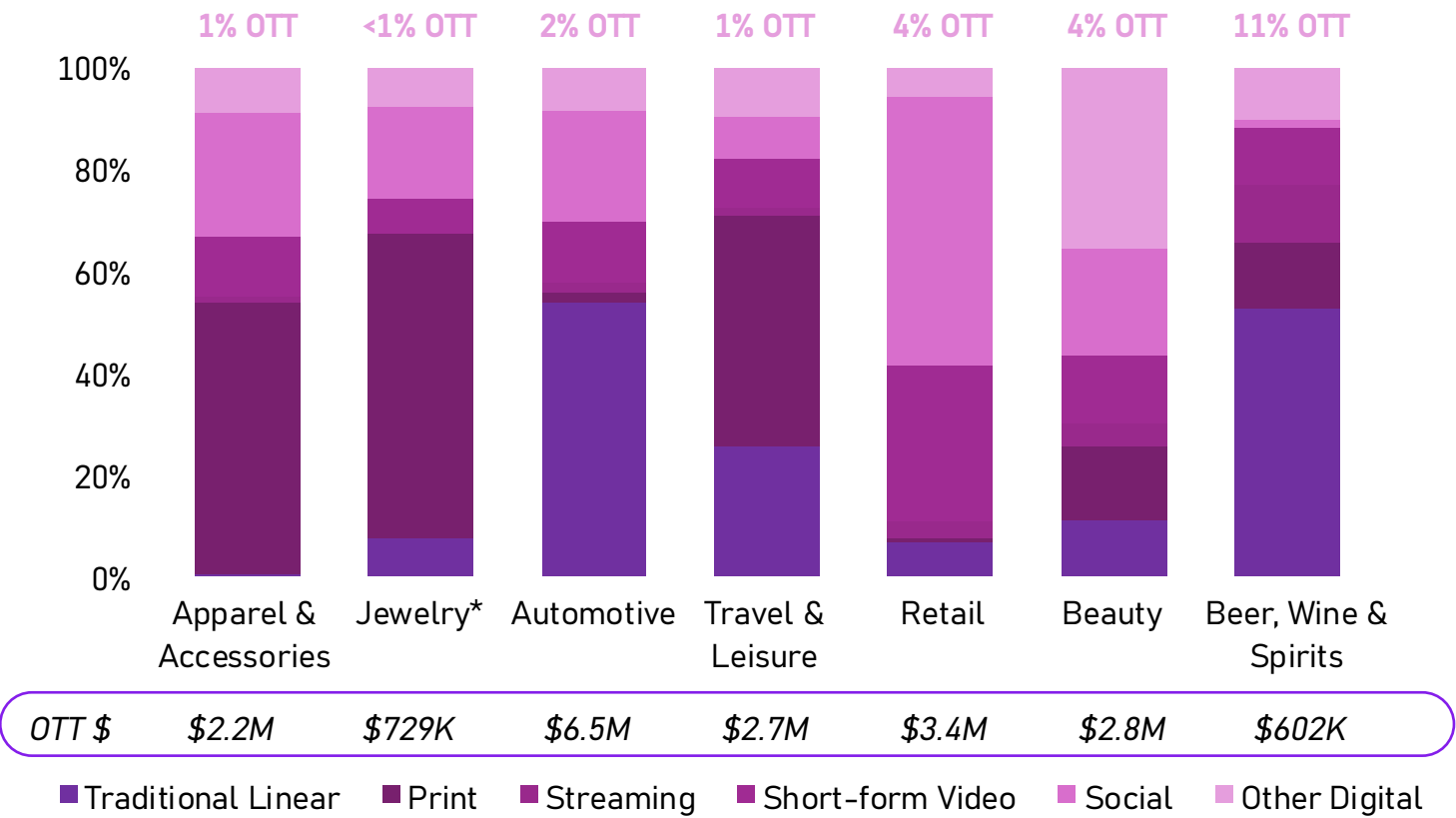
1%

1H'25 Streaming SoS












# Streaming Remains A Growing Opportunity Across Luxury Sub-Categories

Top Luxury Sub-Category Media Mix  
1 H '25



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

Luxury Level Top Channels		
Ultra High-End	Print  69% 94% w/o Auto	Other Digital  22% 4% w/o Auto
Super Premium	Print  57% 82% w/o Auto	Social  30% 6% w/o Auto
Core Luxury	Print  41% 65% w/o Auto	Linear  26% 5% w/o Auto
Affordable Luxury	Linear  25% 16% w/o Auto	Social  24% 27% w/o Auto
		Print  18% 24% w/o Auto

## 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!

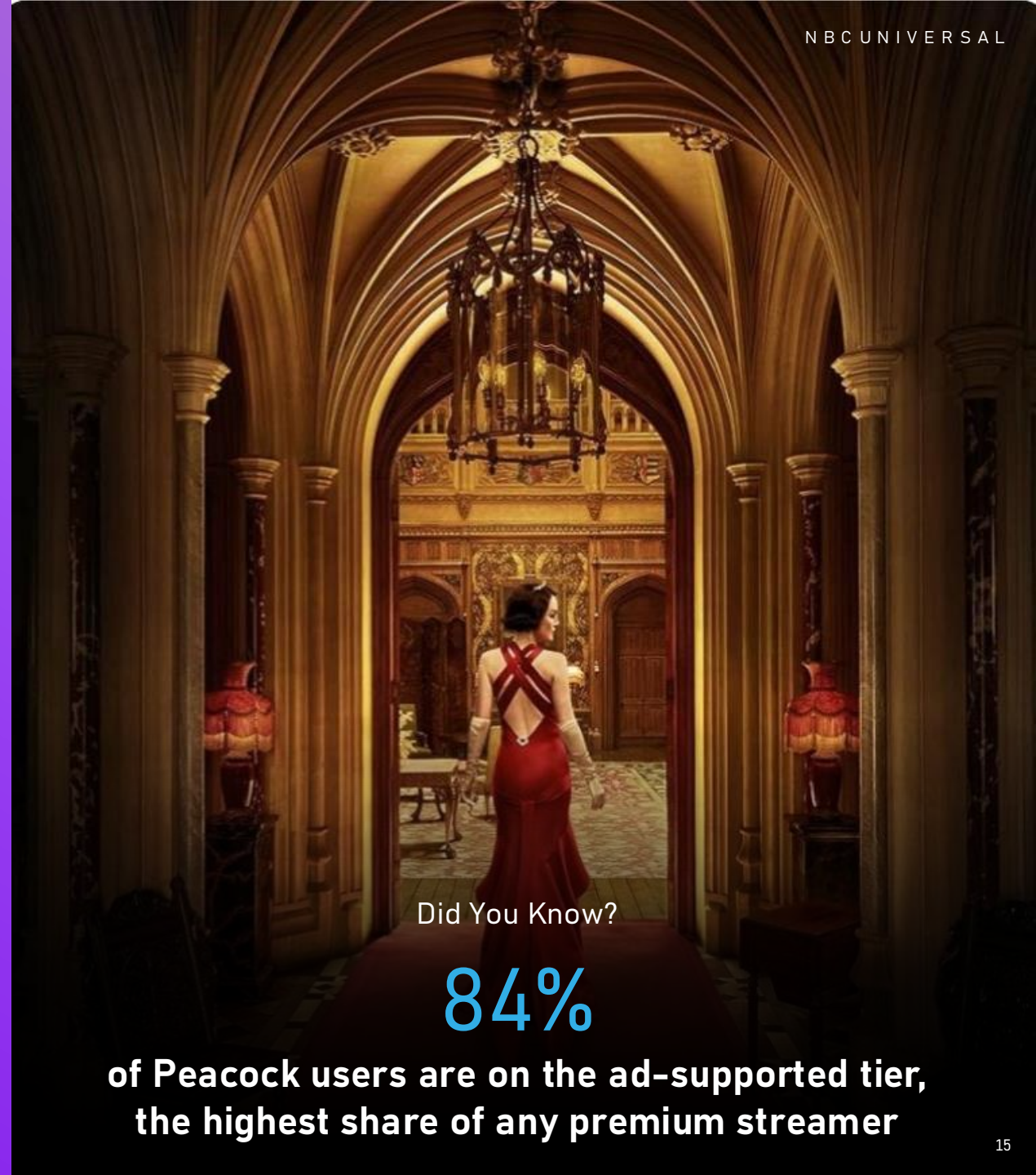
Love Island USA Season 7 Claims Over 1  
Billion Minutes Streamed

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.

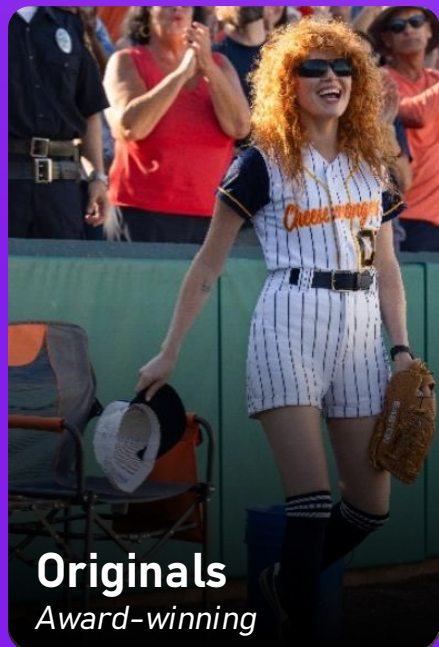


Did You Know?

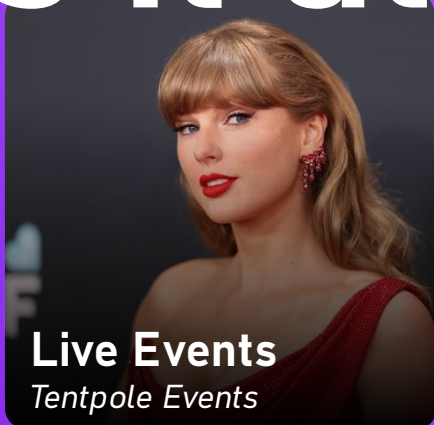
84%

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

# peacock has it all



**Originals**  
*Award-winning*



**Live Events**  
*Tentpole Events*



**Live Sports**  
*7,500+ Hours*



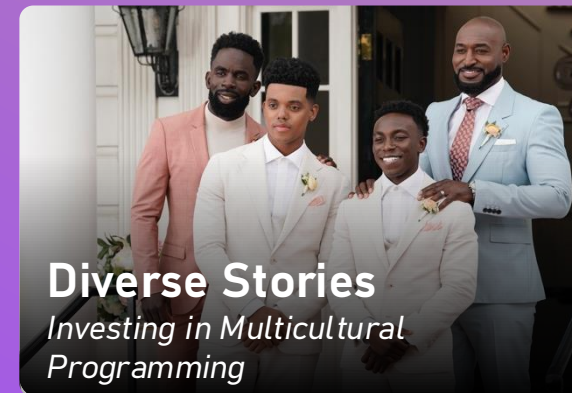
**Movies**  
*Original & Pay One Movies*



**Current TV**  
*NBC, Bravo, Telemundo  
& More*



**Timely News**  
*Local, National  
& Global*



**Diverse Stories**  
*Investing in Multicultural  
Programming*



**Library Favorites**  
*Bingeworthy Classics*

with a unique content  
strategy that works  
hard for your brand

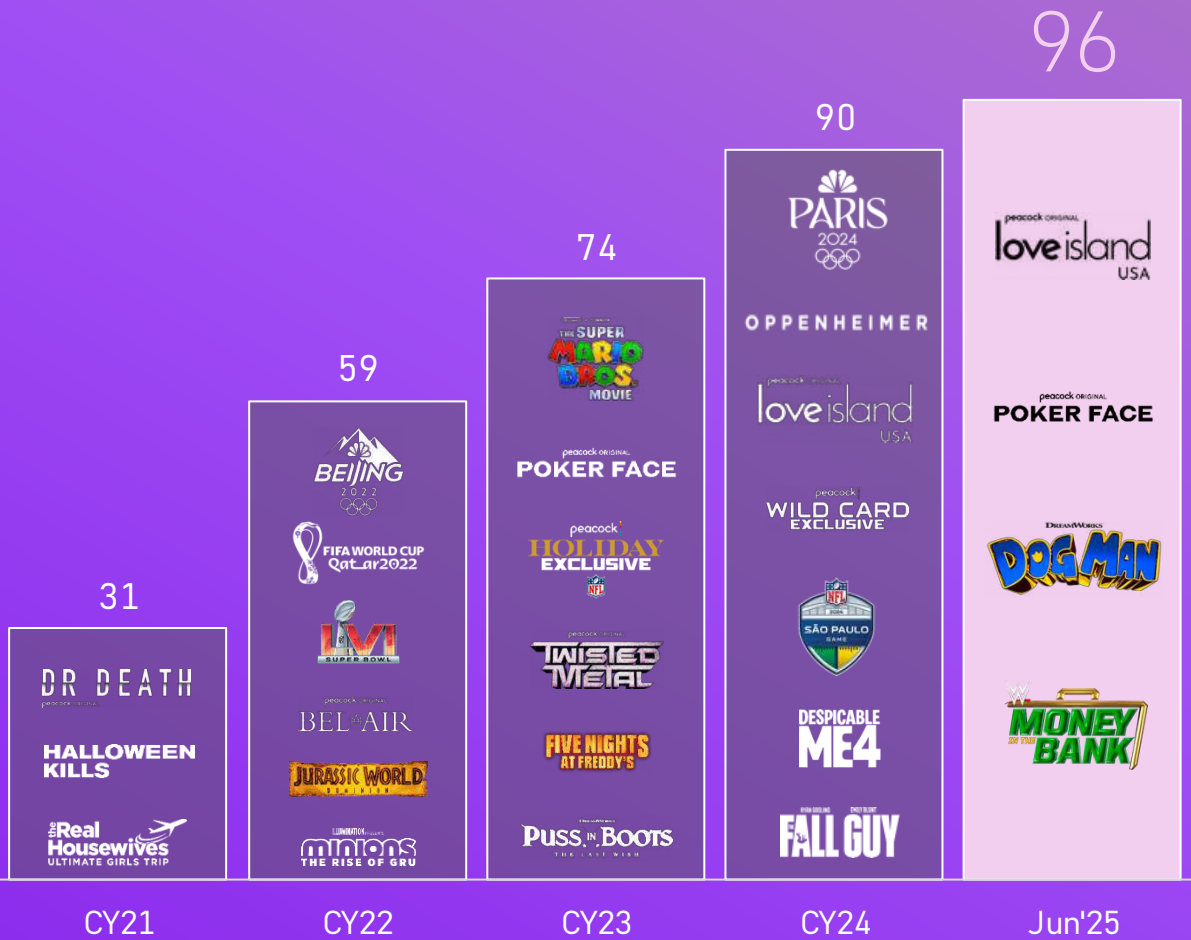
# peacock

continues  
to drive  
significant  
scale

## Peacock P2+ MAUs – Millions

(via Comscore Videometrix)

With so  
much more  
to come...



Source: Comscore Videometrix Multiplatform, 1/1/21-6/30/2025.



# The Luxury Audience Streams Peacock's Content Across Genres

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



Sports

139i



Entertainment

130i



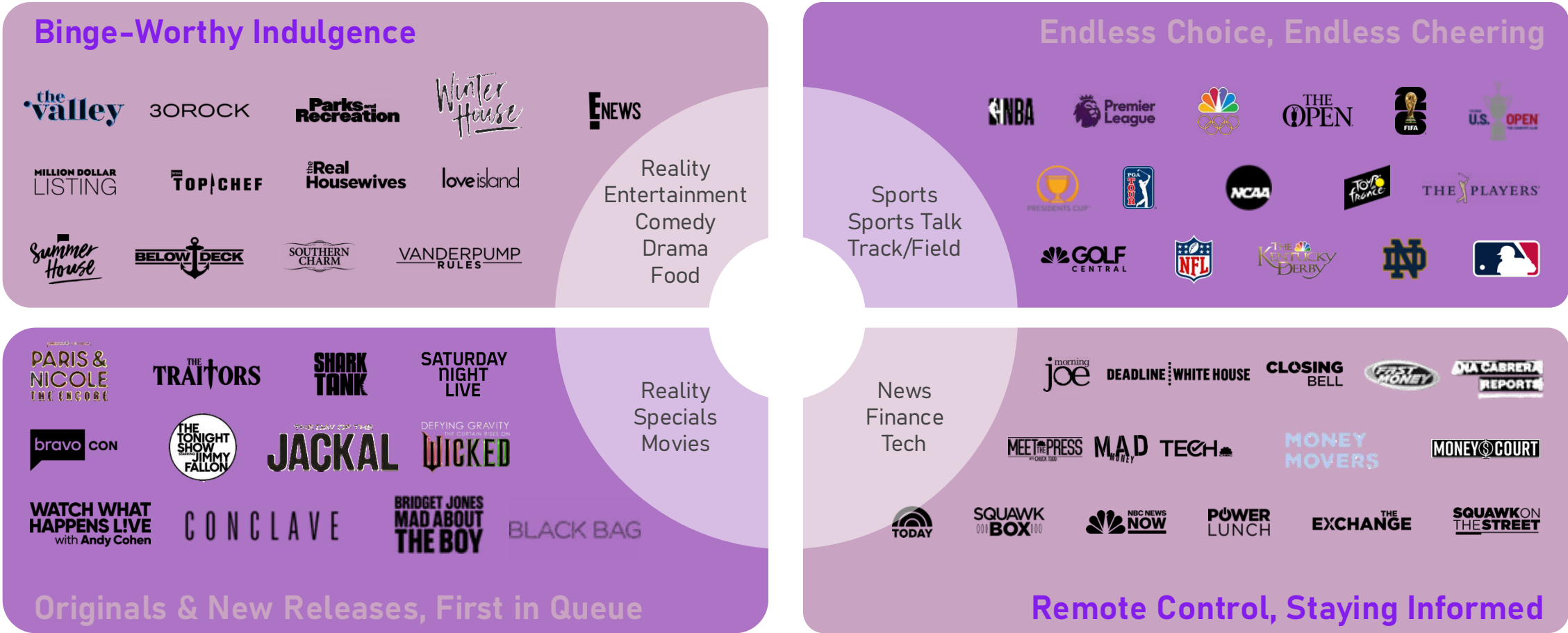
News

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

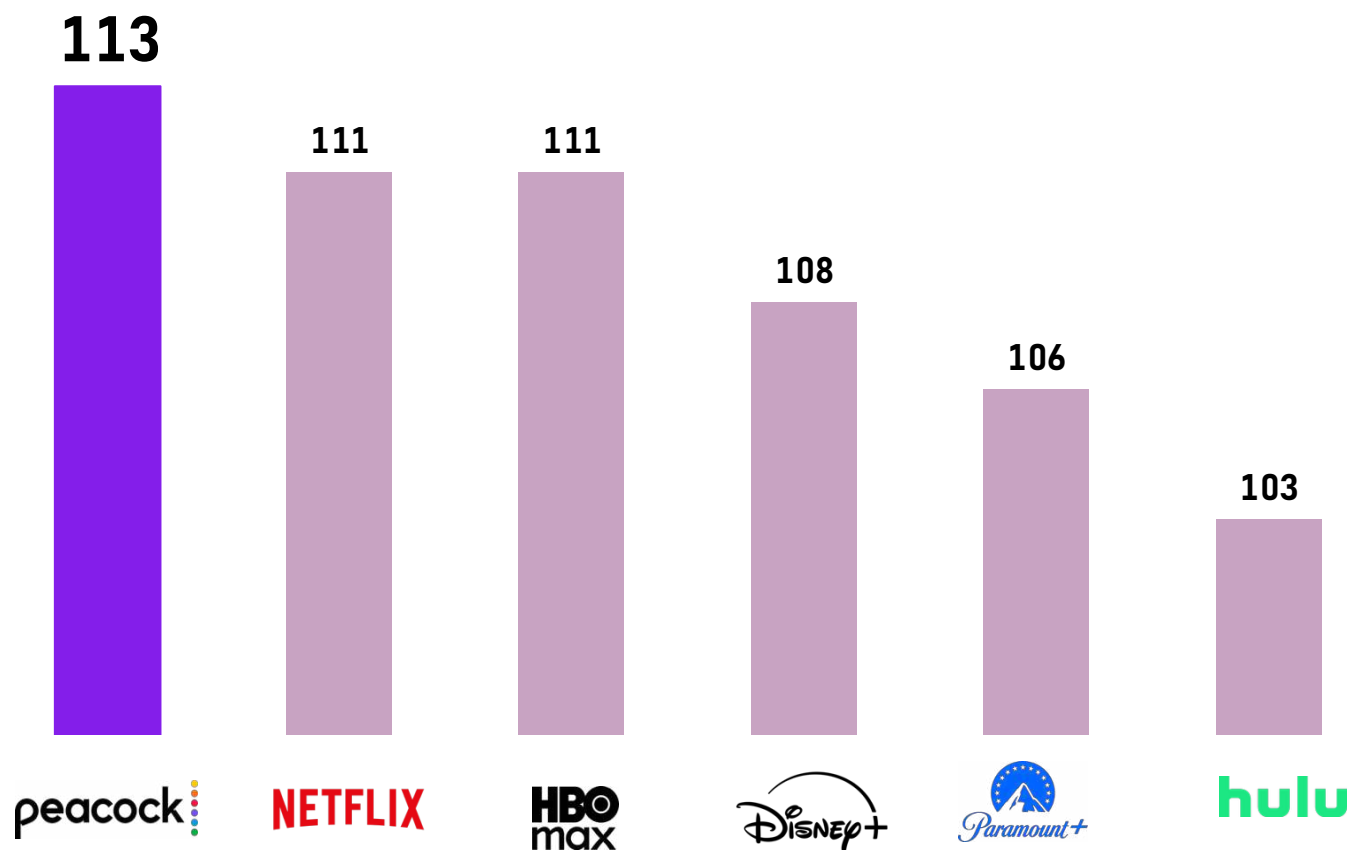


Source: MERKLE/M1, 1P/3P data pulled as of 7.28.25, HMID Counts, luxury segments custom defined, base P18+

# 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 Want<sup>1</sup>

## What Peacock Has

Movies that are in theaters  
make a streaming service more valuable

**84% of viewers**  
agree the cinematic experience is superior  
to interruptive movie experience<sup>2</sup>

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

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

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

**15M+ avg ad-supported hours viewed daily**  
across Originals, Current TV, Major Sports, Live Events,  
News, Spanish Language, and more<sup>3</sup>

**Premium experience**  
Across the platform

**67%** feel the Peacock experience is better than  
other streamers for Current TV<sup>4</sup>, and  
**74%** agree cinematic sponsors are  
more likely to get their attention<sup>5</sup>

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

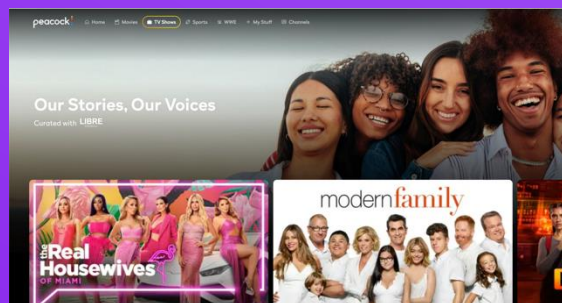
## Spotlight Ad



Own 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

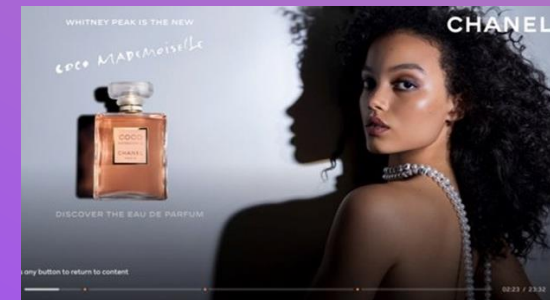
## Curator Ad



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



## 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.

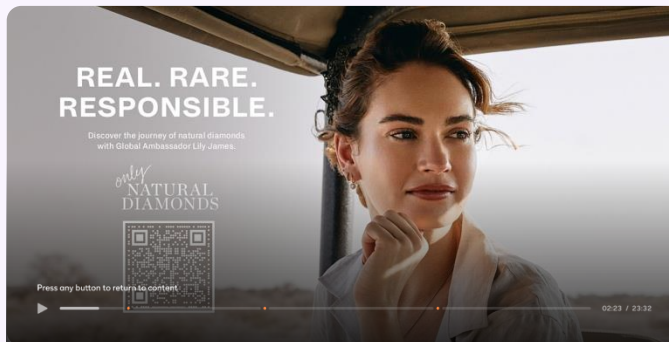
## Shoppable Burned-In Unit



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.

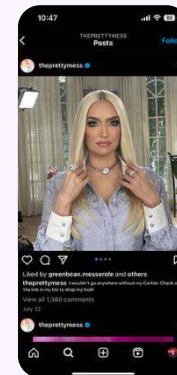
## Shoppable Pause Ad



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.

## 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

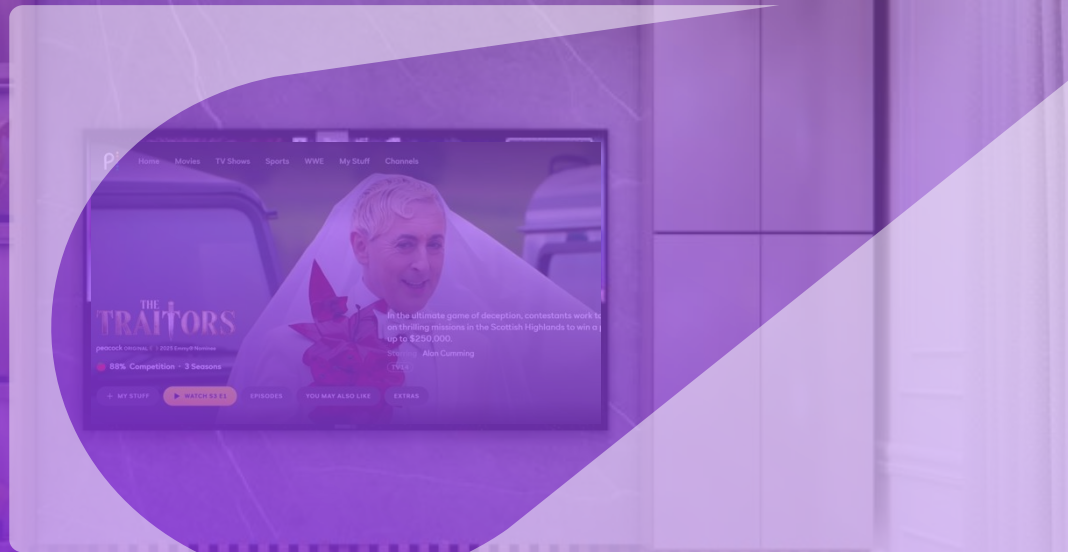
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Premium Content Environments

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September 2025

# 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+

Financial  
Means

Luxury  
Attitudes

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

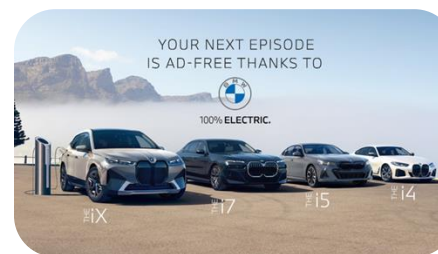
**Paco Rabanne** partnered with Elle Fanning on a **Peacock Ad Innovation** promoting the brand's new fragrance while driving customers to explore more through a **QR code**



#### 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**