



# Studios Playbook

# Studio Playbook Overview

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

## Our Approach

At NBCUniversal, we have a legacy of working with a diverse range of Studio partners to build their brands & businesses. In 2024, NBCU worked with the top studios across genres & release strategies.



Animation /  
Family



Action /  
Thriller



Sci-Fi /  
Fantasy



Sequel /  
Live-Adaptation



Indie

This playbook has been created based on NBCU's:

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

# Studios Playbook Contents

## An Overview

of NBCUniversal's latest Studios perspectives, insights, and strategic considerations.

Marketplace Dynamics



Media Trends & Observations



Brand & Business Imperatives



NBCUniversal Playbook





# '25 Studios Industry Dynamics



# Current Studios Category Dynamics

Studios are using existing IP to inspire attendance and offset macroeconomic uncertainty

## Headwinds

- **Stagflation** could lower campaign spending and send films to streaming / VOD faster<sup>1</sup>
- **Fewer moviegoers and change in consumer behavior** during the pandemic permanently lowered theatrical demand by ~20%<sup>2</sup>
- **Declining ticket sales** due to higher ticket prices (premium push), fewer wide releases, & shrinking theatre footprint<sup>3</sup>
- **Soft Q3 slate** containing very few titles with breakout potential through early October<sup>4</sup>

## Tailwinds

- **Uninterrupted production in 2024** (first FY since 2019) enabled a more balanced slate, with 110 theatrical wide releases estimated in 2025, +15 YoY<sup>1</sup>
- **IP still a clear driver** as seen by major films released in summer 2025 ex. *"Mission Impossible"*, *"Jurassic World"*, *"Superman"*
- **Domestic tax credits** hope to lure production back to the U.S. & counter overseas savings (ex. NY, WI, CA)<sup>5</sup>
- **Uptick in M&A Activity** as major studios split and restructured (ex: Lionsgate-Starz, Warner Bros. Discovery)<sup>6</sup>

# Studios Media Trends To Watch

Studios are combining sponsorships (i.e., licensing) with data-driven distribution to balance brand-building and performance

A Continued Shift towards **Digital**



**+45%**

Jump in **digital** spend in 1H'25 as the category continues to right-size budgets to meet younger, diverse consumers where they are (digital share up +9pp vs. STLY)<sup>1</sup>

Consistent Preference for **Performance Channels**



**+55%**

Increase in **Shortform**, and +46% increase in **Search** in 1H'25 vs. 1H'24 as Studios prioritize efficient, conversion-driving channels<sup>1</sup>

**Mid-Market Momentum**



Mid-sized Studios continue to expand slates and grow market share as Indie box office success justifies higher advertising budgets to further boost **brand awareness and recognition**

An Emphasis on **Sponsorships & Integrations**



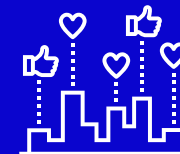
Recognition that brand partnerships are more crucial than ever to **create deeper emotional connections** with consumers and **extend reach** beyond a film's core audience to ultimately drive box office success<sup>2</sup>

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

MAXIMIZE  
**Awareness**



GENERATE  
**Buzz & Consideration**



DRIVE  
**Ticket Sales**



REACH  
**Moviegoers**





'25/26  
Studios  
Playbook

Each month,  
NBCUniversal  
content  
reaches

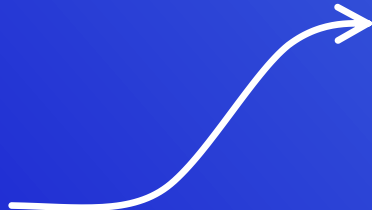
286M

P2+ Proj. 2026



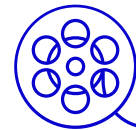
Across  
80M  
Households

*the audiences  
that matter to you*



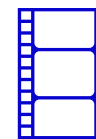
124M

Moviegoers



60M

First 2 Weeks  
Moviegoers



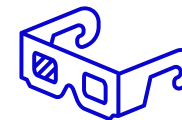
54M

Parents



18M

Action Movie  
Fans



Based on household reach

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

Maximize  
awareness



Generate buzz &  
consideration



Drive  
ticket sales



Reach  
moviegoers



## NBCUniversal's **Studios** Playbook to Reach Moviegoers

01.  
**Maximize  
Awareness** with  
Live Events &  
Cross-Platform

02.  
**Boost Reach**  
with Spotlight  
Ads & Universal  
Moments in Key  
Windows

03.  
**Foster  
Excitement**  
via Sponsorships  
& Social  
Partnerships

04.  
**Meet the Movie  
Fan Where  
They Are**  
with NBCU'  
Targeting  
Solutions

05.  
**Drive  
Ticket Sales**  
with Shoppable  
Ads

# NBCUniversal's Studios Playbook to Reach Moviegoers

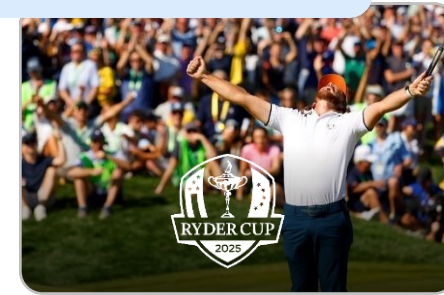
Key

- 01. Mass Awareness
- 02. Boost Reach
- 03. Sponsorships
- 04. Targeting
- 05. Shoppable



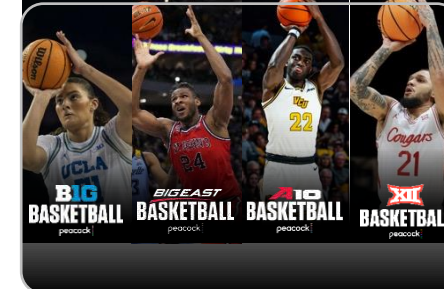
Maximize awareness  
with **Live Events** across  
Primetime & Peacock Premier

01. Maximize awareness



**+88%**  
Higher Daily Reach  
Avg Big Event  
Days vs. 2024 Avg

**+52%**  
Studios Brand  
Familiarity  
in Live Sports & Events



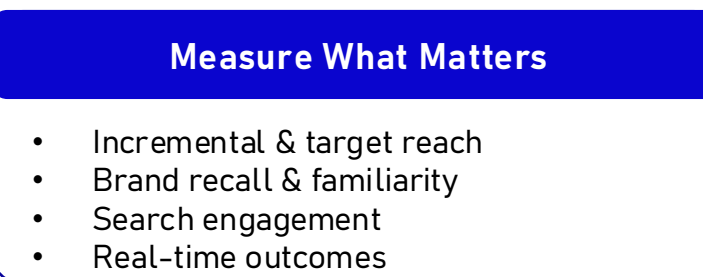
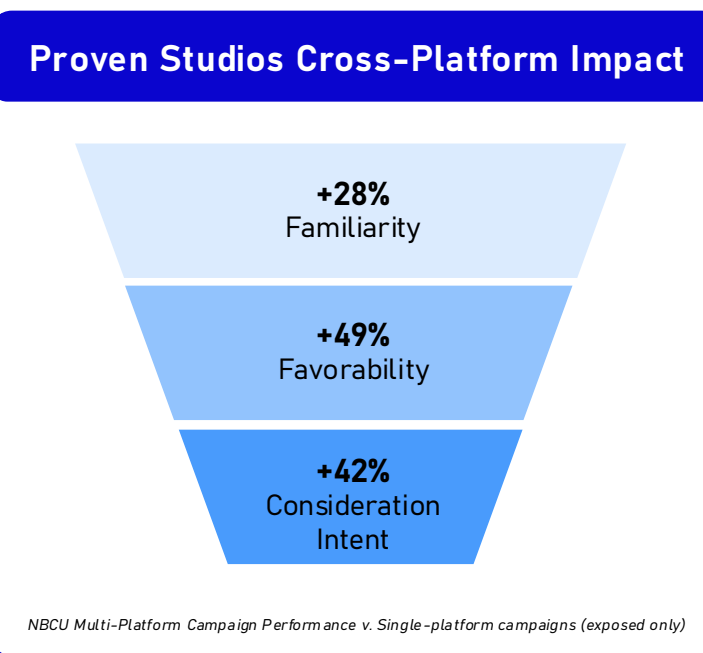
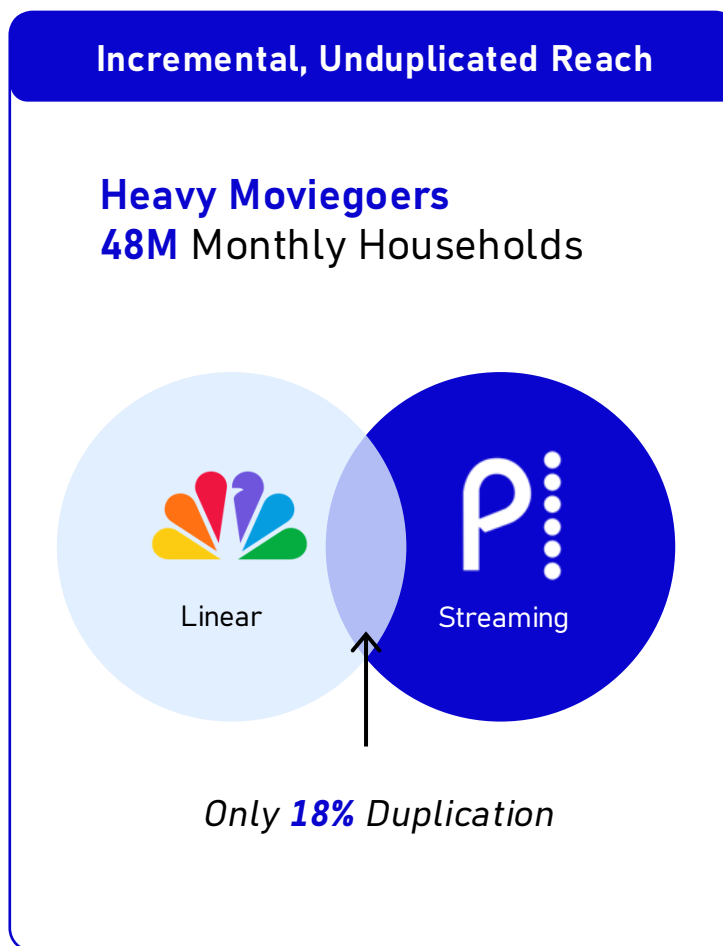
Source in notes

## And extend campaign reach across platforms

Engage moviegoers with key messaging at the right moment in the film lifecycle to ensure strategic, wide, & unduplicated reach

Source in notes

## Power of Cross-Platform Scale for Studios



# Boost reach with Spotlight Ads & Universal Moments

in key windows from trailer drops, ticket on-sale dates, & momentum into opening weekend

Trailer Drop



Tickets On Sale



Pre-open



Release Day



Maximize awareness

Spotlight/Spotlight+ Ad



Stand out as the first impression that day during multiple key moments in the film marketing timeline

Spotlight/+ Ad



Universal Moments (Beta)

Spotlight/+ Ad



Spotlight Ads

Proven Upper Funnel Impact

**90%+**

Reach of Viewers

**+20%**

Ad Recall

**+17%**

Favorability

Measure What Matters

- Incremental & target reach
- Brand impact & life
- Search engagement
- Ticket page visits
- Real-time outcomes & attribution

## New Beta Universal Moments

Our latest solution designed for Studios to transform awareness into performance at scale within a singular, time-bound moment

Sources: Marketcast, NBCU Real Time Outcomes Measurement (Kochava). Ticket data sourced from Fandango.com. ROAS projected based on average ticket volume and price

Universal Moments is built to maximize reach in premium content during compact windows, deliver full funnel impact, & drive actionable learnings

### Universal Moments Features

#### Reach + Flight

20M impressions  
1x impression per user  
72-hour window

#### Assets + Platforms

Non-skip :15/:30 video  
On-domain digital properties  
Live + VOD content

#### Measurement

NBCU Audience Profile  
Marketcast Brand Lift Study  
Fandango & Kochava Attribution

In beta launch, Universal Moments **drove unprecedented reach & impact for an Action film**

### Beta Results

# 2x

Higher title memorability & intent to view vs. competitive platforms

# 4 of 5

Movie Overview page visitors proceeded to Seating Chart page

# 5x

Return on ad spend

## Ad Products Comparison

**Spotlight vs. Universal Moments vs. Spotlight+**

	<b>Spotlight</b>	<b>(Beta) Universal Moments</b>	<b>Spotlight+</b>
<b>Product Benefits</b>	First impression takeover on Peacock	High priority takeover of Peacock + extended digital endpoints at a 1x frequency	First impression takeover of Peacock + digital endpoints with linear 1A position during 8pm programming
<b>Key Categories</b>	General Availability	General Availability	General Availability
<b>Endpoints</b>	Peacock Premier	Peacock AX O&O (incl. Premier) No YouTube + Hulu	Linear Peacock AX (incl. Premier)
<b>First Impression Guaranteed</b>	Yes*	No	Yes
<b>Flight Length</b>	24-hour window	72-hour window	24-hour window
<b>Estimated Impressions</b>	3M	20M	40M
<b>Supported Measurement</b>	Impressions delivery + performance-based measurement (Kochava)	Impressions delivery + performance-based measurement (Kochava)	Campaign delivery, incl. billable impressions

\*Live Sports will not have the guaranteed first impression but will guarantee a premium position (1A, 1B, 2A, etc.)

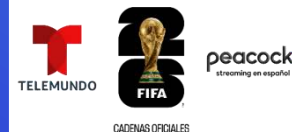
# Foster Excitement via Sponsorships & Social Partnerships

Collaborate on custom integrations & content within premium programming that aligns with your film's genre, target audience, & themes

## Measure What Matters

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

## Unique Sponsorship Opportunities



*Holidays*



Conciertos  
Navideños

— PREMIOS —  
**billboard**  
DE LA MÚSICA LATINA

EMMYS

★ macy's ★  
THANKSGIVING DAY  
PARADE

**NBCUniversal**  
Social

**peacock**  
Pay One Movies

**peacock**  
Originals

**TOP CHEF**

# And extend buzz via social channels & conversation

## Studios Case Study

NBCU Social Sync & cobranded content drove

# 5x

ticket link click-through rate for a Horror/Thriller film vs. NBCU Facebook benchmarks

### Spotlight your film in the NBCU fandom social conversation

# 1.3B

Total followers across big 5 social platforms



# 6.9B

Avg. monthly video views

# 445M

Monthly engagements

# +19%

Ad recall lift for custom content partnerships

### Partner with NBCU to amplify movie audience connections & forge new ones

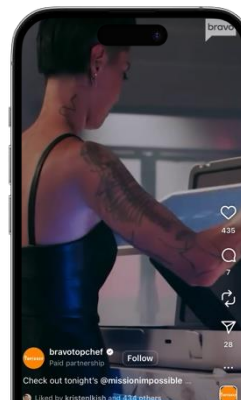
Ads   



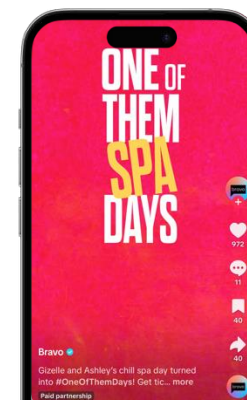
Turn-Key Ads

Run trailers against NBCU content (from Studio handles)

Custom Content       



Show/Event Integration



Custom Content



Franchise Sponsorship

Integrate your film with NBCU content (from NBCU handles)

### Measure what matters

- Brand recall
- Brand favorability
- Purchase intent

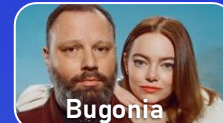
# Engage movie fans directly within their Peacock movie-watching experience via Peacock Pay One & Movie Sponsorships

## Upcoming Pay One Premieres

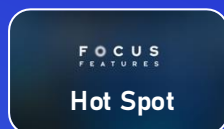
Q3



Q4



Q1



Q2



Movies on Peacock reach moviegoers & drive ad impact

115i Pay One Moviegoer Reach

51% Growth in Peacock movie consumption in last 3 years

71% agree that ads during Peacock movies feel more memorable than ads on other subscription services

# Best-in-Class Studios Showcase

**Proven Impact**  
for Studios

Standard Ads & Integrations

**95%**

As emotionally  
engaging as NBCU content

Custom Marketing Elements

**+68%**

More likeable vs.  
standard ads



## Spotlighting Upcoming Release via Custom Integration

*Custom Content ft. Top Chef VIP Talent for Universal's "Kung Fu Panda 4"*



## Leveraging Bravo's Fan-Favorite Personalities

*Custom Content & Social Amplification for Disney's "Fantastic Four: First Steps"*



## Integrating with Contextual Talent, Programming & Placement

*America's Got Talent Sponsorship for Lionsgate's "Now You See Me: Now You Don't"*



## Promoting Trailer Launch & Release Date Across Platforms

*Featuring Telemundo La Jefa Talent for WB's "Final Destination: Bloodlines"*

*Click to play*

# Meet the movie fan where they are via NBCU targeting solutions

## & track attribution with real-time outcome measurement

### Contextual Targeting

Inspire target audiences by aligning creative with relevant film, genre, & audience-suitable moments

#### By Industry

Align creative with Studio-relevant themes in curated VOD content

ex. *Film Festival Fanatics*

#### By Genre

Deliver trailers in relevant editor-curated genres

ex. *Spanish Language, Horror*

#### Custom Inputs

Using AI, deliver creative with episode-level targeting of thematically relevant moments

ex. *SNL, Action & Adventure genre*

#### Emotional

Using AI, deliver creative with program-level targeting thematically aligned to film

ex. *Action, Drama, Documentary genres*

#### Studios Real-Time Outcomes

Return on Ad Spend Benchmarks

**\$6.93** Contextual

**\$9.04** Spanish Language



With NBCU, supercharge your F360 targeting strategy & unlock our insights-based best practices & unique real-time outcome measurement solution combining Fandango, Peacock, & Kochava



#### Studios Real-Time Outcomes

Movie Page Visit Conversion Rates

**1.16%** F360 vs. 0.73% general market

# Drive ticket sales with Shoppable Ads

deployed in key moments to capitalize on growing awareness & buzz before release day

Trailer Drop



Tickets On Sale



Pre-open



Release Day



## Measure What Matters

Brand impact & lift

Search engagement

Ticket page visits

Real-time outcome & attribution

### Shoppable Pause Ad



Drive viewers to scan for ticket purchasing during pause breaks

**+54%**

Studios  
Search Engagement

### Shoppable Engagement Ad



Layer an interactive feature onto ads, allowing viewers to scan a QR code to reserve seats & buy tickets

**+49%**

Studios  
Recommendation Intent

### Shoppable L-Bar Ad



Wrap your movie trailer with CTA messaging and a QR code so fans can dive deeper & purchase tickets

**+5x**

Studios  
Scan Engagement



Studios  
Impact at  
**NBCU**

# Studios Proven impact across client KPIs

NBCU Studios Campaigns – Test vs. Control

## Upper Funnel

Unaided  
Ad Recall  
**+2X**

Unaided  
Brand Recall  
**+39%**

Aided  
Ad Recall  
**+62%**

## Mid Funnel

Brand  
Familiarity  
**+21%**

Avg. Search  
Engagement Index  
**155**

Brand  
Favorability  
**+20%**

## Lower Funnel

Brand Recommendation  
**+35%**

Purchase Intent  
**+30%**

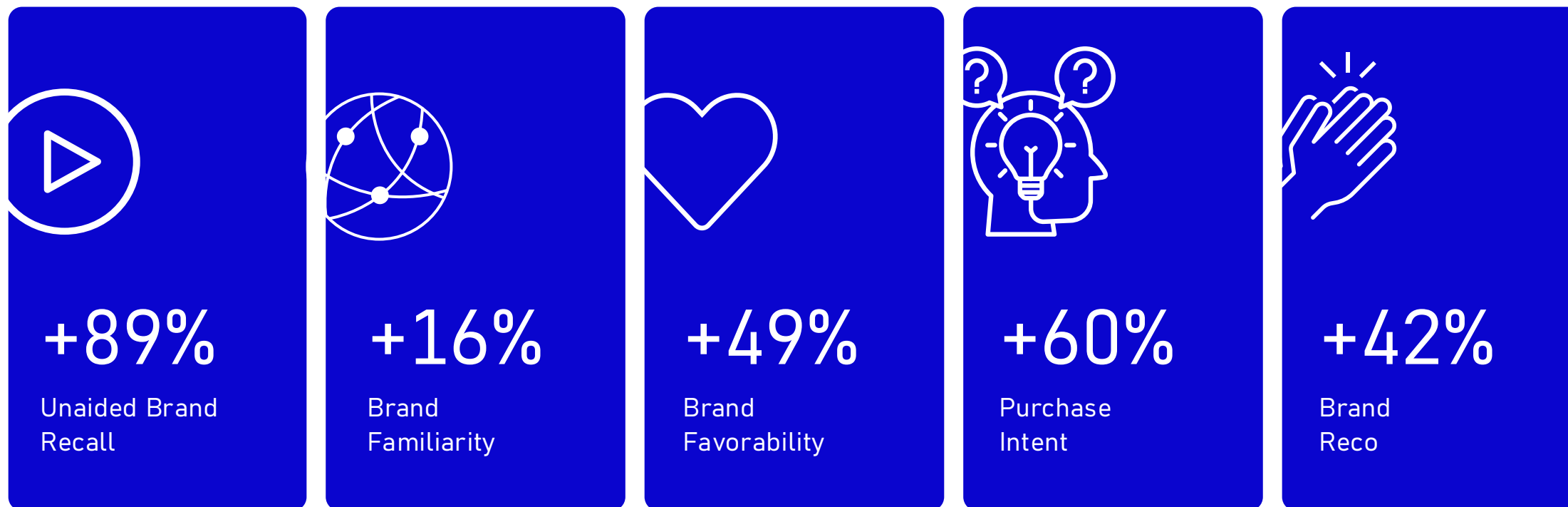
\*Movie Page Visit  
Conversion Rate  
**2.6%**

# Studios

## Campaigns across more than one platform are more effective

Studios Category NBCU Campaigns: Multi-Platform vs. Single Platform

% Lift



# Studios

## Proven **Live** impact across client KPIs

NBCU Studios Campaigns with Custom Marketing – *Test vs. Control*

**+2X**

Aided  
Ad Recall

**+25%**

Brand  
Favorability

**+66%**

Brand  
Recommendation

**+78%**

Search  
Engagement

# NBCU offers measurement opportunities providing full-funnel insights for Studios

	Buy Side Activation	Clean Rooms	NBCU Measurement Opportunities (Sell-Side Measurement)
Awareness	✓		Brand Lift Study <i>Title Familiarity</i> <i>Ad Awareness</i> <i>Intent to Watch</i>
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:**

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

\*Requires client to permission data



# Studios Case Studies

# Studios Case Study

## A Peacock targeting strategy drove \$27 ROAS for an IP action/adventure film

to help accelerate ticket sales for a widely successful box office

### Strategy

#### Reach + Content

1M+ unique viewers



#### Targeting

A18-44, Parents, Gamers,  
Action/Adventure Fans,  
Moviegoers via



#### Attribution

NBCUniversal

KOCHAVA★



### Results

#### Ticket Value

**\$926K+**

\$1.07 cost per ticket

#### Movie Page Visits

**57K+**

\$0.59 cost per visit

#### Impressions

**3.6M**

1.68M measured impressions

# Studios Case Study

## A multi-faceted Peacock campaign drove 18x ROI for a family tentpole film

and delivered 7M+ impressions to help boost ticket sales with key audiences

### Strategy

#### Content

Spanish Language  
peacock

#### Targeting

Households with  
Children

#### Ad Innovations

Spotlight Ads  
Pause Ads

#### Attribution

NBCUniversal  
KOCHAVA★  
FANDANGO

### Results

#### ROAS

**\$18.70**

\$1.7M+ total ticket value

#### Checkout Conversions

**60K+**

\$1.54 cost per checkout

#### Movie Page Visits

**75K+**

2.5% overall conversion rate



# Studios Category Resources

# Studios 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



### 25-25 UF Recap

Cross-category analysis of the 25-26 Upfront at NBCU with broader Marketplace summary

## Thought-Leadership & Insights



### The Future of Advertising

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



### Gen Z

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



### Hispanic / Telemundo

Insights for reaching and engaging the Hispanic audience

# Studios Playbook

NBCU Studios Category  
Strategy Team:

Dominique Folacci  
Nicole Lee  
Savannah Stephens

