



# Tech Playbook

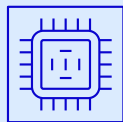
Electronics + Software/SaaS/Cloud +  
Social/Apps/Websites + B2B + Emerging

# Tech Playbook Overview

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

## Our Approach

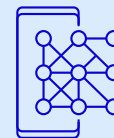
At NBCUniversal, we have a legacy of working with a diverse range of Tech partners to build their brands & businesses. In 2024, NBCU worked with Tech advertisers across the below sub-categories.



Electronics



Software, SaaS,  
Cloud



Social, Apps,  
Websites



B2B



Emerging

This playbook has been created based on NBCU's:

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

# Tech Playbook Content

## An Overview

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

Marketplace Dynamics



Media Trends & Observations



Brand & Business Imperatives



NBCUniversal Playbook





# '25 Tech Industry Dynamics



While navigating volatile macroeconomic & competition challenges,  
**Tech continues doubling down on AI to drive business momentum**





### Headwinds

- **Geopolitical & trade/tariff policy tension** causing uncertainty around consumer spending, supply chain, & manufacturing<sup>1</sup>
- **Cybersecurity & regulatory challenges** may reshape category re: data governance, privacy, antitrust, copyright, & ethics<sup>1</sup>
- **Escalating AI pressure** to offset costs, improve investor confidence, generate results, outperform competitors, navigate regulation & societal concerns, & recruit talent<sup>2</sup>
- **Softer electronics rebound than expected** as consumers opt for lower-priced options, or delay purchases/upgrades<sup>1,3</sup>

### Tailwinds

- **Megadeal values growing +15% YoY** as category prioritizes more transformational M&A/partnerships for scale & competitiveness, especially in AI<sup>4</sup>
- **AI continues invigorating subcategories** as investment & adoption drive demand, faster product cycles, & innovation<sup>1,4</sup>
- **Data & cloud infrastructure investments** fueled by AI will drive enhanced B2B capabilities & demand<sup>4</sup>
- **Ad tech momentum** continues with new AI-powered tools, programmatic offerings, data capabilities, retail media integrations, & CTV/premium video innovations<sup>5</sup>

As the world grows increasingly digital & tech-forward,  
**Tech sub-categories embrace AI to drive adoption & perception**

<b>Electronics</b> 	<b>Software, SaaS, Cloud</b> 	<b>Social, Apps, Websites</b> 	<b>B2B</b> 
<p><b>New integrations</b> (ex. AI-powered wearables &amp; devices, AR/VR, smart glasses, foldable smartphones) re-invigorating innovation &amp; sales</p> <p><b>114M+</b> AI-powered PCs estimated to ship in 2025, equivalent to 40% of total sales <sup>1</sup></p>	<p>Demand for more <b>operational integration, customization, &amp; AI capabilities</b> (ex. superapps, flexible payment models, &amp; AI automation) fueling growth</p> <p><b>+20%</b> global SaaS market annual growth rate<sup>2</sup></p>	<p>AI continuing to boost social's &amp; retail media's <b>disruption of traditional search</b> platforms, user behaviors &amp; ad dollars</p> <p><b>2/3</b> of U.S. consumers use social for search<sup>3</sup></p> <p><b>+26%</b> YoY growth in retail media share of search ad dollars<sup>3</sup></p>	<p>Growing AI adoption (ex. in personalized outreach, CRM integrations, &amp; workflows) <b>accelerating B2B sales</b> performance</p> <p><b>56%</b> of B2B sales employees use AI daily &amp; are 2x more likely to exceed revenue targets<sup>4</sup></p>

# Tech Media Trends to Watch

Tech brands are prioritizing flexibility and advanced targeting with increasing investments across efficient, premium channels to optimize multiplatform reach and drive full funnel impact

## An Emphasis on Performance Video



### 62%

Of Tech category spend 1H '25, went towards **social and shortform video**, as brands seek targeted reach and measurable ROI<sup>1</sup>

## The Rise of Retail Media Networks



### +27%

Increase in RMN spend for the Tech Category in 1H '25<sup>1</sup>, with retail media **search forecasted to comprise over half of total RMN spend in FY 2025<sup>2</sup>**

## A Continued Shift towards Programmatic



### 71%

Of Category Streaming share in 1H '25 was Programmatic, up +2% (\$7M) vs. STLY<sup>1</sup>, reflecting a broader industry trend: **70% of all streaming revenue will be programmatic by 2030<sup>3</sup>**

## Standing Out with Sports



In a highly competitive, top-heavy market Tech brands are using sports tentpoles to drive differentiation, reaching captive audiences and generating cultural relevance to **inspire brand love and loyalty**

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

BREAKTHROUGH  
via Cultural Moments



SHAPE  
Perception + Sentiment



INSPIRE  
Action *(sales, time spent, adoption, etc.)*



INCREASE  
Market Share & Loyalty





'25/26  
Tech  
Playbook

Each month,  
NBCUniversal  
content  
reaches

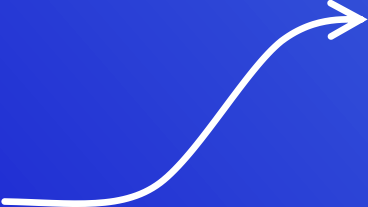
**286M**

*P2+ Proj. 2026*



Across  
**80M**  
Households

*the audiences  
that matter to you*





<b>47M</b>	
Tech Enthusiasts	
<b>54M</b>	
Heavy Mobile Users	
<b>36M</b>	
Tech Early Adopters	
<b>35M</b>	
Business Decision Makers	


*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.

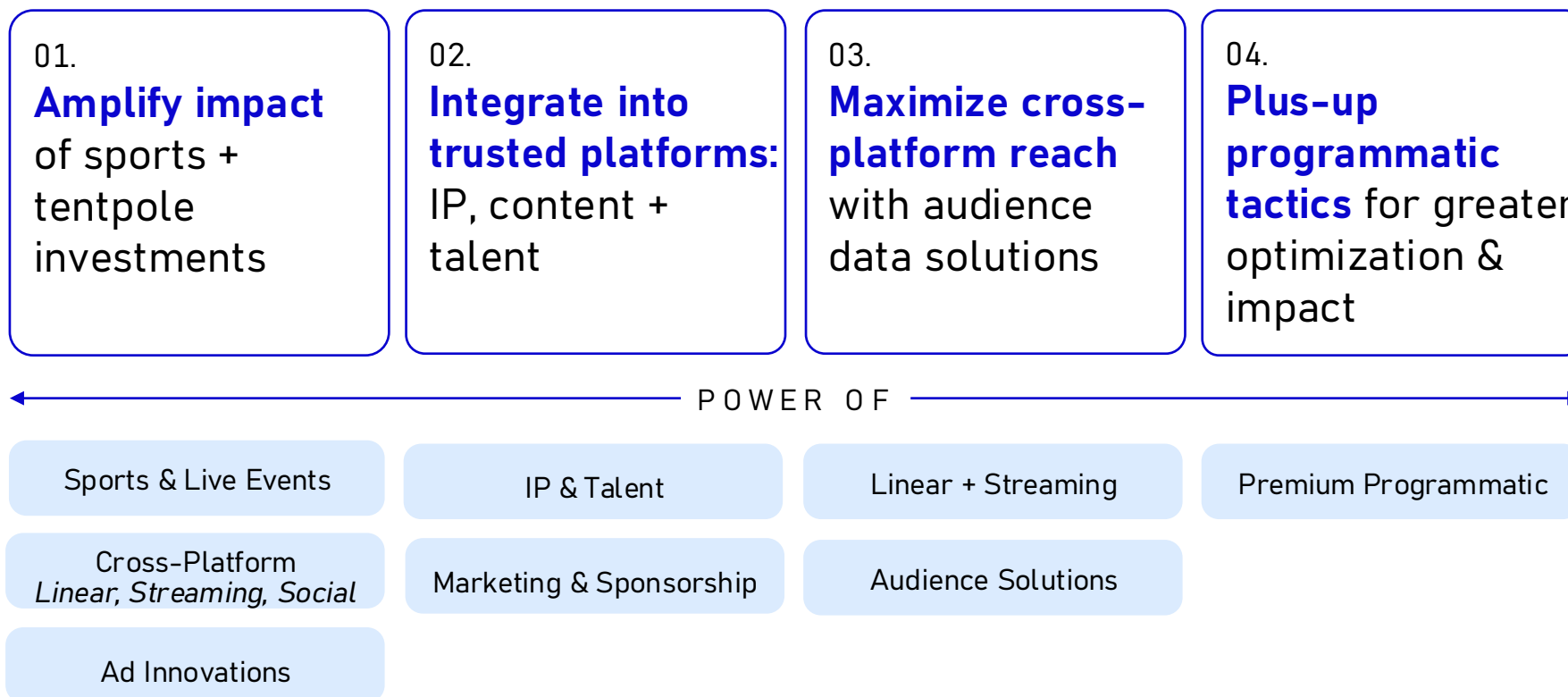
Breakthrough via cultural moments 

Shape perception + sentiment 

Inspire action  
*(sales, time spent, etc.)* 

Increase market share + loyalty 

## NBCUniversal's Tech Playbook



# 01. Amplify impact of sports + tentpole investments

Maximize the value of live programming's ever-growing reach & influence with 360° campaigns

Sources: 1. NBCU Ad Impact Database 4Q23-2025; 2. NBCU Ad Impact Database 2017-2025; 3. Listenfirst. 2024 (1/1/24-12/31/24); 4. Statista, "Social Media and Sports Viewership" (2023)

## Tap into ownership opportunities

NBCU's live programming drives **+67%** purchase intent for Tech brands<sup>1</sup>



### Invest cross-platform

**22x Search Engagement** for NBCU Tech multi-platform vs. single platform campaigns<sup>2</sup>



### Extend impact across social

Live events drive **96B Social Video Views** +43% YoY<sup>3</sup>



### Complement to league, team, or talent partnerships

**47%** of sports fans more likely to watch an event if promoted by an athlete on social<sup>4</sup>

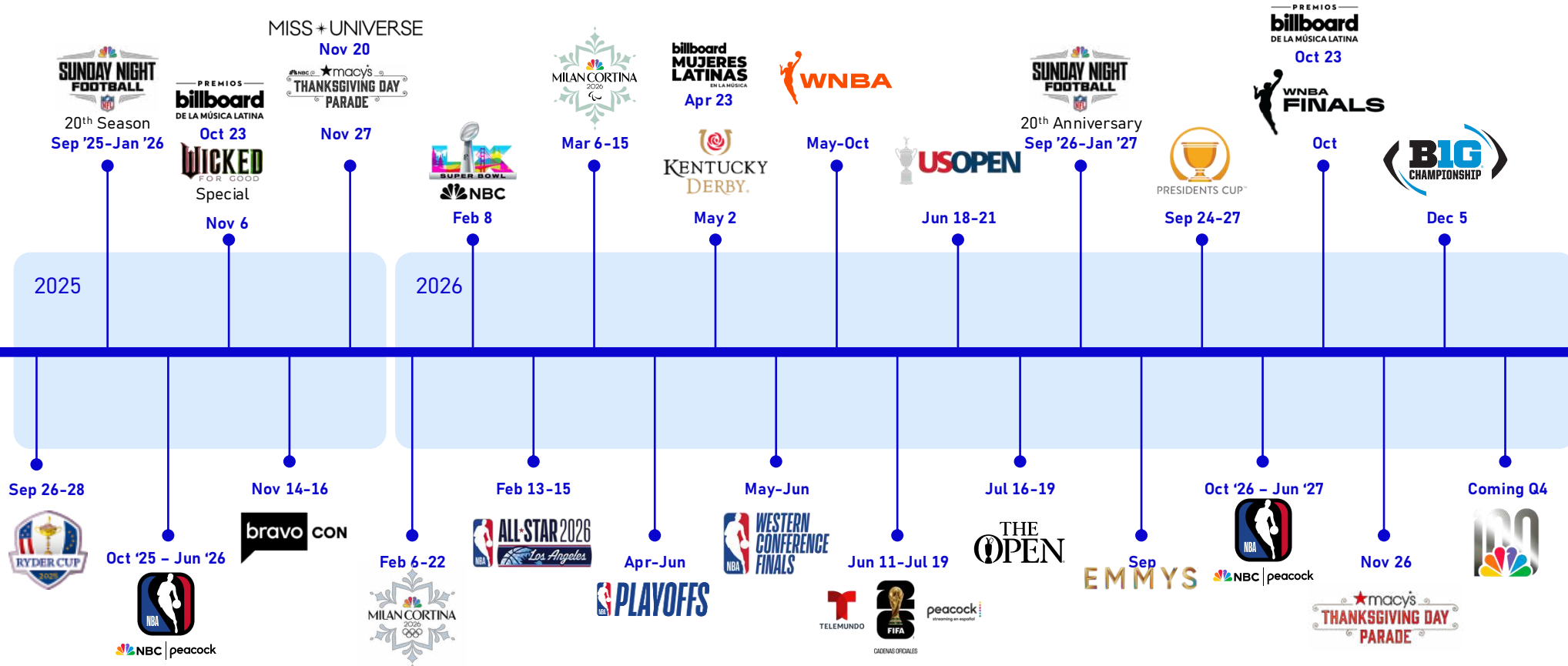


## Measure what matters

- Ongoing campaign reach & frequency
- Brand impact or attribution

# Tap into ownership opportunities

Leverage available exclusivity sponsorships and/or ad units within tentpoles aligning with target audiences & time periods



*Align with new product launches, key shopping periods, & target audiences' top programming*

# Then maximize your tentpole presence across additional tactics



## Invest in Cross-Platform: Live Ad Innovations



Multiview  
with  
Sponsor



Live in  
Browse  
with  
Sponsor



Pause Ad  
on Live



## Extend Impact with Social: NBCU Toolkit

Turn-key ads



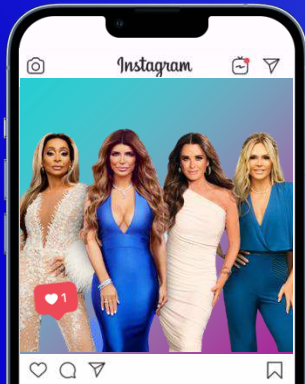
Show & event integrations



Custom content



Franchise sponsorships



# 1.3B

total followers  
across NBCU big 5  
social platforms



## Complement to League, Team, & Talent Partnerships



Samsung Galaxy S25 Ultra x 2025 Met Gala  
E!'s Met Gala CreatorCam Livestream  
sponsorship & fashion designer LaQuan  
Smith partnership



Google Consumer Apps x  
2024 Paris Olympics  
NBCU custom broadcast integrations  
& Team USA sponsorship

## 02. Integrate into trusted platforms

Demonstrate products contextually in fan-favorite programming, differentiate from competitors, & drive brand KPIs

### Measure What Matters

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

## Unique Sponsorship Opportunities



# Best-in-Class Tech x NBCU Showcase

## Proven Impact

Likeability Lifts for Tech

Official Sponsors

**+50%**

Custom Billboards

**+60%**

In-Show Integrations

**+21%**

Source: MediaProbe (more details in notes)

02. Integrate into trusted platforms



## Capitalizing on Humor in Late Night

*Jimmy Fallon Custom In-Show Content & Social Amplification*



## Spotlighting Product via Show Sponsorship

*Love Island USA Official Smartphone Partner & Integrations*



## Demonstrating & Contextualizing Tech Features

*Late Night with Seth Meyers Custom In-Show Content*



## Audience-Targeted Experiential & Thought Leadership

*CNBC Technology Executive Council Sponsorship*



## Building Credibility with Trusted Platforms

*News Brand Studio Custom Content*

## 03. Maximize cross-platform reach with audience data solutions

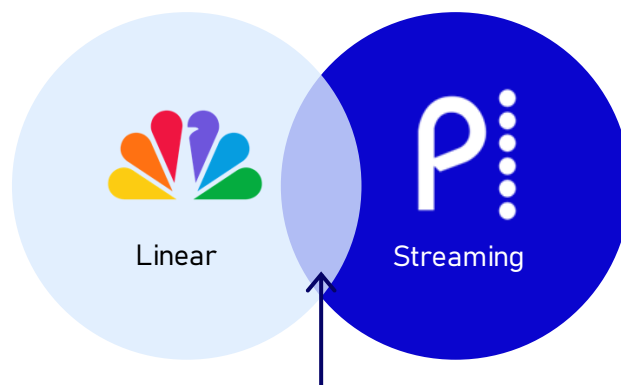
Reach target audiences with the right message at the right time, ensuring strategic, wide, & unduplicated reach

Source: Based on NBCU's in-house audience insights using 1P and 3P data; date range: June 2025; base: HH; Audience segments derived from MRI audience comps from August 2025 Cord Evolution (SP25 USA) study applied to P18+ NBCU Crossplatform Reach.

Leveraging our cross-platform scale is essential to  
**maximize your full-funnel results**

### Tech Enthusiasts

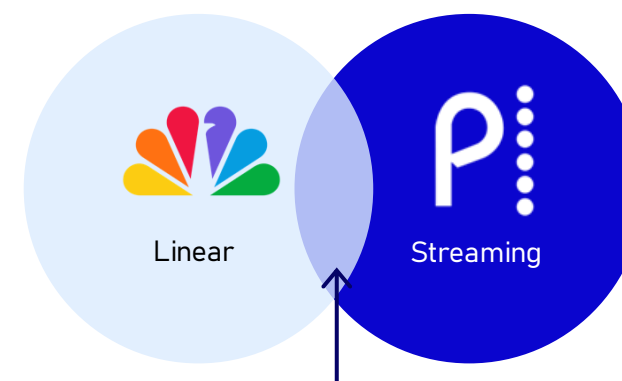
32M Monthly Households



Only **17%** Duplication

### Video Gamers

45M Monthly Households



Only **19%** Duplication

#### Measure what matters

- Incremental & target reach
- Brand recall & familiarity
- Search engagement
- Purchase intent

#### Proven Tech Cross-Platform Impact

<b>+38%</b>	<b>+35%</b>	<b>+10%</b>
Brand Favorability	Message Association	Purchase Intent

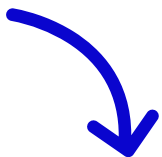
NBCU Multi-Platform Campaign Performance v. Single-platform campaigns (exposed only)

# Future-proof performance & drive incremental reach with **strategic targeting**

0.1 Start with precision

0.2 Extend with scale to NBCU programs proven to over-index

0.3 Capture incremental reach




# 30%

more targetable inventory, which means **maximum reach for your audience-based campaigns**

## Indexing

## 1:1 Audience Targeting

Example



Tech Early Adopters  
**36M**  
U.S. HHs

NBCU O&O footprint



Titles from...



All devices, incl.



# 04. Plus-up programmatic tactics for greater campaign optimization & impact

## Why NBCU programmatic for Tech

Our premium programmatic experience is designed to address Tech's media-buying preferences & priorities as product launches, campaigns, KPIs, & budgets shift in real-time

Premium content & environments

Flexible options & easy activation

Huge in-demand audience reach

Addressable omnichannel delivery

Full funnel impact & transparent real-time reporting

## NBCU programmatic activation paths

Flexible activation across PG and PMP

**peacock Premier**

Peacock only

**peacock AX**

Peacock + core digital video  
(NBCU's TVE apps, NBCU streaming on MVPDs/vMVPDs)

**NBCU Streaming**

Core digital video  
(NBCU's TVE apps, NBCU streaming on MVPDs/vMVPDs)

**Live Sports**

Sunday Night Football, NBA, Olympics, B1G Football, Notre Dame, Olympics, Premier League, Golf and many more...

# Opportunities to enhance programmatic buys across NBCU's premium programmatic portfolio

## Live Sports & Events



PEOPLE'S  
CHOICE  
COUNTRY  
AWARDS

**BIG  
BASKETBALL**  
peacock|



PREMIOS  
**billboard**  
DE LA MÚSICA LATINA

THE  
KENTUCKY  
DERBY

**LIVE  
FROM**



PEOPLE'S  
CHOICE  
AWARDS

## Curated Content Packages

Popular on Peacock

ex. the office loveisland USA YELLOWSTONE

Peacock Shows

ex. VOICE POKER FACE Real Housewives

Peacock Films

ex. LOVE HURTS WICKED

NBCU Shows/Networks

ex. NBC Bravo E

Peacock Top 10 Rail

ex. Top 10 Shows or Movies Today

Premium Live Events

ex. CHRISTMAS IN ROCKEFELLER CENTER PREMIOS billboard DE LA MÚSICA LATINA LIVE FROM

## Contextual Targeting

Drive authentic connections and actions by aligning your brand messaging with positive, brand-suitable moments with new contextual solutions powered by AI

### Custom contextual

via direct IO and PG  
Align your brand's creative cues with key moments in premium NBCU content to boost relevance and drive action.

### Emotional alignment

via direct IO and PG  
Build connections by aligning your brand's emotional tone with key moments in premium content

## Programmatic-enabled Commerce Innovations

PMP with upfront investments

Burned-In Ad

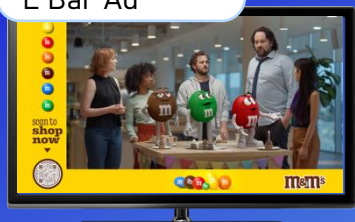
Immersive Ad

Canvas Ad

Canvas Carousel Ad

PG deals

L Bar Ad



## Retail Media



Automated access to NBCU programmatic streaming, including live sports and tentpoles, reaching Walmart Connect's high-value consumers with full-funnel outcome measurement



Tech  
Impact at  
**NBCU**

WEEKEND UPDATE WEEKEND UPDATE WEEKEND UPDATE  
**A DRONE**



# Tech

## Proven impact across client KPIs

NBCU Tech Campaigns – Test vs. Control

### Upper Funnel

Unaided  
Brand Recall  
**+21%**

Aided Ad  
Recall  
**+20%**

Brand  
Familiarity  
**+12%**

### Mid Funnel

Avg. Search Engagement Index  
**169**

Message Association  
**+13%**

### Lower Funnel

Consideration Intent  
**+14%**

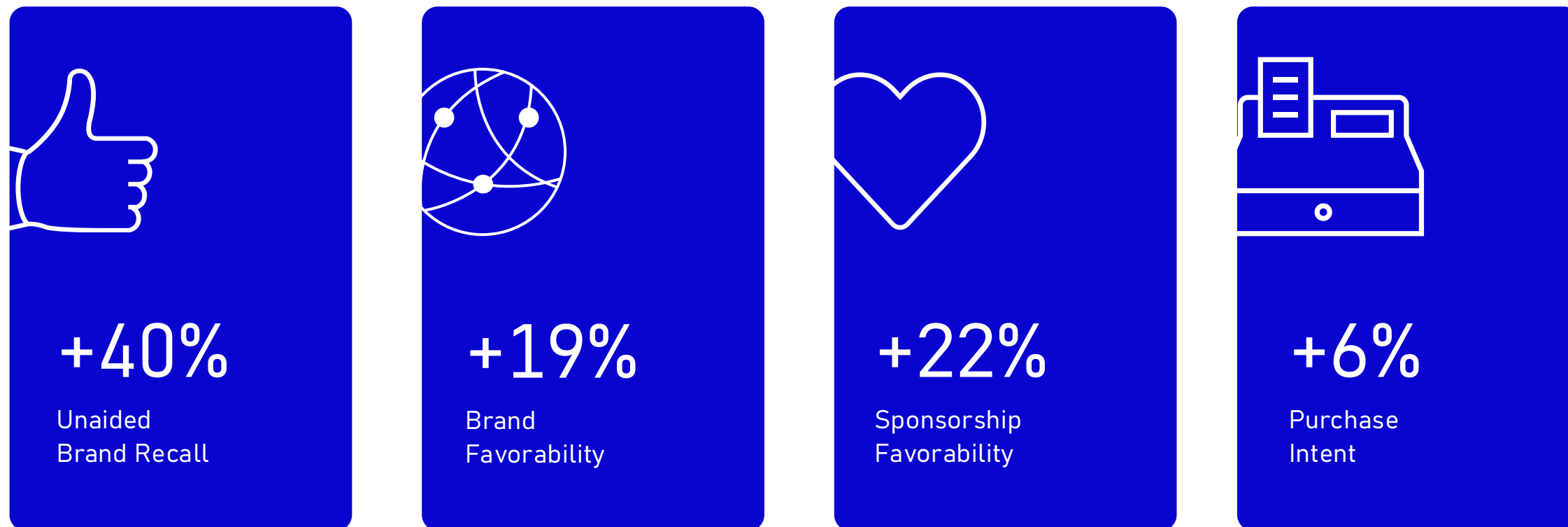
Purchase Intent  
**+19%**

Recommendation Intent  
**+10%**

# Tech

## Campaigns across more than one platform are more effective

Tech Category NBCU Campaigns: Multi-Platform vs. Single Platform % Lift

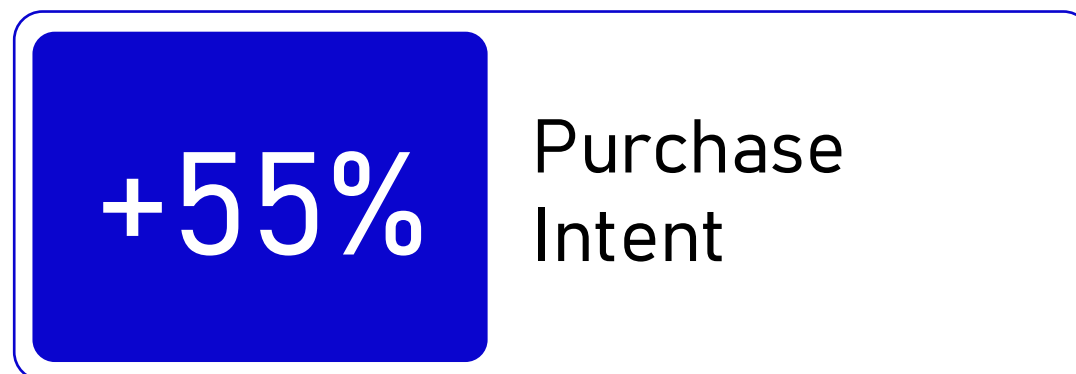
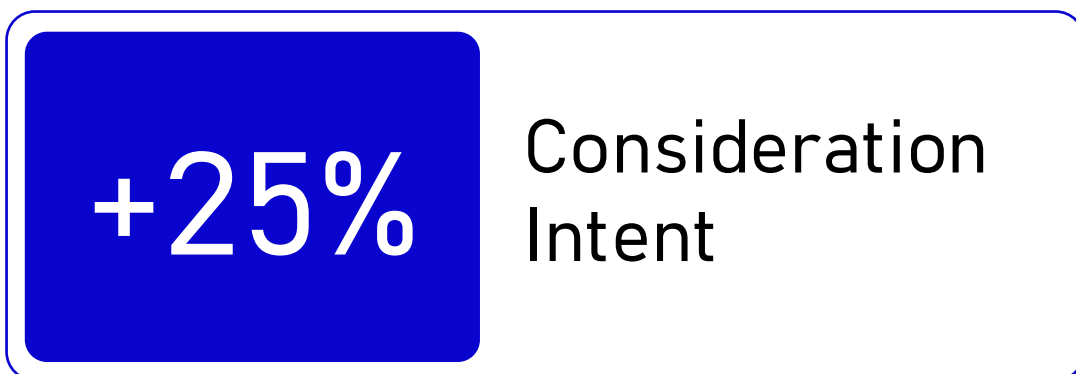
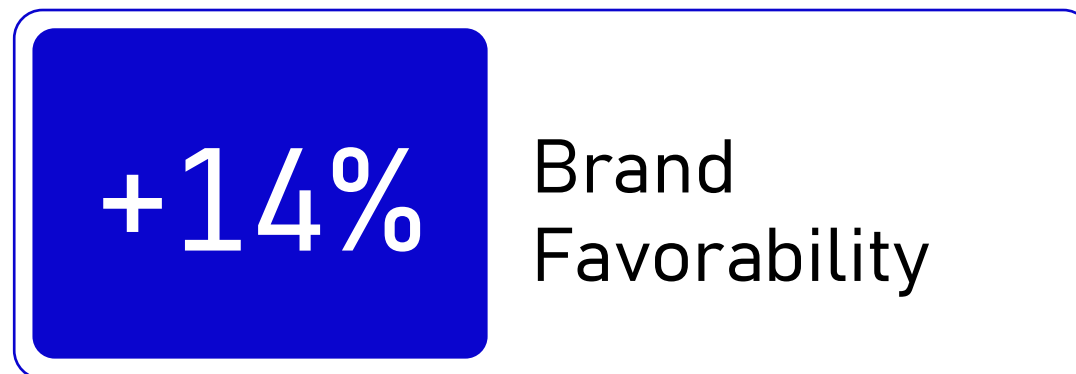
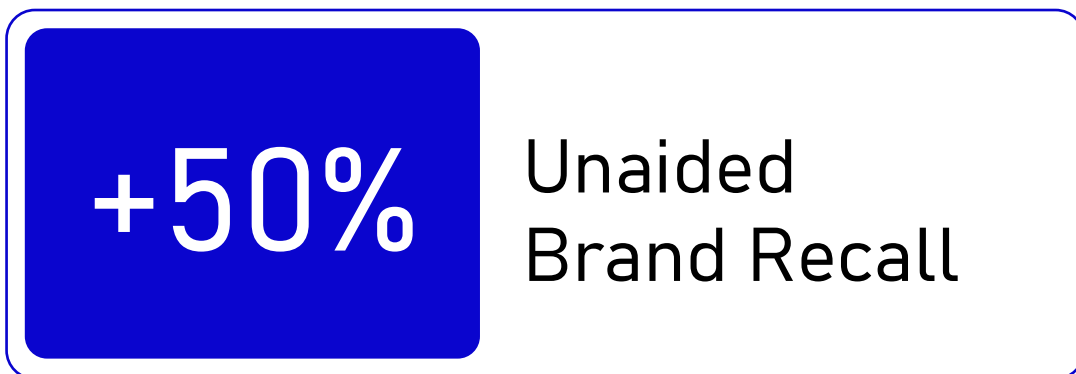


Source: NBCU Ad Impact Database 2017-4Q2025, 125 Single Platform Campaigns v. 71 Multi-Platform Campaigns  
Custom research, vendors vary. Average of test cells for 2+ platforms vs. single platform campaign

# Tech

## Proven **Peacock** impact across client KPIs

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



Source: NBCU Ad Impact Database 2020-4Q2025, 65 Campaigns across 24 Brands Peacock measured Tech campaigns Custom research, vendors vary. Average of exposed vs. control cells for NBCU. Top 2 box

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

	Buy Side Activation	Clean Rooms	NBCU Measurement Opportunities (Sell-Side Measurement)
Awareness	✓		Brand Lift Study <i>Ad Recall</i> <i>Brand Sentiment</i> <i>Product Consideration</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:**

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

\*Requires client to permission data  
Vendor partners are a sample



# Tech Case Studies

# Tech x NBCU Olympics Case Study

NBCU's collaboration with a technology company brought the Paris Olympics to life for millions of viewers



**16.4M**  
social delivery **total**  
impressions

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**13M** total **linear** impressions

**9.7M** total **CNBC Custom Content**  
**Digital Media** impressions

## Tech x NBCU Web Attribution Case Study

Technology provider saw increased response rate from business executives over time thanks to NBCU's web attribution



**4.0%**  
avg. response rate

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**283K** attributed web visits

**52%** of responses came within the first two days after the ad was served

## Tech x NBCU Data Targeting Case Study

Combined tech brand's customer data with NBCU 1p data to apply unique behavior-informed targeting, ultimately driving conversions

# 2x

**better efficiency**  
vs. other publishers

(same conversion rate in half the time)

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# Tech Category Resources

# Tech 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



### B2B Toolkit

Deep dive into B2B dynamics & audiences plus NBCU solutions & recommendations

## Thought-Leadership & Insights



### The Future of Advertising

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



### NBCUniversal Masterclass

How NBCU invests in cultural strategy & builds for connection/engagement



### Gen Z

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

# Tech Playbook

NBCU Tech Category  
Strategy Team:

Dominique Folacci  
Nicole Lee  
Savannah Stephens

