

NBCUniversal



TECH **2025 YEAR IN REVIEW**

Industry *Highlights* & Media Trends

as of March 2026

Agenda

1

Tech Landscape

Current Landscape & 2025 Media Trends

2

Tech @ NBCU Update

Media Trends, Creative Showcase

3

Tech Upcoming Opportunities At NBCU



Current **Tech** Category Dynamics

AI continues to redefine category priorities, driving challenges and momentum in equal measure

Headwinds



Persistent tariff & supply chain concerns as companies mitigate risk & cost¹

Operational efficiency pivots resulting in layoffs & talent gaps²

Continued heavy AI CAPEX pressuring profit margins³

Ongoing regulation & AI wariness impacting category perception^{2,4}

Tailwinds



53% of S&P 500's total 2025 return driven by top tech stocks thanks to AI progress⁵

Surging demand for AI hardware innovation, ex. chips & consumer electronics⁶

Projected revenue & adoption growth for B2B AI-powered software/applications⁷

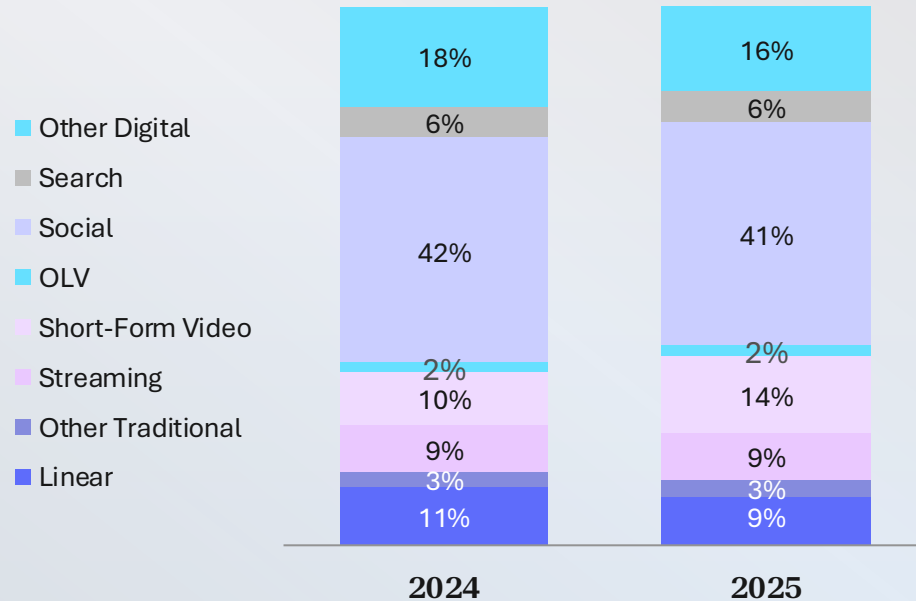
Strong 2026 investor preference despite potential AI slowdown concerns⁸

Tech Marketplace Spend

The category continues to favor digital performance channels, extending budgets across short form, & social

Telco Category Media Mix

Share of Spend, in %



Traditional vs. Digital % Split 2024 2025

14% / 86% 12% / 88%

Total Spend

+7% YoY

Driven by digital (+9%)

Social

+6% YoY

Maintained #1 media subtype share ranking (41% of total spend)

Streaming

+8%

Accounting for 10% of digital spend & 9% of total dollars

Short Form

+53% YoY

Largest \$ increase vs. STLY & 2nd highest media subtype share (14%)

TECH NBCU SPEND

2025 vs. 2024

NBCU Tech partners are prioritizing audience reach at scale via premium, fan-favorite content and efficiency for brand love and credibility, particularly with AI messaging



LINEAR

budgets expanded as brands tapped into mass reach tentpoles to drive positive affinity via fan favorite programming

+36%

Linear

+63%

Broadcast Ent.

+40%

Sports



ADVANCED

buying methods gained maintained momentum as brands prioritized data-driven placements & flexibility

+34%

Total Advanced (DDL, Aud IO, Prog.)

+91%

Programmatic



STREAMING

remained key for reaching engaged audiences at scale as brands leaned into fan-favorite/premium content & efficient reach

+52%

Total Streaming

+59%

Peacock Premier

+44%

Peacock AX



AD INNOVATIONS

gained additional momentum as brands activate high impact formats to capture attention on streaming

+83%

Ad Innovations

+101%

Pause Ad (28% share)

Creative & Innovation

Across The Marketplace & NBCU

Marketplace



SNL's Bowen Yang & Colin Jost x Zoom

Channeling "1984" & Apple TV's "Severance," Zoom staged a satirical workplace rebellion campaign to position its platform as intuitive, simplified, and AI-forward

NBCU Spotlight



On Brand with Jimmy Fallon x Samsung

Samsung powered the creativity of the inaugural season's contestants via connected ecosystem of display monitors, smart TVs, and Galaxy mobile devices

SAMSUNG

NBCU Spotlight



CNBC and Sunday Night Football x Cloudflare

To reach CTO/IT and Tech Decision Makers, Cloudflare sponsored CNBC's cybersecurity segment and activated a livestream L-Bar overlay during Sunday Night Football

CLOUDFLARE

2026 **TECH** Predictions



These are **4 key topics** as the category continues accelerating innovation, especially around AI, to drive market share, adoption, & positive affinity in today's competitive landscape.

Prioritizing AI Search Over AI Hype

AI-generated search use & Generative Engine Optimization (GEO) strategy continues to grow at the expense of traditional search & SEO.

Tech brands will amplify their digital brand presence through mass reach & mass buzz tactics to maximize their appearance within AI search results.

75%

of AI users depend on AI-driven recommendations daily or weekly.¹

Gen AI Marketing goes Mass Appeal

In 2025, gen AI brands branched into upper funnel marketing, such as OOH & premium video brand campaigns.

Given that trajectory & the competitive AI race, gen AI will graduate to splashier marketing (ex. experiential & sponsorships) to capture wider mindshare & associate with consumer passions.

3x

growth in linear marketing spend by AI brands in Q4'25 vs. STLY.²

The More Micro, the More Impact

For connection, audiences are increasing gravitating toward niche, community-driven spaces over mass-market, generic content.

Tech will leverage their data & AI to better understand, reach, & engage multiple audience segments with specific messaging that authentically speaks to each segment's interests & needs.

88%

of American participate in niche communities with half preferring brands that cater to specific passion points.³

Humanizing Over Optimizing

As the world becomes increasingly efficient from AI & tech, there's a corresponding, growing desire for greater human connection, trust, & transparency.

Within campaigns, tech brands will balance utility messaging with more human-centric storytelling to grow trust & positive perception.

70%+

of consumers still value human assistance within gen AI-driven customer journeys.⁴

NBCUniversal

A close-up photograph of a person's hand holding a futuristic, glowing blue and purple device. The device has a circular, globe-like interface with a grid pattern and a bright light source. The background is a bright, out-of-focus white and blue gradient.

THANK YOU

NBCU Tech Category Strategy Team:

Dominique Folacci, Nicole Lee, Savannah Stephens