

NBCUniversal

MARCH 2024

Luxury & Streaming



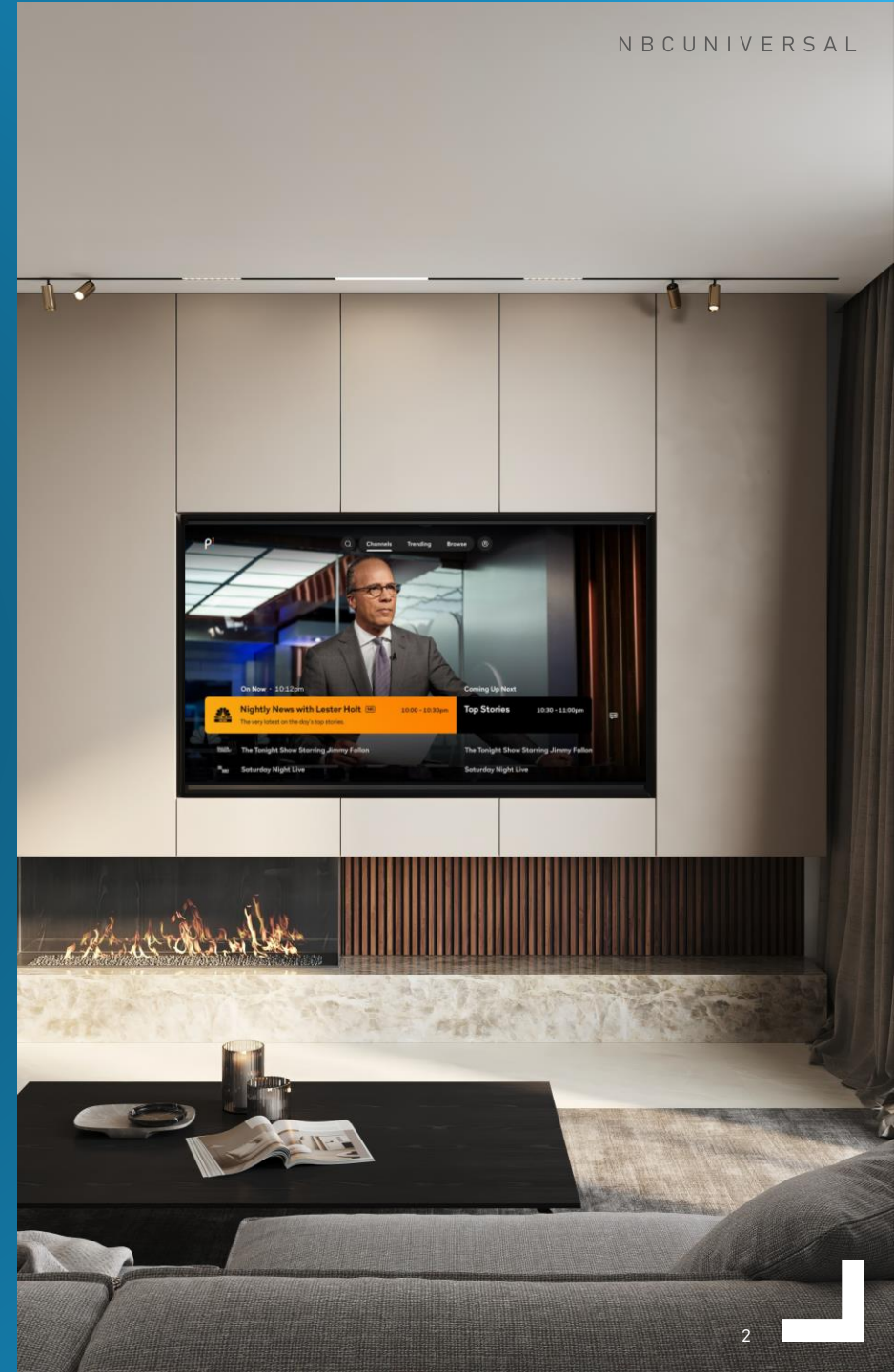
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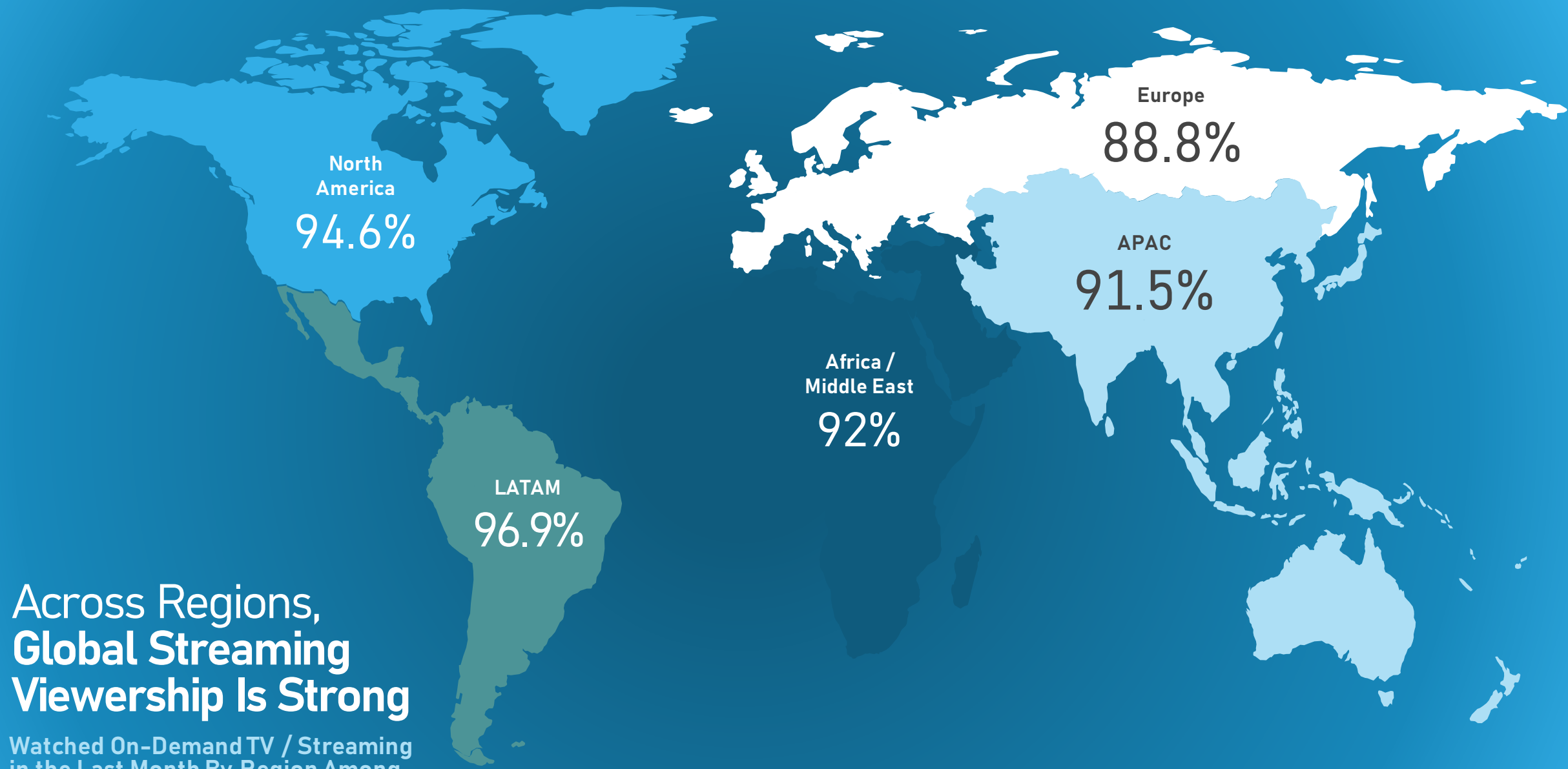
3 Key Areas of Focus

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,

95%

of HHs (123M) **subscribe to at least one service**, a near total market saturation¹

& Did You
Know?

Adoption Is High Among Adults

~80%

CTV viewer penetration in 2024 for A25-54³

Who Are Spending More Time Viewing

+11%

increase in time spent streaming in '23 vs. '22²

And Making The Switch To AVOD From Ad Free

14%

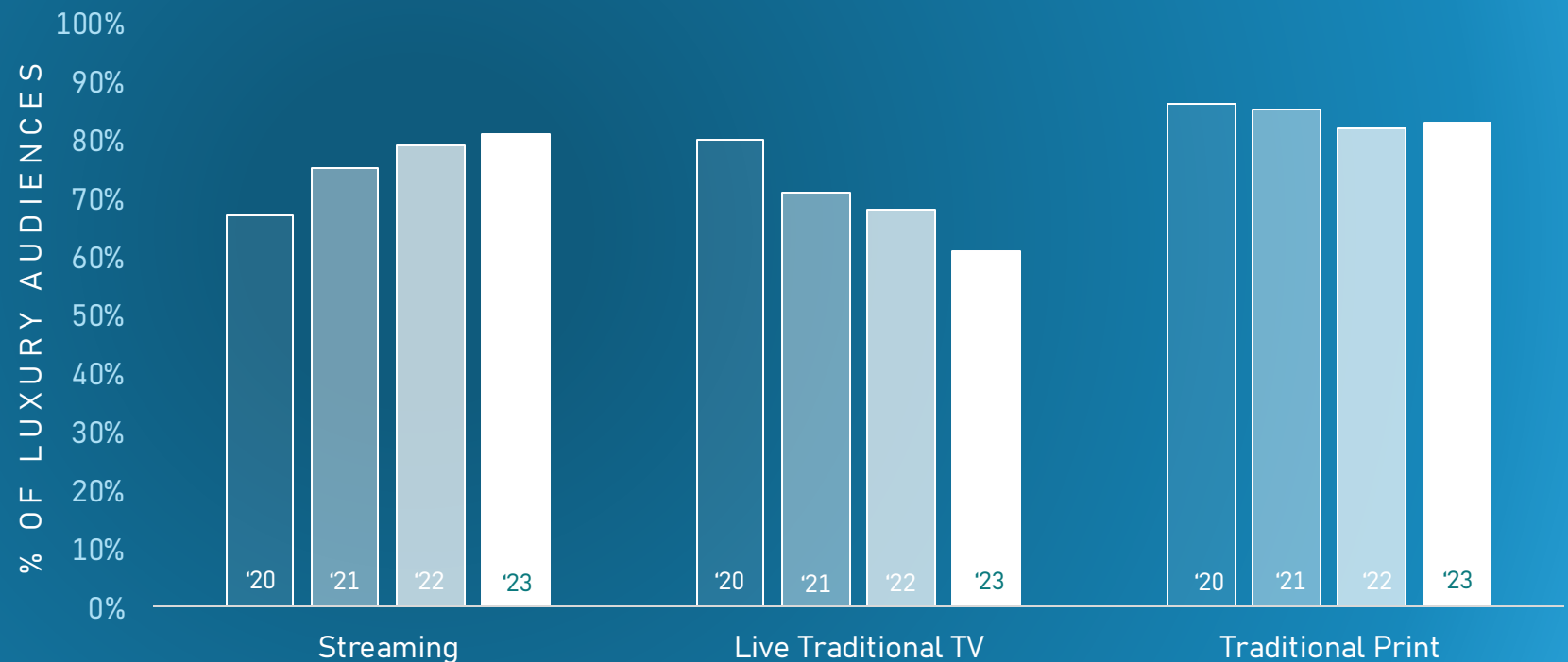
of viewers switched to AVOD in '23, highest among younger gens

Luxury Audience Media Behaviors Are Continuing To Evolve

Streaming
viewership
surpassed Linear
TV and continues
to grow

Print readership
remains strong

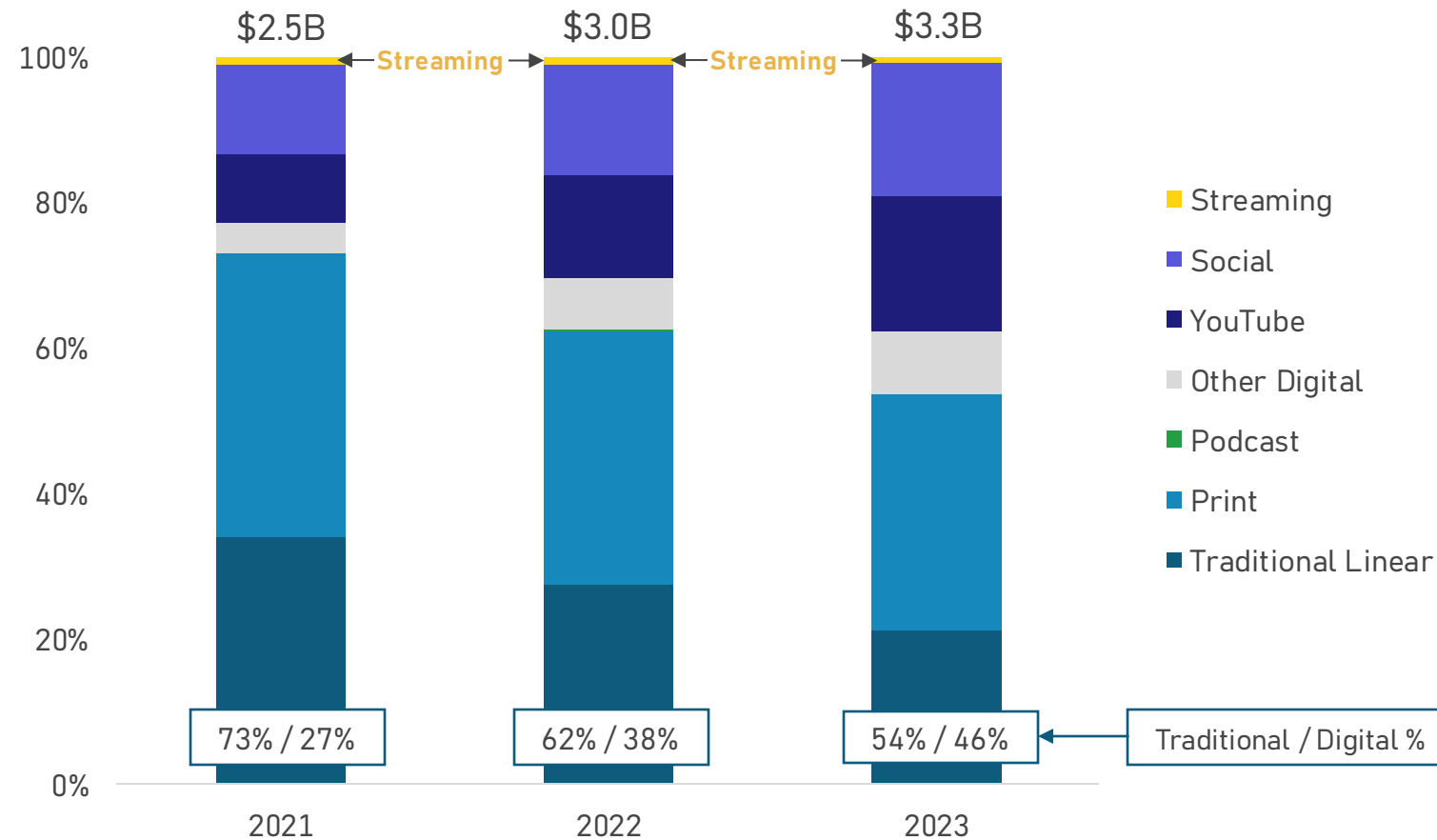
Luxury Audience Media Consumption 2020 - 2023



Yet A Disconnect Exists Between Behavior And Spend

Luxury Industry Media Mix

2021 - 2023



Source: MediaRadar, Luxury Brands, 2021-2023

Print is seeing slight declines in share, though remains the top channel for luxury, while the emphasis on streaming is slow to catch up with consumer behavior

35%

Avg. Print SoS

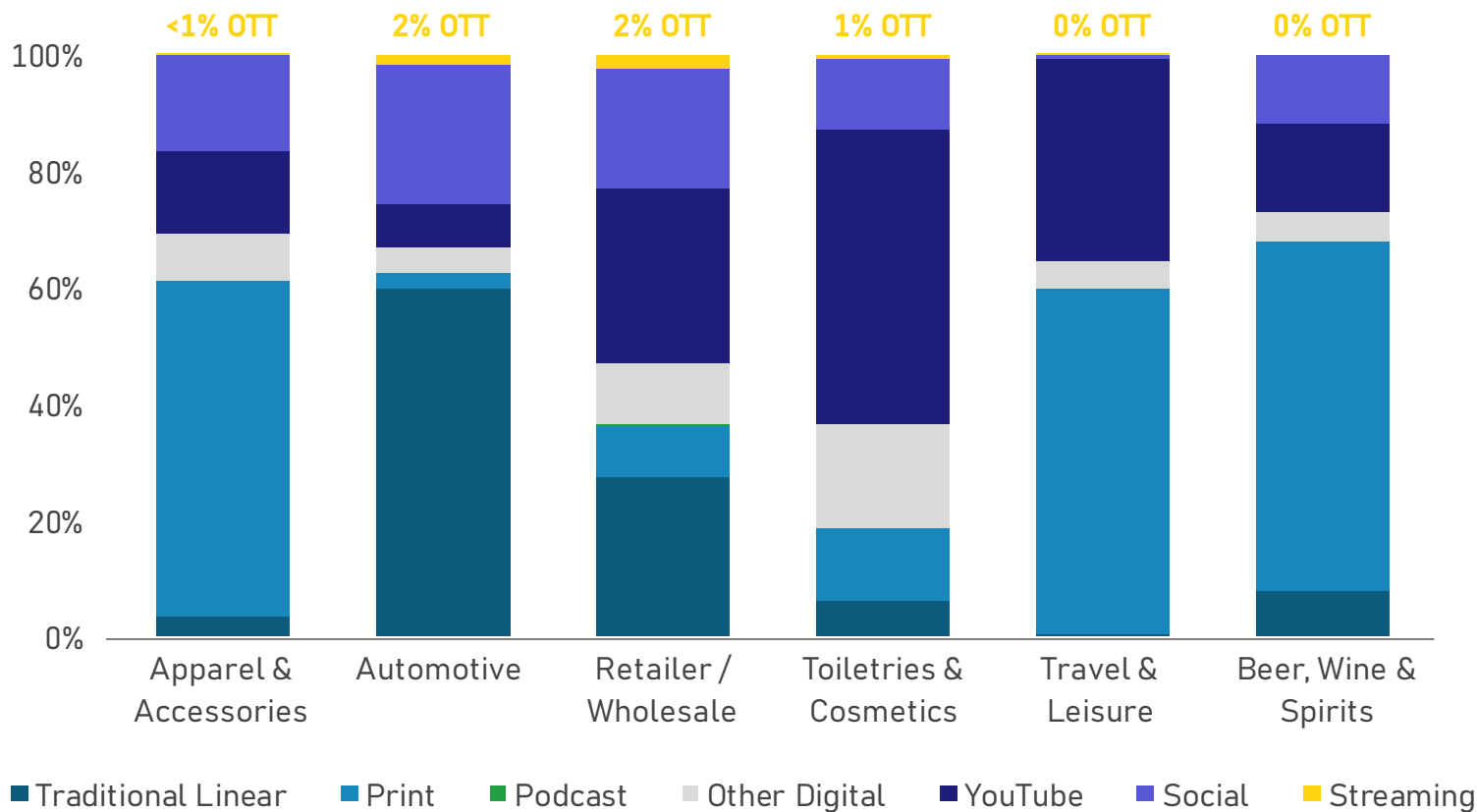
1%

Avg. Streaming SoS

Most Luxury Subcategories Are Slowly Making Room For Streaming In Their Media Mixes

Top Luxury Subcategory Media Mix

CY 2023



Source: MediaRadar, Luxury Brands, 2023

Top Channels

By Luxury Level

Ultra High-End



Print
84%

Super Premium



Print
61%



Social
17%

Core Luxury



Print
40%



Linear
26%

Affordable Luxury



YouTube
39%



Social
22%

Print & Streaming Can Offer Similar Experiences For The Luxury Audience

And both are needed to connect with brand loyalists *and* the next generation of buyers



Print Will Never Go Out Of Style

Luxury audiences are
44% more likely* to trust magazines
more than any other medium

*compared to gen pop

Authentic

Integrated into context, disruptive
to capture attention

Curated

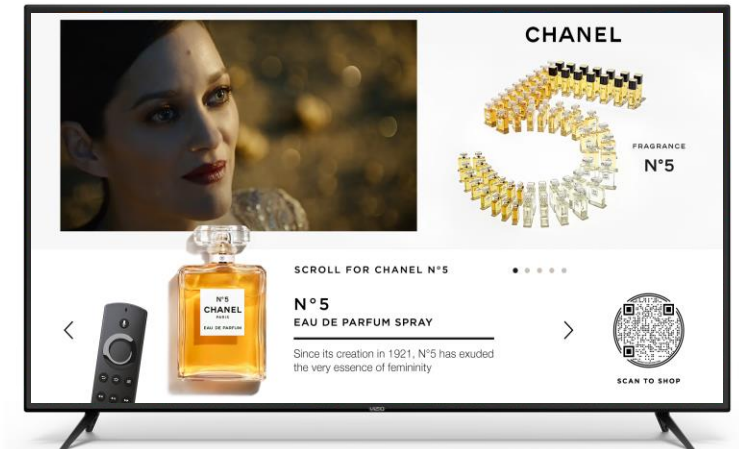
Message is tailored for the audience

Immersive

Evokes an all-encompassing feeling

Premium

High production quality,
conveyed through imagery



Streaming Is A Great Accessory

Luxury audiences aged 18-24
are **20% less likely*** to agree
that ads in magazines are interesting

*The audience is **25% more likely*** to say
the ads they see on streaming services are
relevant to them*

*compared to total Luxury Audience (all ages)

What Draws Them To The Streaming Experience

Unpacking the Luxury Audience's Motivations & Attitudes Towards Streaming



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

50%

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

11%

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



37%

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



82%

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

85%

like that streaming services have **fewer ads / commercials**

13%

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

39%

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

40%

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

39%

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

DID YOU KNOW?

More luxury buyers subscribe to AVOD than SVOD services

Both AVOD & SVOD streaming are on par with gen pop

86%

used an **ad-supported** streaming service in past 30 days (102i)

80%

used a **non-ad-supported** streaming service in past 30 days (103i)

And the leader for ad-supported streaming



Peacock Makes A Mark

JAN 15, 2024

CNN

The Chiefs-Dolphins game on Peacock was the most-streamed live event in US history

FEB 21, 2024

VARIETY

'Oppenheimer' Surpasses 'Super Mario Bros. Movie' as Peacock's Biggest Ever Launch for a Pay-One Film

MAR 20, 2024

Broadcasting+Cable

Peacock's New 'Apples Never Fall' Tops TVision's Power Score Rankings



Did You Know?

87%+

of Peacock users can't be reached by ads on Netflix, Disney+, or Max



peacock ORIGINAL
ORLANDO BLOOM
TO THE
EDGE

SUITS: LA

FALL
GUY

TOUR
de
france

SATURDAY
NIGHT
LIVE

MISS
UNIVERSE
NICARAGUA

CLOSING
BELL

We Have It All

Peacock
Originals

Current
TV

Exclusive
Films

Major
Sports

Live
Events

Spanish
Language

Timely
News

60+ Titles

NBC/Bravo
Next-Day

30+ Universal
Pay-One/Day &
Date Films

20+ Leagues
Covered

SNL + Tentpole
Events

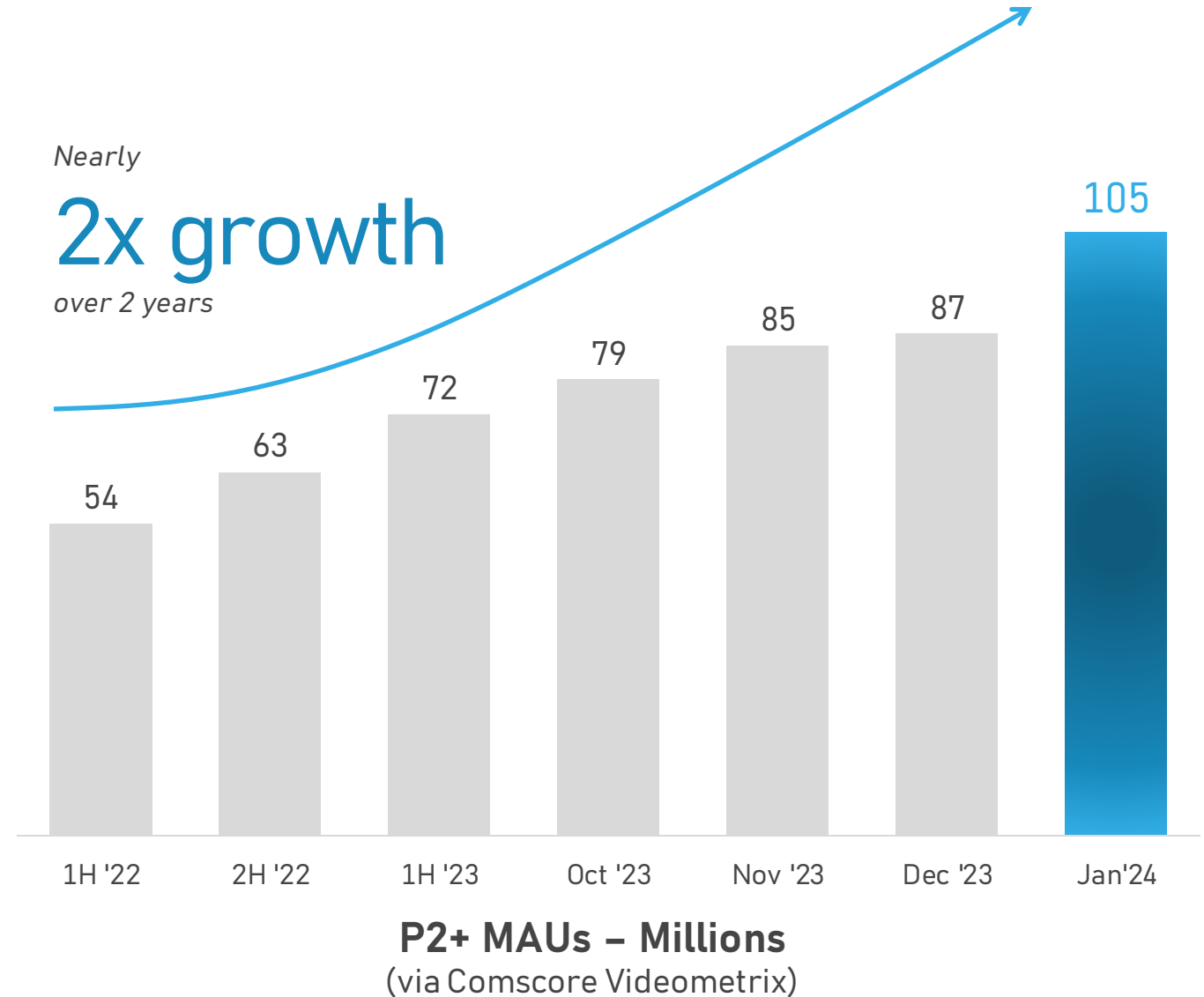
Thousands of
Hours of Content

Local, National
and Global



More People
Are Watching Than
Ever Before

Source: Growth Graph: comScore Video Metrix Multiplatform, Jan '22 – Jan '24, includes all Peacock distribution points, based on U.S. Only.; Sign-ups via Antenna



The Luxury Audience Streams Peacock's Content Across Genres

Entertainment and Sports are on par with gen pop; News over-index



Sports
103i



Entertainment
103i



News*
138i

Note: Audience definition in Notes.
Source: MRI-Simmons Cord Evolution Study, November 2023. Indices refer to luxury audience streaming on Peacock Premier (ad-supported). *Reflects Peacock AX (inclusive of Peacock Premier)

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

Binge-Worthy Indulgence

THIS IS US 30 ROCK **Parks + Recreation** **SUITS** **E! NEWS**

MILLION DOLLAR LISTING **THE TOP CHEF** **The Real Housewives** love island

Summer House **BELOW DECK** **SOUTHERN CHARM** **VANDERPUMP RULES**

Reality
Entertainment
Comedy
Drama
Food

Endless Choice, Endless Cheering

Sports
Sports Talk
Track/Field

ROLAND GARROS **Premier League** **NBC OLYMPICS** **THE OPEN** **FIFA** **U.S. OPEN**

PRESIDENTS CUP **PGA TOUR** **MASTERS** **JOE FRONCE** **THE PLAYERS**

GOLF CENTRAL **NFL** **THE KENTUCKY DERBY** **ND** **MLB**

Paris to Love **THE TRAITORS** **SHARK TANK** **SATURDAY NIGHT LIVE**

bravo CON **MISS + UNIVERSE** **POKER FACE** **TÁR**

WATCH WHAT HAPPENS LIVE with Andy Cohen **Mrs. Harris Goes to PARIS** **WHITE HOUSE CORRESPONDENTS' DINNER**

Reality
Specials
Movies

Originals & New Releases, First in Queue

News
Finance
Tech

morning joe **DEADLINE: WHITE HOUSE** **CLOSING BELL** **FAST MONEY** **DATeline**

MEET THE PRESS **MAD TECH** **THE RACHEL MADDOW SHOW** **HALLIE JACKSON REPORTS** **MONEY @ COURT**

TODAY **SQUAWK BOX** **NBC NEWS NOW** **POWER LUNCH** **EXCHANGE** **SQUAWK ON THE STREET**

Remote Control, Staying Informed

How Peacock Delivers The Luxury Audience *For You*

peacock

Reaches

14%

of the
Luxury Audience

VS.

NETFLIX
13%

Paramount+
12%

max
7%

How Peacock Delivers For The Luxury Audience

WHAT THEY WANT

WHAT PEACOCK HAS

Movies that were in theaters
make a streaming service more valuable¹

48M viewers
watched Pay 1 and Day & Date films on Peacock in Q4'23²

TV shows, movies, or videos that are
only available through streaming¹

Peacock's exclusive and original titles include
30 Rock, Poker Face, & The Traitors²

Large selection
of TV shows, movies, and videos that streaming offers¹

95k+ content hours
across Originals, Major Sports, Live Events,
News, Spanish Language, and more²

Fewer ads / commercials¹

Less than five minutes of ads
per hour of content, which is 1/3 the ad load of linear TV²,
compared to Hulu (7-7.5 mins), Paramount+ (>7.5mins)³

Sports content¹

300+ exclusive hours
of sports coverage (e.g., MLB, EPL, Olympics)²

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

With your audience based on their needs and expectations.

e.g., audience targeting, leveraging your data and ours

02.

Centering Around Premium Environments

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

e.g., thematic collections

03.

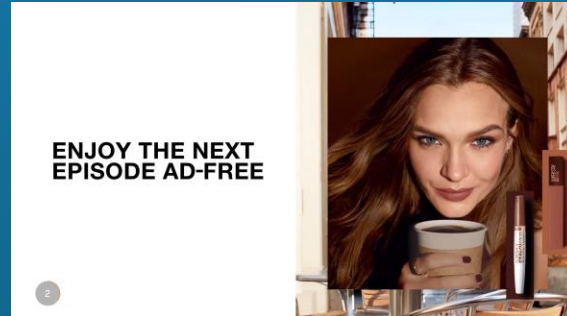
Crafting Immersive Experiences

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

e.g., ad innovations

Crafting Immersive Experiences Through Ad Innovations

Pristine, clean, premier relevant environments, curated for Luxury



Binge Ad

Be the *exclusive sponsor* of an ad-free viewer experience, rewarding viewers with an ad-free episode when they have watched 2 episodes in a row of the same show

+17% Message Memorability vs. Midroll



Solo Ad

Be the only advertiser of an episode through exclusive sponsorship, which includes a short intro and your Solo Ad midroll

+57% Content Hours Per Visit vs. Visits w/o Solo Ads



Pod Bounce

Be the only brand in the first break of an episode offering an ad free break, with the option of being the exclusive advertisement in the second break

+21% Brand Memorability



Engagement Ad

Be the focus of the audience's attention with interactive experiences that encourage action and fuel discovery

+59% Total Interaction Rate



Pause Ad

Greet viewers when they are taking a break with the first pause ad they see, offering an unobtrusive and high-impact experience

+13% Likeability vs. Standard Midroll

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**

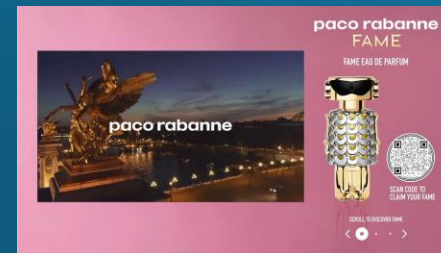


Spirits

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**

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

NBCUniversal

Thank You

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