



Travel Playbook

Airlines, OTAs & Websites, Cruises, Hotels & Lodging,
Destinations & Tourism, Rideshares

Travel Playbook Overview

Explore NBCUniversal's latest perspectives & insights into the Travel industry

Our Approach

At NBCUniversal, we have a legacy of working with a diverse range of Travel partners to build their brands & businesses. In 1H '25, NBCU worked with 150+ Travel advertisers across the below sub-categories.



This playbook has been created based on NBCU's:

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

Travel Playbook Contents

An Overview

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

Marketplace Dynamics



Media Trends & Observations



Brand & Business Imperatives



NBCUniversal Playbook





'25 Travel Industry Dynamics

Travel consumer intent remains strong despite macro pressures; Experiences, affluent demand, and AI personalization sustain growth



Headwinds

- **Economic uncertainty**
is prompting consumers to tighten their budgets, hindering growth in the mid-market¹
- **Business travel recovery lags**
as a result of corporate cost-cutting and virtual options, hindering full recovery of business trip volume, while spending is up²
- **Geopolitical tensions and policy shifts**
are creating uncertainty, impacting international and inbound tourism and US dollar purchasing power for international trips³
- **Elevated operating costs and persistent labor issues**
from rising fuel prices, supply chain issues and labor shortages keep operational expenses high for travel providers⁴

Tailwinds

- **Americans have an “always on” travel mindset**
fueling a strong desire for more frequent trips and driving continued spending growth⁵
- **Shifts towards sustainable & experiential travel**
as travelers prioritize eco-friendly accommodations and immersive experiences⁶
- **Resilience among affluent travelers**
fueling growth from luxury travel, wellness tourism, premium accommodations and experience-led travel (sports, cultural)⁷
- **AI-powered personalization**
is enhancing trip planning, booking, and in-destination experiences, offering seamless and tailored journeys

Brands across travel sub-categories are
evolving to meet shifting consumer lifestyles through innovation, personalization & immersive experiences

OTAs & Websites	Cruise Lines	Hotels & Lodging	Airlines	Destinations & Tourism
OTAs continue to grow, driven by mobile-first and AI-powered planning. To compete, brands are rolling out gen-AI tools for personalized recommendations and seamless booking, and expanding into fintech, loyalty, and curated experiences.	Cruises are rebounding with strong early bookings and better visibility. To attract new audiences, lines are expanding themed itineraries, immersive experiences, and using advanced on-board tech for personalization and guest satisfaction.	Brands are focusing on experience-driven stays, wellness, and personalization . 'Soft travel' concepts such as sleep tourism, mental health, and self-care are popular. Tech-enabled amenities are key differentiators.	Airlines are facing cost pressures but are investing in customer experience, loyalty programs, and streamlined operations. Premium economy is growing , and ultra-basic long-haul options are expanding for budget-conscious travelers.	Destination marketing is increasingly driven by experience-driven storytelling. "Set-jetting," is inspiring travel to locations from film and TV , while travelers also favor "dupe" destinations —uncrowded, authentic alternatives for cultural immersion.
62% of U.S. travelers are using AI travel tools on OTAs and travel websites ¹	63% of cruisers reported taken river and adventure cruises emerged as the most popular cruise formats in 2025 ¹	1 in 5 of travelers making trips for self-discovery/mental health in 2025 ³	72% of travelers say they are very likely to book a premium airline seat for a leisure trip in the next 12 months ¹	3 in 5 travelers discover destinations via entertainment content ⁴

Marketplace Travel Media Trends To Watch

Travel brands and destinations are balancing their advertising strategies to build long-term brand equity while simultaneously driving short-term performance and bookings

Sports Wins Dollars



47%

of Linear spend in 1H '25 was in Sports, **growing +14%** from 36% in 1H '24 as brands leverage the power of live events to reach and engage mass audiences

The Future is Streaming



49%

of travel's premium video spend in 1H '25 was on streaming, 4ppt increase from 1H '24

Streaming spend is projected to grow by 21% by 2030

Influencing via Social & Short Form Video

28%

of Travel category 1H was in Social, the #1 channel, growing 8% YoY

Short-form & social is projected to grow 48% by 2030

Cruises Fuel Category Growth



+11%

Cruise line spend continues to drive category growth, growing 11% in 1H '25, fueled from **22% increase in premium video spend**

As a result of these industry dynamics, **we are seeing Travel brands & portfolios prioritize a few key objectives**

MAXIMIZE

Brand & Destination Visibility



CAPTURE

High-Value Audiences



DRIVE

Engagement & Bookings



BUILD

Authentic Brand Affinity





'25/26 Travel Playbook

Leverage the power of NBCUniversal's **content & audiences** to drive brand and business impact

Maximize brand and destination visibility

Capture high-value audiences

Drive engagement and bookings

Build authentic brand affinity

NBCUniversal's **Travel** Playbook



01. **Engage Audiences Across Platforms to Maximize Scale to Fuel Demand**

02. **Create Connection with Contextual Targeting Solutions**

03. **Drive Full-Funnel Engagement with Premium Content and Events**

04. **Amplify Messaging and Partnerships via Social & Fandoms**

05. **Inspire & Engage Along the Traveler Journey Through Ad Innovations**

POWER OF

Linear + Streaming

Audiences & Premium Content

Premium Content

Social

Ad Innovations

Targeting Strategies

Live

Fandom

Activation Pathway

IP & Talent

Each month,
NBCUniversal
content
reaches

286M

P2+ Proj. 2026

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.



Across
80M
Households

*the audiences
that matter to you*



62M

Leisure
Travelers



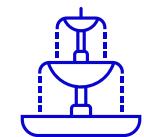
61M

Travel
Intenders



59M

Luxury
Travelers



54M

International
Travelers



Based on household reach

Engage Audiences Across Platforms to Maximize Scale to Fuel Demand

Meet your audience where they consume content with a holistic view of TV to achieve scale, create awareness, and drive action

33%

Of U.S. travelers are cord cutters¹, while...

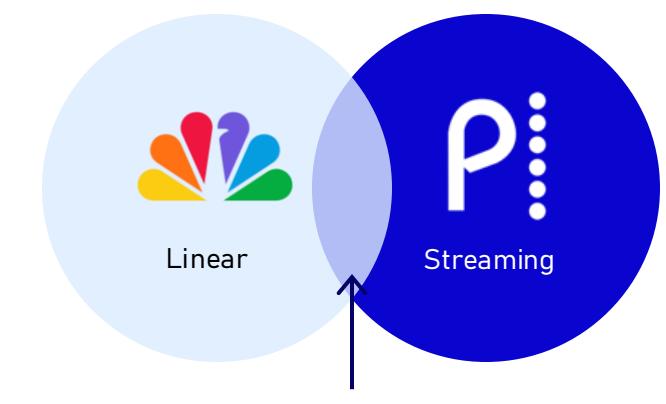
29%

are cord loyalists¹

A cross-platform approach is essential to Maximizing your impact against full-funnel objectives

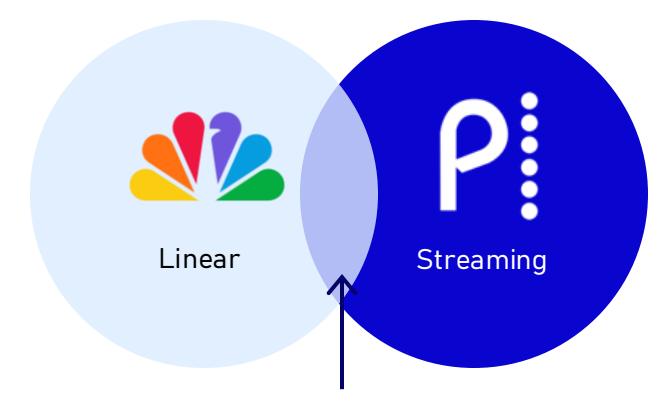
Leisure Vacationers

62M Monthly Households



Business Travelers

36M Monthly Households



Measure what matters

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

Cross-Platform Impact for Travel

+55%	4.3x	+14%
Unaided Brand Recall	Avg. Search Engagement	Purchase Intent Index

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

Let your target audiences' viewing behaviors guide your cross-platform approach with One Platform Total Audience (OPTA)

OPTA delivers optimized buys across our linear and streaming footprint for unduplicated reach against strategic audiences at scale

Follow your audience

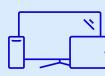
across NBCU's linear and streaming portfolio



Ensure **the right people** see your ads



Deliver **more efficient reach @ scale**



Create **cross-platform video efficiency**, with linear granularity to the program level



Make the most of **your own data assets**

Maximize reach with

Audience Targeting

Transact on targeted audiences

vs. demos

71M Domestic Travelers

27%
Missed with traditional buying demo

73%
A25-54



Drive Results



+14%

increase in online engagement

vs. competitive linear & streaming media for an Amusement park brand

One Platform Data-Driven Linear Activation

Enhanced 1:many delivery to your target audience at scale through the broad reach of national linear TV

Why DDL with NBCU

+10%

TV has a halo effect as part of an integrated campaign and can lift multi-platform ROI by up to 10%¹

Strategic TV targeting **at scale**

Any data source matched to your TV viewership choice

Program-level optimization

Inventory expansion and **new audience insights**

Post-campaign **reporting and measurement**

National Linear Audience Activation @ Scale



The breadth of NBCU's premium broadcast and cable programming



Second-by-second TV viewing data
(Comcast, VideoAmp, and more)



Rich consumer data—yours, ours, and/or 3rd-party



Your strategic audience delivered at scale across NBCU's national linear portfolio for maximum effectiveness



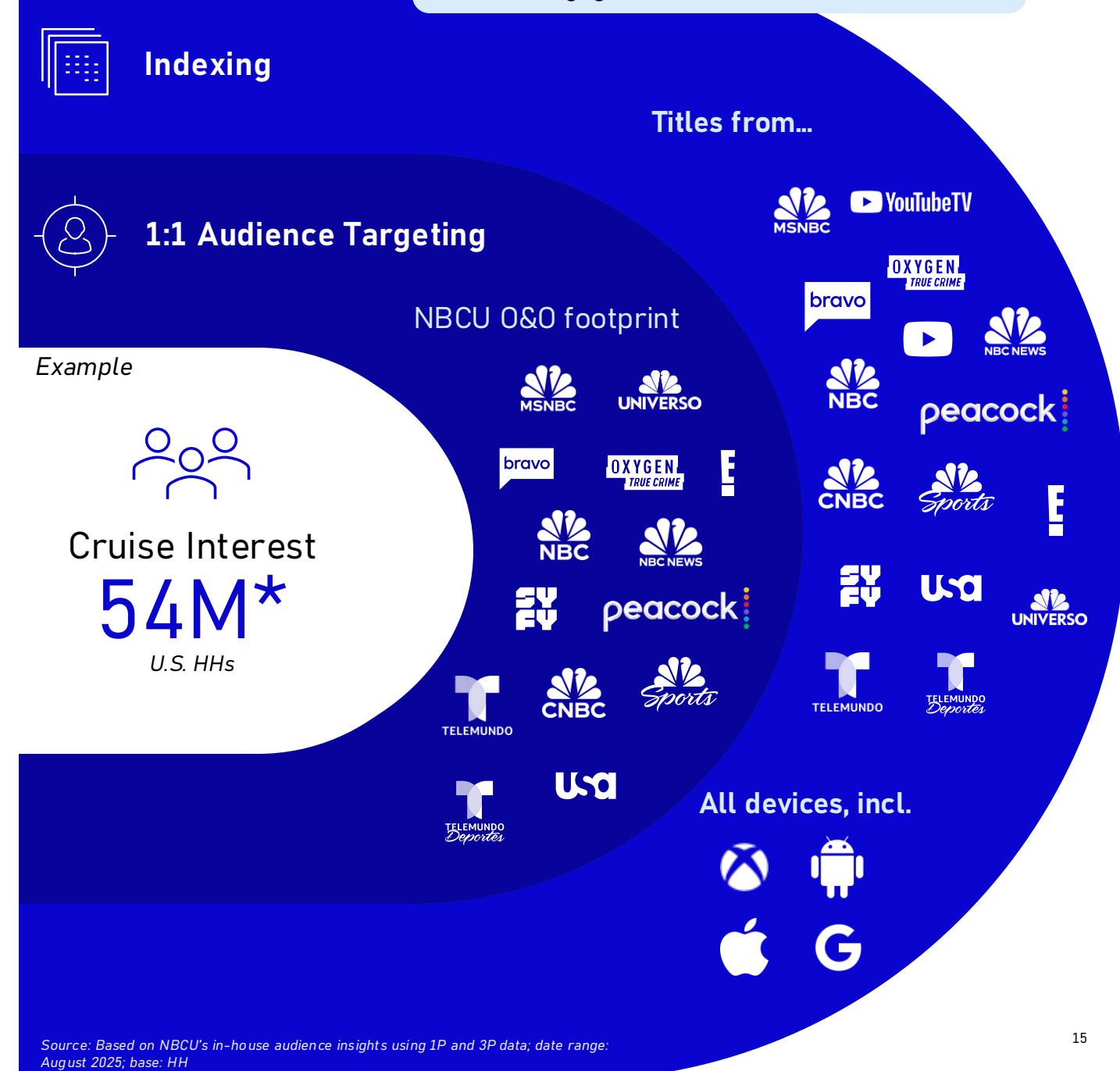
Strategic targeting extends your campaign delivery into high indexing content across devices

1. Start with precision
2. Extend with scale to NBCU programs proven to over-index with your audience
3. Capture incremental reach



30%

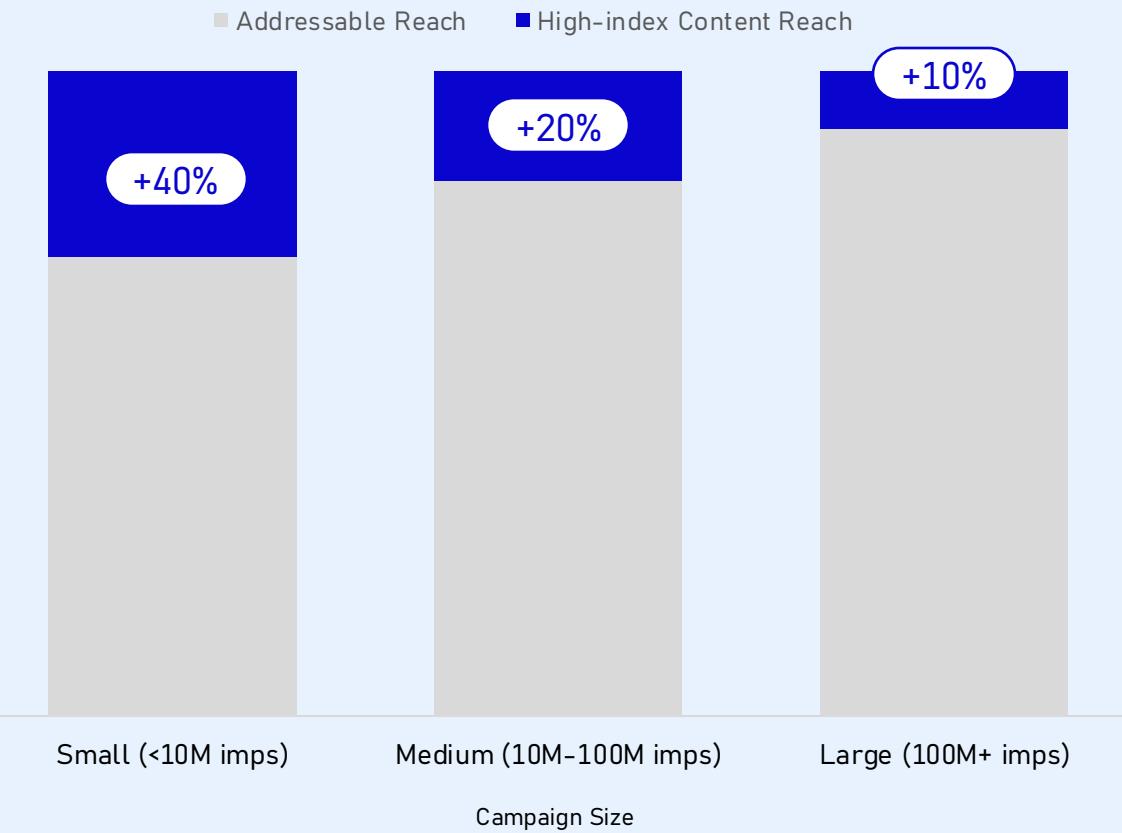
more targetable inventory
(opt outs & non-addressable
endpoints) across NBCU's
streaming footprint,
leading to maximum reach for
your audience-based campaigns



Proving Impact

Extending your investment to high-indexing content results in significant incremental reach for campaigns of all sizes

NBCU Total HH Streaming Reach



Source: NBCU all Direct IO and Programmatic brand campaigns by quarter from 3Q24 – 2Q25, NBCU Total Digital. Freewheel for Household imps, HH reach modeled with non-addressable footprint included.

For NBCU travel partners,

Programmatic activation opens the door of possibilities for you to reach your audience on streaming

Live Sports & Events



Curated Content Packages

Popular on Peacock

ex. *the office*

Peacock Shows

ex.

Peacock Films

ex.

NBCU Shows/Networks

ex.

Peacock Top 10 Rail

ex. *Top 10 Shows or Movies Today*

Premium Live Events

ex.

Programmatic-Enabled Ad Innovations

PMP with upfront investments

Burned-In Ad

Immersive Ad

Canvas Ad

Canvas Carousel Ad

PG deals

L Bar Ad



Contextual Targeting

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

Industry, Custom, Emotional Alignment
via direct IO and PG

Genre Contextual
via direct IO, PG and PMP

Maximize brand & destination visibility

Capture high-value audiences

Drive engagement & bookings

Create Connection with Contextual Targeting Solutions

Engage your audience at the **intersection of audience and brand** – ensuring they are met in content that they love and that is relevant to your brand message – sparking inspiration and driving action

2/3



of global travelers have considered booking travel to destinations **after seeing them on streamed shows or movies**¹

Sources: 1. *Travel Weekly*

Genre

Deliver ads within genres of editor-curated VOD content from across NBCU's premium streaming portfolio

Direct IO PG PMP



Industry

Align your brand with industry-relevant themes in curated VOD content from NBCU's premium streaming portfolio to drive deeper viewer connection

Direct IO PG



New!

Custom inputs

Powered by AI

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

Direct IO PG



New!

Emotional alignment

Powered by AI

Build connections by aligning your brand's emotional tone with key moments in premium content



Direct IO PG

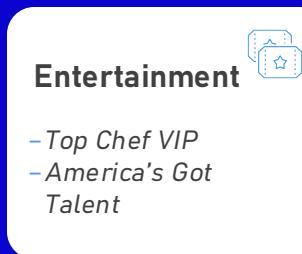
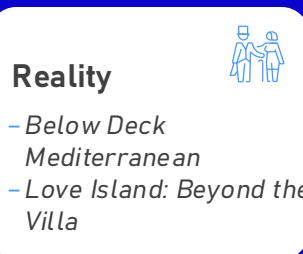
Content is a key source of travel inspiration; drive impact with consumers when they are in the travel mindset via

Contextual Targeting by Genre & Industry

Genre

Deliver your travel ads in **editor-curated genres** across NBCU's premium streaming portfolio—serving relevant messaging that resonates with viewers and boosts campaign impact

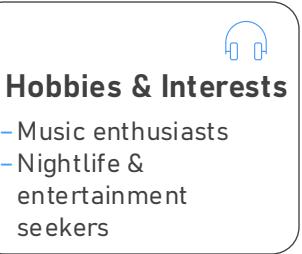
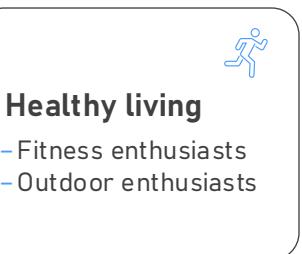
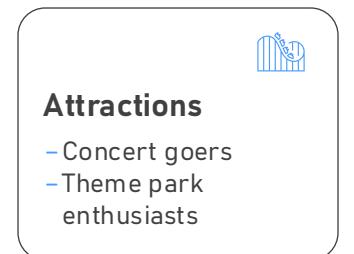
Relevant genres:



Industry

Align your brand with **travel industry-relevant** themes in curated VOD content from NBCU's premium streaming portfolio to drive deeper viewer connection

Relevant categories:



3 in 5

travelers discover destinations via entertainment content¹



Connect with key themes, positioning and messaging through *AI-Powered*
Custom Inputs & Emotional Alignment

Custom

Align your brand's creative with thematically relevant moments for travel across NBCU's premium content portfolio to drive meaningful engagement and inspire action

Overview:

0 1 .

Using AI, scan Peacock content for **thematically relevant moments**

- AI-powered technology scans for *bespoke inputs* (video, audio, and images) at a frame-level to identify episodes

0 2 .

Deliver specific creative with **episode-level targeting** of thematically relevant moments

- Shows include:** *Incredible World, Destination X, Leguizamo Does America*
- Genres include:** Entertainment, Reality, Travel

Thought Starters

Mentions of road trips to promote domestic travel

Content featuring iconic people from specific destinations

Content highlighting beach destinations

Content tied to international culinary adventures

68%

of consumers are more likely to recommend a brand they feel connected to¹

Emotional Alignment

Build authentic connections by matching your travel brand's emotional tones/themes to resonant key moments across NBCU's premium streaming content that inspire engagement and action

Overview:

0 1 .

Using AI, NBCU ingests your brand's creative to identify emotional cues to match across NBCU content

- AI-powered technology analyzes ad creative and metadata (themes, tones, values) to find aligned NBCU content

0 2 .

Deliver specific creative with **program-level targeting** thematically aligned to your ad creative

- Shows include:** *Top Chef, Below Deck, The Office, Tour de France*
- Genres include:** Reality, Docuseries

Thought Starters

Objective

Embed creative and/or brand in emotionally relevant or desired content

Example Emotional Theme

- Wanderlust
- Community
- Safety and trust

Drive Full-Funnel Engagement with Premium Content & Events

Travel consideration is not seasonal—prospects need ongoing nudges to maintain brand preference, prompt spontaneous bookings, and fill demand gaps

Proven Impact

Live Events + Sports Lifts for Travel

Unaided Brand Recall

+90%

Avg Search Engagement Index

134

Brand Favorability

+24%

Purchase Intent

+49%

Source: NBCU Ad Impact Database

Maximize brand & destination visibility

Capture high-value audiences

Drive engagement & bookings

Build authentic brand affinity

Live Sports Programming and Events



Lifestyle, Entertainment, & Multicultural Events

Cultural Moments and Events



Fan Favorite Premium Content Providing Contextual or Audience Alignment



Peacock Originals
Connected to Key Interests/Genres

The biggest live events and iconic everyday moments for travel to connect with key audiences

'25/'26 Culture-Driven Content & Events For Travel



Among HHs reached by NBCU...

+15% are more likely to have Cruise Intenders who are **holiday enthusiasts**

44% have International Travel Intenders who are **news enthusiasts**

28% have Women Travel Intenders who are **talk fans**

30% have Luxury Travel Intenders who are **entertainment fans**

Inspire travel all year long by connecting with them through our curated lineup of can't-miss moments

Key Travel Timing & Events



Wave Season



Valentine's



Spring Break



Memorial Day



Independence Day



Summer Travel



Labor Day



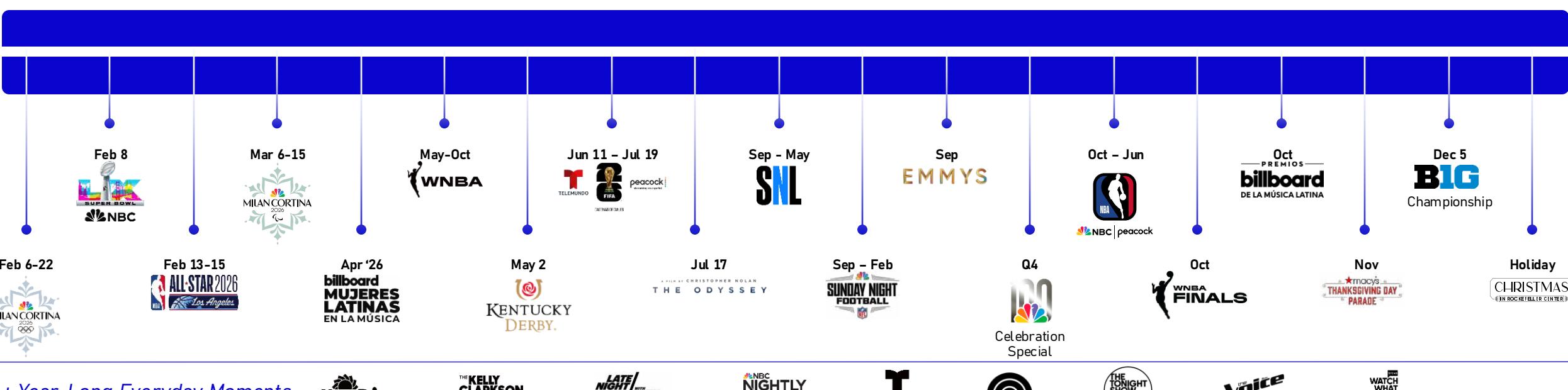
Thanksgiving



Winter Holidays



Ski Season



Best-in-Class Showcase

How Travel brands are executing custom storytelling with NBCU premium content

Proven Impact
Lifts for Travel

Official Sponsors

+90%
more likeable

Sponsored Segments

+49%
more emotionally engaging



Tapping into IP & Talent

Watch What Happens Live and Below Deck Custom Content



Creating Cultural Connection

Top Chef Sponsorship and In-Show Integrations



Delighting Travelers with Live Integrations

TODAY Integration and Live Plaza Giveaway



Inspiring Travel through Custom Content

Golf Channel Custom Content Series



Showcasing the Destination by Traveling the Show

TODAY 3rd Hour on Location

Maximize brand & destination visibility

Capture high-value audiences

Drive engagement & bookings

Build authentic brand affinity

Amplify Messaging and Partnerships via Social & Fandoms

When consumers are already inspired by a genre, show, or passion, brands can tap into known, engaged audiences by extending into social existing fandoms to support key messaging areas – turning passions into opportunities for travel experiences



Extend Impact with Social:

67%

of U.S. travelers say travel social media are very or somewhat influential in shaping their travel decisions¹



NBCU Toolkit

Turn-key ads



Show & event integrations



Custom content



Franchise sponsorships



1.3B

total followers across NBCU big 5 social platforms



Tap Into Passion Points & Fandoms:

As the travel landscape has become more competitive, passion points and personal interests in content have become key connection points and travel motivators

Culinary Moments

Live Sports

Iconic Locations



Connect with viewers of genre/theme and show-specific content on NBCU streaming properties and/or visited relevant genre/theme-specific NBCU brand sites by targeting *fans of...*

Genres/ Themes

Specific Sports

NBCU Brands Shows & Franchises

NBCU social helps travel brands

amplify existing connections and forge
new ones to reach younger audiences

of NBCU social
followers are
under 35

Ads



Turn-key ads

- TikTok Pulse Premiere *post-roll*
- X amplify *pre-roll*
- Snap Shows

Custom Content



Show & event integrations

- In-show, live event integration
- Sponsored segments



Custom Content

- Bespoke content
- Talent / Creators



Franchise sponsorships

- Custom open
- Presented by mention

Run *YOUR* ad against our NBCU content
(ads from advertiser's handle)

Integrate your brand with NBCU content(ads from NBCU handles)

Continue the momentum by tapping into traveler passion points & fandoms, **across NBCU streaming, powered by exclusive 1P data by targeting “fans of”...**

Genre/Themes

Examples

 Action


Family Content



Fantasy

 Adventure


Hispanic-Led



Holiday

 Romance


Westerns



Reality

Specific Sports

Examples



Baseball



Basketball



College Sports



Soccer



Football



Golf



Motor Sports



Horse Racing

NBCU Brands



Shows/Franchises

Examples











Inspire & Engage Along the Traveler Journey through Ad Innovations

The travel customer journey is dynamic and omni-channel. Ad innovations can prompt immediate actions (e.g., bookings) and support full-funnel outcomes while making the brand stand out in a crowded field

Source: 1. NBCU internal analysis using internal and external reporting sources; 2. MRI-Simmons Cord Evolution study, August 2025; 3. NBCU Ad Impact Database 4Q23-2025, 7 Campaigns across 5 Brands NBCU measured Travel campaigns

Maximize brand & destination visibility

Capture high-value audiences

Drive engagement & bookings

Build authentic brand affinity

82%

of travel investors who spent on ad innovations increased spend¹

Over

1/3

of travelers say they like that ads on streaming are interactive²

Ad innovations help consumers every step of the traveler journey

Creating awareness **to spark inspiration**

+11% Brand Familiarity³

Fuel exploration **to create consideration**

+8% Consideration Intent³

Drive planning and **convert bookings**

+7% Brand Recommendation³

Sample Travel Thought Starters

Inspire a new trip or offer a discount via **Spotlight ad**

Entice travel exploration and generate leads via **Engagement Ad** (e.g. *what's your next getaway*)

Helping to narrow choice by exploring travel preferences via **Canvas Carousel**

Suite 1: Upper Funnel with Ad Innovations

Inspiring & engaging along the buyer journey through Peacock ad innovations for travel

Ad Innovations @ NBCU [Click here](#)Product Names [link to One Pagers](#)

Inspiration & Awareness

Spark Inspiration

by establishing a connection to the brand, destination, or service

Pod Bounce**+53%**

Brand memorability vs. Midroll for Category

Give travelers a first-class getaway from commercials with a limited ad experience

Solo Ad**+31%**

Message memorability vs. Midroll for Category

Offer a "Spring Break" from commercial time through a limited ad experience where your brand owns the only ad within an episode

Spotlight Ad**+57%**

Message memorability vs. Midroll for Category

Inspire a new trip or offer a upgraded trip as a reward for viewer's attention

Planning & Booking

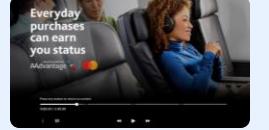
Fuel Discovery

by exploring what's available

Engagement Ad**+14%**

Ad memorability vs. Midroll for Category

Prompt audiences to discover local travel deals or engage with your loyalty app through the various actionable Engagement Ad formats (e.g., Trivia)

Pause Ad**+59%**

Ad memorability vs. Midroll for Category

Align with seasonal travel flighting and encourage users to choose your brand for holiday trips

**Additional Innovations:**[Curator Ad](#), [Binge Ad](#), [Cinematic](#), [Sports Suite](#)

Key: CTV Mobile Web Targeting Buying Path: Direct IO only

Suite 2: Full Funnel with Commerce Innovations

Connecting to consumers along the buyer journey through **commerce ad innovations for travel**

Commerce Innovation
@ NBCU [Click here](#)

Awareness, Exploration & Booking

Spark Curiosity, Fuel Discovery, & Drive Action

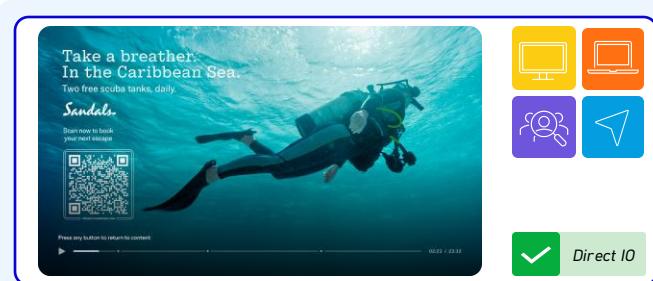
by exploring what's available & informing decision-making, all while building connections with the brand

77%

of travelers use official platforms (e.g., airline, hotel/resort, and destination websites) to plan travel¹



Tell a shoppable episodic brand story with
Sequential Storytelling
(Audience-first or content-first story)



Promote travel offers during viewing breaks via
Shoppable Pause Ad
(full-bleed static ad during content pause)



Browse destinations & amenities online through
Shoppable Canvas Carousel
(immersive auto-scrolling gallery wrapped around your brand spot)



Elevate brand messaging and offers with a
Shoppable Canvas Ad
(featuring an engagement canvas style creative wrapped around your brand spot)

+11%

Lift in **brand familiarity** for travel brands²

+8%

Lift in **consideration intent** for travel brands²

Key:

(e.g., brand/product site)

Source: 1. Skift U.S. Traveler Trends 2025; 2. NBCU Ad Impact Database



Travel
Impact at
NBCU



Travel

Proven impact across client KPIs

NBCU Travel Campaigns – Test vs. Control

Upper Funnel

Aided Ad
Recall
+37%

Unaided Brand
Recall
+55%

Ad
Recall
+132%

Brand
Familiarity
+13%

Mid Funnel

Brand
Favorability
+19%

Avg. Search
Engagement Index
125

Message
Association
+23%

Lower Funnel

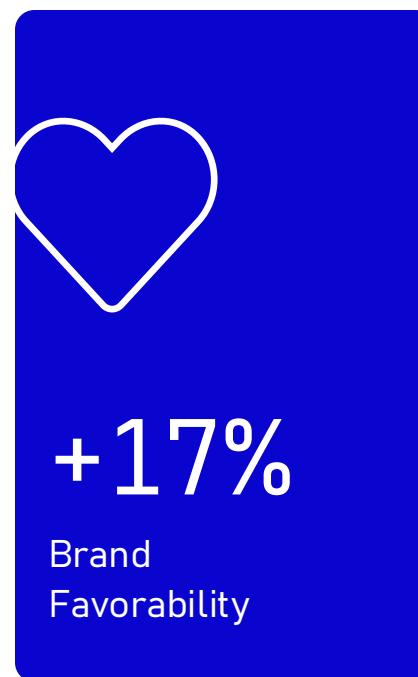
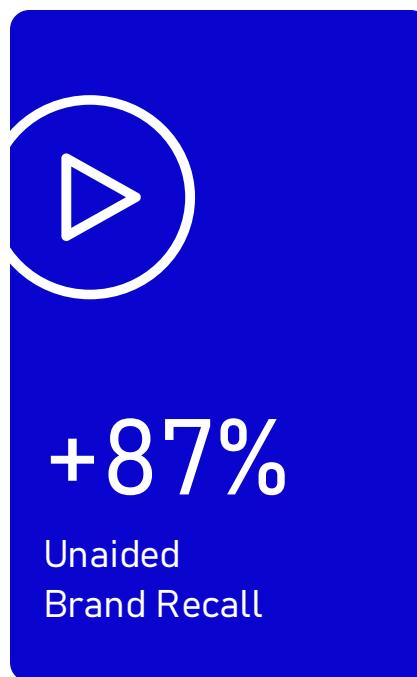
Consideration Intent
+17%

Purchase Intent
+14%

Recommendation Intent
+20%

**Travel****Proven Peacock impact across client KPIs**

NBCU Travel Peacock Campaigns – *Exposed vs. Control*



NBCU offers measurement opportunities providing full-funnel insights for Travel

	Buy Side Activation	Clean Rooms	NBCU Measurement Opportunities (Sell-Side Measurement)	
Awareness	✓		Brand Lift Study <i>Ad Recall</i> <i>Brand Favorability</i> <i>Consideration</i>	Dedicated NBCU Insights Team provide: <ul style="list-style-type: none"> Travel category consultation and recommendations Sponsorship and audience impact analysis
Consideration	✓	✓	Search Engagement Real-Time Outcomes Measurement (Attribution) Site / App Visitation (Incrementality)	
Conversion	✓	✓	Real-Time Outcomes Measurement (Attribution) Site / App Visitation (Incrementality) Sales Lift (1P)*	

Travel Case Studies



Data-Driven Linear
Leading cruise line
saw **significant**
increase in search
engagement
thanks to their NBCU DDL
campaign



+25%
search engagement lift
vs. travel category benchmark

+5% **boost in search**
vs. non-NBCU linear



Travel Category Resources

Travel Category Resources

Category Trends & Strategic Recommendations



Annual Playbook

Category trends, opportunities, and recommendations based on learnings at NBCU



Regularly Updated Category Highlights

Latest trends and opportunities based on learnings at NBCU

Strategic Media Insights & Opportunities



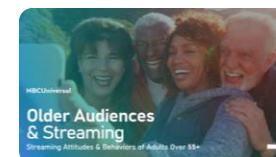
The Power of Live

Leveraging live events to place your brand at the center of cultural conversation



Luxury & Streaming

A deep dive into luxury audiences and their relationship with streaming



Older Audiences & Streaming

A deep dive into older audiences and their relationship with streaming



Connecting w/ Luxury Audiences

A deep dive into luxury audiences and the differentiation between luxury sub-groups

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



Role of Language Study

Insights for maximizing marketing success by understanding the role of language

Travel Playbook

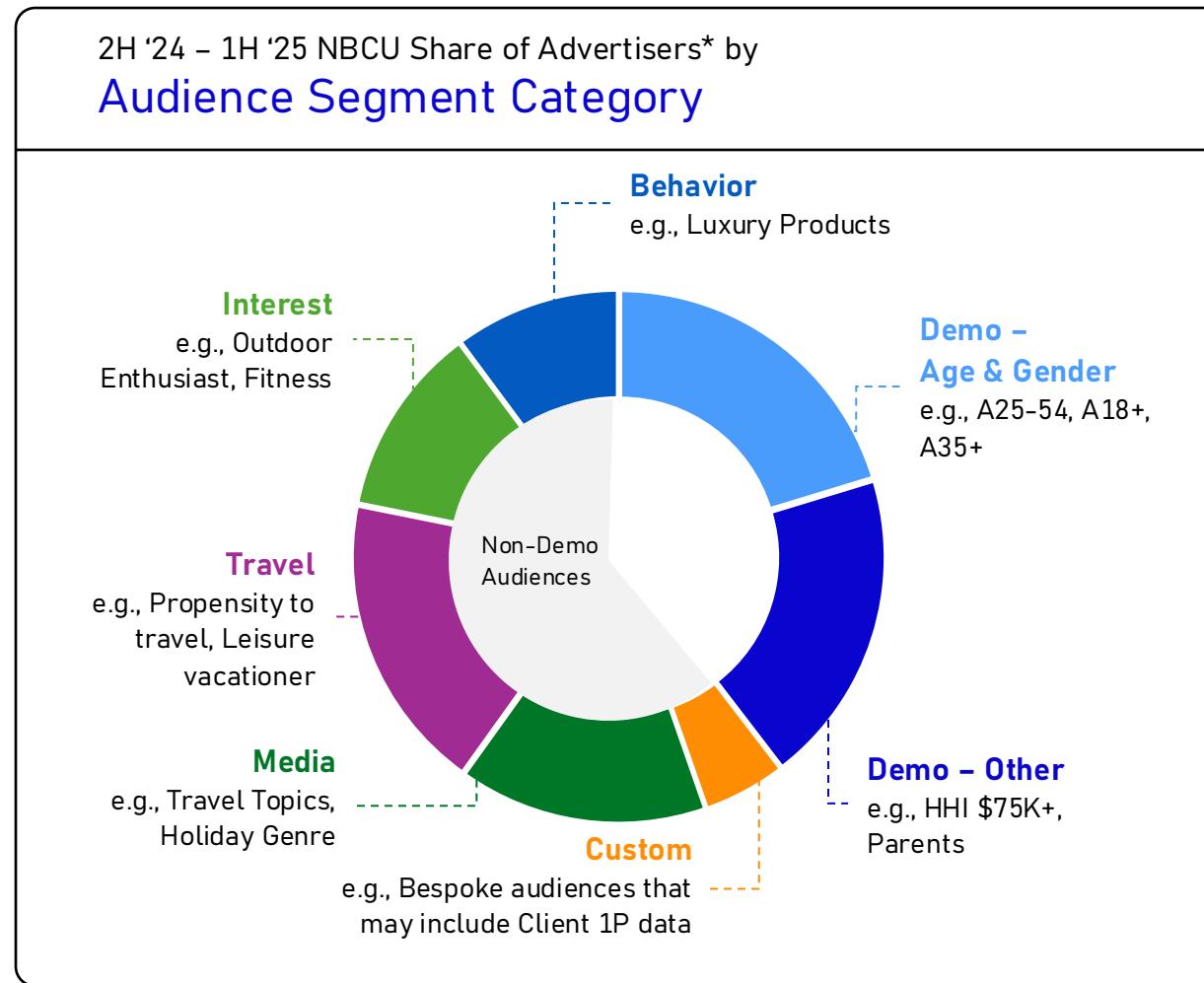
NBCU Travel Category
Strategy Team:

Megan Ryan
Nick Cafiero
Ben Cohen



Travel Top Audience Segments

More than half of travel advertisers use non-demo audiences, leveraging first-party data or targeting based on travel behavior, interests, or media



Most Commonly Used Travel Segment at NBCU

- Leisure Vacationer
- Cruise Interest
- In-Market for Travel
- Domestic Traveler
- International Vacationer
- Business Traveler
- Luxury Traveler
- Adventure Traveler