

NBCUniversal

**Travel**

# **QUARTERLY UPDATE 3Q'25**

Industry *Highlights* & Media Trends

# Agenda

1

## Travel Landscape

Current Landscape & 3Q'25 Media Trends

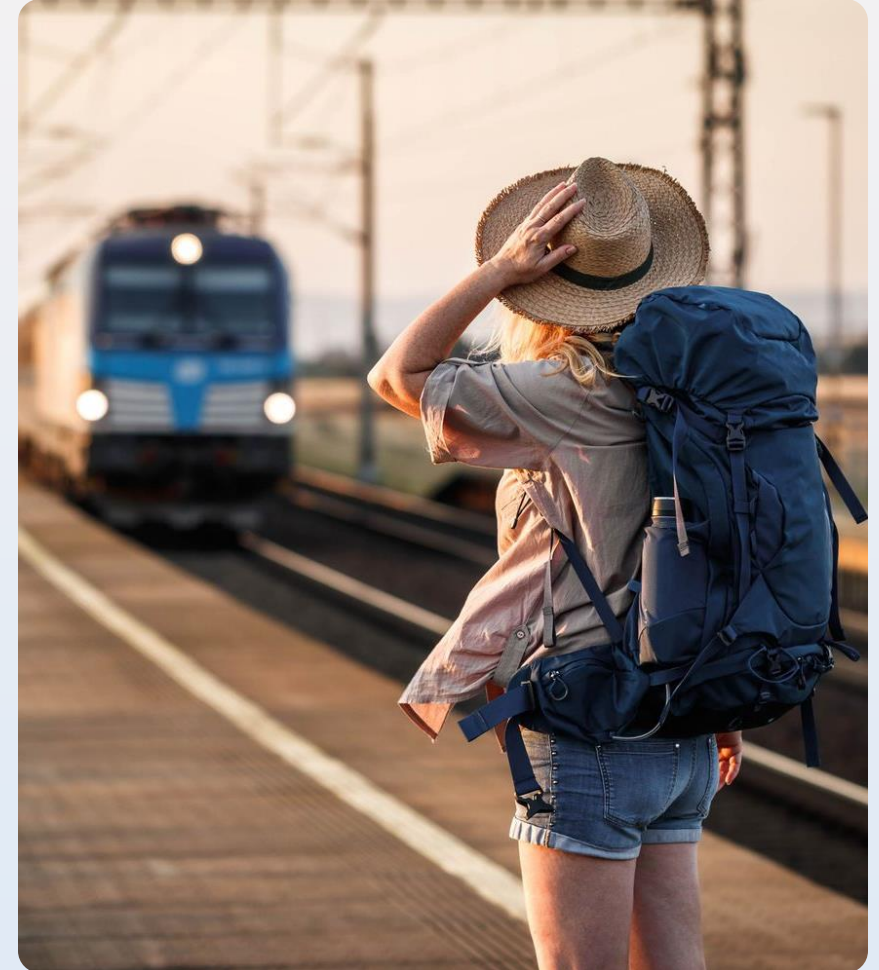
2

## Travel @ NBCU Update

Media Trends, Creative Showcase

3

## Travel Upcoming Opportunities At NBCU



# Current **Travel** Category Dynamics

Travel consumer intent remains resilient despite macro pressures;  
Live tourism & experiences, affluent demand, and shoulder season sustain growth

## *Headwinds:*

- **International traveler confidence remains volatile**, despite the sustained resilience of domestic and short-haul leisure travel
- **Economic uncertainty** is increasing price sensitivity, reducing demand for extras, shifting destinations, and delaying travel - especially amongst the mid-market
- **Inbound U.S. travel remains weak** due to geopolitical volatility, high costs, and safety concerns
- **Shrinking business travel budgets** are impacting premium and full-service carriers as corporate cost-cutting tightens travel expenditures

## *Tailwinds:*

- **Travel remains a priority especially among younger generations**, with 57% of travelers under 40 saying travel is more important now than five years ago<sup>1</sup>
- **Premium and luxury travel remains strong**, driven by the resiliency of high-income travelers in economic uncertainty
- **Live tourism and experience-led travel** drives high-value bookings, becoming a key growth strategy for brands<sup>2</sup>
- **Shoulder and off-peak seasons** are gaining strength due to remote work flexibility, climate concerns, and the desire for less crowded experiences





# Travel Category Round Up |

## Industry Marketplace Intelligence

### Overall demand stays steady

as traveler consumer behaviors evolve



84% of global travelers plan to go abroad in 2026 as much or more than they did in 2025  
[\(SkyScanner\)](#)

Pop culture-driven travel is rising, with 81% of Gen Z and Millennials planning trips inspired by TV and movies  
[\(Expedia\)](#)

Travel searches in the 13-day planning window increased 20% QoQ, indicating shift toward last-minute bookings  
[\(Expedia\)](#)

## Latest News

### Shifts in travel dynamics amid economic & geopolitical factors



Global business travel spend is projected to reach \$1.57T in 2025, through growth slowed to +6.6% vs. 10% pre-US tariffs  
[\(Skift\)](#)

International arrivals to the U.S. are projected to decline 6.3% in 2025, driven by a sharp pullback in travel from Canada and other key overseas markets  
[\(U.S. Travel Association\)](#)

One in five U.S. adults plan to travel this holiday season down from 27% in 2024  
[\(Bankrate\)](#)

# Travel |

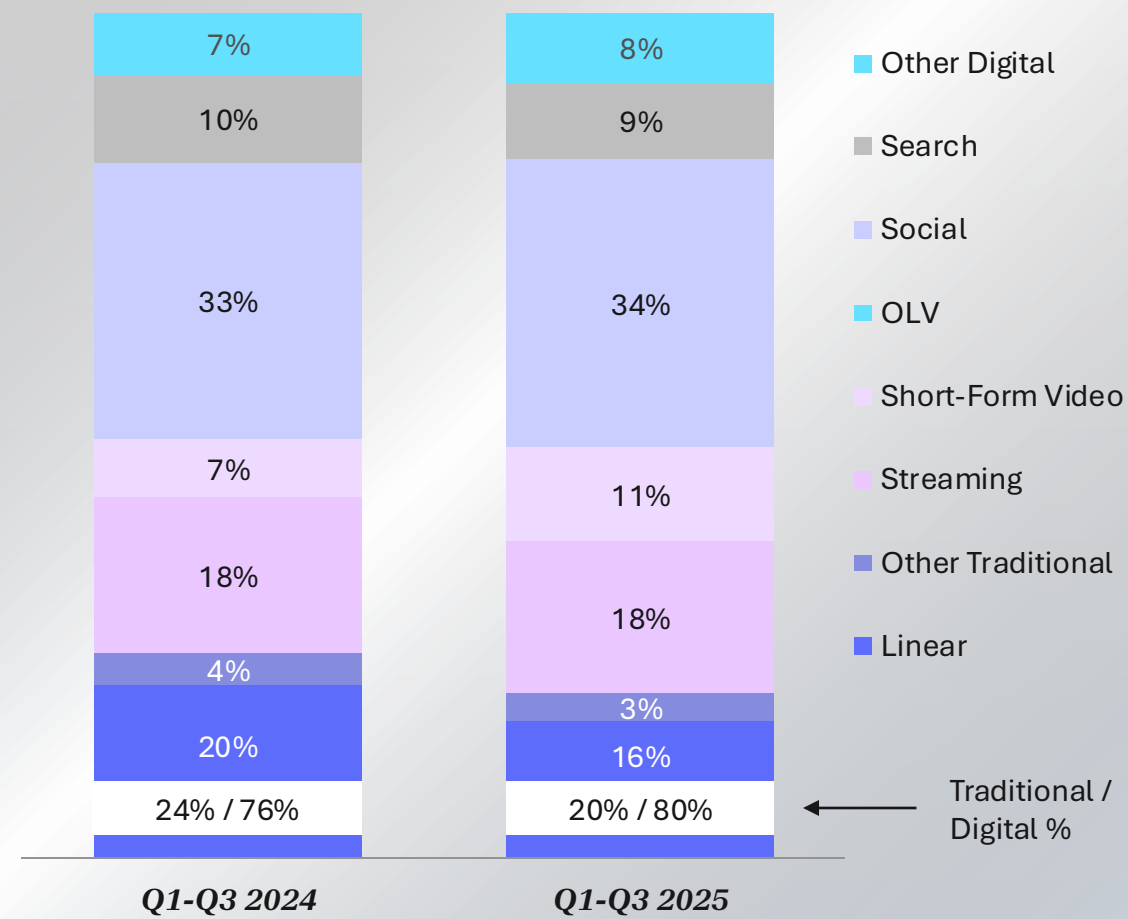
## Marketplace Spend

The category continues to tap into cultural moments and prioritize performance, increasing spend across the digital video ecosystem

- Travel spend is up +7% YoY vs. STLY, driven by digital growth (+13%)
- Streaming rose +4%, with Travel now leading premium video streaming SoS at 53% (vs. other categories)
- Short-Form Video spend surged +69% YoY, now accounting for 14% of digital spend (up +5pp YoY)
- Social plays a vital role for the category with spend +11% YoY and accounting for over 1/3 of category media spend
- Linear spend declined -15% YoY, fueled by steep declines in ELG (-29%) and Local (-34%)

### Travel Category Media Mix

*Share of Spend*

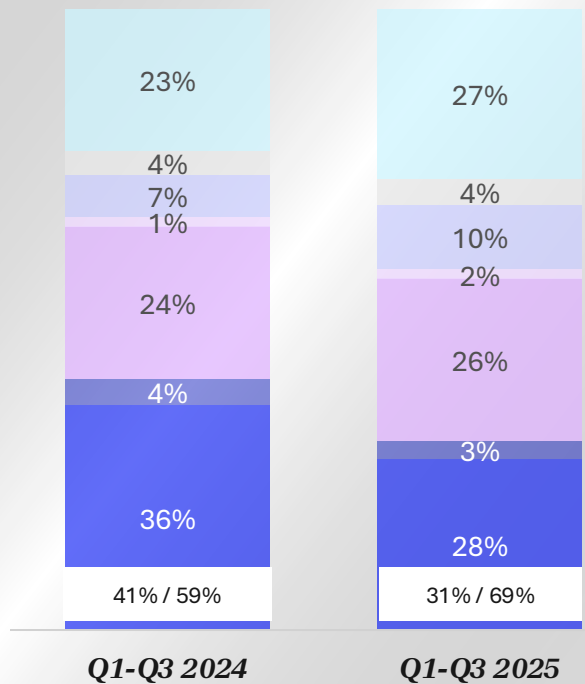


# Travel Marketplace Spend By Sub-category

Travel sub-categories see consistent increases in spend across digital channels with linear declining

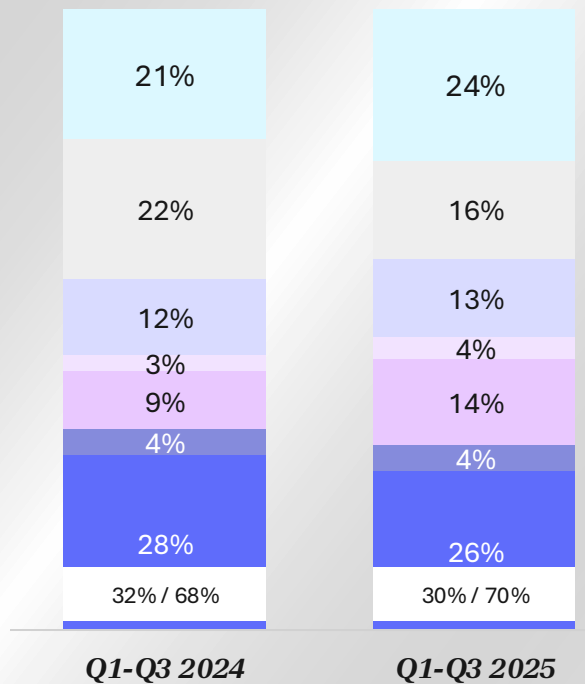
## Travel Services & Websites

29% of Travel Spend (Spend ↑ vs. STLY)



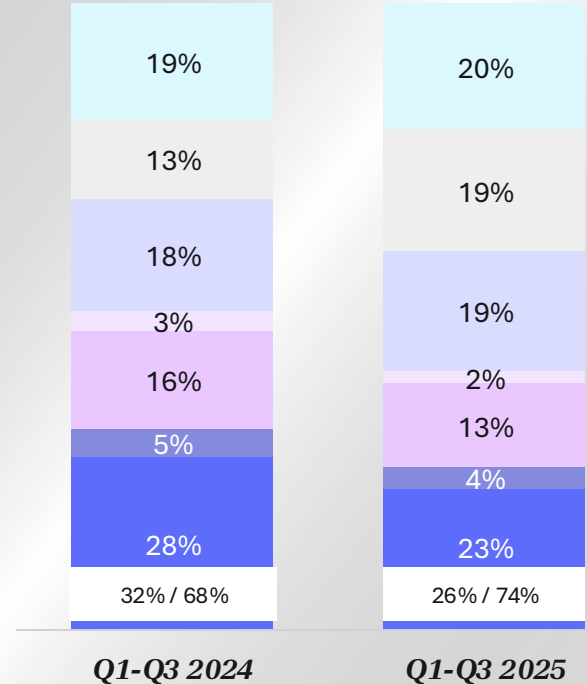
## Cruise Lines

25% of Travel Spend (Spend ↑ vs. STLY)



## Hotels & Casino Resorts

23% of Travel Spend (Spend ↓ vs. STLY)



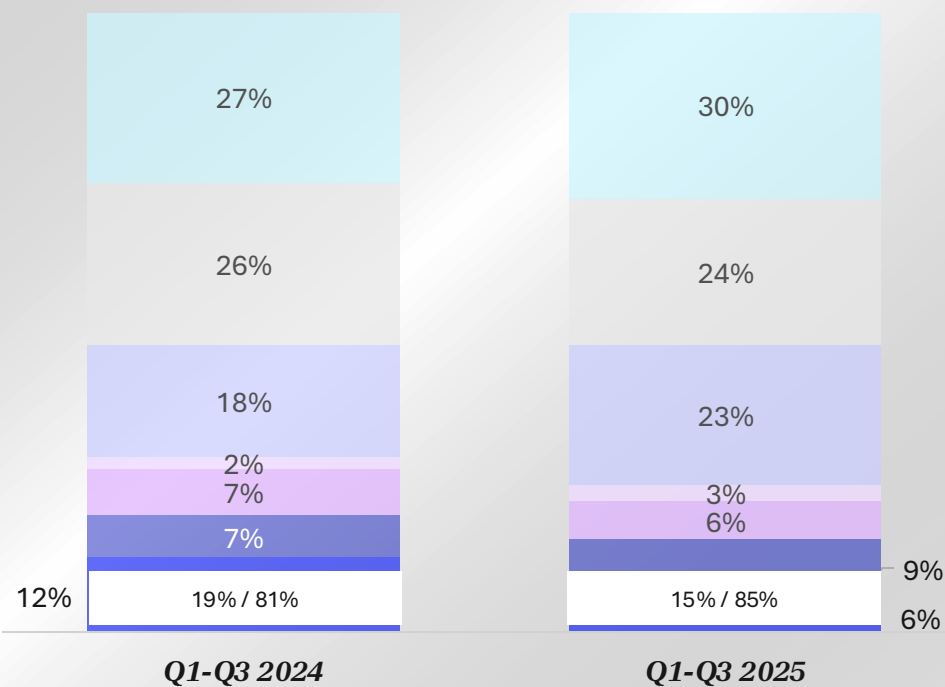
Linear
Other Traditional
Streaming
Short-Form Video Platforms
Social
Search
Other Digital
Traditional / Digital %

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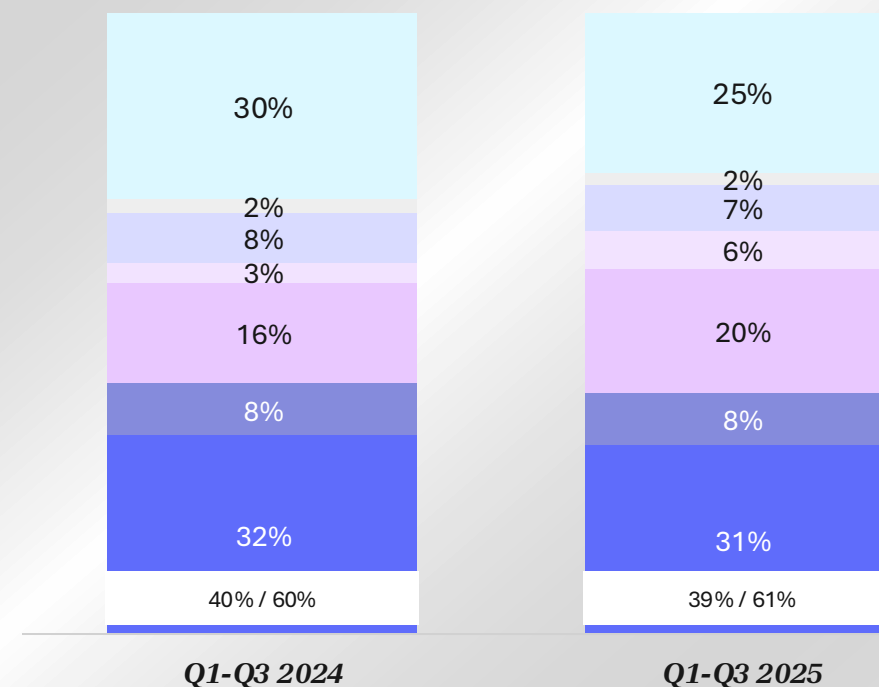
## Airlines

21% of Travel Spend (Spend↓ vs. STLY)



## Tourism Bureaus

2% of Travel Spend (Spend↓ vs. STLY)



■ Linear ■ Other Traditional ■ Streaming ■ Short-Form Video Platforms ■ Social ■ Search ■ Other Digital ■ Traditional / Digital %

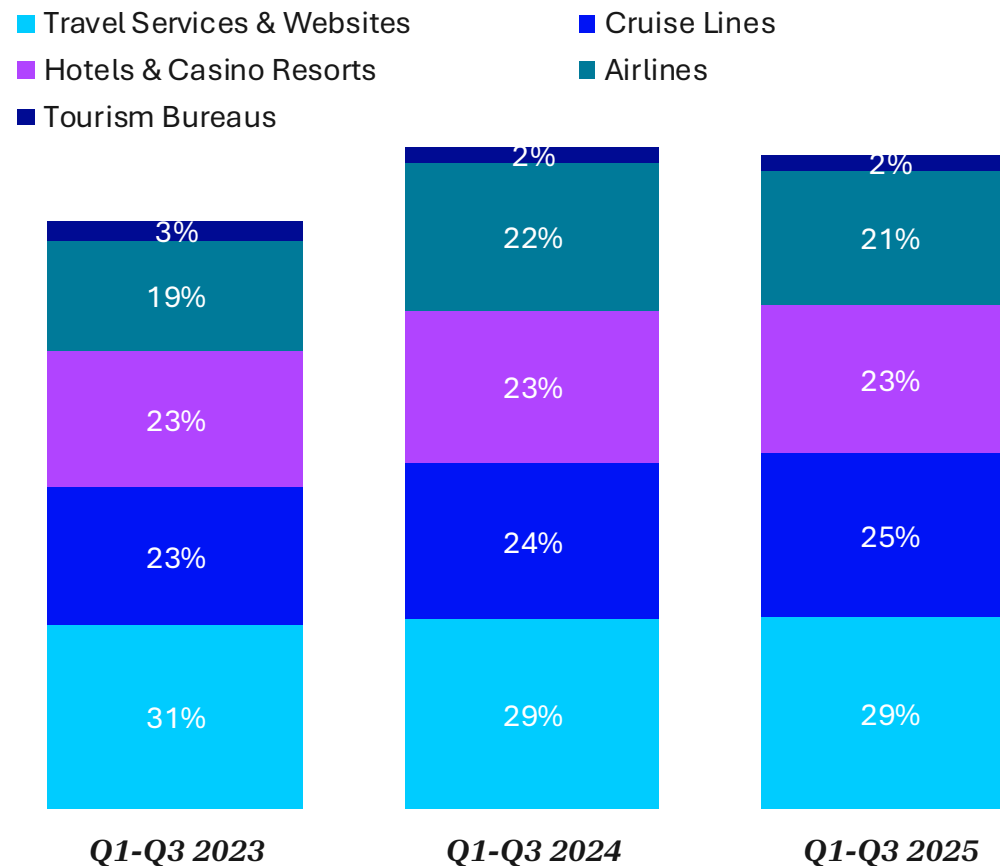
## Travel

# Marketplace Media Spend Sees Even Contribution Across the Industry

Travel media investment growth was fueled by the **Travel Services & Websites (+2%)** & **Cruise Line (+4%)** sub-categories.

Since 2019, Travel Services & Websites (+166%) and Cruise Lines (+172%) have been the sub-categories with the most advertising growth across all Travel sub-categories.

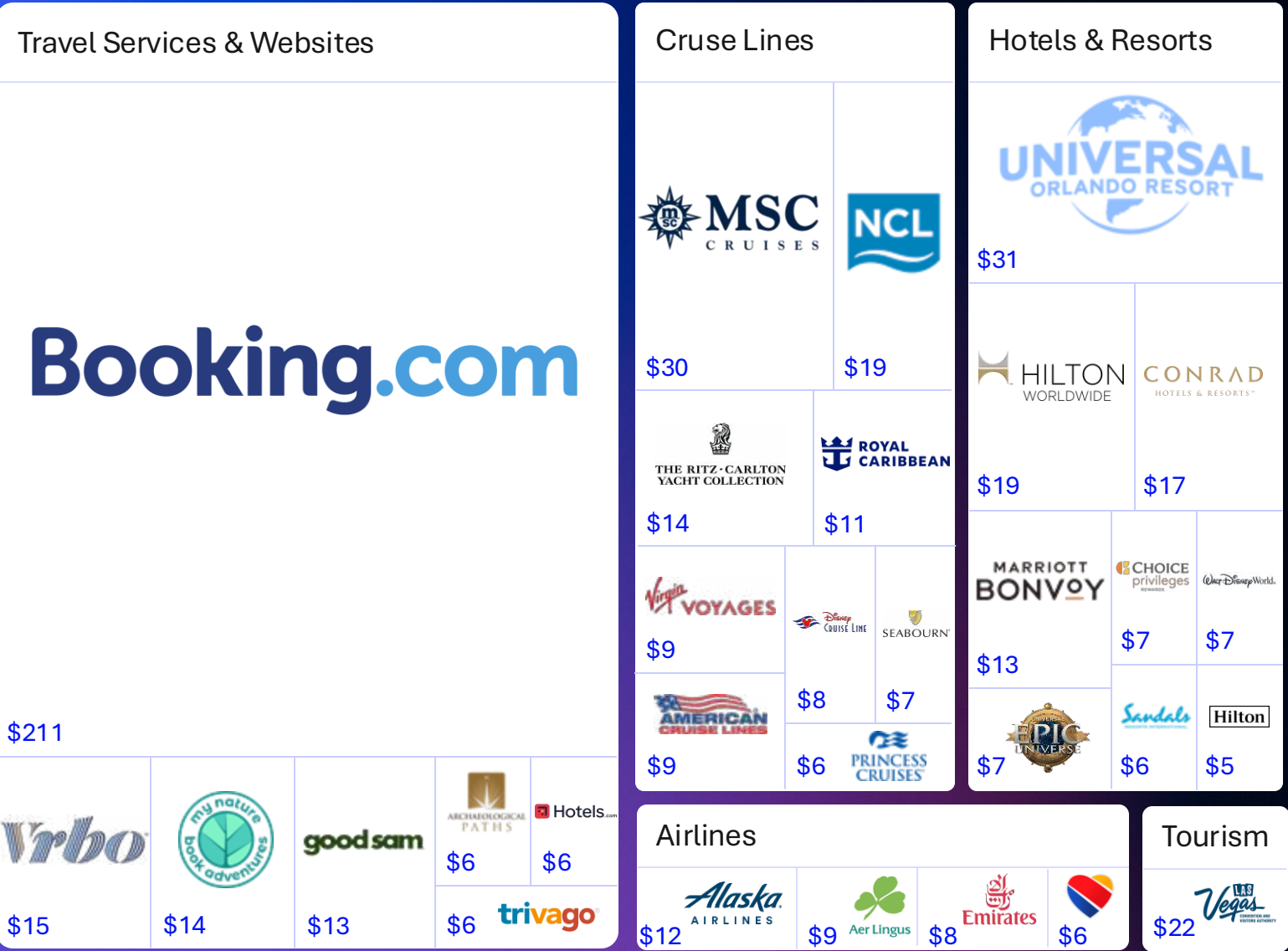
### Travel Media Spend by Subcategory





The largest Q1-Q3 '25 Travel spend growers to date are in the **OTA, Cruise Line, and Hotel Categories**

2025 Q1-Q3 Travel Advertiser Spend Volume Growth by Sub-Category  
\$USD Millions



Source: MediaRadar

# Travel NBCU Spend

At NBCU, our Travel partners are leaning further into premium content across platforms, ad innovations, and advanced buying



## *Linear*

remains the focal point of investment, with the Sports and ELG genres driving investment as brands tap into cultural moments

Sports & ELG combined account for 65% of Travel linear spend, a +7pp increase YoY



## *Advanced Buying Paths*

are being prioritized, with Travel having the largest share (43%) of advanced spend across all categories, as brands seek to strengthen relationships with key consumer segments

Investment in advanced buying increased +18% YoY



## *Streaming*

continues as a key area to engage audiences, accounting for 93% of all digital spend, as brands look to drive impact and reach with premium content opportunities

Peacock Premier and Peacock AX media spend increased +39% and +5% YoY, respectively



## *Ad Innovations*

Ad Innovations continue as an integral part of the category's streaming strategy – capturing attention, sparking inspiration, and driving action

Category spend in ad innovations increased +44% in Q1-Q3 '25 YoY

# Creative & Innovation

## Across Travel @ NBCU

### NBCU Spotlight



#### Las Vegas Convention and Visitors Authority x Sunday Night Football

LVCVA tapped into NBCU's Sunday Night Football with media and in-game integrations to support its new branding campaign "Welcome to Fabulous Las Vegas," which builds on the city's iconic sign to further drive tourism for the legendary destination



### NBCU Spotlight



#### Travel Texas x NBC Spot On

Travel Texas turned to NBC Spot On to reach out-of-state families across NBCU's digital properties - amplifying their notable outdoor adventure and music themes through Engagement and Pause Ad Innovations to boost tourism interest





Leverage the power of NBCUniversal's

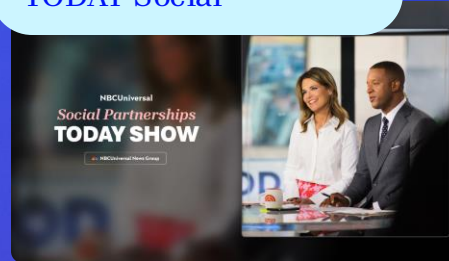
# Content & Audiences to drive impact for your brand & business

2026 Opportunities On The Horizon For The Travel Category

## Q1'26 Peacock Opportunities



## TODAY Social



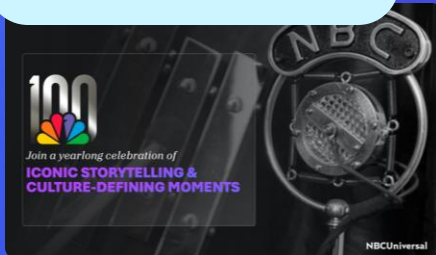
## Billboard Latin Women In Music



## La Casa de los Famosos, S6



## NBCU 100



## Access Hollywood



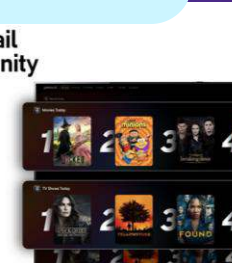
## Peacock Top 10 Rail

### Peacock Top 10 Rail Targeting Opportunity

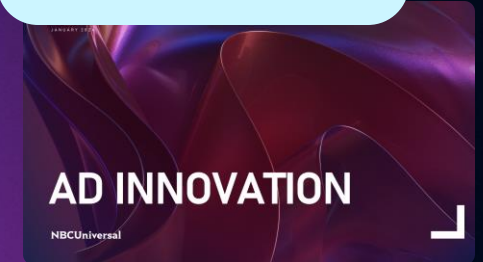
Leverage the power of Peacock's Top 10 rails—a curated, highly visible destination where viewers go to discover what's trending right now.

This exclusive sponsorship surrounds our 10 most-watched topical/new shows and movies with premium media placements, ensuring high-impact exposure and deeper brand alignment with content that viewers are actively choosing to watch.

With rotational impressions across Peacock's biggest hits, advertisers can maximize reach, scale, and awareness among viewers who are deeply invested in the stories they love.



## Ad Innovations





NBCUniversal

A photograph of a beach scene with travel-related items. In the foreground, a silver vintage camera with a black strap lies on a white beach towel. To its left is a tan straw hat. To its right is a pair of dark sunglasses. Further right is a small globe of the Earth with blue oceans and yellow and pink landmasses. In the bottom right corner, a small white toy airplane is on the towel. The background shows a sandy beach and the ocean under a bright sky.

# THANK YOU

NBCU Travel Category Strategy Team:

Megan Ryan, Nick Cafiero, Ben Cohen