

NBCUniversal



# FINANCE

# 2025 YEAR IN REVIEW

Industry *Highlights* & Media Trends

as of March 2026

# Agenda

1

## Finance Landscape

Current Landscape & FY'25 Media Trends

2

## Finance @ NBCU Update

Media Trends, Creative Showcase

3


## Finance Upcoming Opportunities At NBCU



# Current **Finance** Category Dynamics

Financial markets remain resilient, but economic uncertainty and competitive pressures are reshaping customer growth strategies

## Headwinds



Economic and policy uncertainty persists	Consumer credit stress remains elevated <sup>2</sup>
Persistent inflation continues to pressure consumers <sup>1</sup>	Customer acquisition costs continue to rise in a crowded brand landscape <sup>3</sup>

## Tailwinds



Resilient markets continue to support investor confidence & asset growth <sup>4</sup>	Gradual rate normalization supports borrowing & deal activity <sup>5</sup>
AI adoption accelerating across banking & wealth management <sup>6</sup>	Digital asset infrastructure gaining institutional acceptance <sup>7</sup>

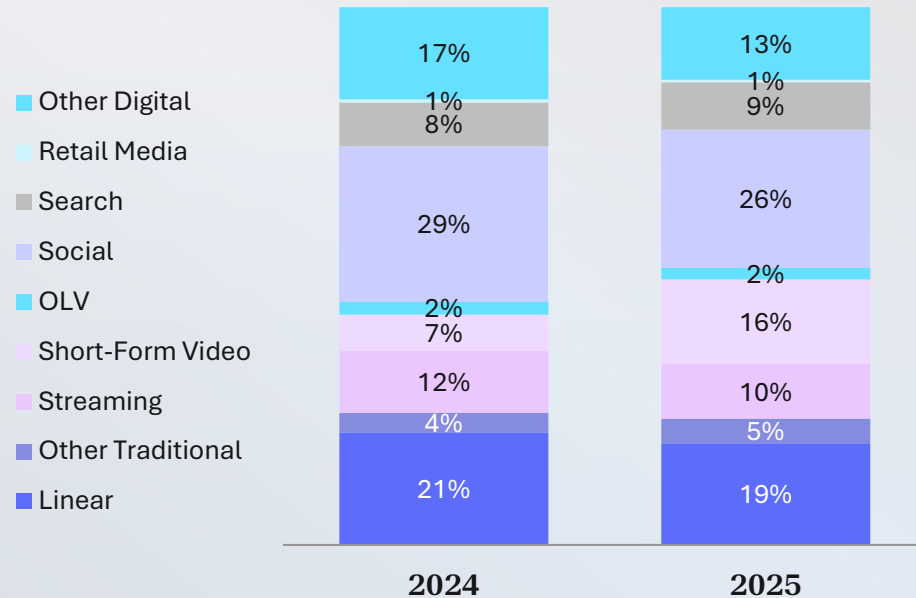
Sources: 1. NerdWallet 2. New York Fed 3. First Page Sage 4. SeekingAlpha 5. PwC 6. McKinsey 7. Morgan Stanley

# Finance Marketplace Spend

Digital channels are driving Finance category growth, with gains across Shortform and Search outperforming slower growth in linear

## Finance Category Media Mix

Share of Spend, in %



Traditional vs. Digital % Split  
 2024: 25% / 75%  
 2025: 23% / 77%

### Total Spend

**+16% YoY**

Fueled by increases across both Digital (+18%) and Traditional (+11%)

### Streaming

**+2% YoY**

Fueled by +15% Direct growth

### Shortform

**+168% YoY**

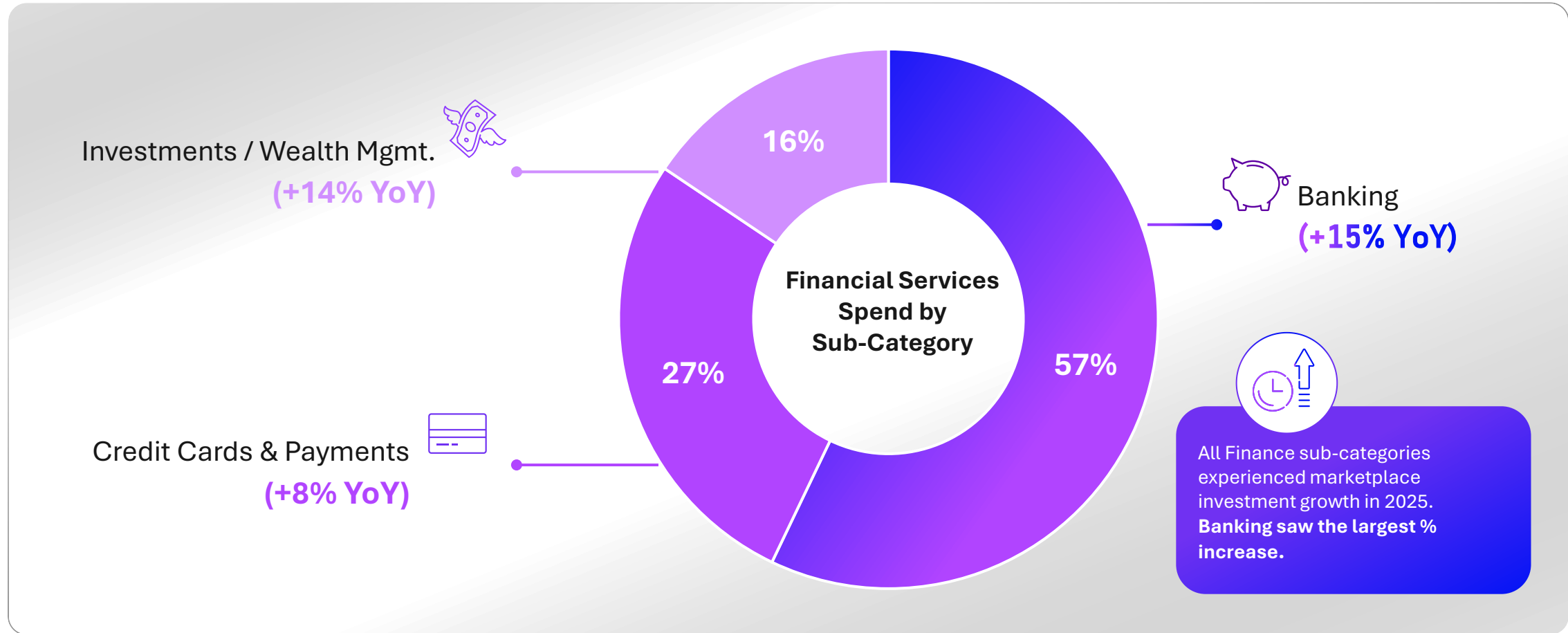
And accounts for 16% of total category spend

### Linear

**+5% YoY**

Fueled by +32% Local growth

# Over half of **Finance** media investment is driven by Banking







Source: Internal analysis using internal and external reporting sources; Financial Services

2025 saw significant spend growers across all Finance sub-categories





### 2025 Financial Services Advertiser Spend Volume Growth by Sub-Category

\$USD Millions









#### Banking

 +62% (\$75M)	 +62% (\$60M)
 +31% (\$24M)	 +768% (\$21M)



#### Payments

 +44% (\$204M)	 +21% (\$22M)
 +20% (\$16M)	 +10% (\$12M)



#### Investments

 +55% (\$105M)	 +108% (\$41M)	 +32% (\$31M)	 +57% (\$23M)
 +102% (\$21M)	 +243% (\$9M)	 +86% (\$9M)	 +17% (\$6M)

#### Crypto

 crypto.com +30% (\$7M)	 +147% (\$4M)
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#### Finance B2B

 +9% (\$7M)	 +68% (\$7M)
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# FINANCE NBCU SPEND

2025 vs. 2024

As finance advertisers  
balance premium  
storytelling with  
performance,

NBCU is outperforming the  
broader marketplace in  
streaming investments



## SPORTS

remains a key priority as finance brands leverage the power of live events to reach engaged, broad audiences

**+29%**

in Digital Sports Programmatic

**+18%**

in Direct Sports Programmatic

**+11%**

in Linear Sports

peacock

## STREAMING

growth continues as finance brands continue to look for alignment with premium streaming content and younger audience reach

**+18%**

in total streaming investments with double digit growth across Premier, Peacock AX, Programmatic, and Sports



## AD INNOVATIONS

remain a priority to engage audiences and drive impact and brand differentiation

**+10%**

in total Ad Innovation investments with growth across 7 formats

**71%**

of existing finance Ad Innovation spenders grew investments in '25



## ADVANCED AUDIENCES

investment continues to grow as finance advertisers leverage 1P & 3P data to reach strategic audiences with precision and efficiency

**+13%**

in DDL & Digital Audience IO

**+7%**

in Programmatic

# Creative & Innovation

## Across NBCU

### NBCU Spotlight



#### Wells Fargo x Top Chef

Wells Fargo Active Cash Card helped heat up the competition, featuring a “pay moments” payments/commerce integration, and sponsored interactive challenges/trivia.

WELLS  
FARGO

### NBCU Spotlight



#### Amex x NBA

Amex helped launch the NBA's return to NBC with its “At the Half” sponsorship, which included two custom integrations, 30+ lockup logo elements, customized features, and wraparound graphics that deliver 10 min. of avg. brand exposure every show.

AMERICAN  
EXPRESS

### NBCU Spotlight



#### Capital One x SNL

As an exclusive presenting sponsor, this year-long collaboration included custom content, exclusive SNL experiences & product access, and high-impact sponsorships during the anniversary week.

Capital One

# 2026 **FINANCE** Predictions

Brand innovation and evolving consumer behavior are reshaping finance brand strategies and marketing opportunities through these **4 key topics**.



## Wealth: From Product to Life-Centered

As wealth significantly shifts to younger generations and new investing demographics enter the market, financial services are moving beyond transactional products toward a more holistic approach, integrating financial advice, planning, mgmt, etc.

Brands must reframe strategies & messaging to reach and connect with a new wave of investors with evolving expectations.

**2x**

the share of investors seeking more comprehensive, holistic financial planning services has nearly doubled since 2018.<sup>1</sup>

## Prediction Markets go Mainstream

Prediction markets are rapidly evolving into a mainstream product, blending investing, betting, public opinion, news, and entertainment.

As this space matures, there will be increased emphasis on media & marketing support. There will also be more data partnerships between key media and prediction markets players due to predictive/forecasting capabilities across relevant news topics.

**\$44B**

total prediction market volume reached in 2025, mostly split between top players Polymarket (\$21.5B) and Kalshi (\$17.1).<sup>2</sup>

## Stablecoins Reshape Money Movement

As institutional stablecoin adoption increases, this will transform global money movement options, creating faster, cheaper cross-border payment and settlement rails.

This will expand beyond crypto into traditional payment networks. These brands should prioritize strategies and messaging highlighting new activation points around seamless commerce and payment experiences.

**\$250B**

estimated stablecoin market size, up 22% in 2025.<sup>3</sup>

## Brand Equity Through In-Person Experiences

As digital financial tools become the norm and digital fatigue kicks in, brands will double down on in-person experiences and events to deepen emotional connection and loyalty while differentiating themselves.

Financial brands should leverage experiential touchpoints as a premium engagement channel to elevate retention and distinction.

**77%**

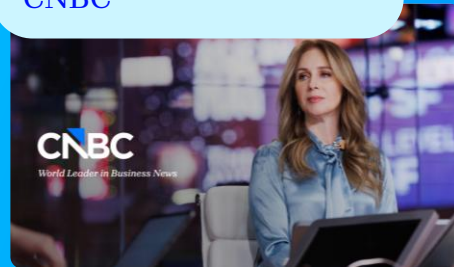
of consumers report increased trust in a brand after attending a live experience.<sup>4</sup>

# 2026 Opportunities for the **Finance** Category

MS Now



CNBC



Common Ground



Premios Billboard



Bravo Fan Fest



The Five Star Weekend



America 250



NBCUniversal



# THANK YOU

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