



NBCUniversal

STUDIOS 2025 YEAR IN REVIEW

Industry *Highlights* & Media Trends

as of March 2026

Agenda

1

Studios Landscape

Current Landscape & 2025 Media Trends

2

Studios @ NBCU Update

Media Trends, Creative Showcase, & Case Studies

3

Studios Upcoming Opportunities At NBCU



Current Studios Category Dynamics

While consumers still want maximum value out of movie ticket purchases, younger audiences and robust IP slates signal a promising 2026 theatrical market

Headwinds



-5% YoY slight decline in 2025 U.S. theatrical attendance¹

Film discovery varies widely by audience demos and genre fans

Movie ticket costs remains #1 barrier to more theatrical visits²

Audiences are seeking reassurance of movie quality to justify theatrical prices & efforts

Tailwinds



+10% projected 2026 U.S. box office growth³

\$6.1B est. revenue for 2026 franchise films based on predecessor film earnings (+13% YoY)²

Gen Alpha driving momentum with 60% preferring movies at theaters vs. home⁴

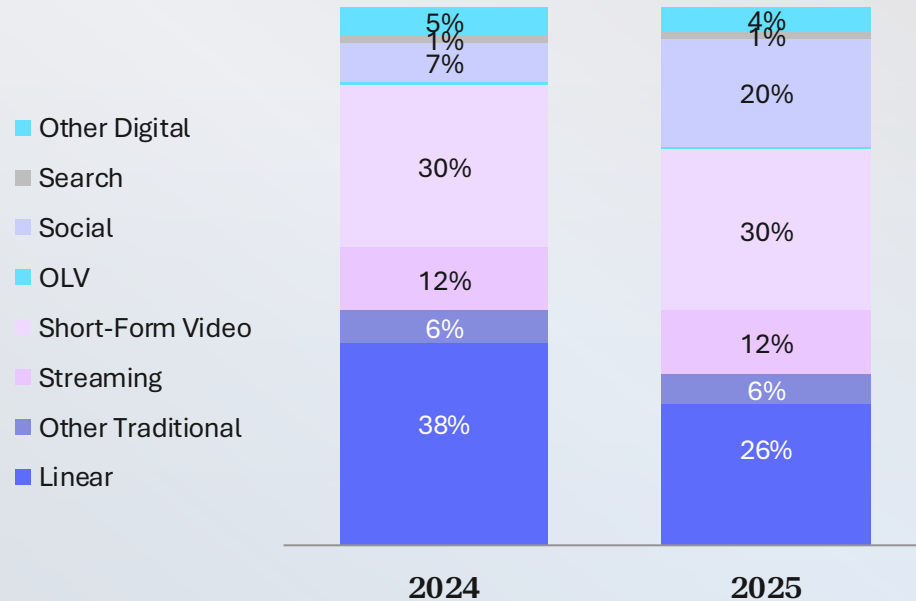
Gen Z driving growth with 43% planning to increase 2026 theatrical visits vs. 33% gen pop⁵

Studios Marketplace Spend

The category prioritized conversion-driving channels via short form & social, while still maintaining solid share of spend in premium video

Studios Category Media Mix

Share of Spend, in %



Traditional vs. Digital % Split	2024	2025
	44% / 56%	32% / 68%

Total Spend

+39% YoY

Driven by digital gains (+68%)

Streaming

+41%

Accounting for 17% of digital spend & 12% of total dollars

Short Form

+38% YoY

Maintained #1 media subtype share ranking (30% of total spend)

Social

+290% YoY

Largest \$ increase vs. STLY (up 9 figures), share grew +13pp YoY

STUDIOS NBCU SPEND

2025 vs. 2024

Studios leveraged premium sponsorships & performance channels to drive reach & consideration for priority titles



SPORTS

remained the focal point, as Studios sought to align with live, mass-reach programming for maximum title awareness

+31%

Sports (Linear & Digital)



ADVANCED

While DIO maintained largest share, PG & PMP continue to grow steadily due to growing interest in flexibility

+38%

Programmatic



STREAMING

continued as a key destination for reaching engaged audiences at 53% of digital spend as Studios tapped into contextual alignment & premium sponsorship

+64%

Streaming

+86%

Peacock Premier



AD INNOVATIONS

were integral for conversion with Spotlight / Pause ads capturing attention, boosting consideration, & driving ticket purchases

+42%

Ad Innovations

+104%

Spotlight Ad

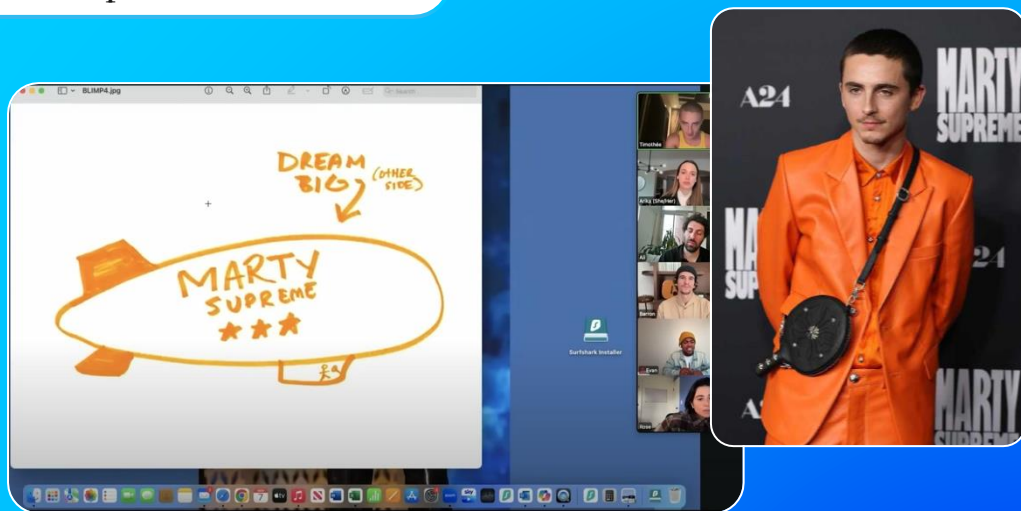
+125%

Pause Ads

Creative & Innovation

Across The Marketplace & NBCU

Marketplace



Marty Supreme Viral Stunts

A24 & Timothée Chalamet drove buzz & studio record box office by dropping spoof Zoom call recordings, exclusive jacket drops, Las Vegas Sphere activations, & on-theme premiere appearances

NBCU Spotlight



The Yellow Brick Road to BravoCon

"Wicked: For Good" partnered with BravoCon to create custom content with Bravolebrities in a cross-platform campaign driving intent to watch, press coverage, & record social post engagement

An NBCU IP partnership & paid social campaign drove incremental **REACH & CONSIDERATION** for a major studio

The Challenge:

A major studio wanted to drive **pre-release awareness & buzz** for an upcoming gothic romance film

The Approach:

The studio launched a cross-platform sports & entertainment campaign & sponsored season 4 of **The Traitors** on Peacock. The campaign leveraged Traitors-themed custom content, ad innovations, paid social, & contextual targeting to **maximize reach & capture the attention of engaged fans**

The Measurement:

We leveraged NBCU Streaming & 1P Social data to measure performance

The Results

Peacock & Paid Social Campaign Results

43M+

Peacock Impressions

6M+

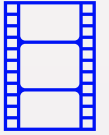
Social Impressions –
Instagram & TikTok

+27%

Video View Rate (2s) vs.
Instagram NBCU Social Ent.
Benchmark



2026 **STUDIOS** Predictions



Spanning the film lifecycle from theatrical release to awards season, these are **5 key topics** shaping the Studios category amid evolving global consumption trends, preferences, & tastes for entertainment.

Theatrical Gets Experimental

Traditional fixed release windows are being upended by film or audience-specific strategies (ex. weekend-only, sing-alongs) to capitalize on engaged fandoms, urgency, & data-driven optimization.

Specialized releases can help drive scarcity, demand, & experience differentiation especially amongst target genre or demo audiences.

64%

of Gen Alpha go to theaters to make seeing a movie feel like a special event.¹

Loyalty Comes at a (Lower) Price

High ticket prices necessitates more economical programs (ex. loyalty tiers, Discount Days, bundles, subscriptions) that give viewers more bang for their buck & lower high-cost barriers to entry.

Building stronger lifetime value with customers through DTC programs drives loyalty & repeat business long-term.

Top factor that consumers say would increase movie-going:

#1 Less expensive tickets or finding deals on movie tickets^{2,3}

Nostalgia & Known IP Drive Buzz

The upcoming theatrical slate is full of returning famous faces & franchises primed to drive social chatter & draw fans to theaters.

Leverage audiences' pre-existing IP knowledge to have more creative freedom with unique promotions that capture attention & tie into today's most relevant, cultural moments.

\$6.1B

estimated potential revenue for 2026 franchise films based on predecessor film earnings. +13% vs. 2025²

The Balance of Arthouse/Original IP

The recent critical & commercial successes of arthouse, independent, & original IP films demonstrate their resilience among franchise & established IP.

This resonance of original & niche stories alongside tentpole films will shape future slate development & what/whose stories get to be told on the screen.

72%

of Americans want to see more original films with fresh genre takes & creative risks.²

Hollywood Goes Global

The global box office & award shows have been skewing towards non-U.S. films & talent, demonstrating an audience & industry shift to a more global-centric entertainment culture.

This enriches opportunities to engage a more diverse range of consumers & expose viewers to different cultures & stories they may not otherwise experience.

18

Academy Award & 21 Golden Globe nominations across 5 international films from Neon.⁴

2026 Opportunities for the **Studios Category**

Love Island USA



Bravo Docuseries



Super Mario Galaxy Movie Pay One



2026 Live From E!



Today Show



Top Chef





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THANK YOU

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