



# What's Included

Based on customer & internal input, a new self-service toolkit covering the latest insights, strategies, & takeaways for all B2B brands (Big Tech, Mid-Tier, SMB) to drive impact with NBCU, including:

- Category Macro Trends
- B2B Audiences @ NBCU
- Power of Endemic + Non-Endemic
- Links to Relevant GTM Materials
- Case Studies

# How To Use

Select/combine slides most relevant for client & agency discussions

Please note red boxes for any slide instructions

For client recommendations or customizations, contact Domnique Folacci & Nicole Lee (Category Strategy )

For GTM questions, contact Jess Cohen (Sales Enablement), Jenn Gettlin (News, Peacock, Ent), or Bonnie Fallon (Sports, Olympics)

# NBCU's B2B Toolkit

*Click for section*



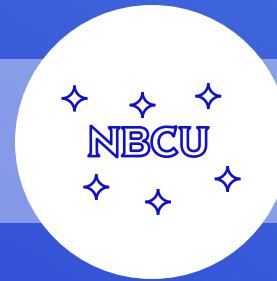
**Category Trends &  
Insights**



**Strategic  
Audiences**



**Informed & Entertained  
Framework**



**Power of Premium  
Live & Sports**



**Streaming  
Opportunities**



**Endemic  
Programming**



**Branded Storytelling  
& Custom Content**



**Case Studies &  
Benchmarks**





# B2B Category Trends & Insights

While tariffs could impact finances & operations, some B2B brands may experience steady or increased demand for services



Reduced financial activity could reduce U.S. GDP by 1% from curbed lending, investment, & overall financial activity<sup>1</sup>

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Rising CAPEX could heavily impact B2B growth & spend

AI costs will jump 5% above Big Tech's already planned \$325B in 2025, potentially diminishing innovation, revenue, and other budgets (e.g. advertising)<sup>2</sup>

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Small businesses may reduce B2B services or B2B ad spend

thanks to rising costs, slowed business, and decreased VC funding & federal support<sup>3</sup>

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Stickier B2B subcategories may be insulated or benefit including software, consulting services, data analytics, & telco<sup>4</sup>

**The 'Business  
of Business'**  
*continues to grow*  
resulting in a  
*more competitive*  
& **crowded marketplace**



**40M**

U.S. Business  
Decision Makers

**+19.4%**

SaaS global  
revenue CAGR  
to reach \$793B by 2029

**+62%**

B2B brands  
considered in  
buying journeys  
2024 vs. 2021

**+80%**

B2B sales to be  
generated digitally  
by the end of 2025  
vs. 13% in 2019



And today's  
decision-making  
process has grown  
more complex  
necessitating new  
sales & marketing  
strategies

*Democratized Decision-Making*

10-11

Average size of a business  
decision-making group

72%

of buying teams hire outside  
consultants to influence decisions

*Shrinking Shortlists*

49%

of BDMs only consider 1-3  
products per decision making  
cycle (up 16ppts YoY)

80-90%

of BDMs already have a  
vendor shortlist before the  
research process

*Growing Prioritization  
of Brand Building*

95%

of BDMs are not in market now, but  
will be in the future while only 5%  
are projected to be in market now

45%

of B2B marketers would commit  
over half of marketing spend on  
brand if not for budget constraints

# This Changing Landscape Creates Distinct Challenges For Marketers

These challenges are not necessarily new, but are more important than ever to address



Determining the right  
**“Business Decision  
Maker” Targets**



Finding the  
Balance Between  
**Brand &  
Performance  
Strategies**



Navigating Complex  
Decision Journeys To  
**Build Customer  
Lifetime Value**



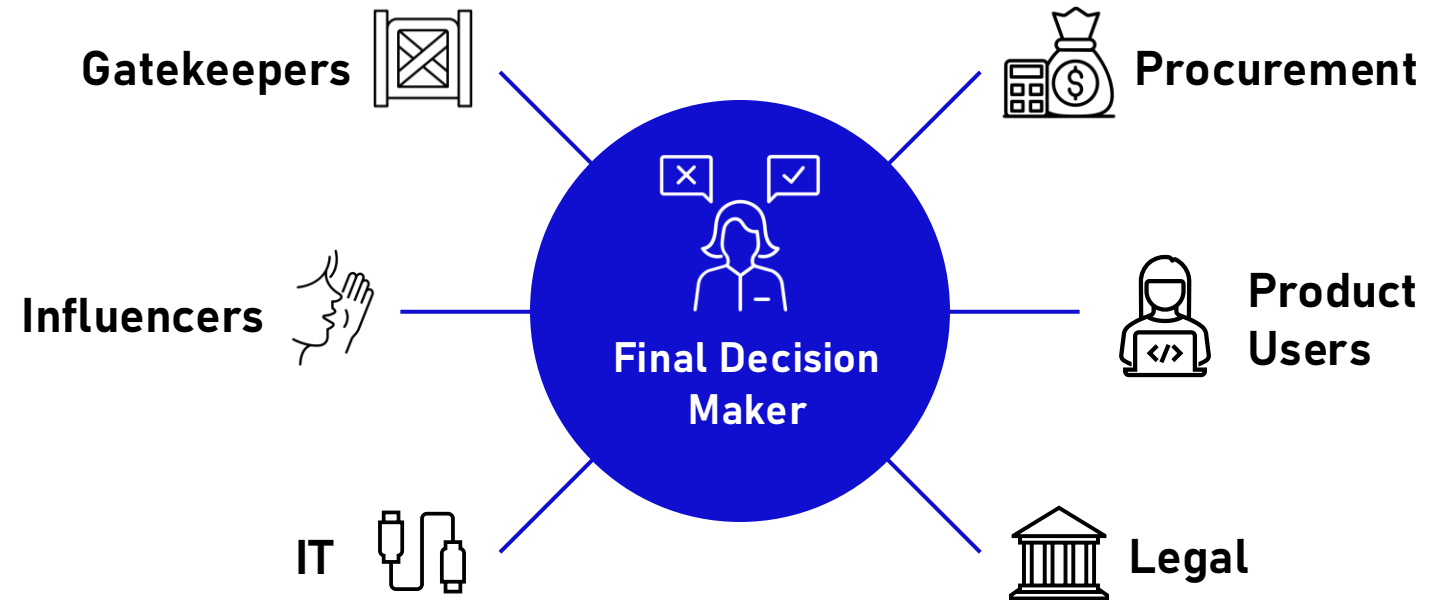
# Determining the right “Business Decision Maker” targets

In this changing landscape, decision-making stakeholders are moving targets consisting of different types of employees coming together in a matrix

# 10-11

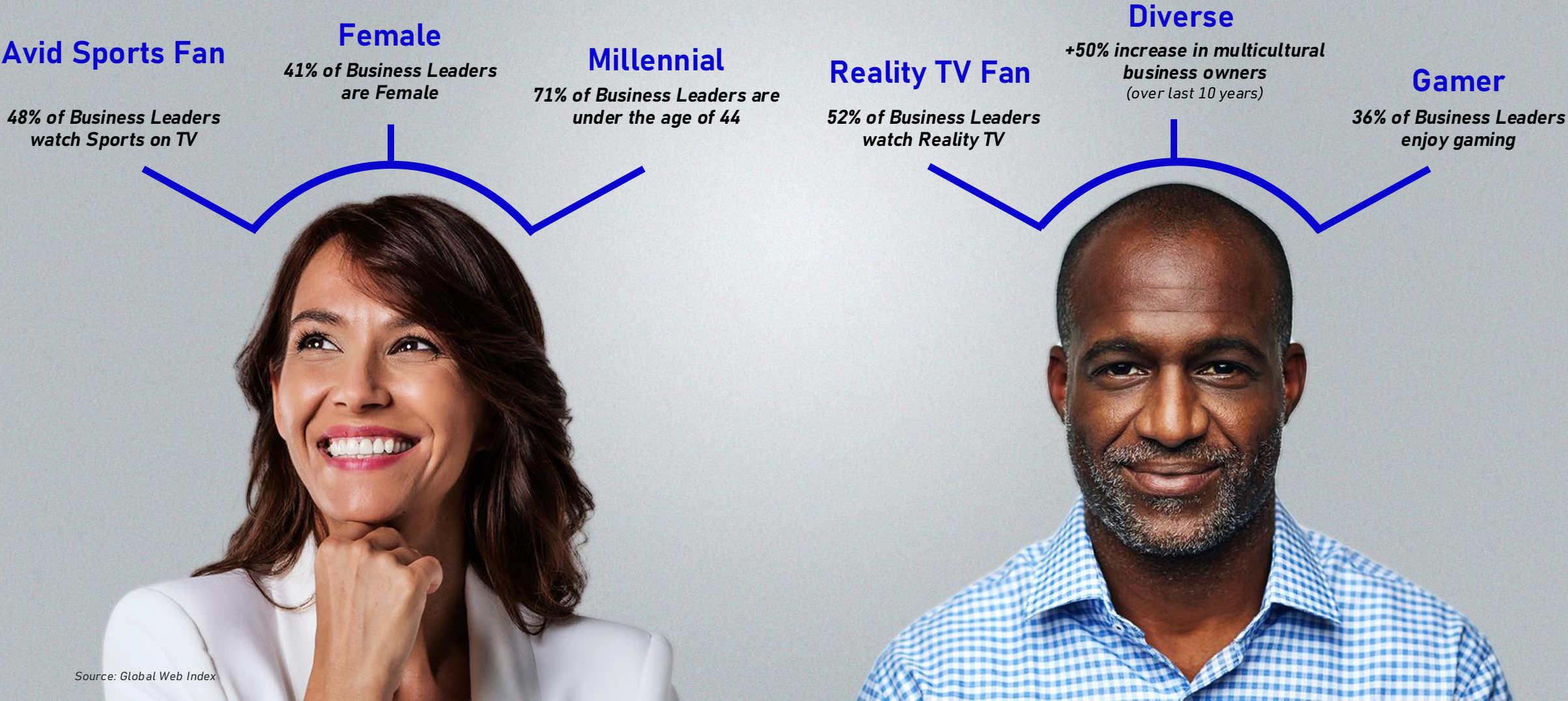
Stakeholders involved in the decision-making process

## Decision-Making Stakeholder Matrix Illustrative Example





# Today's business leaders are younger and more diverse – B2B storytelling must evolve accordingly to authentically speak to them



Source: Global Web Index

Navigating  
complex decision  
journeys to  
**build customer  
lifetime value**

Today's economic landscape  
can't accommodate the high  
customer acquisition costs  
with the minimal returns that  
have defined the last decade  
of marketing strategy,  
sparking a shift to prioritizing  
lifetime value

**Growth Strategy Timeline:**

**61%**

of marketers report  
that the "growth at all  
costs" mentality is over

2010 - 2021



Growth driven by  
**customer acquisition**

**67%**

of businesses are  
prioritizing keeping  
current customers happy  
over acquiring new ones

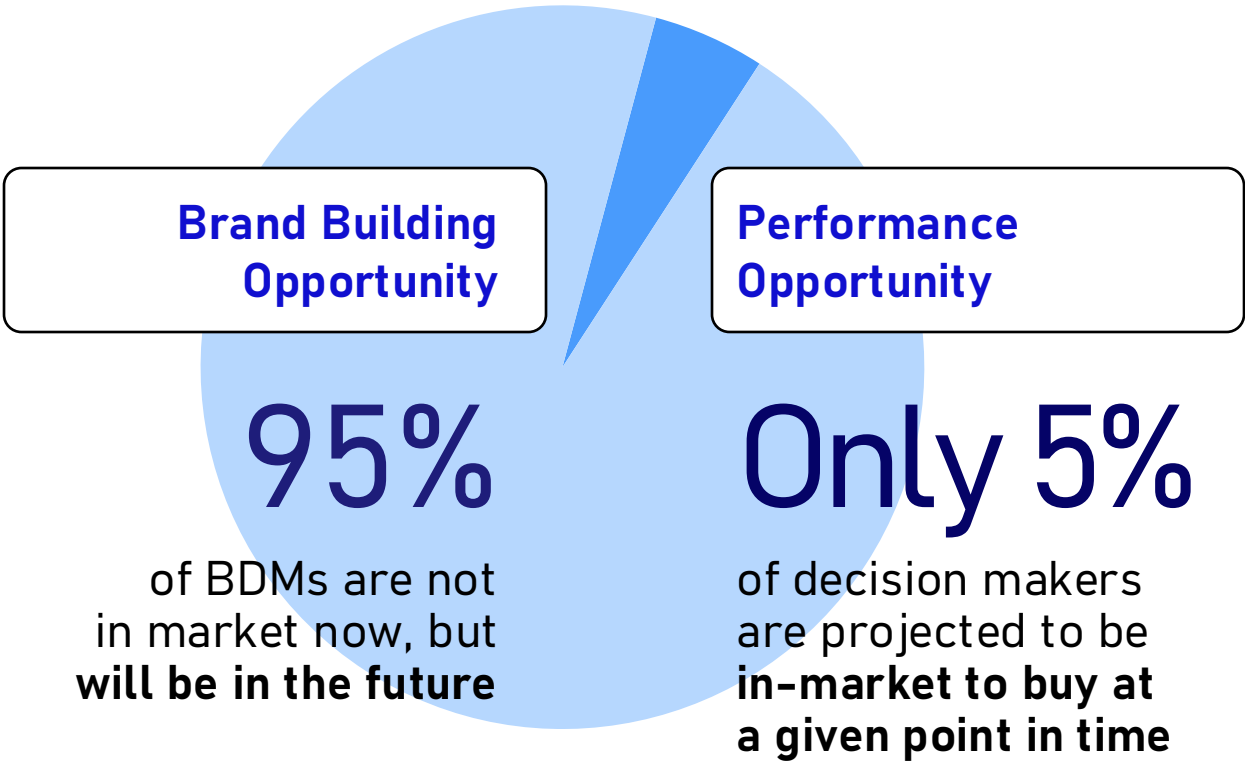
2022 +



Growth driven  
**by tangible  
lifetime value**



B2B marketers  
must strike the right  
balance between  
*brand & performance*  
strategies to  
*drive full funnel impact*







B2B marketers need effective media strategies to reach & influence

# decision power







# Strategic B2B Audiences @ NBCU

NBCUniversal  
continues to  
be the right  
partner **to reach  
decision makers**

Each month, our content reaches

286M

P2+



that includes the  
**audiences** that  
matter to you



Consult Audience Insights tool or I&M  
for latest B2B audience segments

44.7M

Business Decision Maker  
Director Level & Above

38.6M

Technology Decision Makers

44.9M

Small Business Owners

2.5M

C-Suite

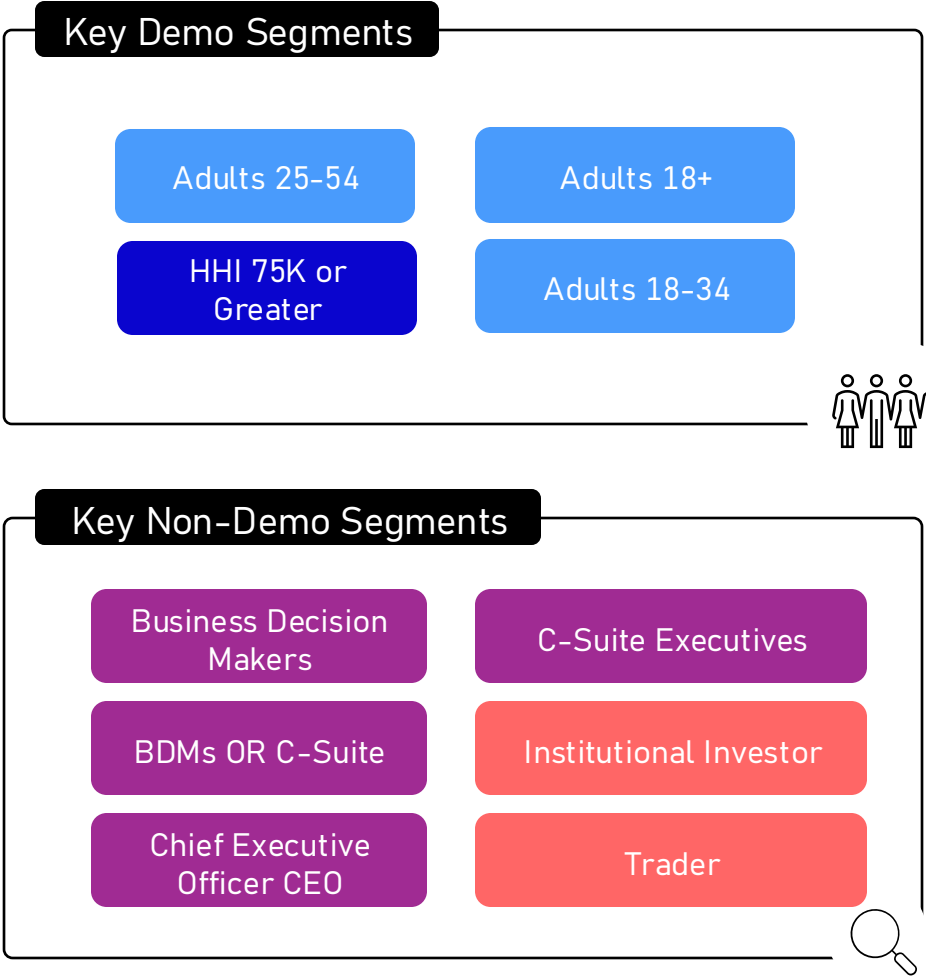
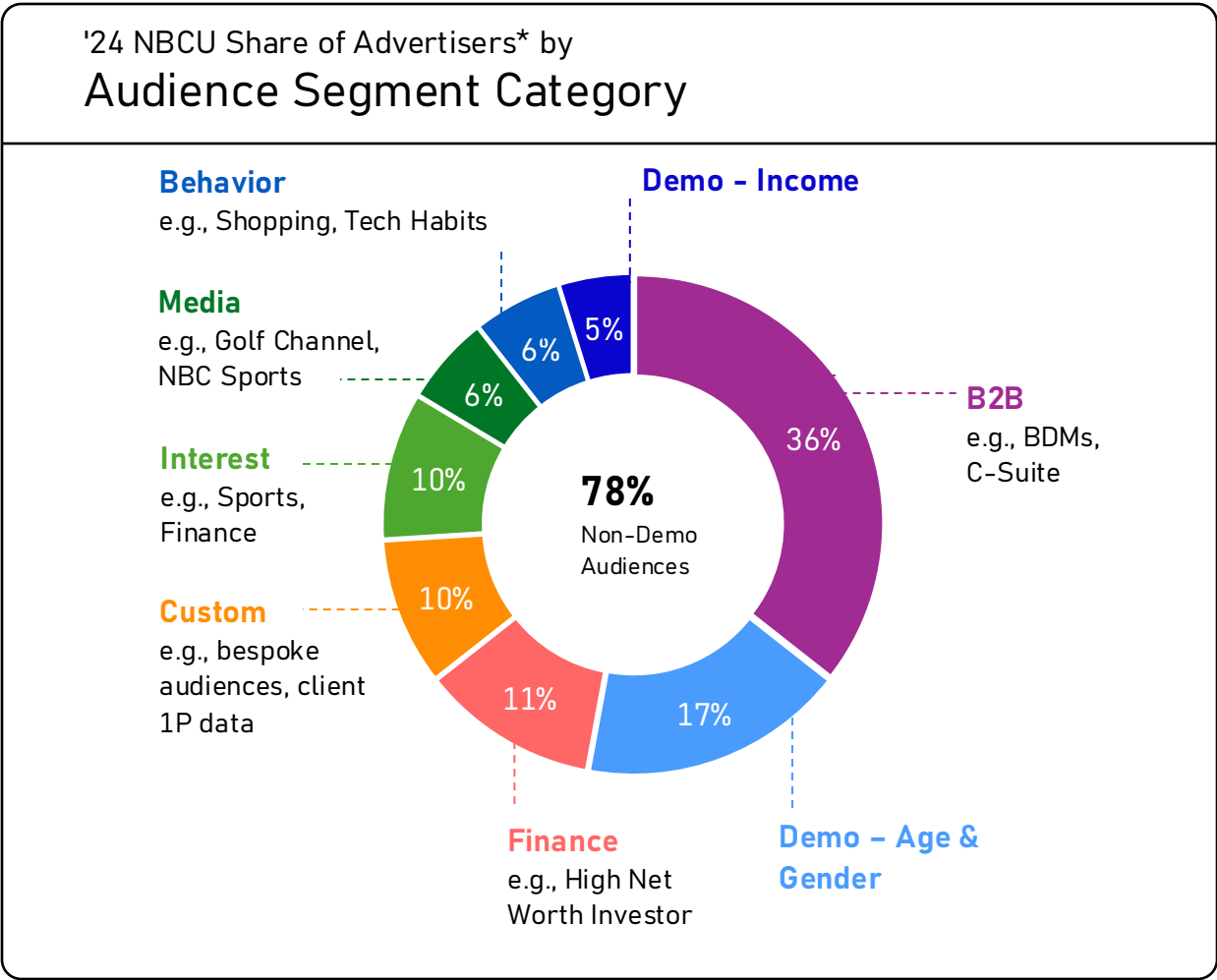
This data-driven approach allows them to find nuanced audiences wherever & whatever they are watching





# Tech & Finance B2B primarily leverage B2B audience segments

to reach decision-makers where they're most engaged across NBCU's portfolio



Top Telco B2B Segments: 1) Business Decision Makers, 2) Business Decision Makers OR C Suite, 3) IT Decision Makers, 4) Small Business Owners

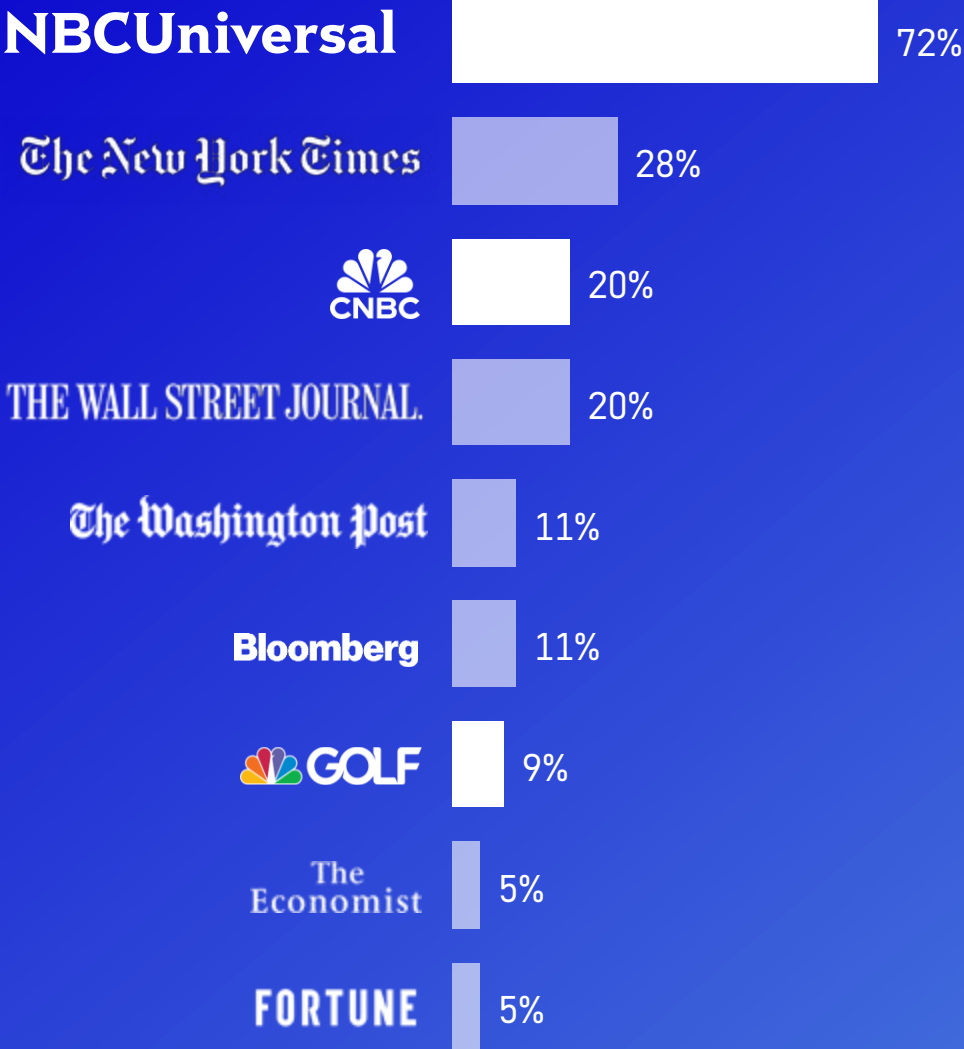
Consult I&M for other B2B audience cuts (ex. BDMs Spending \$100K or \$1M+, Consulting Services BDMs, Travel BDMs, etc.)

NBCU reaches more  
**high value  
business  
targets**  
monthly than traditional  
B2B powerhouses

BDMS Spending  
\$10K+ Annually

C-Suite

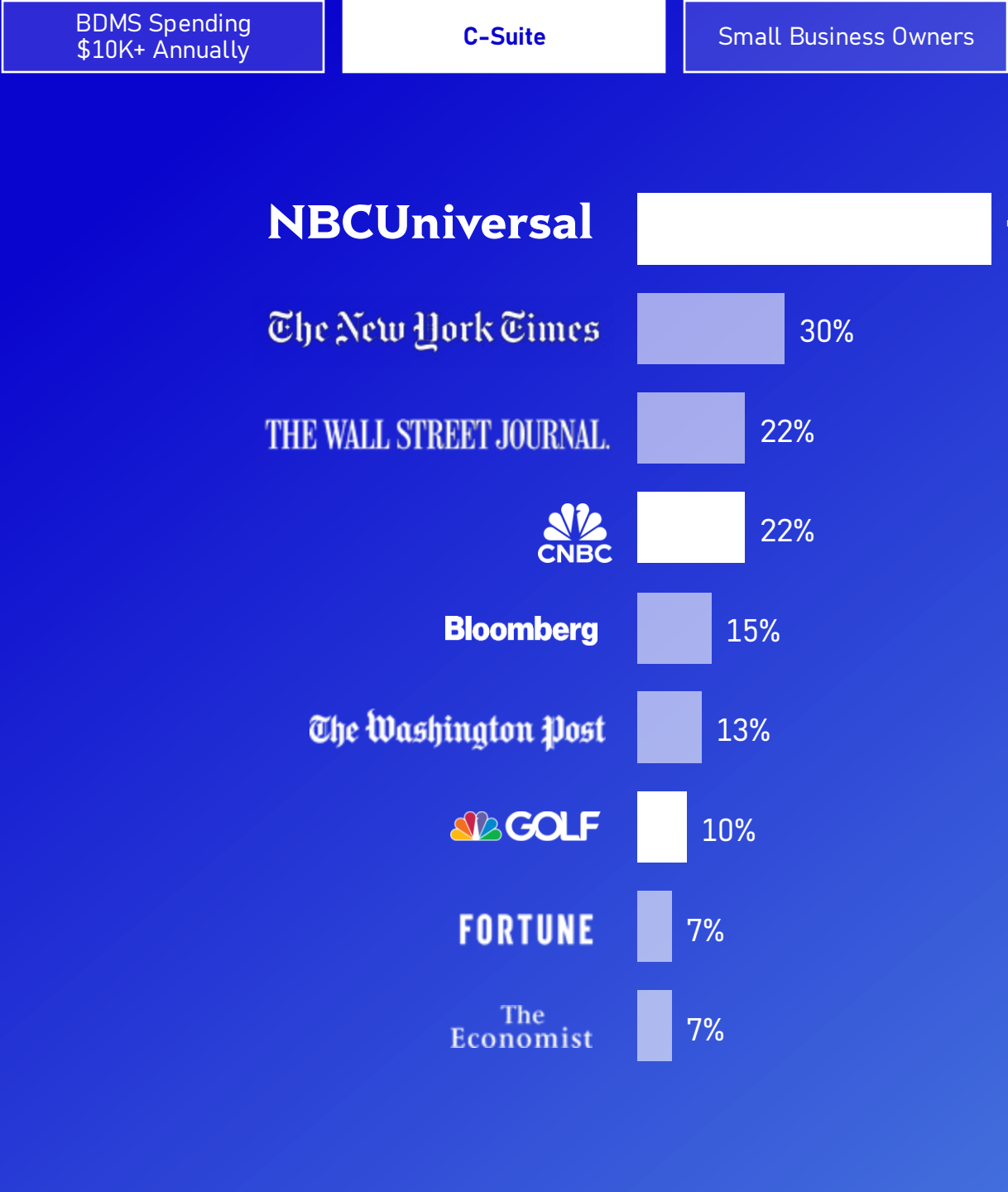
Small Business Owners



Consult I&M for other B2B audience cuts (ex. BDMs Spending \$100K or \$1M+, Consulting Services BDMs, Travel BDMs, etc.)

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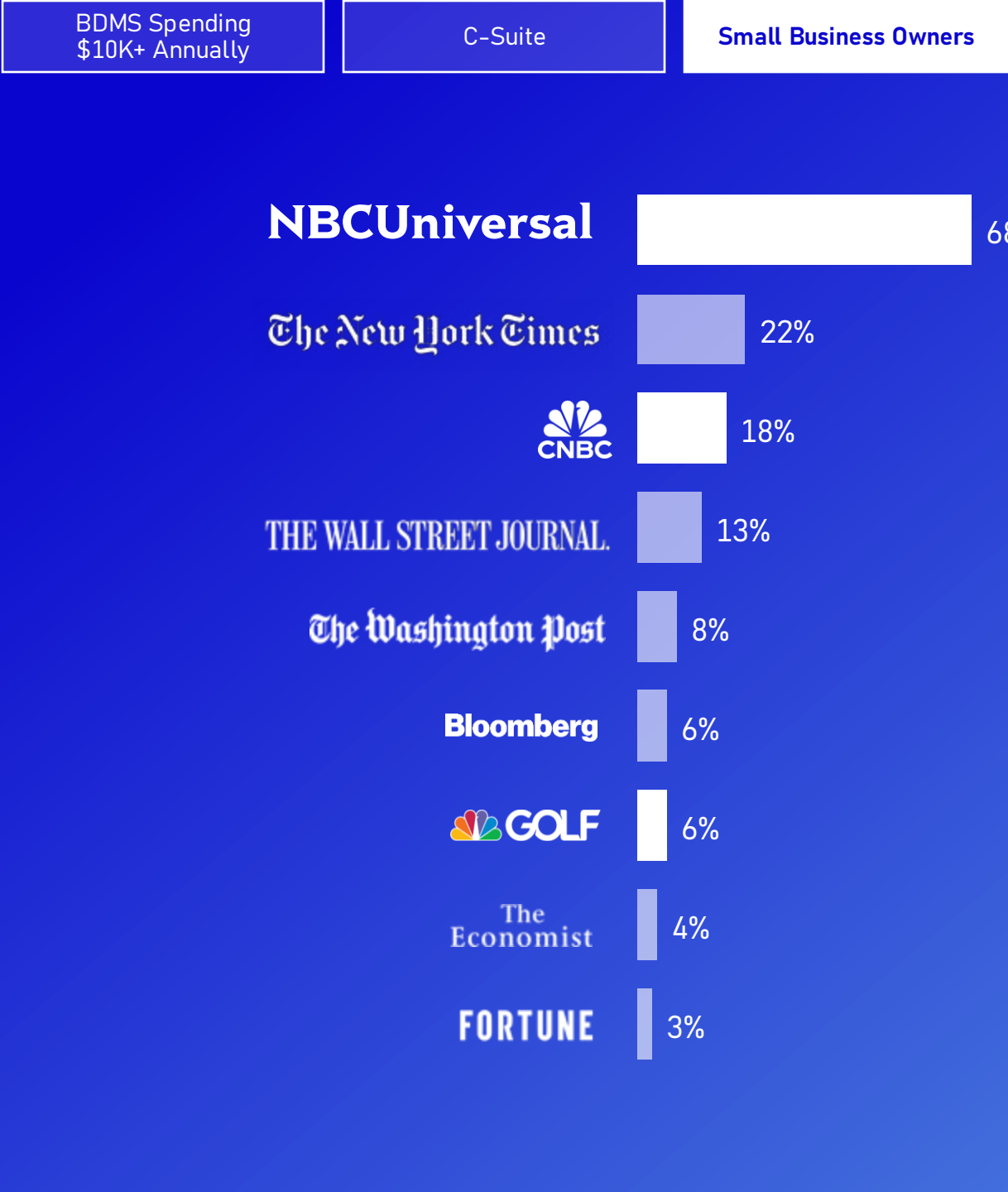
Source: 2025 MRI Custom Video Study. U.S. P18+ population. Cross Platform.  
C-Suite = C-suite 1 or C-suite 2



Consult I&M for other B2B audience cuts (ex. BDMs Spending \$100K or \$1M+, Consulting Services BDMs, Travel BDMs, etc.)

NBCU reaches more  
**high value  
business  
targets**  
monthly than traditional  
B2B powerhouses

Source: 2025 MRI Custom Video Study. U.S. P18+ population. Cross Platform.  
Small Business Owners = 0-50 employees





A data-driven,  
audience strategy  
**maximizes reach &  
impact** for B2B brands



# Activate your audiences your way

with flexible, always-on options to meet your objectives



## Streaming

Dynamic, 1:1 addressable delivery across CTV, desktop, and mobile

- ✓ Direct IO, PG, or PMP



## Data-driven linear (DDL)

Enhanced 1:many delivery at scale through the broad reach of national linear TV

- ✓ Managed service *or* self-service
- ✓ NBCU only *or* cross-pub with OpenAP



## Cross-platform (XP)

### One Platform Total Audience

Unified, cross-platform strategic audience optimization across linear & streaming

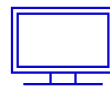
- ✓ NBCU only *or* cross-pub with OpenAP
- ✓ Streaming via direct IO or PG

B2B brands  
leveraging a **data-  
driven approach** with  
NBCU have already  
found success

✓	More Target Audience Impressions	+36%
✓	Higher Target Audience Index	+9%
✓	Greater Target Audience Reach	+55%
✓	Better Cost Efficiency & Lower CPM	-20%

# NBCU Tech B2B Spend 1H'25 v. 1H'24

The subcategory is not only growing spend, but diversifying spend across platforms & genres to reach audiences wherever they're consuming content across our CTV ecosystem



**Broadcast Entertainment**  
grew as a key vehicle for mass reach as brands activate messaging across Prime & Late Night

*Broadcast Entertainment spend grew 3x vs. STLY*



**Cross-Platform Sports**  
investment grew as advertisers leverage the fan-favorite genre across CTV

*Linear & streaming sports spend grew +7% vs. STLY, accounting for 34% of total spend*



**Programmatic Streaming**  
spend grew 2x as brands utilize flexible & efficient channels to reach CTV audiences

*Programmatic share of total spend grew 6pp vs. STLY*



**News**  
remains a resilient & effective channel for endemic & business news contextual marketing

*News accounted for 20% of total spend, up 9pp vs. STLY*



The background image is a blue-tinted photograph of a person sitting at a desk, viewed from behind. They are looking at a large computer monitor on the left and a laptop in front of them. In the background, a television is mounted on a stand, displaying a golf player in mid-swing. The NBC peacock logo and the word 'GOLF' are visible in the bottom left corner of the TV screen. A white diagonal line runs from the top right towards the bottom center, separating the text on the left from the text on the right.

**NBCUniversal**

believes in reaching your audience  
when they want to be:

Informed  
&

Entertained



# Informed



## #1

Business Network *for monthly cross-platform reach (2.4X higher than Bloomberg)*

Business News site *for Time Spent Watching Video (+54% vs. #2 Property)*



## 60+

Events each year convening core business audiences including C-suite executives, business decision makers, financial advisors, investors, opinion leaders & more

## 10k+

Total Attendees Across CNBC Events & CNBC Council Events in 2023



## 59%

Increased brand recall with branded content vs. standard digital ads

## 22x

Branded content is more engaging vs. display ads

## 50%

Brand lift for branded content distributed through premium publishers

Connecting when BDMs are informed is integral,  
but advertisers can further differentiate with **emotion-driven  
content & entertainment**

56%

of the business decision-maker choice comes down to **emotional factors**

88%

of business leaders are more likely take note of advertising from B2B brands that **speak to their passions and interests**

2x

B2B video ads that incorporate emotional content see **2x the web visitation** vs those that only incorporate rational content



# 90%

of business leaders say a good B2B ad captures their attention if they're relevant; it doesn't matter if they run in business content

Select top programs amongst BDMs @ NBCU



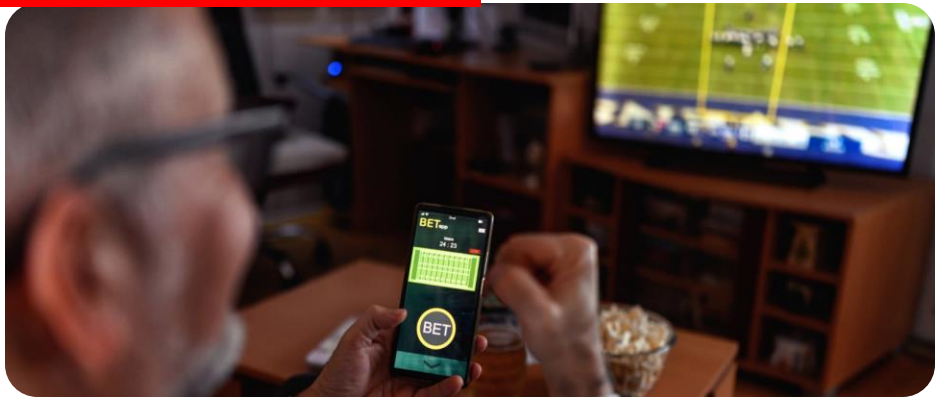
# Entertained





# The Power of Premium (Live + Sports)





The Unique Value &  
Unstoppable Rise of

# Sports in Media

NBCUniversal







# The Power of Peacock / NBCU Streaming



World Leader in Business News



NBCUniversal



# Why News

2025







**BRAND STUDIO**

# Why Branded Content?

Branded Content is a highly effective way for brands to deliver their messaging. **Brand recall is 59% higher** with branded content than with other digital ads and **22x more engaging** than display ads. Further, branded content distributed through premium publishers has a **50% higher brand lift**.\*

The award-winning NBC News Brand Studio can engage your brand's audience across the NBCU portfolio through strategic branded content that tells your brand's story, lifting awareness, consideration and action.





# B2B Case Studies & Benchmarks

B2B Consulting Org Case Study

# Customizing Campaigns via Trusted Programming

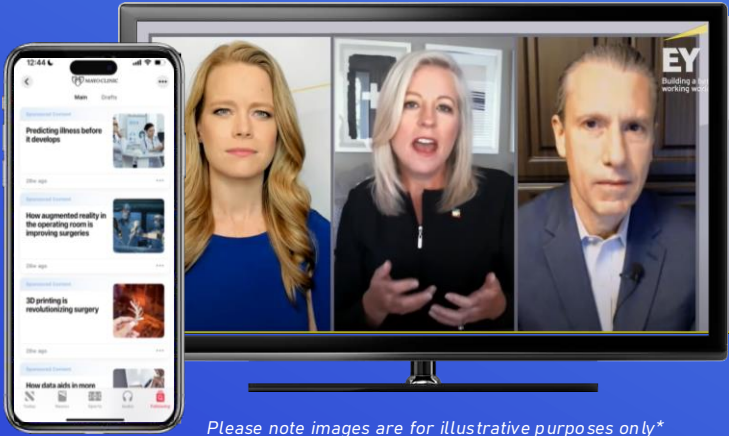
**Challenge**

Demonstrate brand thought leadership and engage target BDMs to amplify B2B reputation and affinity

**Solution**

Recognizing the power of partnership, we leveraged CNBC Brand Studio to craft a custom content series featuring this brand's leaders and strategic partners discussing forward looking trends

The brand partnership was further amplified via broader NBCU digital/social portfolio



Please note images are for illustrative purposes only\*

**Results**

Exposure Drove Brand Lift

**+13%**

Brand Opinion

**+17%**

Recommendation

CNBC Partnership Drove Affinity

**92%**

agree this brand is a good fit for CNBC



B2B IT Company Case Study

# Optimizing Beyond Traditional Channels

## Challenge

A leading IT company wanted to make the most of their linear ad spend to drive search engagement

## Solution

Optimization resulted in **expanding number of linear properties purchased**, while also **increasing CNBC**, and **still including Golf**



## Results: EDO Search Engagement

+32%

lift in search engagement compared to non-NBCU linear

+17%

lift in search engagement compared to NBCU non-DDL

## Power of E!, Oxygen, Bravo

New non-endemic networks **outperformed endemic networks** and drove some of the **strongest search engagement lifts**



B2B IT Company Case Study

# Activating the Full Funnel

### Challenge

A leading IT/Consulting company wanted to gain insights into audience viewing behavior and the impact of advertising across multiple types of content

## Solution

Identify impactful alignment points throughout a cross-genre campaign to maximize audience reach and execute a multi-layered, study including qualitative and quantitative research as well as bio-metric screening to measure the impact of the campaign.



## Results

Brand Awareness & Familiarity

**79%**  
of BDMs  
vs. 21% Not Aware

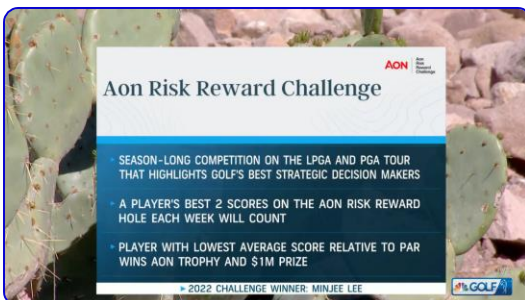
Favorability Towards Brand

**70%**  
of BDMs  
vs. 6% Not Favorable

Brand Consideration

**65%**  
of BDMs  
vs. 10% Unlikely to Consider

# How B2B partners are **evolving their storytelling**



## Establishing Season-Long Integrated Messaging

AON Risk Reward Challenge engaged viewers as an always-on campaign during PGA & LPGA Tours



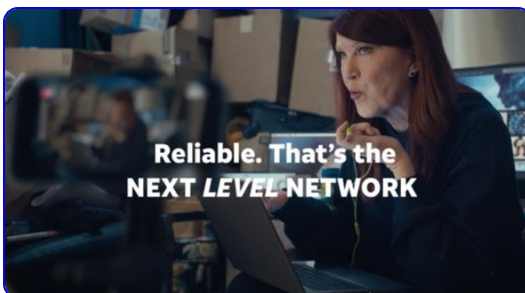
## Enhancing the Fan Experience

Salesforce's Tableau created custom analysis during Tour de France coverage



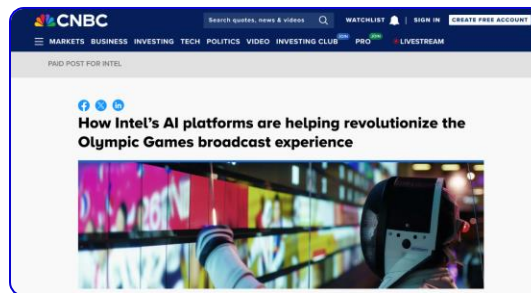
## Demonstrating Product Capabilities

AWS powered unique insights highlighted via SNF in-game features



## Leveraging Fan-Favorite Talent

AT&T Business's "Executive Edge" CNBC campaign featured "The Office" talent to employ humor & capture attention



## Customizing Content via Trusted Tentpoles & Platforms

Intel contextualized its tech to the Paris Olympics to enhance credibility



## Activating Experiential for 1:1 Connection

Salesforce sponsored CNBC's Technology Executive Council to engage a curated audience

# NBCUniversal is also the right partner to make an impact of decision makers

NBCU Tech B2B Campaigns – Test vs. Control

Upper	Unaided Brand Recall +13%	Brand Familiarity +12%	Aided Brand Recall +19%
Middle	Search Engagement +88%	Brand Favorability +5%	Consideration Intent +11%
Lower	Purchase Intent +10%	Recommendation Intent +14%	

Source: NBCU Ad Impact Database 2017-2023, 38 Campaigns across 7 Brands NBCU measured Insurance campaigns  
Custom research, vendors vary. Average of exposed vs. control cells for NBCU. Top 2 box  
Search Engagement (SER Index): EDO, Volume in five minutes following ads airing on NBCU vs. same brand competitive averages expressed as an index (123).

# NBCUniversal is also the right partner to make an impact of decision makers

NBCU Finance Campaigns – Test vs. Control

Upper	Aided Brand Recall +13%	Unaided Brand Recall +28%	Ad Recall +47%	Brand Familiarity +30%
Middle	Brand Favorability +25%	Sponsorship Favorability +16%	Sponsorship Association +63%	Message Association +48%
Lower	Search Engagement +59%	Consideration Intent +55%	Purchase Intent +16%	Recommendation Intent +43%

Source: NBCU Ad Impact Database 2017-2023, 172 Campaigns across 57 Brands NBCU measured Finance campaigns  
Custom research, vendors vary. Average of exposed vs. control cells for NBCU. Top 2 box  
Search Engagement (SER Index): EDO, Volume in five minutes following ads airing on NBCU vs. same brand competitive averages expressed as an index (159).



# NBCUniversal is also the right partner to make an impact of decision makers

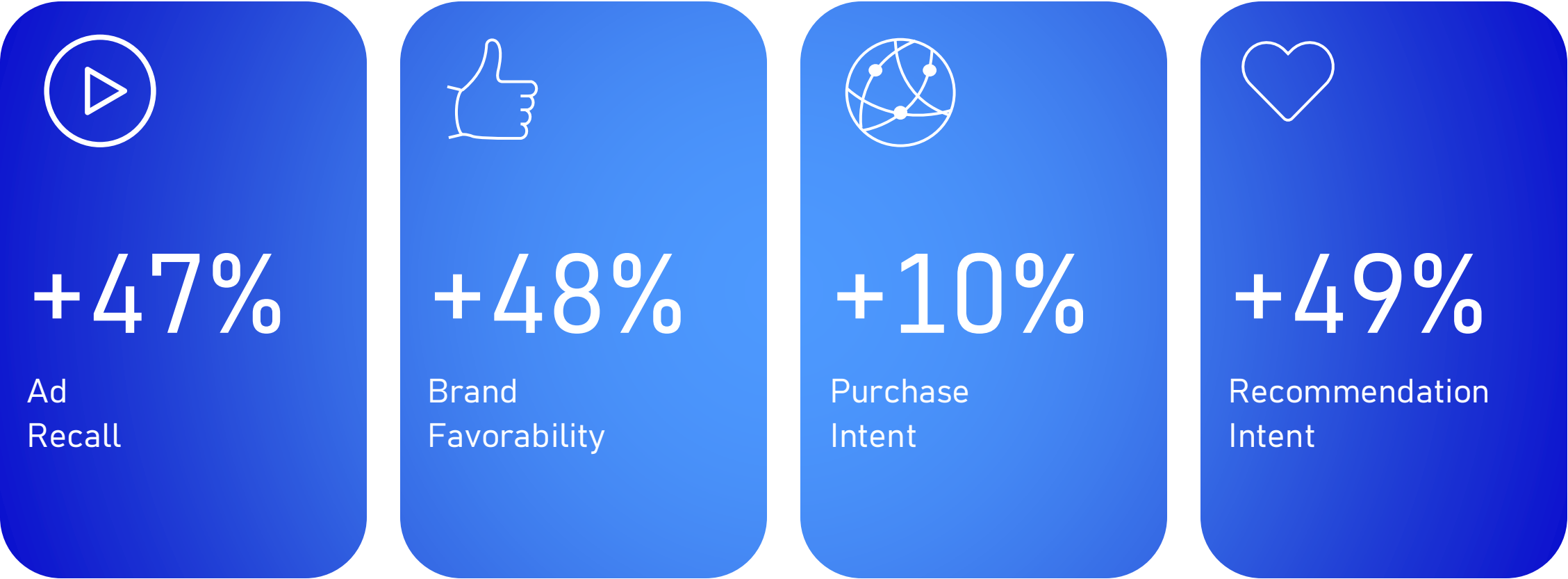
NBCU Telco Campaigns – Test vs. Control

Upper	Unaided Ad Recall +51%	Ad Recall +16%	Brand Familiarity +5%		
Middle	Brand Favorability +11%	Sponsorship Favorability +11%	Sponsorship Association +10%		
Lower	Search Engagement +44%	Purchase Intent +17%	Recommendation Intent +27%	Consideration Intent +25%	Any Web Visit +54%

Source: NBCU Ad Impact Database 2017-2023, 124 Campaigns across 19 Brands NBCU measured Telco campaigns  
Custom research, vendors vary. Average of exposed vs. control cells for NBCU. Top 2 box  
Search Engagement (SER Index): EDO, Volume in five minutes following ads airing on NBCU vs. same brand competitive averages expressed as an index (144).

# Campaigns across more than one platform are more effective

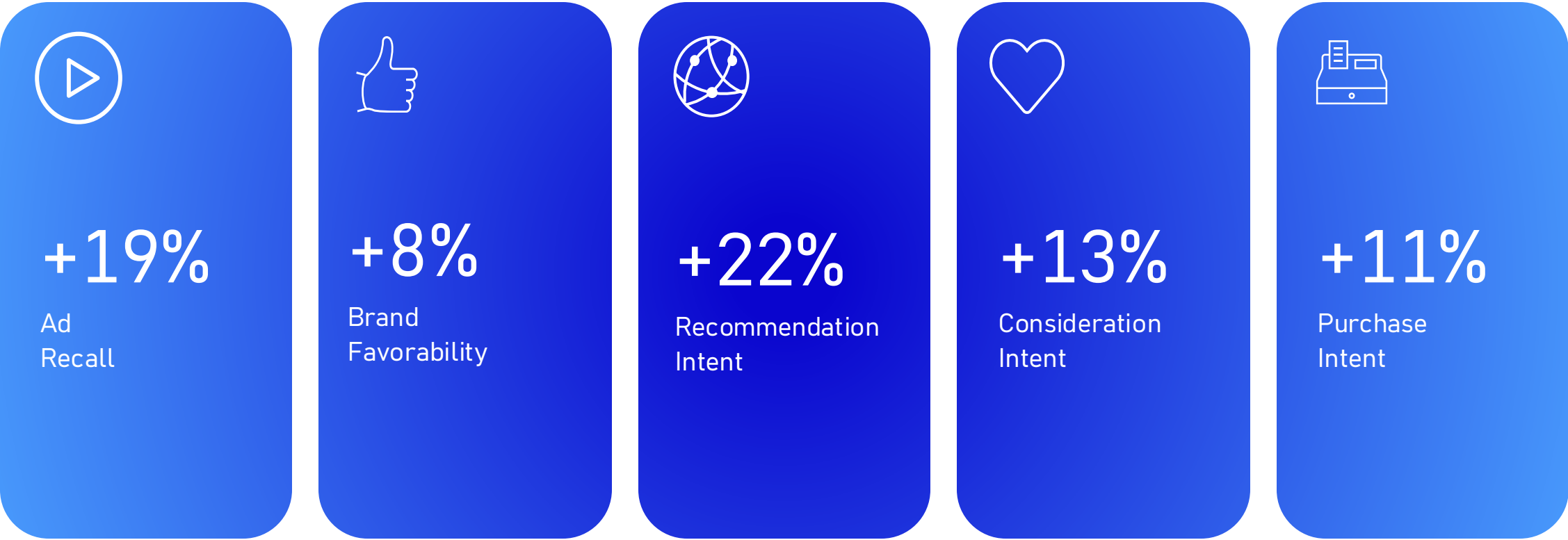
Tech Category NBCU Campaigns:  
Multi-Platform vs. Single Platform  
% Lift



Source: NBCU Ad Impact Database 2017-2023, 76 Single Platform Campaigns v. 36 Multi-Platform Campaigns  
Custom research, vendors vary. Average of test cells for 2+ platforms vs. single platform campaigns

# Campaigns across more than one platform are more effective

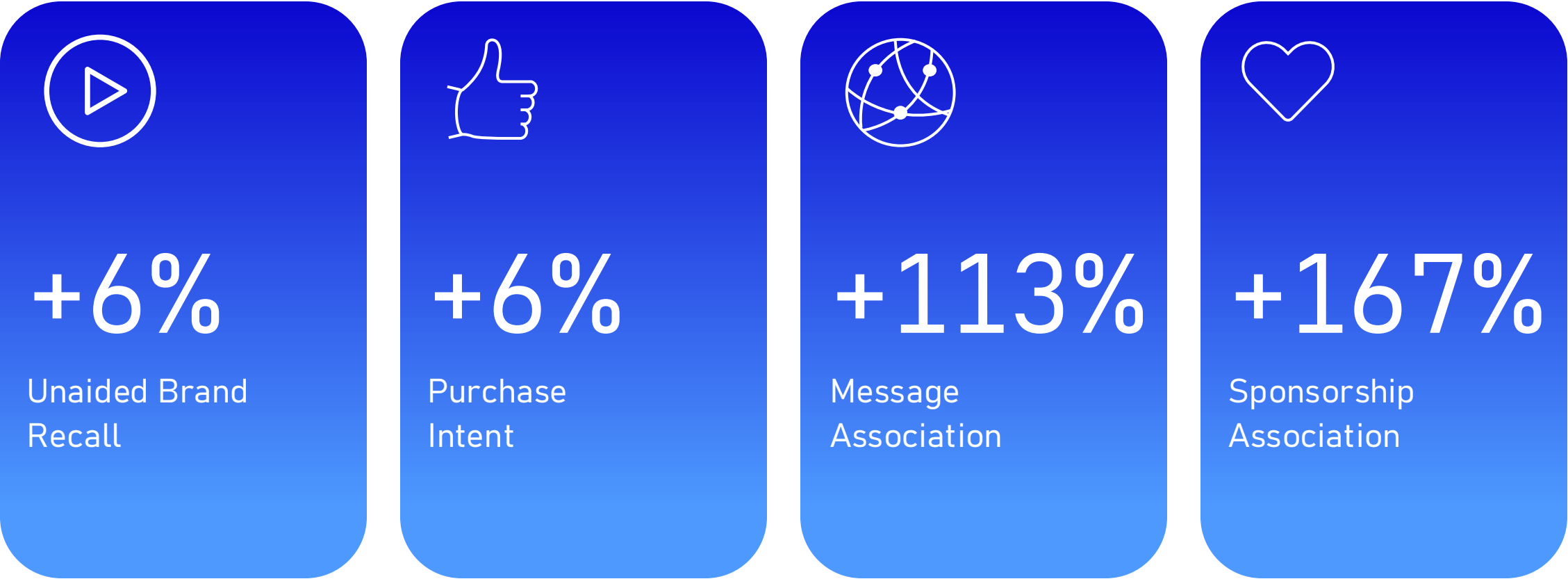
Telco Category NBCU Campaigns:  
Multi-Platform vs. Single Platform  
% Lift



Source: NBCU Ad Impact Database 2017-2023, 69 Single Platform Campaigns v. 55 Mult-Platform Campaigns  
Custom research, vendors vary. Average of test cells for 2+ platforms vs. single platform campaigns

# Campaigns Across More than One Platform Are More Effective

Finance Category NBCU Campaigns: Multi-Platform vs. Single Platform  
% Lift



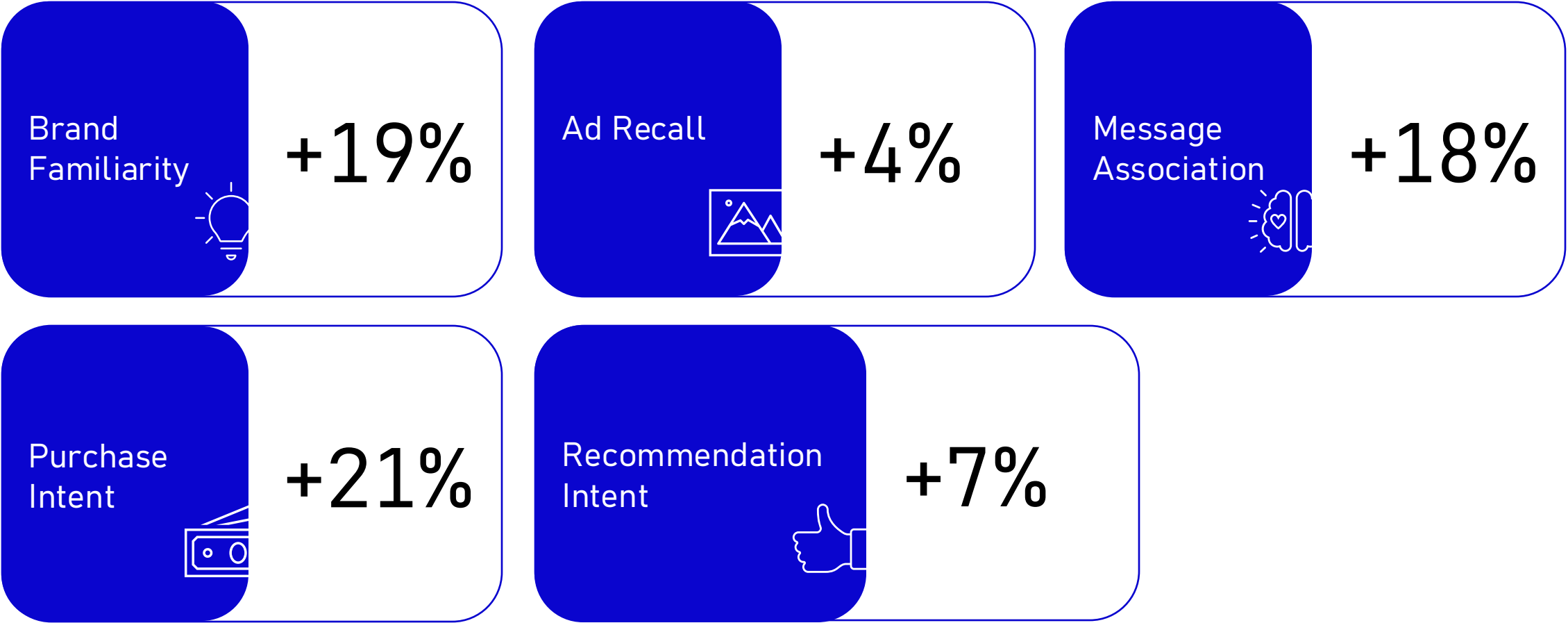
Source: NBCU Ad Impact Database 2017-2023, 92 Single Platform Campaigns v. 80 Multi-Platform Campaigns  
Custom research, vendors vary. Average of test cells for 2+ platforms vs. single platform campaigns



# Tech (Peacock)

## Proven impact across client KPIs

NBCU Tech Campaigns – *Test vs. Control*



Source: NBCU Ad Impact Database 2017-2023, 51 Campaigns across 34 Brands Peacock measured Tech campaigns  
Custom research, vendors vary. Average of exposed vs. control cells for NBCU. Top 2 box

# Finance (Peacock)

## Proven Impact Across Client KPIs

NBCU Finance Campaigns – Test vs. Control

Upper	Unaided Ad Recall +37%	Unaided Brand Recall +3%	Aided Ad Recall +10%	Brand Familiarity +2%
Middle	Brand Favorability +13%	Sponsorship Favorability +8%	Sponsorship Association +2%	Message Association +1%
Lower	Consideration Intent +22%	Purchase Intent +2%	Recommendation Intent +14%	

Source: NBCU Ad Impact Database 2017-2023, 36 Campaigns across 12 Brands Peacock measured Finance campaigns  
Custom research, vendors vary. Average of exposed vs. control cells for NBCU. Top 2 box

# Power of Ad Innovations

Drive Effective Results through Strategic Application and Category Best Practice

**75%**  
of B2B brands that invested in Ad Innovations in 2023 increased investments in 2024

Tech

## Spotlight Ad



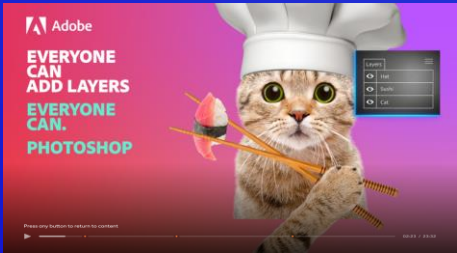
**+34%** Ad Likeability vs. Midroll for Category

## Power Break Ad



**+65%** Ad Likeability vs. Midroll for Category

## Pause Ad



**+33%** Ad Likeability vs. Midroll for Category

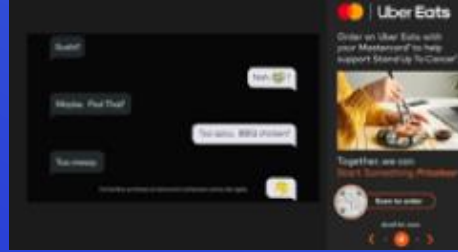
Finance

## Pod Bounce



**+58%** Brand Memorability vs Midroll for Category

## Engagement Ad



**+11%** Message Memorability vs. Midroll for Category

Telco

## Audience Targeted Pause Ad



**+98%** Ad Likeability vs. Midroll for Category

\*Lifts are not guaranteed and are dependent on creative

# GTM Resources

[Click for deck](#)

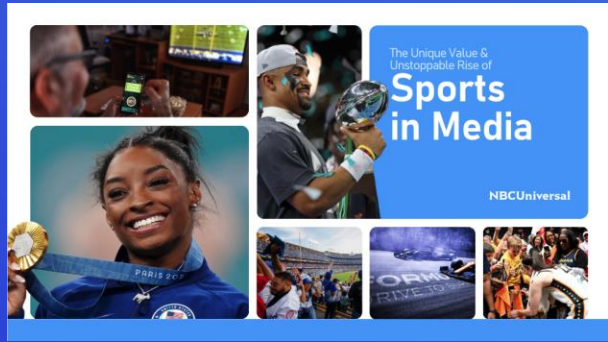
## 25/26 GTM Materials



## Q2'25 Scatter to Capitalize on Current B2B Momentum



## 2025 Sports Upfront Deck



## News GTM Materials



## CNBC GTM Materials



## News Brand Studio GTM Materials





**NBCUniversal**

# Thank You

**Category Strategy**

Dominique Folacci & Nicole Lee

**Sales Enablement**

Jess Cohen

**Trade Marketing**

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