



NBCUniversal

B2B & Business Decision Makers Toolkit 25/26

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



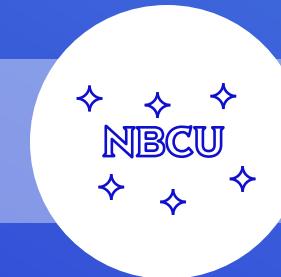
Category Trends & Insights



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 activity¹

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)²

Small businesses may reduce B2B services or B2B ad spend

thanks to rising costs, slowed business, and decreased VC funding & federal support³

Stickier B2B subcategories may be insulated or benefit including software, consulting services, data analytics, & telco⁴

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**

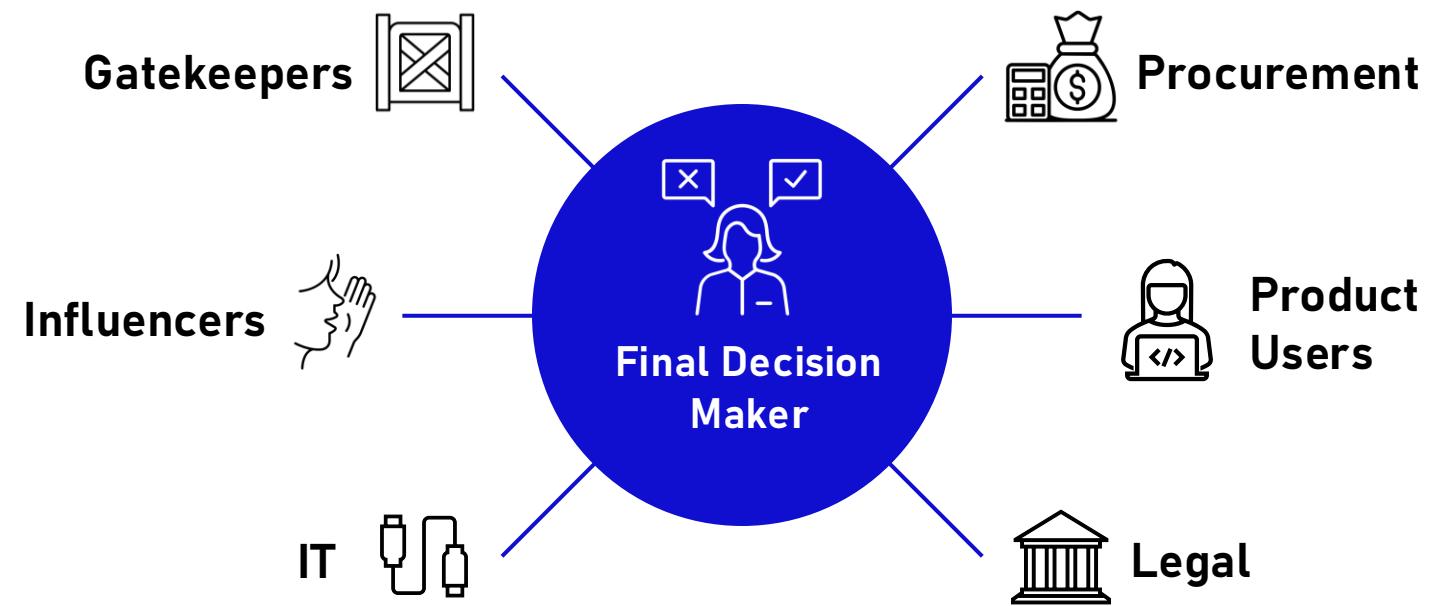
Determining the right “Business Decision Maker” targets

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

Avid Sports Fan

48% of Business Leaders
watch Sports on TV

Female

41% of Business Leaders
are Female

Millennial

71% of Business Leaders are
under the age of 44



Reality TV Fan

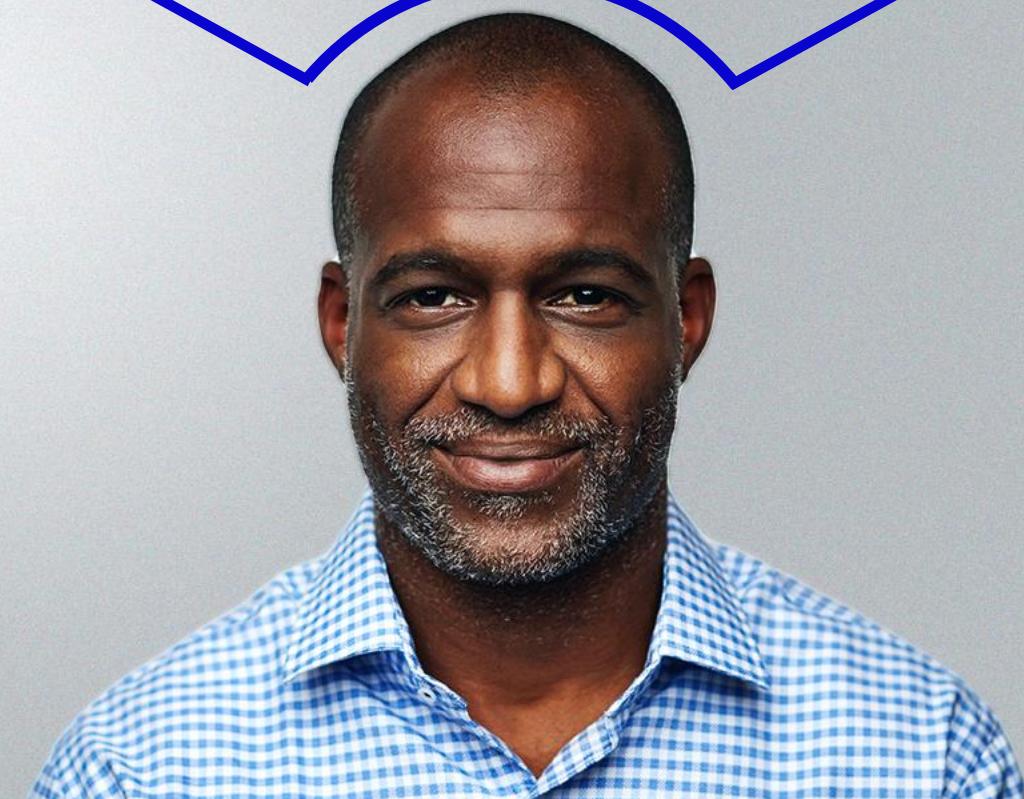
52% of Business Leaders
watch Reality TV

Diverse

+50% increase in multicultural
business owners
(over last 10 years)

Gamer

36% of Business Leaders
enjoy gaming



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



67%

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

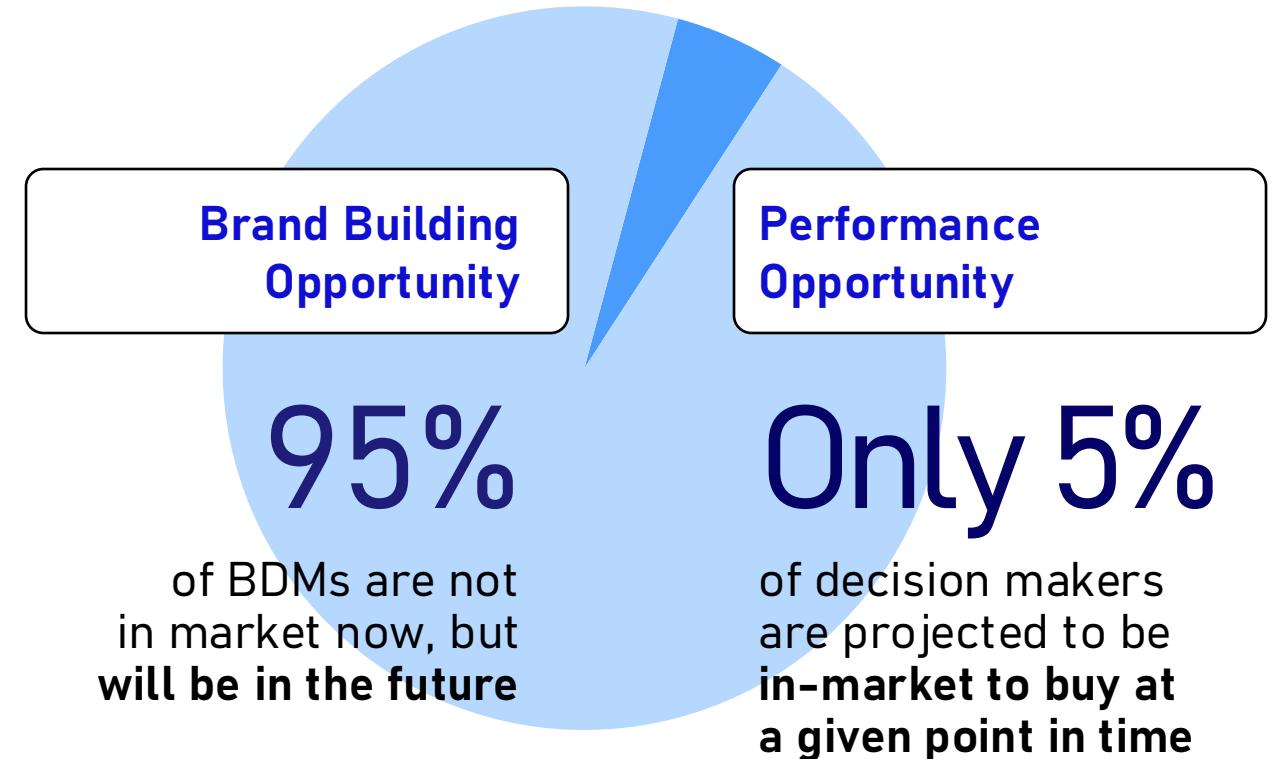
2022+



Growth driven by **customer acquisition**

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

**Business
Decision Makers**

**Small Business
Owners**

**C-Suite
Executives**

**Sales &
Marketers**



What Are
They
Watching?

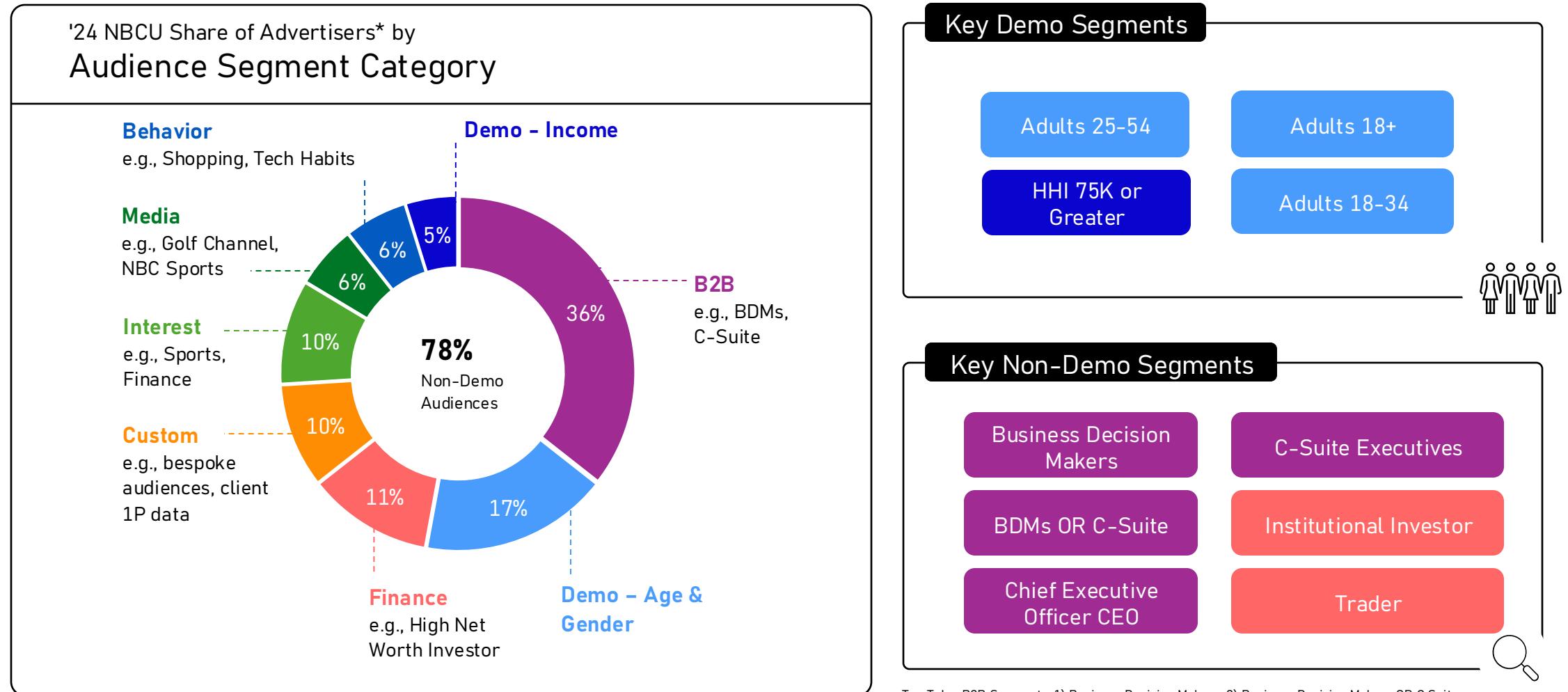


the office



YELLOWSTONE

Tech & Finance B2B primarily leverage B2B audience segments to reach decision-makers where they're most engaged across NBCU's portfolio



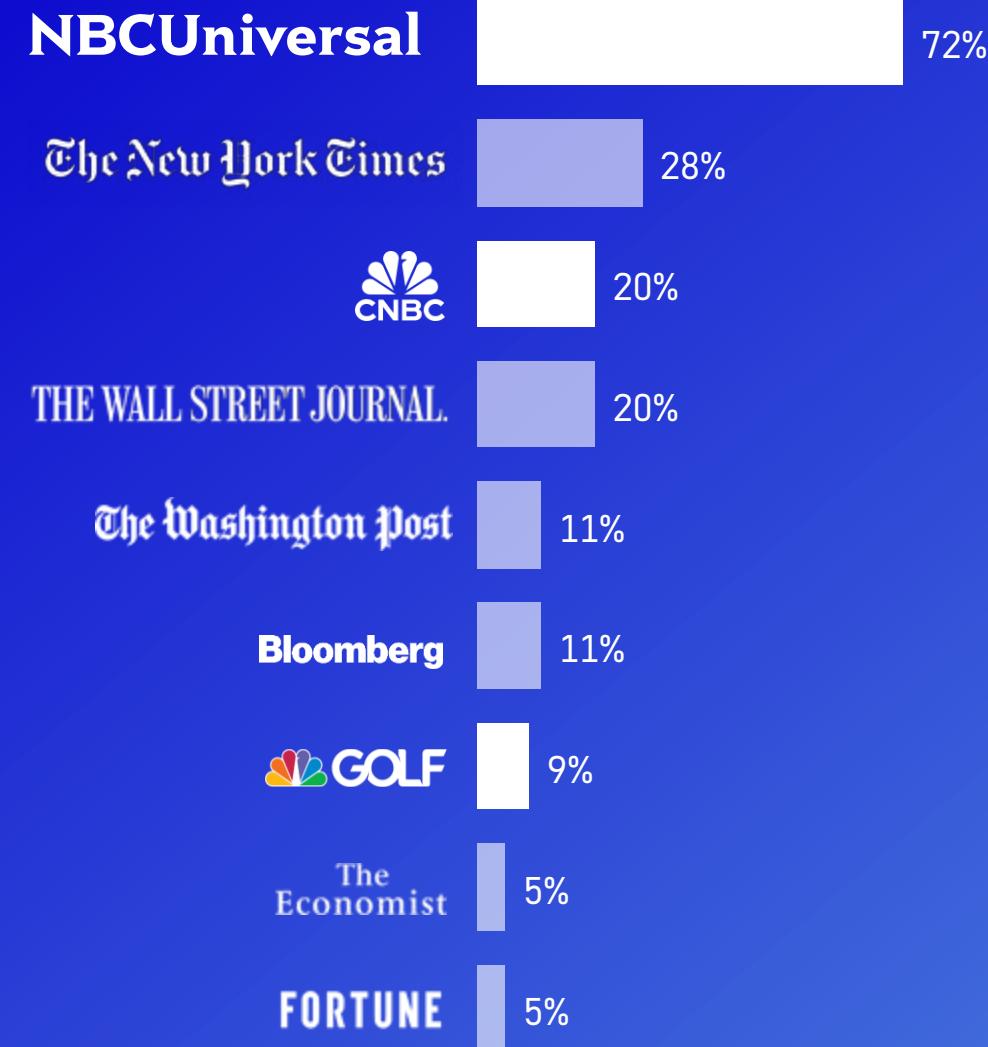
Consult I&M for other B2B audience cuts (ex. BDMs Spending \$100K or \$1M+, Consulting Services BDMs, Travel BDMs, etc.)

BDMS Spending
\$10K+ Annually

C-Suite

Small Business Owners

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



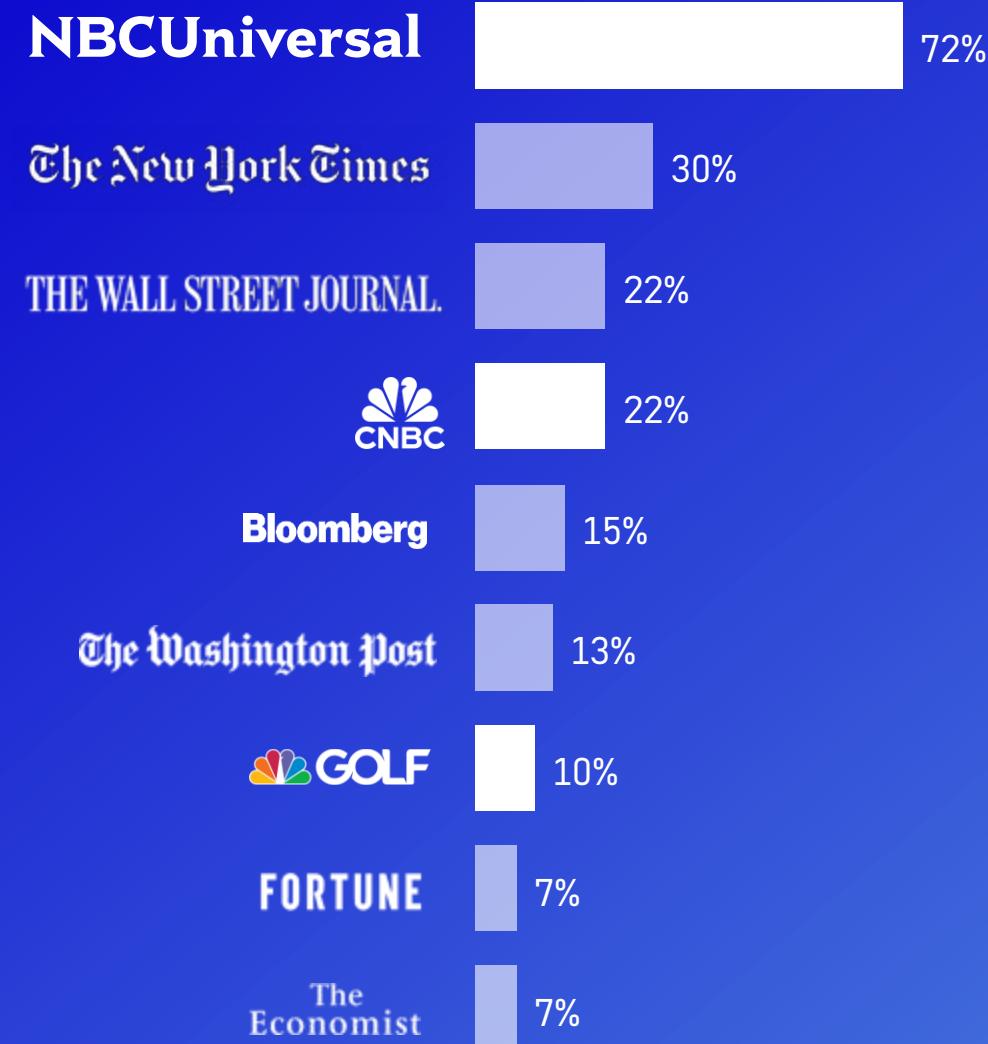
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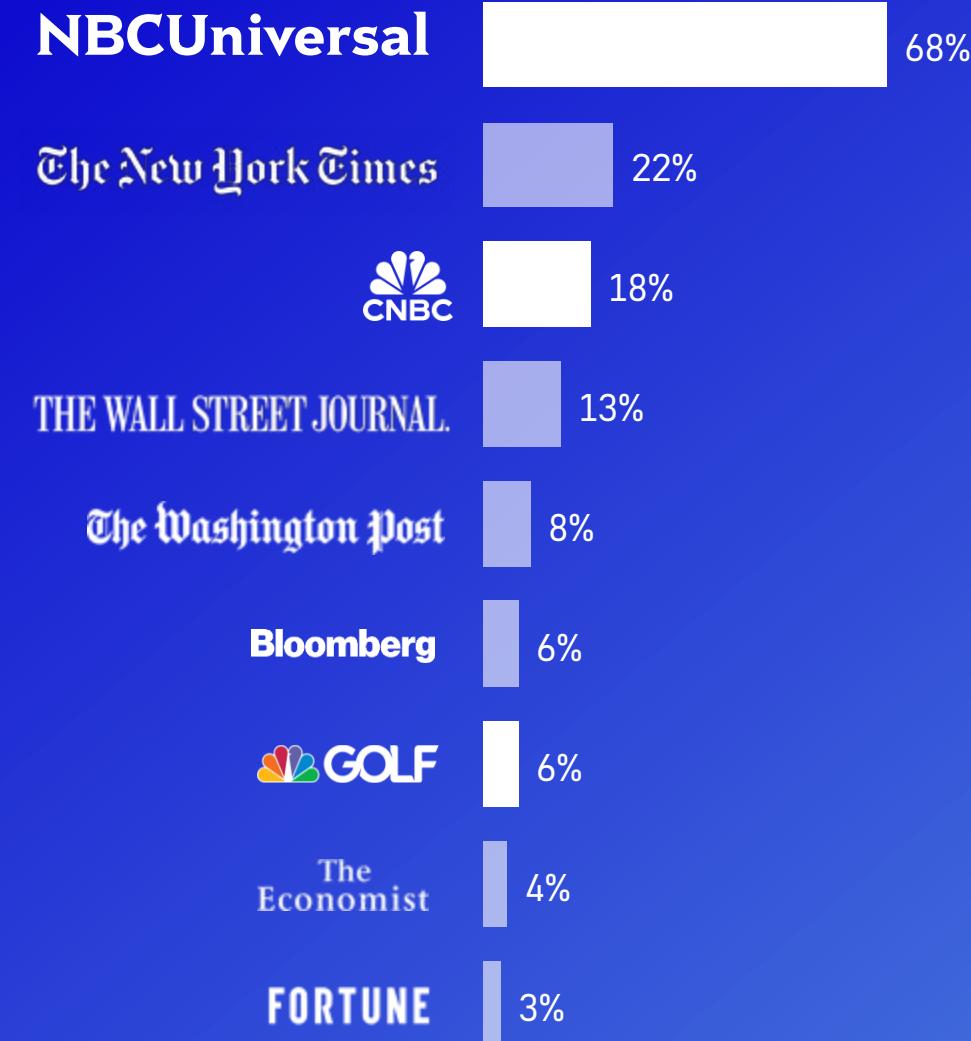
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C-Suite

Small Business Owners

NBCU reaches more
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B2B powerhouses



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



Activate your audiences your way

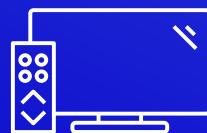
with flexible, always-on options to meet your objectives



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%

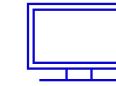
NBCU Tech B2B Spend 1H'25 v. 1H'24

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





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)*

CNBC EVENTS

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



BRAND STUDIO

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

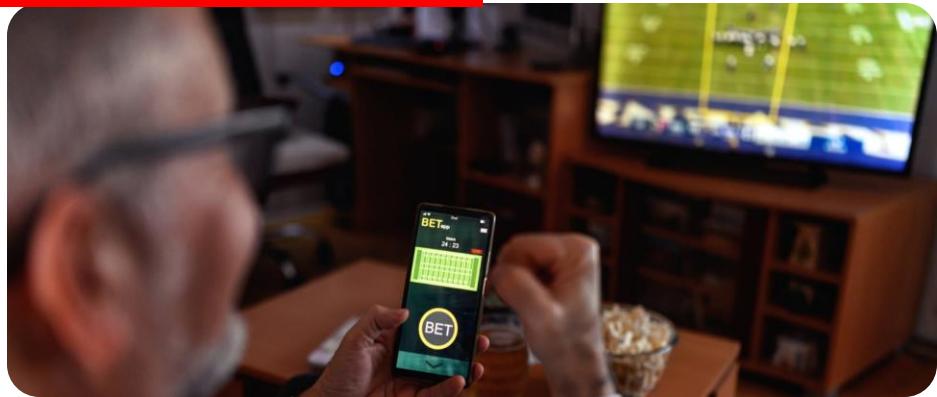


Entertained





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

ROCKEFELLER PLAZA
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

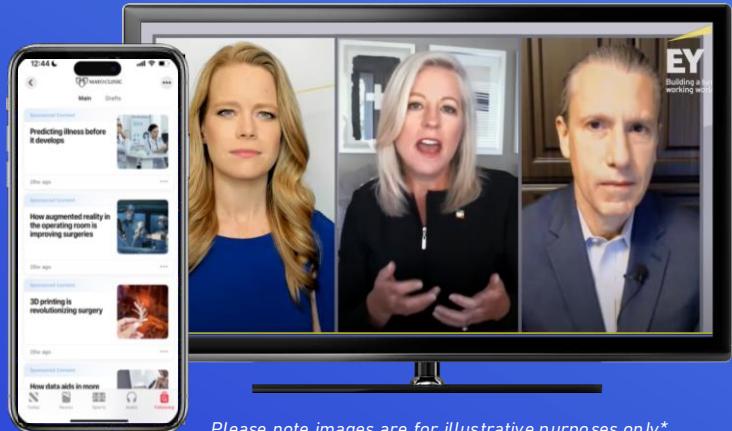
Challenge

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

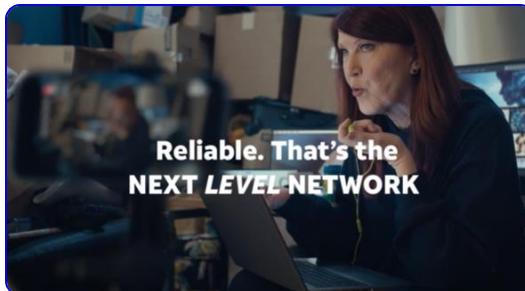
65%
of BDMs
vs. 10% Unlikely to Consider

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



Leveraging Fan-Favorite Talent

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



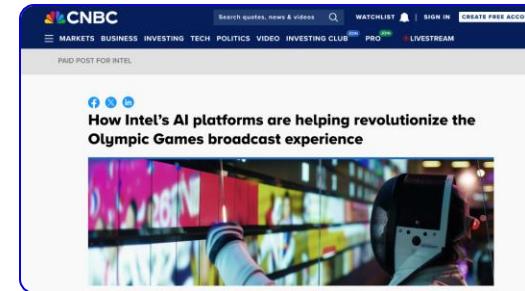
Enhancing the Fan Experience

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



Demonstrating Product Capabilities

AWS powered unique insights highlighted via SNF in-game features



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%

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%
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Middle

Brand Favorability +25%	Sponsorship Favorability +16%	Sponsorship Association +63%	Message Association +48%
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Lower

Search Engagement +59%	Consideration Intent +55%	Purchase Intent +16%	Recommendation Intent +43%
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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%

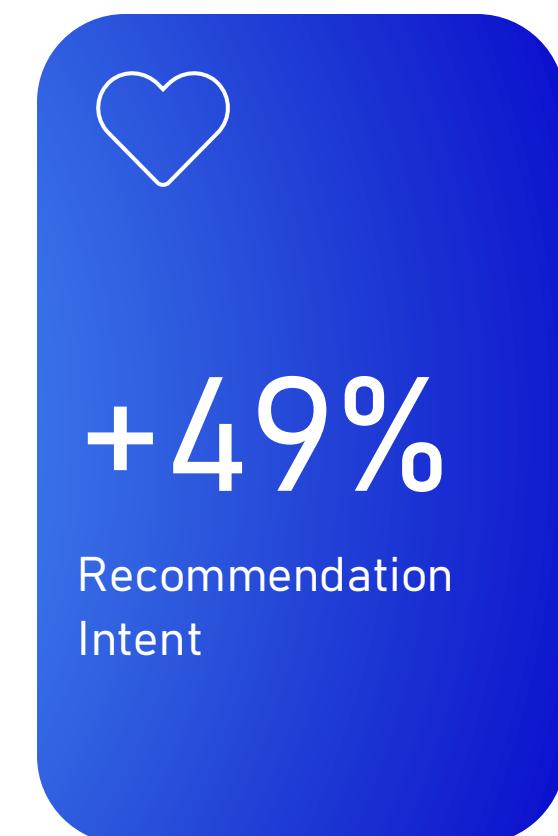
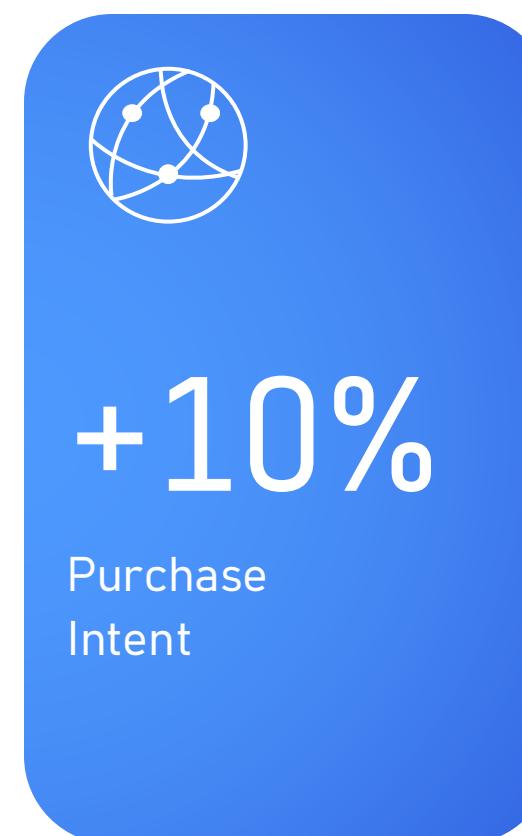
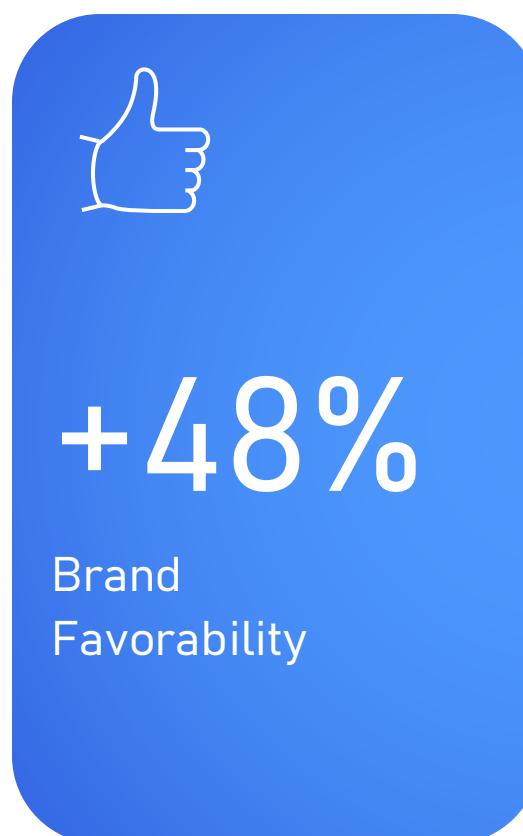
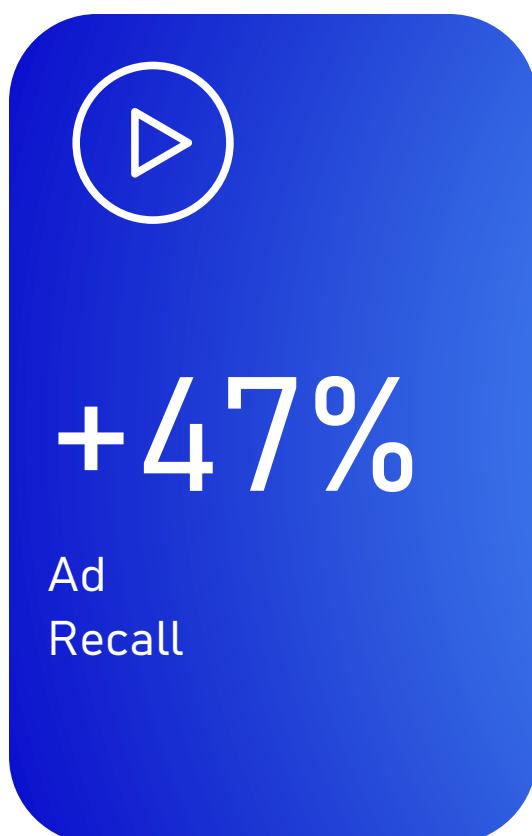
Recommendation
Intent
+27%

Consideration
Intent
+25%

Any Web
Visit
+54%

Campaigns across more than one platform are more effective

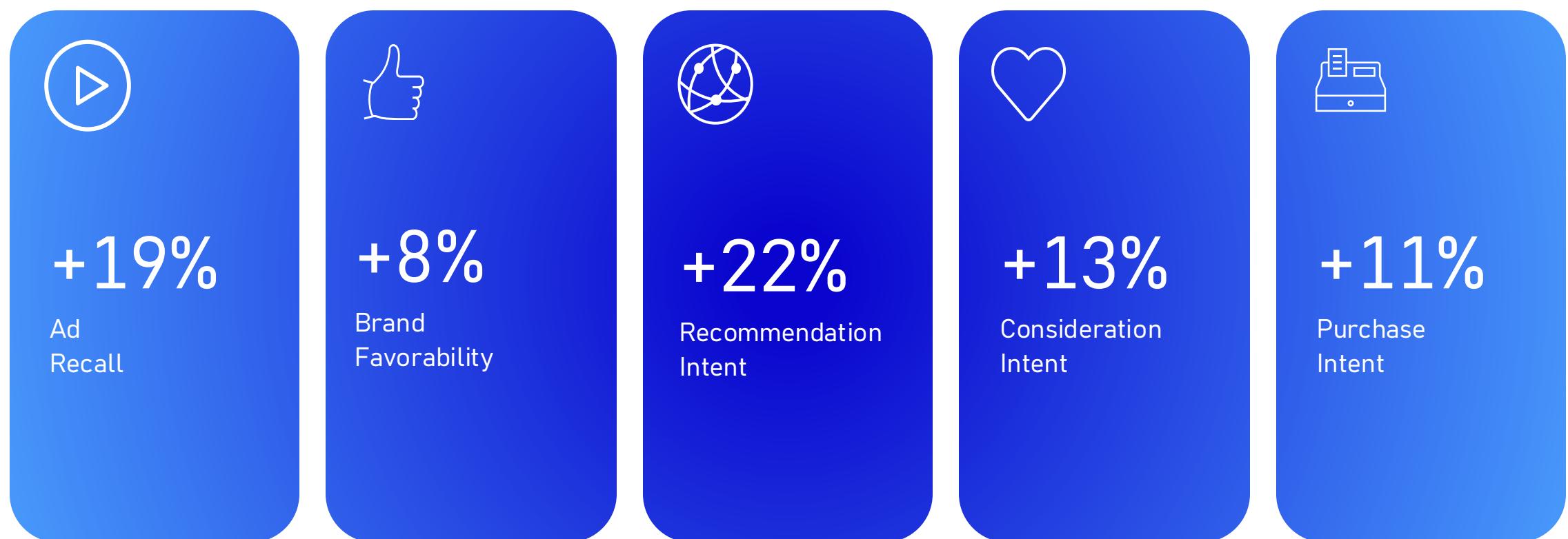
Tech Category NBCU Campaigns:
Multi-Platform vs. Single Platform
% Lift



Campaigns across more than one platform are more effective

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

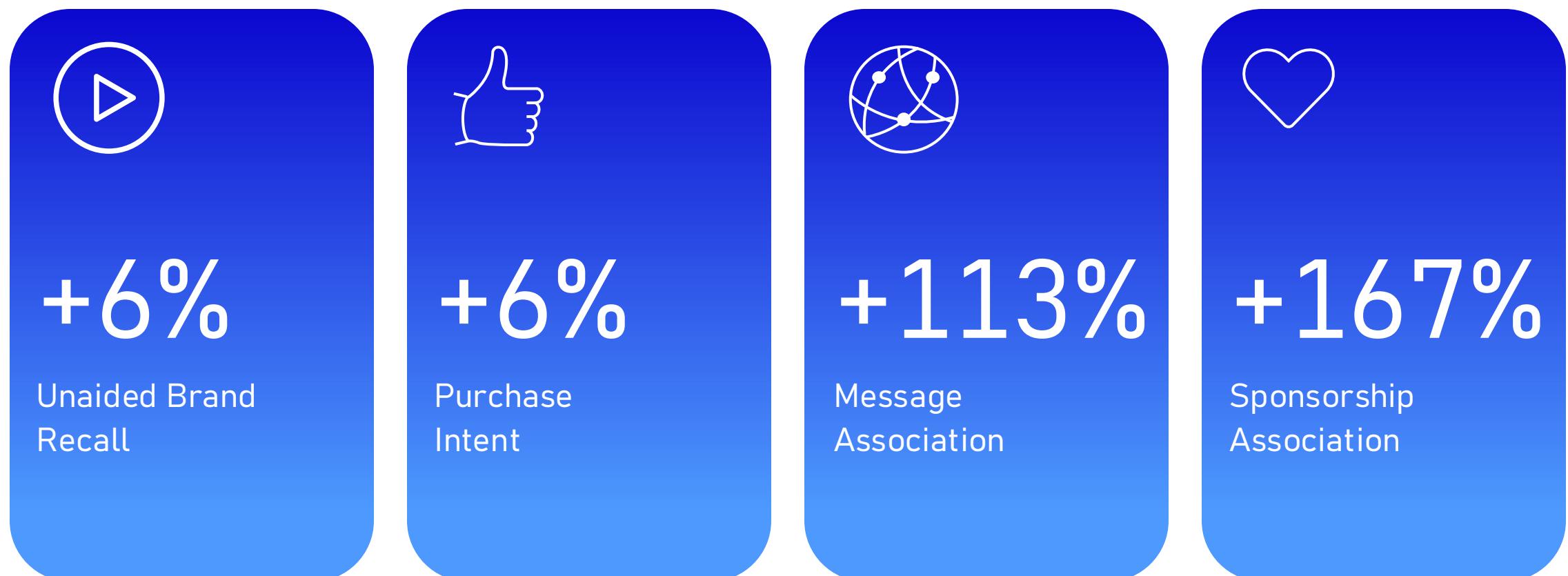
% Lift



Campaigns Across More than One Platform Are More Effective

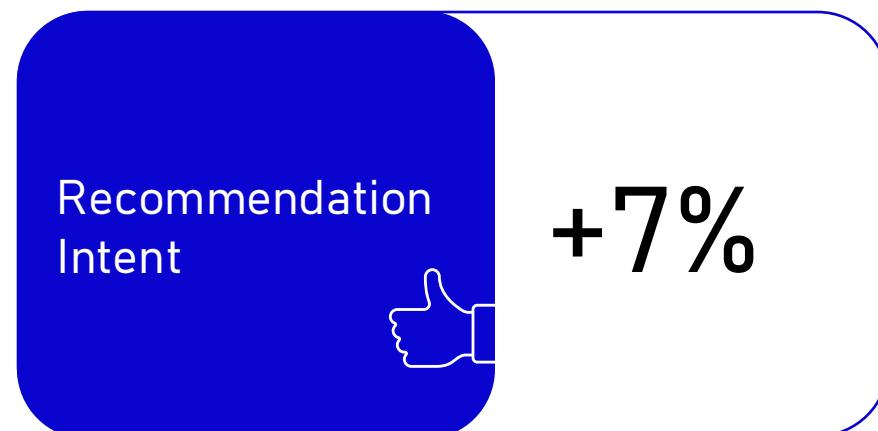
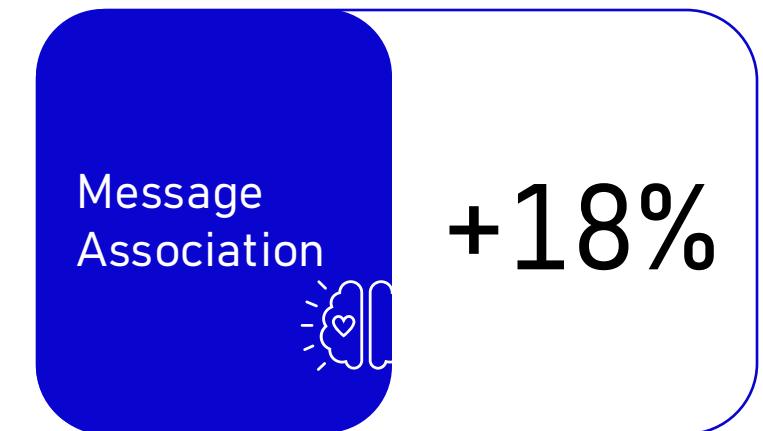
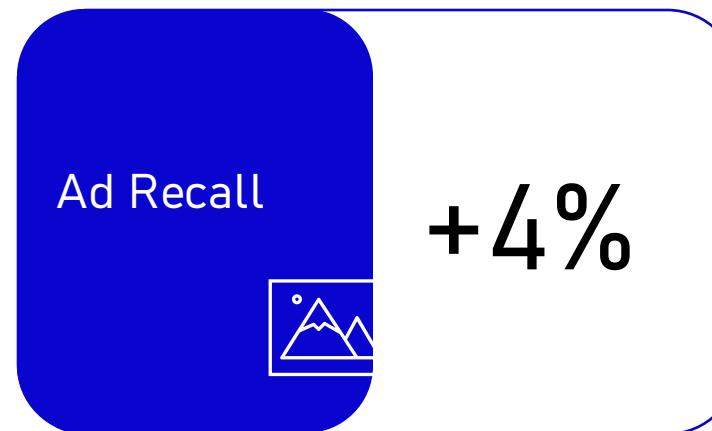
Finance Category NBCU Campaigns: Multi-Platform vs. Single Platform

% Lift



Tech (Peacock) Proven impact across client KPIs

NBCU Tech Campaigns – Test vs. Control



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%
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Middle

Brand Favorability +13%	Sponsorship Favorability +8%	Sponsorship Association +2%	Message Association +1%
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Lower

Consideration Intent +22%	Purchase Intent +2%	Recommendation Intent +14%
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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



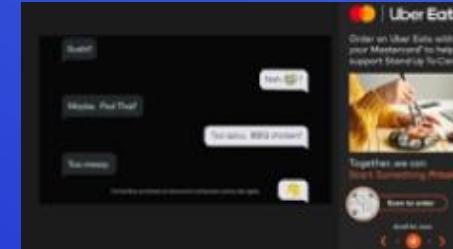
+33% Ad Likeability vs. Midroll for Category

Pod Bounce



+58% Brand Memorability vs. Midroll for Category

Engagement Ad



+11% Message Memorability vs. Midroll for Category

Audience Targeted Pause Ad



+98% Ad Likeability vs. Midroll for Category

Finance

Telco

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





Thank You

Category Strategy

Dominique Folacci & Nicole Lee

Sales Enablement

Jess Cohen

Trade Marketing

Carolyn Scaglione, Bonnie Fallon