

NBCUniversal

2022

B2B

Industry Assessment



Welcome!



Introduction

Explore NBCUniversal's latest perspectives and insights into the B2B industry. This report provides an overview of recent marketplace dynamics, our prediction of key future trends impacting the industry, and strategic recommendations for B2B brands and marketers as they navigate what's next.

Our Approach

At NBCUniversal, we have a legacy of working with a diverse range of B2B partners to build their brands. This report has been created based on NBCU's:

- Ongoing Industry Evaluation
 - Conversations with B2B Advertisers and Agencies
 - Continual Marketplace Analysis
 - Examination of Consumer Attitudes towards the B2B Industry
-

NBCUniversal Has a Unique Perspective

In 2022, NBCU worked with the biggest brands in
B2B



Tech/Software



Cloud
Services



Financial
Services



Business
Services



Governmental



Healthcare

Contents

2022 Landscape

B2B Forward-Looking Trends

NBCU B2B Strategic Considerations

NBCU Relevant Materials



2022 Landscape

Overview of Key B2B Marketplace Dynamics



For B2B brands, 2022
has been a time to focus on

Humanization & Emotional Connections

to changing consumer routines
and evolving areas of demand



The B2B Category Continues to Look for New Ways to Connect with Key Audiences as the Scope of B2B Expands



Emphasis on Brand Humanization & Purpose

B2B brands are going all-in on humanizing their brand & championing purpose within their messaging. This is especially important as the complexion of BDMs evolves to be younger and more diverse, with these audiences putting more emphasis on how brands create impact in society & the world



Growing Focus on Globalization

As technology continues to help connect the global business environment in new ways, B2B brands are eager to take advantage of the globalization phenomenon through business expansion and by using global-centric media & creative strategies



Evolving the Business Decision Maker Profile and Journey

The complexion of the BDM continues to change, with younger, more diverse and more female leaders taking hold in key roles. In parallel, the decision-making journey continues to become more complex. These evolutions are pushing B2B marketers to connect with these audiences in new ways



Navigating Economic Volatility

B2B brands emphasized media & marketing efforts during the pandemic, but recent economic headwinds have created challenges, with some B2B marketers planning to reduce spend. With less budget, many brands are looking for efficient marketing solutions that can translate to direct impact against key KPIs

The Power of B2B Advertising Is Evident as Ever

...Especially the
Importance of
Building Brand

81%

of B2B companies plan to
invest more in brand marketing
over the next 5 years

Advertising helps to
influence BDM purchase behavior...

39%

of business
decisions today are
**driven by brand
reputation**

87%

of BDMs agree
seeing ads from
potential vendors
**helps keep them
top of mind**

68%

of BDMs saw ads
from the brand
they **chose as a
vendor during their
selection process**

B2B Forward-Looking Trends

Key Trends We Expect to Influence B2B
Marketing & Media Strategies



LOOKING AHEAD,
**Key B2B Trends
We Expect to
Influence
Marketing &
Media Strategies**



Accelerated Emphasis on
Digital Transformation



Standing Out in
a Sea of Sameness



Established Brands Acquire
Emerging Entrants



Embracing Data
& **Measurement**



Greater Extension Beyond
Endemic Content

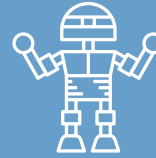
Accelerated Emphasis on Digital Transformation

As B2B decision journeys become more complex, the power of technology-driven digital innovation is more critical for brands to master than ever before.

Given the complexity of the category, B2B buyers demand **convenient, streamlined, full-service digital solutions**

In parallel, we expect to see continued **evolution favoring digital and data-driven media & marketing approaches**

Purchase Journey Relies on Digital



50% of interactions during a B2B purchase journey **do not involve a salesperson**

Digital Platforms for Discovery



Web search & web articles are the **top 2 discovery channels for BDMs today**

Greater Focus on Automation for Convenience



67% of all businesses plan to adopt at least one new cloud technology by 2023

Standing Out in a Sea of Sameness

Amidst rising competition, we are seeing B2B brands focusing on media to drive differentiation & creative breakthrough.

Messaging that taps into themes like **humor, emotion, and purpose** is proven to have an impact:



2x stronger performance for B2B ads that incorporate **emotional content** (vs. rational content)

Using Humor



amazon business

We came together with some amazing creative partners to **tell stories with an eye on empathy and humor**. Having big dreams and running a business to achieve them is hard work, it's okay to find a laugh in the challenges every once in a while.

CREATIVE DIRECTOR, BSSP

Tapping into High Profile Talent



salesforce

Matthew McConaughey plays #TeamEarth. The award-winning actor partnered with the brand to help launch a new platform addressing climate change.

Established Brands Acquire Emerging Entrants

Acquisition is helping established brands further their quest to offer full-service solutions for customers.

This phenomenon is leading to **increased media spend amongst the biggest brands**, and greater acceleration of **emerging brands focusing on building awareness** through media & marketing.



In the last 5 years, Salesforce has acquired Slack (\$28B), Tableau (\$16B), MuleSoft (\$7B) among others.

The 5 largest acquisitions totaled a whopping \$55.2 billion



Block, Inc. (Square parent) acquired Afterpay for \$29 billion, making it the largest tech acquisition in history



Panasonic acquired Blue Yonder for \$7B

Acquisition accelerates the Autonomous Supply Chain™ by combining IoT and AI/ML to deliver smarter, more connected supply chains and optimized multi-channel commerce

Embracing Data & Measurement

B2B marketers continue to adopt the usage of data and advanced analytics.

B2B CMOs are relying heavily on technology to track campaign success with **70% of marketing leaders planning to increase their marketing technology investment**

“ ”

Without big data, you are blind and deaf in the middle of a freeway.

GEOFFREY MOORE, MGMT.
CONSULTANT FOR B2B

89%

of B2B marketers agree that the quality of data is **becoming increasingly critical for marketing and sales success.**

92%

of B2B marketers are **using data analytics tools with their current marketing technology stack** (+15% increase in 2022)

However, there is still room for the adoption of these practices to grow...

<50%

of the same marketers using data analytics tools **feel they are not using these tools in an advanced capacity**

Greater Extension Beyond Endemic Content

As the complexion of the BDM audience evolves, so too must the marketing strategy for B2B organizations.

The perception that BDMs only consume business-related content no longer holds true. Data also shows that **B2B ads drive impact in all types of content**



90%

of BDMs say
good B2B ads capture their attention if they're relevant;
it doesn't matter if the ads run in business-related content or not.



+11%

increase in number of media properties
B2B brands ran ads on
(2021 vs. 2017)

LOOKING AHEAD,
**Key B2B Trends
We Expect to
Influence
Marketing &
Media Strategies**



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NBCU B2B Strategic Considerations

Key Considerations for Driving Growth for B2B Brands



NBCUNIVERSAL

B2B Strategic Considerations



01. Balance Brand & Performance Messaging

Create a balanced media budget to support building brand and driving acquisition through a cohesive, full funnel strategy

02. Reach Emerging BDMs

Connect with the next generation of BDMs in authentic, humanistic ways in order to stand out and build brand trust with consumers who place an increased importance on emotional connection

03. Pair Content with Non-Endemic Reach

Leverage a cross-platform approach across key content spaces such as sports and endemic business content while expanding reach in other, select content spaces

04. Supercharge Your Data-led Approach

Craft campaigns focused on data analytics and media metrics tailored to brand specific KPIs

01.

Balance Brand and Performance Messaging

Create a balanced media budget to support building brand and driving acquisition through a **cohesive, full funnel strategy**.



39%

of business decisions today
**are driven by
brand reputation**

Brand Messaging

(Broad Demos)

Age/Gender
(i.e. A25-54)

Millennials
/ Gen Z

Hispanic
A18-54

Business
News
Viewers

A balanced approach to
build brand, trust, education,
drive product consideration,
and drive conversions

Large Corp
BDMs

Competitive
Customer

Small
Business
Owners

Brand
Website
Visitor

Existing
Customer

(Advanced Audiences)

Performance Messaging

93%

of companies report
**conversion success
when they
personalize their
marketing**



02. Connect with Emerging Audiences

Reach emerging audiences in authentic, humanistic ways in order to stand out and build trust among a saturated competitive landscape.



Align with Cultural Moments

Reach diverse audiences and build emotional connections by aligning with culturally relevant content



Tap Into Passion Points & Fandom

Show up in the right non-endemic environments, and leverage sponsorships and custom marketing to stand out and breakthrough



Data + Advanced Audience Targeting

Ensure precision reach against *whichever* key BDM audience is a priority for a specific brand or product, regardless of where they are consuming across our portfolio



Leverage Innovative Partnerships

Connect with emerging audiences on new platforms like gaming (Anzu), mobile (Apple News), social media, and reachTV

03. Pair Endemic Content with Non-Endemic Reach

Build on top of existing presence in business-related content

Business-Related Content

Foundational endemic content geared towards business audiences



Non-Endemic Content

Only including CNBC & Golf on a plan leaves **63% of BDMs on the table...**

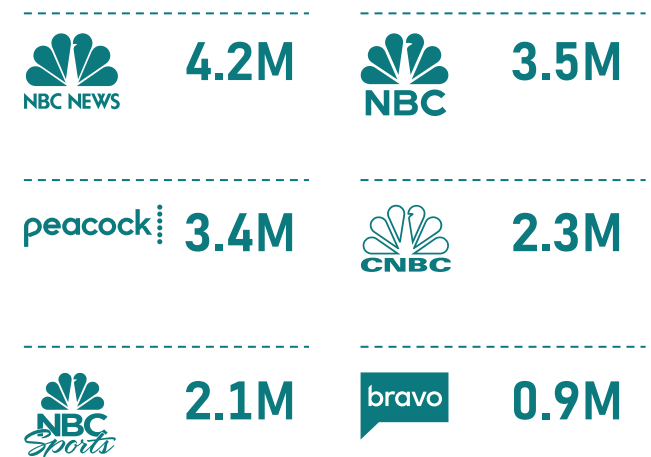
PROGRAMMING EXAMPLES:



Data-driven Targeting

NBCUnified Example: **Where BDMs are Interacting with NBCU**

NBCU BDM REACH
(SELECT PROPERTY EXAMPLES):



04. Supercharge Your Data-led Approach

Leverage 1P or 3P data to target audiences across platforms, reinforcing messaging with prospective & existing customers

Leverage NBCUnified to mine for audience insights...

*... expand through lookalike modeling... **target through AdSmart***



**Millennials &
Gen Z**

+16%

growth in BDMS < 40
since 2010



**C-Suite
Females**

75%

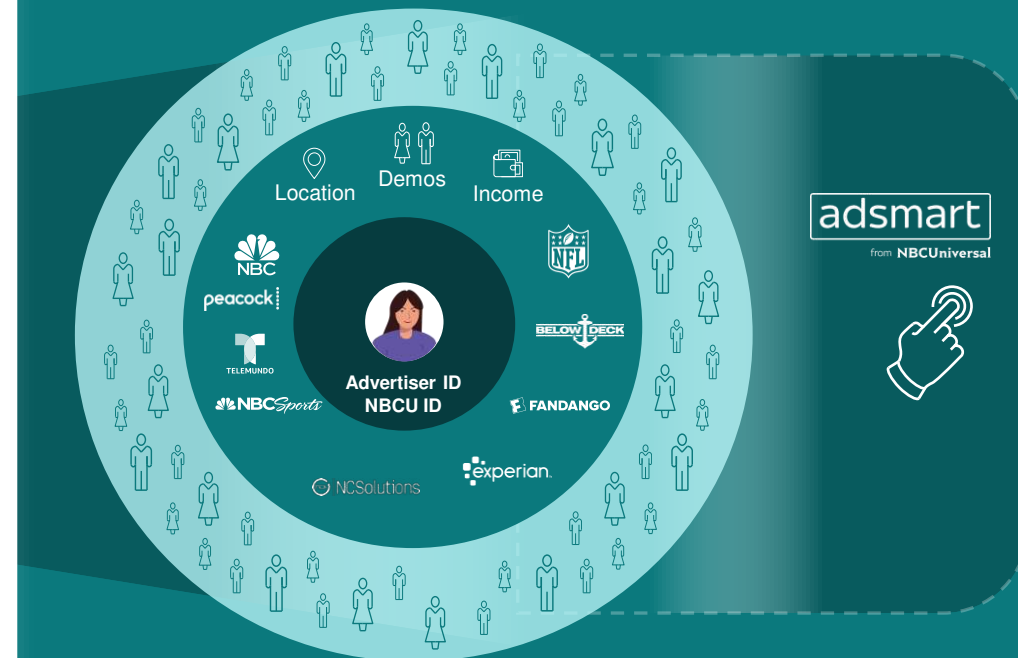
of B2B c-suite hires
over the last 2 years
were female or
multicultural



**Social Impact
Advocates**

84%

of BDMS say a
vendor's CSR values
influence their
purchase decisions



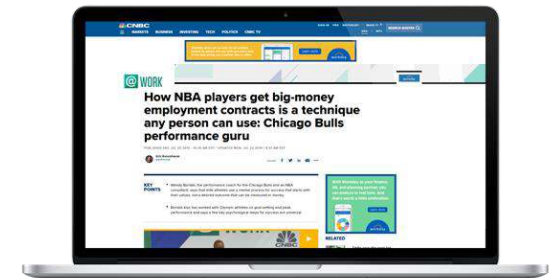
NBCU Relevant Materials

Example B2B Industry Partnerships



NBCUNIVERSAL

B2B Partnership Examples



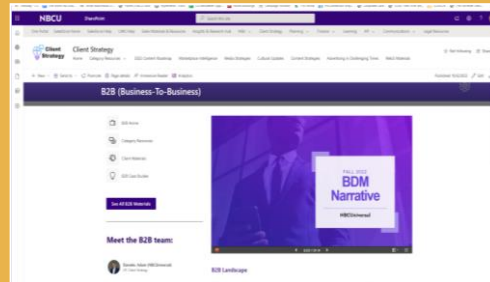
NBCU B2B Industry Content

TOGETHER SITE

Category Content & Strategies



BDM Narrative (Fall 2022)



B2B Client Strategy Sharepoint Site (NEW!)

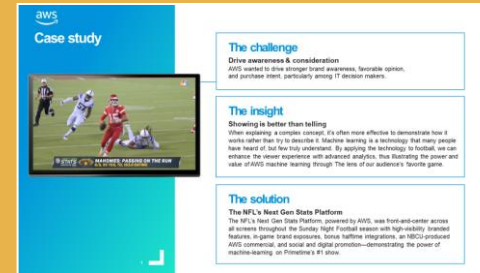


The Power of Marketing to Influence B2B Decision Making



Power of Purpose & Brand Humanization for B2B Marketers

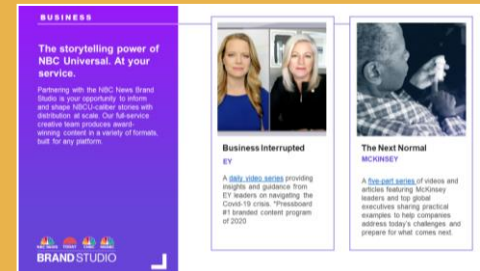
B2B Case Studies



Sunday Night Football + Amazon Web Services (AWS)



CNBC Case Study Examples



NBC News Brand Studio Case Studies

2022 B2B Industry Assessment

NBCUniversal

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