



Harnessing the Power of **Data + Targeting** for Finance

NBCUniversal

Financial attitudes are shifting...

Demographic Changes

\$68 trillion in wealth to be transferred

Millennials & Gen Z prefer to have conversations about long-term financial goals



Consumer Mindset

Financial services **trust levels are low...**

But the category has seen the **highest growth in trust levels (+10%)** over the past 10 years



Pandemic Pressures

90% of consumers are **anxious about money**

62% noted a **negative financial impact** due to the pandemic

These shifts continue to create opportunities to reach distinct audiences with relevant messaging

A recent survey showed that **70% of respondents believed knowing more about finances could have helped them manage their money better** throughout the pandemic

GENERAL CONSUMER SENTIMENT

47%

Of Americans say 2021 was a difficult year for them financially

65%

Are considering new financial goals for 2022

<12%

Feel they have a great deal of knowledge on the topic of finance & investments

EMERGING OPPORTUNITIES

Hispanic & Black audiences

are seeking out and advice and starting financial planning earlier than other demographics

75% of Women under 45

are currently managing their money on their own

The average Gen Z starts saving for retirement at age 19

(for boomers it was 35)

Creating relevance with consumers helps to build and strengthen relationships...

71%

of consumers say that personalization is important, very important, or the most important reason they will join a bank¹

80%

of consumers would be willing to share data in return for personalized and convenient services²

33%

of consumers who abandon business relationships do so because personalization is lacking³

84%

of customers say being treated like a person, not a number, is very important to winning their business⁴

Relevant messaging also impacts the bottom line...



Targeted communications that are relevant and useful can create lasting customer loyalty and drive revenue growth of

10-30%



93%

of financial services companies report having more success in converting prospects into customers when they personalize their marketing

Data-activated marketing can boost total sales by

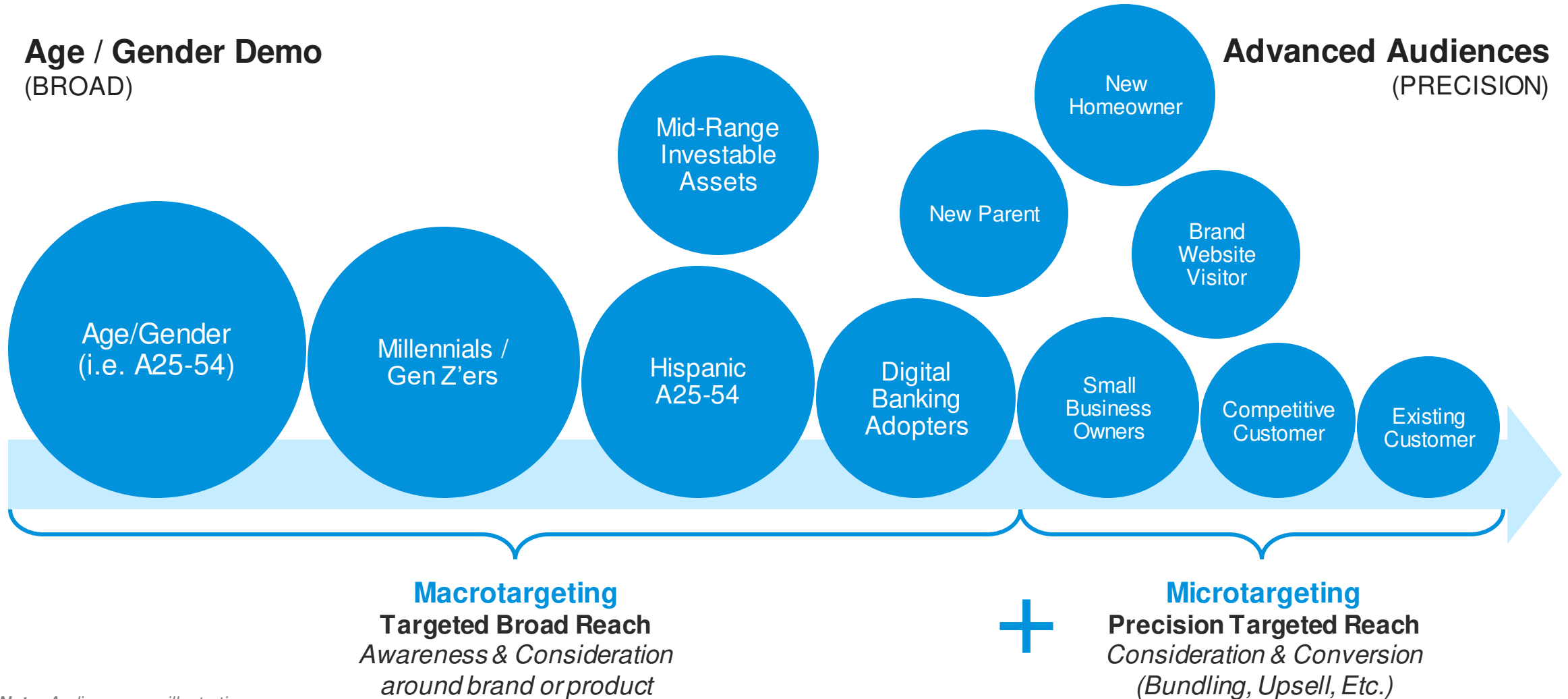
15-20%



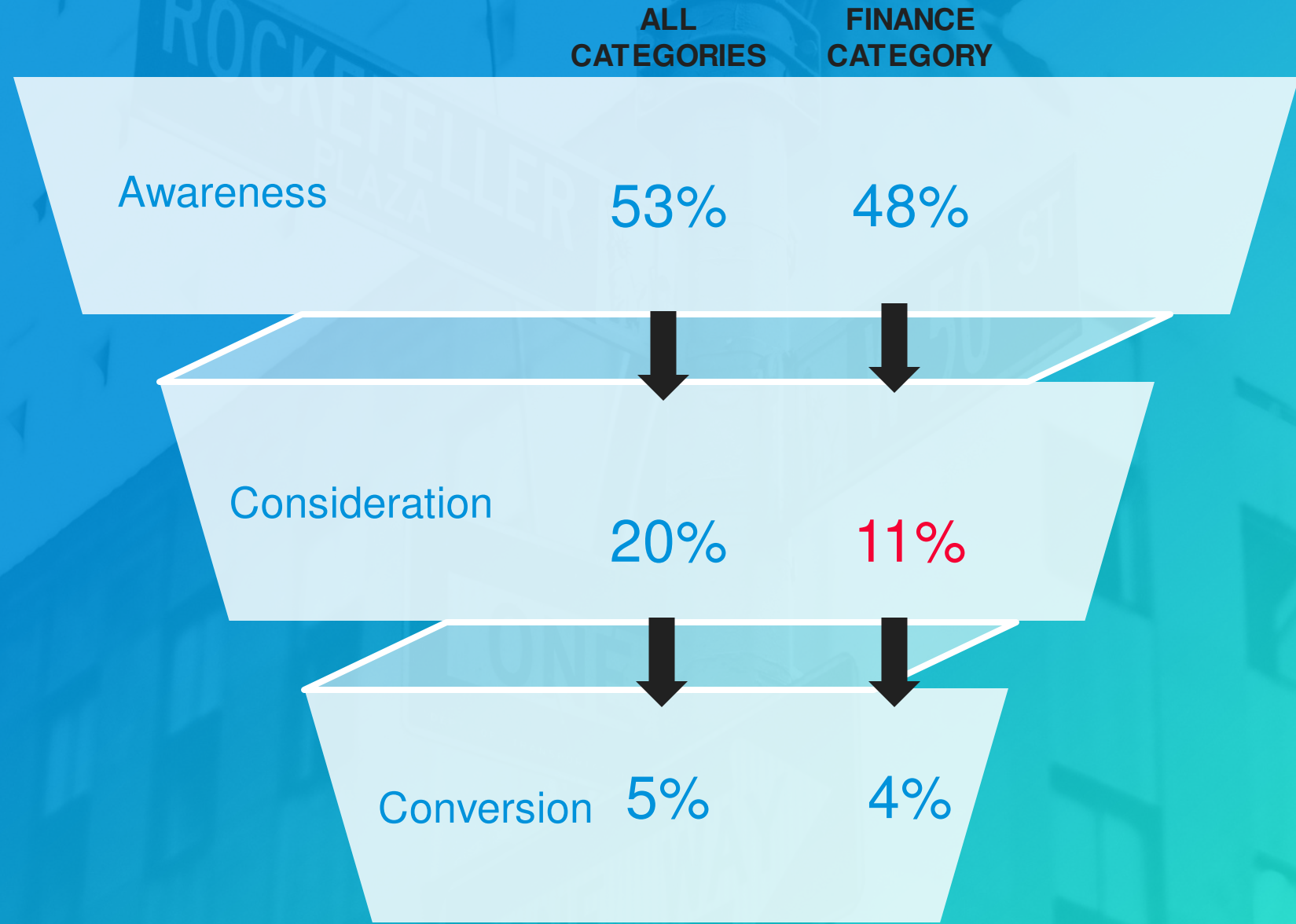
A person is seen from the side, sitting at a desk with several laptops. The scene is overlaid with a blue gradient. The text is centered on the image.

Today, **relevant messaging** via data-driven targeting is often **restricted to lower funnel focused media**, but an opportunity exists to use **data to drive full funnel impact**

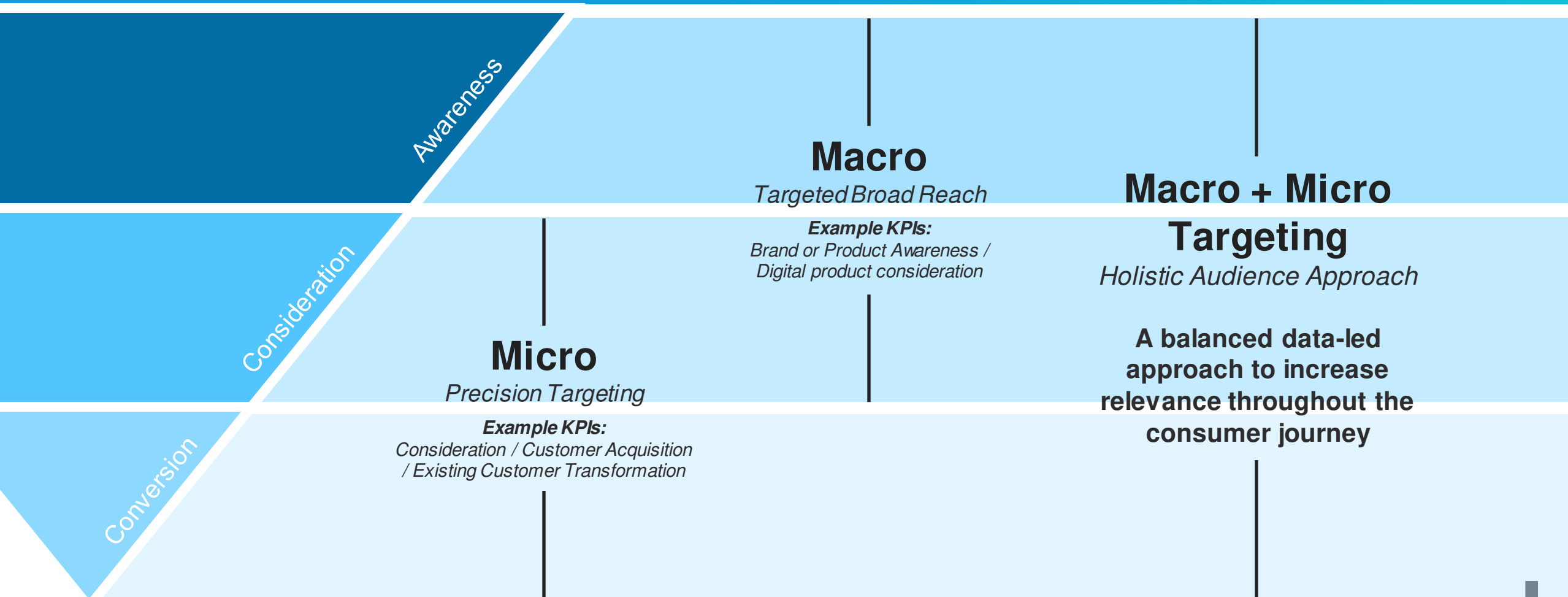
There are many valuable audiences for financial brands



The journey from awareness to conversion is an ongoing challenge within the finance category



Maximizing relevant distribution



A balanced targeting approach can ensure relevant messaging based on consumer needs



There is a better way forward

The **industry is evolving**, moving away from panel-based demos **in favor of more efficient, more effective identity-based advanced audience solutions.**

We're **changing the way we sell**, in favor of audience-based buying.

Panel-Based Demos
(Nielsen Age/Gender Guarantee)



Advanced Audiences

- ✓ Precision targeting across platforms
- ✓ More efficient reach and less waste
- ✓ Opportunity to test & learn audiences
- ✓ More accurate measurement
- ✓ AdSmart Data Driven Linear = proven out full funnel impact



CASE STUDY SPOTLIGHT

Driving full funnel impact via advanced targeting



Case study



The challenge

Drive customer acquisition at scale

A direct-to-consumer financial technology company that built its customer base largely through digital and social channels wanted to reach a larger prospective audience to maintain their base and drive new adopters.

The insight

Multi-platform maximizes full-funnel impact

Although digital and social channels can drive efficient customer acquisition, they lack the scale and engagement of NBCU's reach through premium content on every screen. Employing a targeted multi-platform media strategy with NBCU drives full-funnel impact, from awareness to action to acquisition at scale.

The solution

Target customers across platforms

We used the client's first-party data to create a scalable target audience, which we activated across NBCU's premium national linear TV, desktop & mobile video, and display content.



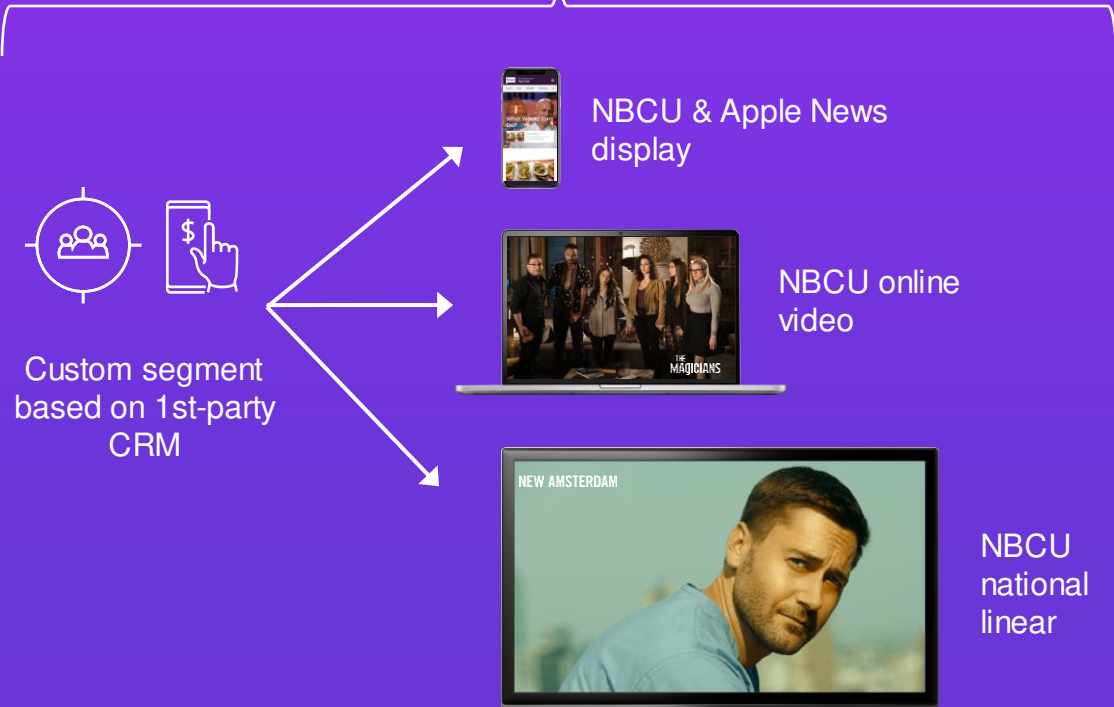


The approach

Advanced targeting to reach customers across the NBCU portfolio on every screen.

adsmart

from NBCUniversal



The results

To measure the full-funnel impact of the campaign, we leveraged YouGov for pre- vs. post-campaign brand metrics and partnered with Data Plus Math for direct web attribution.

Brand metrics increased significantly vs. pre-campaign

+9%

lift in brand awareness

+33%

lift in brand opinion

+30%

lift in brand purchase intent

AdSmart campaign exposure drove double-digit lift in site visits & app installs

+28%

lift in website visits

+52%

lift in home page visits

+27%

lift in mobile app installs

AdSmart campaign exposure drove double-digit lift in sign-ups & completed registrations

+27%

lift in web sign-ups

+25%

lift in mobile app sign-ups

+24%

lift in completed web registrations

+33%

lift in completed mobile app registrations

Maximize the power of data at scale across premium content on all viewing platforms



NBCU Audience Insights Hub



Interoperability with client data allows for a customizable 1P or 3P targeting approach

Data-driven delivery through premium video on:



National linear TV



Set-top box VOD



Connected TV



Desktop

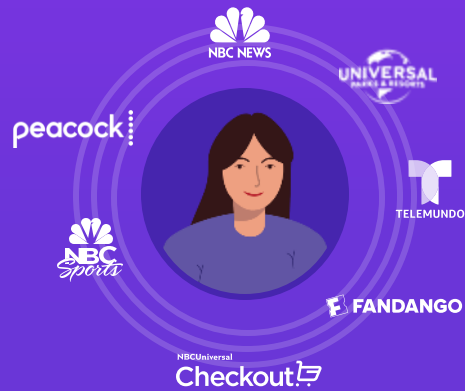


Mobile



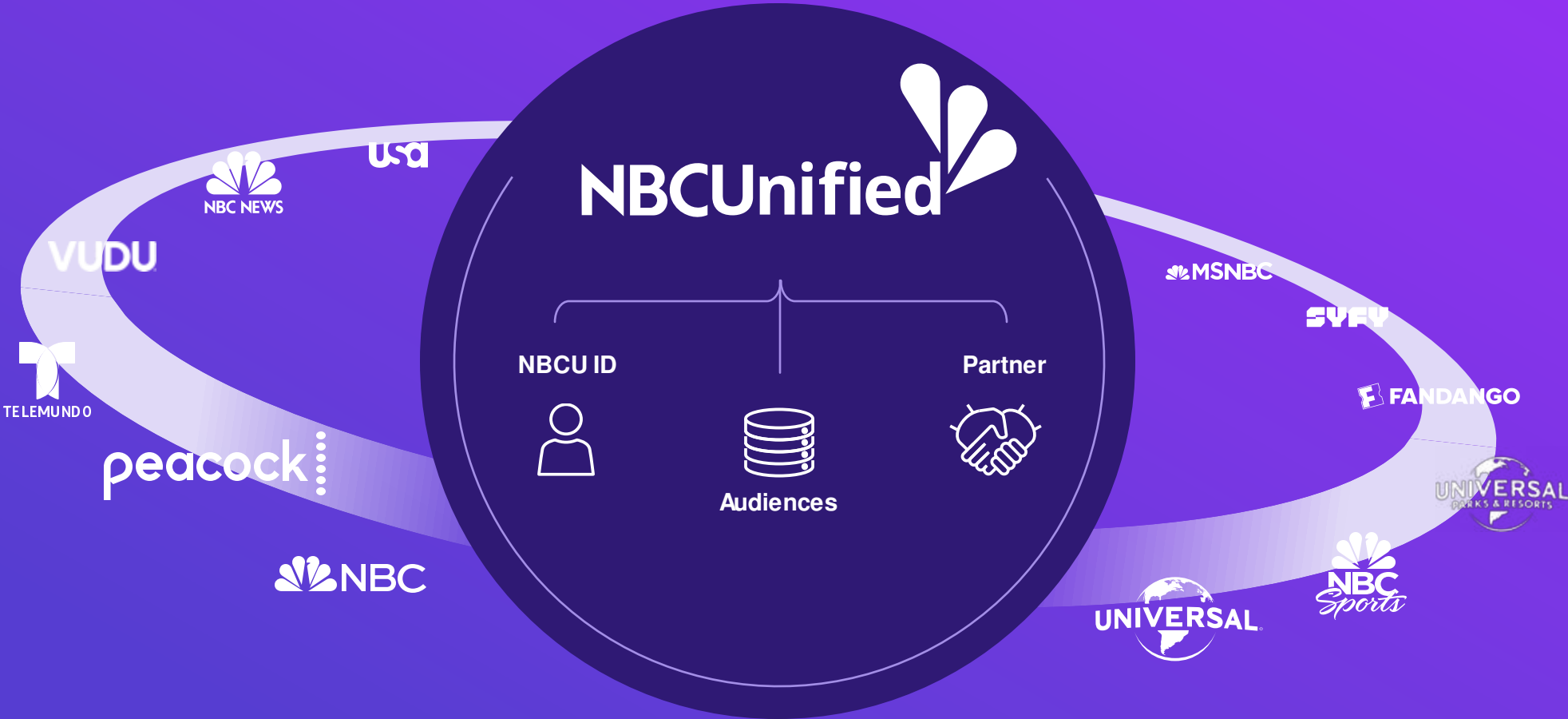
Transforming Data & Identity

Independent NBCU 1st-party identity and data at scale

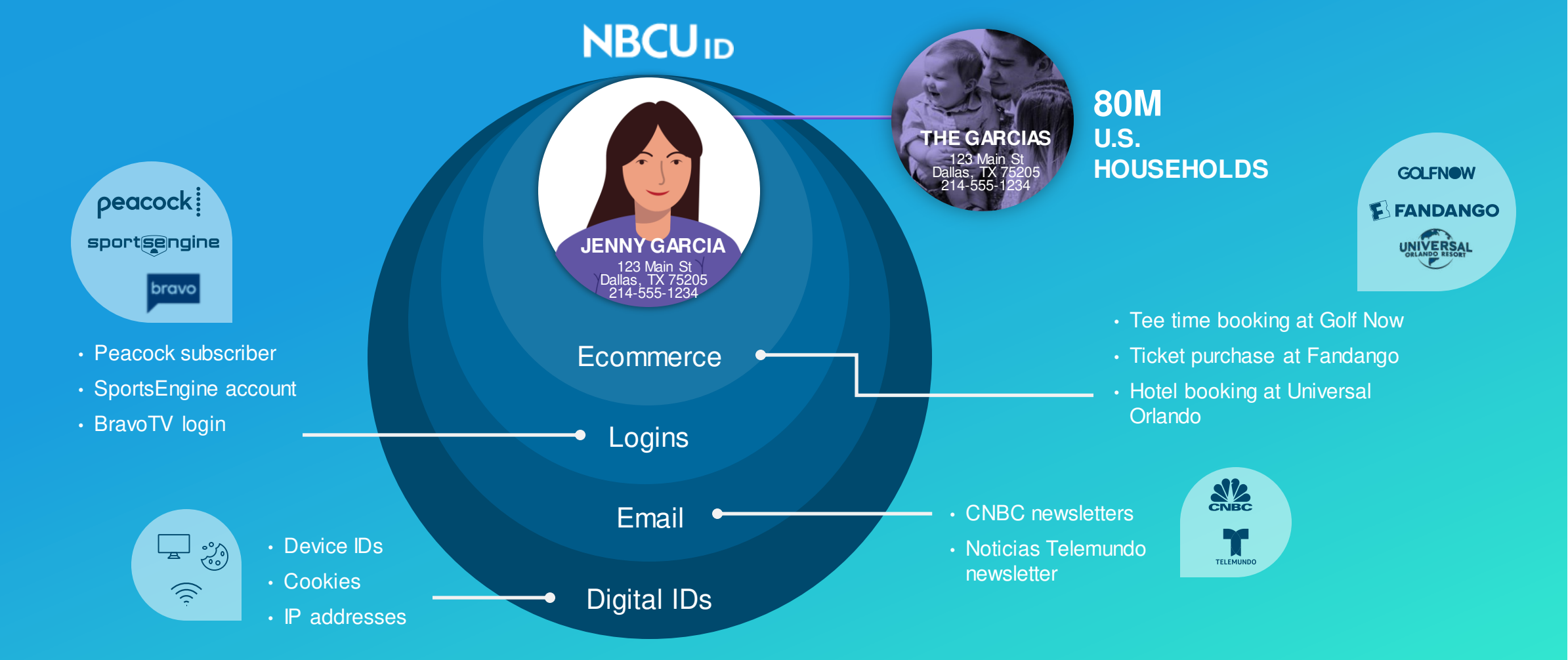


Introducing NBCUnified

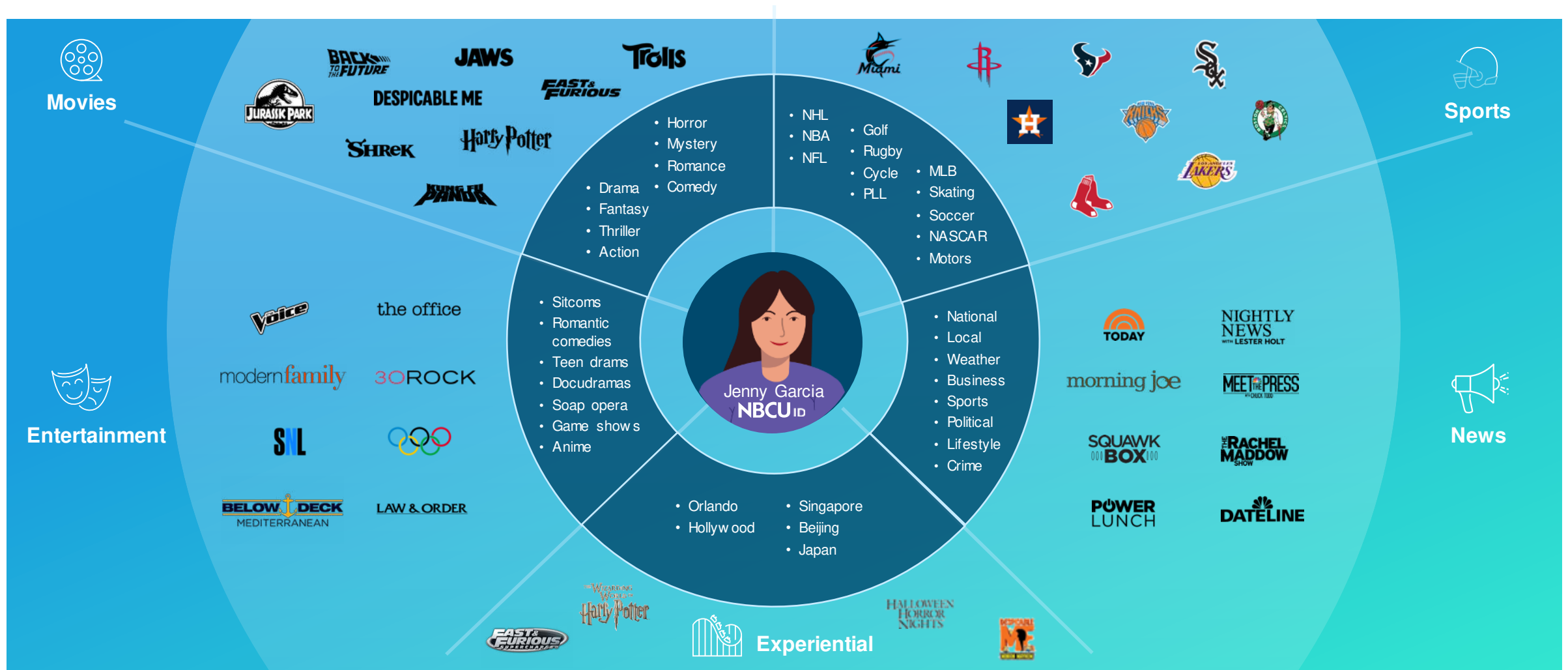
NBCU's new identity & data platform that **unifies** consumer identity and data from across the enterprise



The NBCU ID will be released with 150M first-party consumer IDs tied to known people and households



NBCUnified will include thousands of person-level attributes across media, entertainment, and commerce behaviors



Additional Case Studies



Case study



The challenge

Drive tax filing conversions

A leading tax services provider wanted to leverage advanced TV targeting to improve conversion for their services online and in their retail locations.

The insight

Use the best of both data worlds

By combining the advertiser's 1st-party CRM file with 3rd-party data from Acxiom, we were able to scale the target audience to reach existing customers as well as users of competing providers to encourage them to switch services.

The solution

Target tax service users via advanced TV

We partnered with the client to run an AdSmart data-driven linear campaign and two AdSmart addressable campaigns, both of which were targeted across our portfolio to reach custom LiveRamp segments (comprising retail tax filers and online/DIY tax filers) instead of a traditional Nielsen demo.





The approach

Advanced TV targeting to reach the right consumers across NBCU's linear portfolio.



Retail & online/DIY tax filers

Data-driven linear delivery via national TV

Addressable delivery via STB VOD & Hulu



The results

We commissioned two custom LiveRamp studies to measure the impact of the AdSmart campaigns on driving tax filing conversion in the advertiser's retail locations and online.

National linear exposure to AdSmart drove lift for tax filings overall and among target audience

+6% overall conversion lift

+5% target conversion lift

4X higher conversion among target HHs vs. non-target

68% of target converter HHs filed in a retail location

AdSmart drove lift for tax filings among both addressable target audiences

+19% overall conversion lift across both targets

+42% conversion lift among retail filer target HHs, with **90%** filing in a retail location

+14% conversion lift among online/DIY filer target HHs, with **87%** filing online



Case study



The challenge

Drive tax filing conversions

A leading tax services provider wanted to leverage advanced TV targeting to improve conversion for their services online and in their retail locations.

The insight

Use 1st-party data to reach the right target

With an already engaged audience, our client was able to leverage advanced TV targeting to create a lookalike target of their own 1st-party data to focus solely on reaching & acquiring new customers (by suppressing their existing customers from the lookalike modeled audience segments).

The solution

Target tax service users via advanced TV

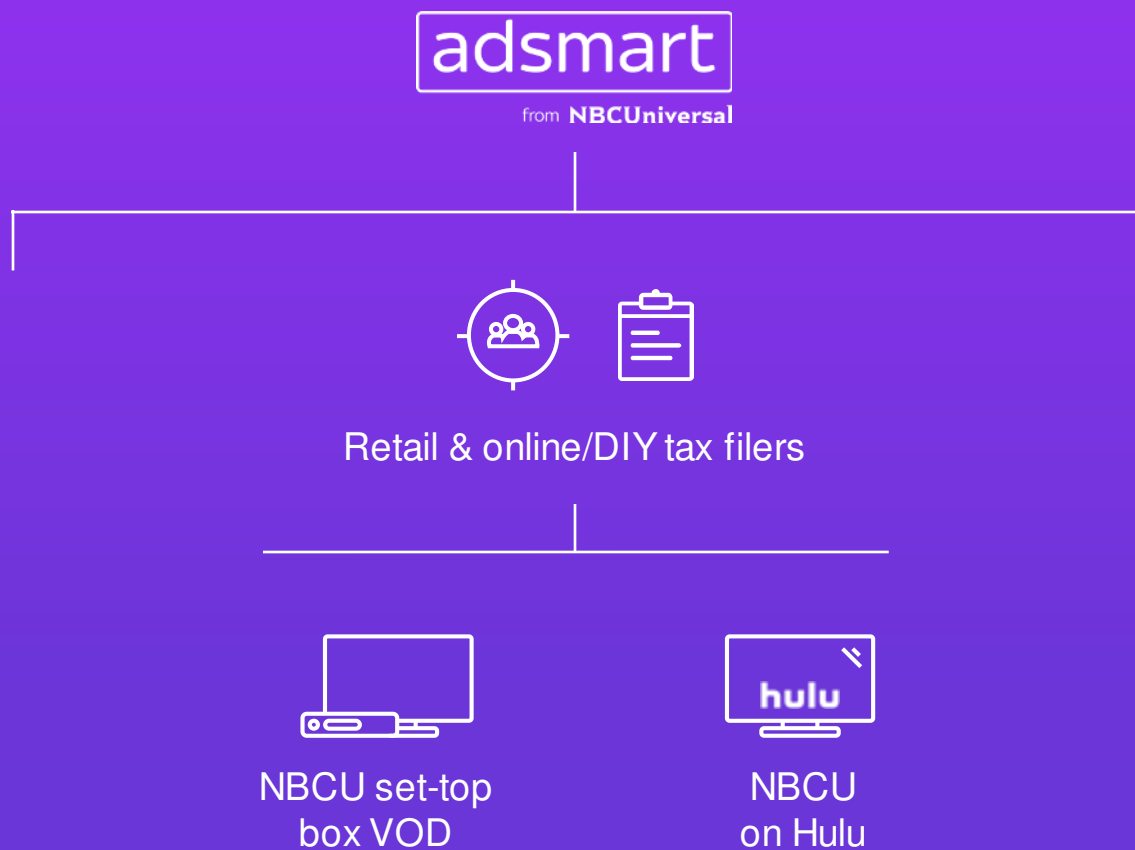
We partnered with the client to run an AdSmart addressable campaign across our portfolio to reach a custom TransUnion lookalike target modeled from the client's 1st-party data (comprising retail tax filers and online/DIY tax filers) instead of a traditional Nielsen demo.





The approach

Advanced TV targeting to reach the right consumers across NBCU's VOD on set-top boxes and Hulu.



The results

We commissioned a custom Data Plus Math study to measure the impact of the AdSmart campaigns on driving tax filing conversion in the advertiser's retail locations and online.

AdSmart drove lift for tax filings overall

+10%

overall lift in tax filing conversion rate

+10%

lift in online/DIY tax filing conversion rate

+10%

lift in retail tax filing conversion rate

2020 campaign results vs. 2019 campaign results

+66%

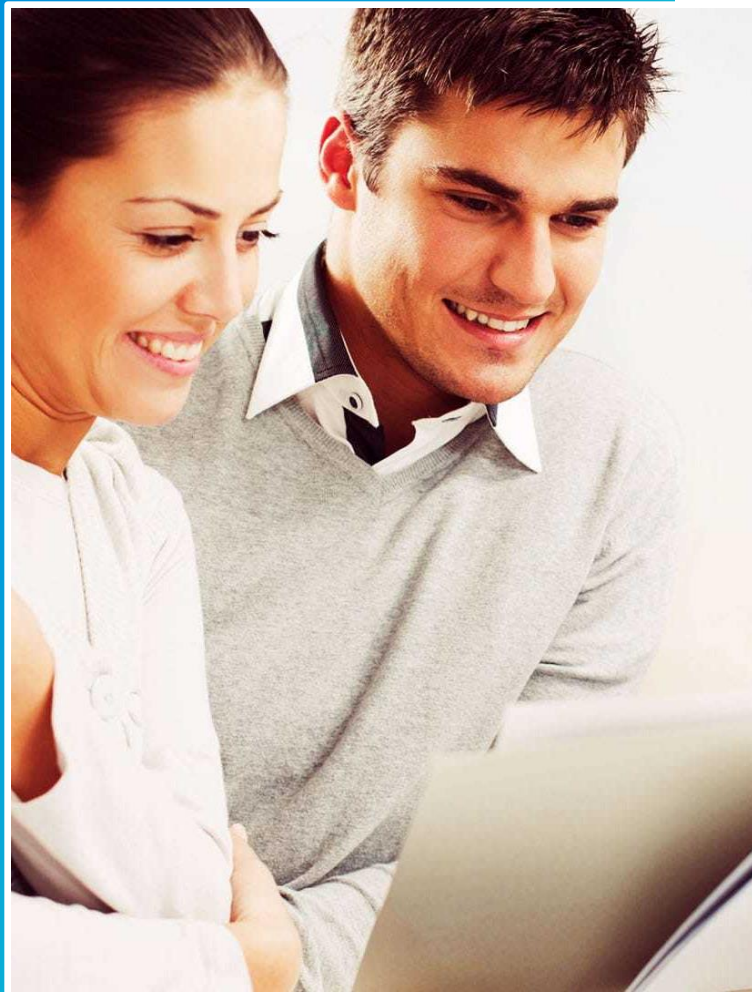
more efficient cost per conversion in 2020 vs. 2019

+2.5%

higher tax filings conversion rate in 2020 vs. 2019



Case study



The challenge

Drive perception & consideration

A leading insurance company wanted to leverage advanced targeting on linear TV to drive perception and consideration for life insurance among existing customers.

The insight

Encourage policy bundling

Policy bundling is an essential strategy for insurance companies to increase customer lifetime value, and advanced targeting is a great way to cross-sell existing customers.

The solution

Target insurance customers via national TV

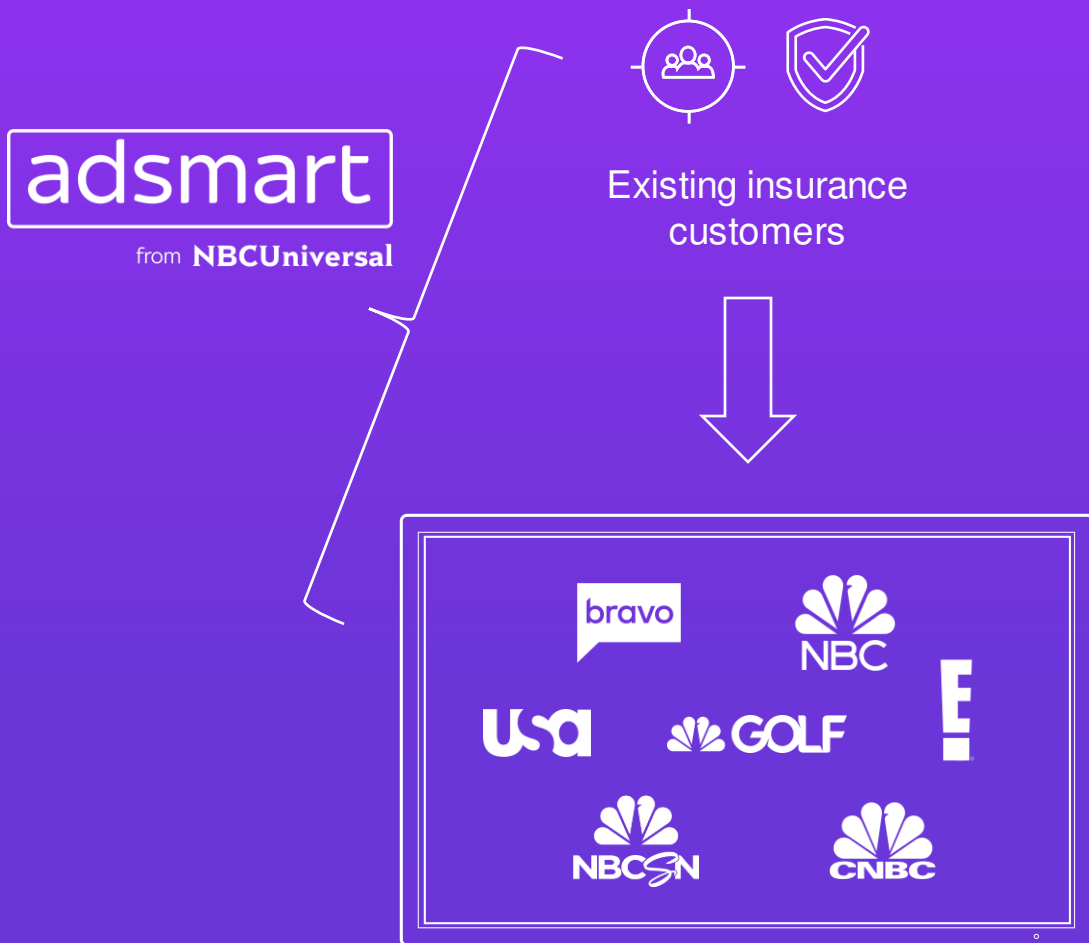
We partnered with the client to run an AdSmart national TV campaign optimized across our portfolio to reach their existing insurance customers instead of a traditional Nielsen demo.





The approach

Advanced TV targeting to reach the right consumers across NBCU's linear portfolio.



The results

NBCU commissioned a custom Kantar Millward Brown study to measure the impact of AdSmart campaign on driving perception and consideration for the client.

AdSmart exposure drove brand impact, especially among target HHs

+20%

ad recall lift among target HHs exposed to AdSmart campaign vs. unexposed

+54%

higher ad recall lift among target HHs exposed to AdSmart campaign vs. non-target

+34%

message recall among target HHs exposed to AdSmart campaign vs. unexposed

+182%

higher message recall among target HHs exposed to AdSmart campaign vs. non-target

+5%

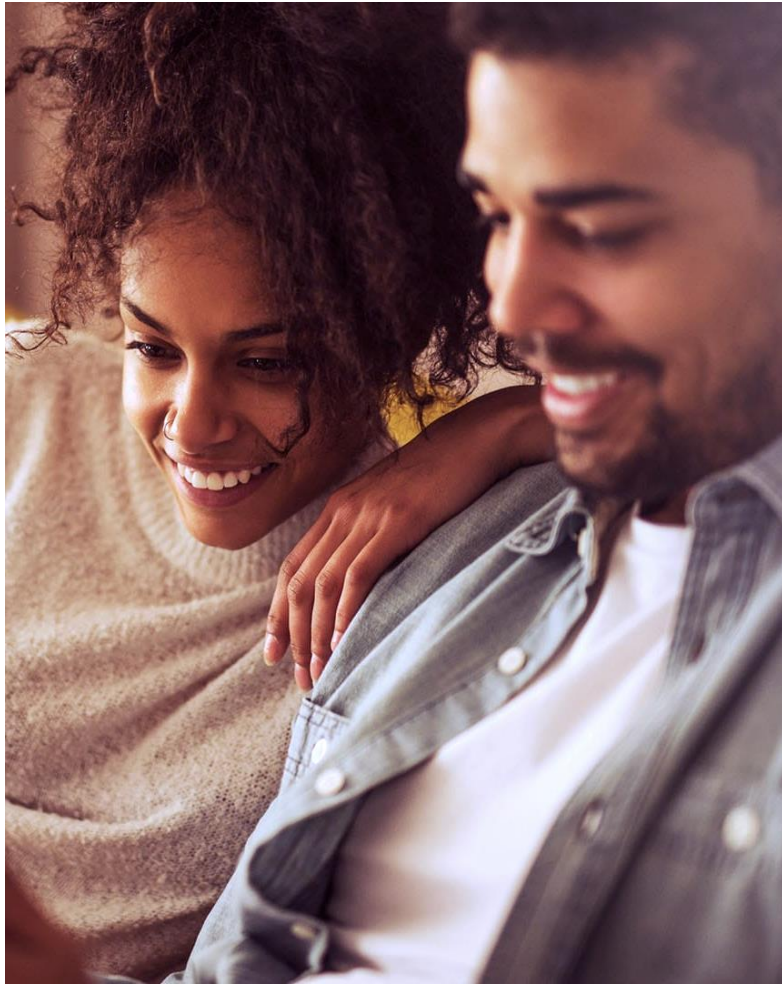
purchase consideration lift among target HHs exposed to AdSmart campaign vs. unexposed

+89%

higher purchase consideration among target HHs exposed to AdSmart campaign vs. non-target



Case study



The challenge

Drive site traffic

A leading mutual life insurance company wanted to leverage advanced targeting on linear TV to drive site traffic to their website, especially among parents planning for their children's future.

The insight

Connect with consumers when they need you most

Adjusting to big life changes like parenthood can be overwhelming, and with so many options for life insurance and financial services, it can be hard to know where to even start. Advanced targeting is a great way for your brand to stand out from the crowd and connect these consumers with the advisors and plans that are right for them.

The solution

Target in-market consumers via national TV

We partnered with the client to run an AdSmart national TV campaign optimized across our portfolio to reach a custom MRI "New and Motivated Parents" target instead of a traditional Nielsen demo.





The approach

Advanced TV targeting to reach the right consumers across NBCU's linear portfolio.



The results

NBCU commissioned a custom Data Plus Math study to measure the incremental impact of the AdSmart campaign on driving traffic to the client's website.

AdSmart exposure drove site traffic vs. non-AdSmart TV exposure

+20%

overall lift in visitation to all pages

+54%

overall lift in visitation to financial advisor pages

+66%

in-target lift in visitation to financial advisor pages

AdSmart top-performing networks drove double-digit visitation lift vs. non-AdSmart TV exposure

+104%

lift in visitation from CNBC exposure

+60%

lift in visitation from Universal Kids exposure

+44%

lift in visitation from Golf Channel exposure