One Platform for Restaurants

NBCUniversal
EVERY INDUSTRY HAS BEEN CHANGED FOREVER

KEY RESTAURANT TRENDS AND PRIORITIES

• Continued investments in digital ordering
• Purpose driven messaging around community and sustainability remains a focus
• Evolved layouts / drive thrs to accommodate off-premise dining
• Menu innovation around healthy and comfort foods
• Breakfast daypart expected to regain strength
CONSUMERS ARE DRIVING MEDIA CONSUMPTION & VIDEO GROWTH

Industry U.S. Video Forecast
Mins Per Person Per Day

- Streaming
- Linear

<table>
<thead>
<tr>
<th>Year</th>
<th>Streaming</th>
<th>Linear</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>334</td>
<td>21%</td>
</tr>
<tr>
<td>2017</td>
<td>343</td>
<td>28%</td>
</tr>
<tr>
<td>2019</td>
<td>358</td>
<td>39%</td>
</tr>
<tr>
<td>2021</td>
<td>367</td>
<td>47%</td>
</tr>
<tr>
<td>2023</td>
<td>363</td>
<td>53%</td>
</tr>
</tbody>
</table>
Digital is rapidly gaining share as a percentage of overall NBCU viewership.

NBCUniversal

NBCU Network Watch Time: Linear vs. Digital
A18-49, reflects aggregate viewership across NBCU portfolio

Pre-COVID

- 19/20 through 4/26: 79% Linear, 21% Digital

Full Season

- 19/20: 74% Linear, 26% Digital
- 20/21 STD: 65% Linear, 35% Digital
- Future State: 50% Linear, 50% Digital
MEET YOUR CONSUMERS WHEREVER THEY ARE

**SATURDAY NIGHT LIVE**

**Digital**

- **2016 Premiere:** 354,423,456
- **2020 Premiere:** 277,082,168
- **Total Digital:** 631,505,624

**Linear**

- **2016 Premiere:** 86,109,088
- **2020 Premiere:** 162,027,534
- **Total Linear:** 248,136,622

**Total Time Spent Viewing:**

- **Digital:** 162,027,534 minutes
- **Linear:** 162,027,534 minutes

**Total Time Spent Viewing:**

- **Digital:** 277,082,168 minutes
- **Linear:** 86,109,088 minutes

Helping marketers reach their audiences—wherever, however, and whenever they choose to watch—on a single, unified media plan.

97% total video consumption is on “big screen”

NBCUNIVERSAL ONE PLATFORM™
THIS IS WHY WE INVESTED IN THE FUTURE

**Scale:** Peacock delivers premium value at scale with 33+ million sign-ups in less than 7 months and growing

**Content:** 40K+ hours of programming across Next Day Prime, Originals, Live Sports, Late Night, News, Top Acquisitions (e.g., The Office, WWE Majors)

**Audience:** Peacock audience reach approaching parity with Broadcast Prime networks

**Experience:** 1/3 TV ad load; more effective than CTV norms (+32% ad likeability, +19% brand memorability)

**Ad Innovation:** Six new ad products in market with commitment to four new innovations per year (88% of viewers more likely to remember brands with an ad innovation vs. a standard ad)

**Data:** Full spectrum data capabilities: geo targeting, demo targeting, custom audiences, contextual alignment
63MM

Heavy QSR Consumers
Average cross-platform reach

75/25
Linear / Digital Mix

Source: YouGov Profiles, 12-6-20; NBCU Linear = Nets Regularly Watched in Last 30 Days, NBCU Digital = Network Apps Downloaded, Liked on Facebook, Followed on Twitter, Websites Visited, or Watched on YouTube in Last 30 Days, based to NBCU Cross Platform Avg Monthly Reach. TV: Nielsen, C3, total day, reach %, 1 min qualifier, digital: comScore VMX and MMX, multiplatform data, Jul '19 - Jun '20 avg monthly reach; shows based on Nielsen MRI Fusion, MRI based on P18-49 minutes.
WHY DOES NBCU ONE PLATFORM WORK?

**DELVERS MORE IMPRESSIONS**

+10%

Basis point improvement on in-flight delivery

**DELVERS RICHER MIX**

+13%

Impressions towards a richer mix

Source: NBCUniversal Proprietary Data
**CAPITALIZE ON A HIGH-QUALITY AUDIENCE**

**THAT PRIMARILY WATCHES OTT ON THE TV SCREEN**

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>40%</td>
<td>Younger</td>
<td>42.8 OTT vs. 59.5 Linear Avg. Age</td>
</tr>
<tr>
<td>60%</td>
<td>More affluent</td>
<td>$98K OTT vs. $61K Linear Avg. HHI</td>
</tr>
<tr>
<td>50M/50F</td>
<td>Skew</td>
<td>OTT vs. 42M/58F Linear</td>
</tr>
<tr>
<td>77%</td>
<td>CTV viewership</td>
<td>OTT Audience Only, 97% TV Viewership on a TV Screen for Combined OTT/Linear</td>
</tr>
</tbody>
</table>

LOOKING AHEAD…

NBCU Insights & Opportunities
KEY OPPORTUNITIES FOR QSR BRANDS

**DRIVING DIGITAL ENGAGEMENT**
- Allocations to NBCU digital platforms almost doubled YoY
- More conversations around streaming and Peacock
- Increased use of social and mobile platforms, such as Snap and Apple News

**AUDIENCE FIRST STRATEGY**
- +140% increase in data-driven linear YoY as restaurants continue to leverage 1st and 3rd party data to reach strategic targets
- Increased interest in how to leverage data to drive incremental reach and cross-platform optimization

**CONNECTING WITH HISPANIC AUDIENCES**
- +11% growth YoY in Hispanic investments as brands look to connect with the multicultural audience

**HARNESSING THE POWER OF TENTPOLES**
- Ongoing use of tentpoles (Olympics, World Cup, Red Carpet) and mass-reach vehicles (cable, broadcast entertainment)
- Leaning into talent and sponsorships: Chris Simms, Lily Singh, Erin Lim
1. DRIVING DIGITAL ENGAGEMENT
LEVERAGING NBCU’S INSIGHTS & CAPABILITIES TO DRIVE DIGITAL ORDERS AND APP DOWNLOADS

TAP-TO-MAP TAP-TO-WALLET
APP DOWNLOADS / USAGE
• Drive App Downloads
• Engage Current Customers
• Promote Rewards
• Leverage Apple data or 1P data
• Behavioral, contextual, dayparting and ZIP code targeting

FANDANGO REWARDS
PREDICTIVE LOCATION MEAL & A MOVIE
• Movie ticket purchase data that can help inform moment-based location targeting
• Incentivize audiences to try new restaurants or increase order size
• Entertainment rewards impact consumer behavior:
  • -51% of consumers are willing to try a new product
  • -31% will spend more to get reward

DRIVE APP DOWNLOADS WITH SHOPPABLE TV
• Linear-led with multi-platform touchpoints
• Scan NBCU code to download app
• Contextually aligned
• 30% higher conversion rate than the avg. industry benchmark
QSR APP DOWNLOAD
Case Study

THE CHALLENGE
Drive App Downloads at Scale
As consumers’ adoption of digital ordering accelerated during pandemic, a leading QSR chain needed to drive app downloads to maintain existing and attract new customers.

THE INSIGHT
Simplify the Path to Conversion to Maximize Impact
Through engaging consumers on a premium, mobile content platform, like Apple News, and leveraging “tap-to-app” technology, a brand can efficiently and effectively reach its target audience at scale and simplify the app download process.

THE SOLUTION
Reach the Right Audience on the Right Platform
Through targeting 3rd party delivery app (Grubhub, Uber Eats, etc.) and competing QSR app users who don’t have the brand’s app in contextually relevant content, the QSR would efficiently drive app downloads at scale.

RESULTS
Over a two-week period, the Apple News campaign drove significant app downloads at an efficient cost per install.

![25,566 Total App Installs](Image)

![$5.87 Cost Per Install](Image)
2. AUDIENCE FIRST STRATEGY
<table>
<thead>
<tr>
<th>Category</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heavy/Frequent QSR Consumers</td>
<td>109.6M</td>
</tr>
<tr>
<td>Millennials</td>
<td>31.2M</td>
</tr>
<tr>
<td>Food Delivery Users</td>
<td>15.9M</td>
</tr>
<tr>
<td>P55+</td>
<td>80.2M</td>
</tr>
<tr>
<td>Sports Fans</td>
<td>16.0M</td>
</tr>
<tr>
<td>Heavy/Frequent Mobile App Users</td>
<td>95.9M</td>
</tr>
<tr>
<td>College Students</td>
<td>53.7M</td>
</tr>
<tr>
<td>Moms</td>
<td>27.7M</td>
</tr>
<tr>
<td>Multiculturals</td>
<td>57.8M</td>
</tr>
<tr>
<td>Restaurant Loyalty Program Members</td>
<td>15.9M</td>
</tr>
<tr>
<td>Hispanics</td>
<td>26.2M</td>
</tr>
<tr>
<td>Gamers</td>
<td>45.3M</td>
</tr>
</tbody>
</table>
THE BEST OF BOTH WORLDS: STRATEGIC AUDIENCES ACROSS ONE PLATFORM

FAST CASUAL PURCHASE (1st Party, 3rd Party)
3P restaurant category purchasers / set of specific restaurants (competitive conquisting); and/or 1P data to target (or suppress) existing customers/loyalists

LOCATION-BASED DATA
Target consumers with a high propensity to visit a restaurant category / set of specific restaurants

BEHAVIORAL / PSYCHOGRAPHIC
Target based on attitudes (healthy lifestyle, on-the-go, etc.) or brand affinity

ABILITY TO LAYER ON ADDITIONAL ATTRIBUTES (HH W/ KIDS, PARENTAL DECISION MAKER, ETC.)
Your advanced audience

Data-driven delivery by platform

Data-driven linear
Enhanced delivery to target audiences at scale through the broad reach of national TV

Addressable
Dynamic delivery to target HHs through highly engaging STB VOD, OTT, & CTV content

Targeted OLV
Dynamic delivery to target users through premium video on desktop & mobile

Activate your way: Managed service or Self-service
ADSMART DATA DRIVEN LINEAR: FULL-FUNNEL IMPACT

Historical performance across key categories

<table>
<thead>
<tr>
<th>BRAND METRICS</th>
<th>RETAIL: AWARENESS</th>
<th>RETAIL: BRAND FAVORABILITY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>+7% overall lift in omnichannel services</td>
<td>+17% overall lift favorability</td>
</tr>
<tr>
<td></td>
<td>awareness</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4X in-target lift vs. non target</td>
<td>29% in-target lift vs. non target</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>“FOOT” TRAFFIC &amp; SITE VISITATION</th>
<th>QSR: “FOOT” TRAFFIC</th>
<th>QSR: WEB VISITATION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>+4.5% overall restaurant visit lift</td>
<td>+9% Higher Conversion Rate vs non AdSmart</td>
</tr>
<tr>
<td></td>
<td>+22% higher in-target visit rate vs. non</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SALES</th>
<th>QSR: SALES LIFT</th>
<th>QSR: PURCHASE CONVERSION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>8% overall sales lift</td>
<td>+19% Higher Conversion Rate vs non AdSmart</td>
</tr>
<tr>
<td></td>
<td>2.4X higher in-target sales conversion vs. non</td>
<td>+9% more efficient Cost Per Conversion vs. non AdSmart</td>
</tr>
</tbody>
</table>

Sources: Retail Brand Lift: KMB & NBCU (Q1-Q2’18); QSR Foot Traffic: Data + Math & NBCU (Q2’19); QSR Web Visitations: Spot & NBCU (Q3’20); QSR Sales Lift: Epsilon & NBCU (Q1-Q2’29); Retail Sales Lift: LiveRamp & NBCU (Q4’16)
3. CONNECTING WITH HISPANIC AUDIENCES
MEET THE HISPANIC QSR/FAST CASUAL EATER

YOUNGER
47% Millennial/Gen Z
vs 25% for NH

PARENTS
47% Have Children
vs 29% for NH

DINE W/ CHILDREN
21%
vs 14% for NH

LARGER HOMES
49% HH size 4+
vs 28% for NH

DINING OUT FACTS

75
Dine-out occasions per year
(vs 64 for NH)

$13
Spend per trip (vs $11 for NH)

$940
Buy rate (vs $729 for NH)
HISPANICS ARE MORE LIKELY TO EMBRACE TECH ENHANCEMENTS

Index vs Non-Hispanics

Ordered via Kiosk: 120i
Mobile App pre-order: 131i
Used mobile loyalty program: 129i
Ordered via 3rd party delivery app: 158i

Source: Mintel’s Quick Service Restaurants – US – May 2019
ESPECIALLY MOBILE ORDERING AND CARRYOUT OPTIONS

44%
Willing to **trade food quality for convenience of delivery** (vs 29% of NH)

67%
Wish more restaurants **offered mobile pick-up options** (vs 55% of NH)

54%
Have ordered delivery for **carryout directly from the restaurant online/app** in the P3M (vs 55% of NH)

Source: Mintel Reports. Restaurant Ordering and Delivery – December 2019 – US
4. HARNESSING THE POWER OF TENTPOLES
See the Impact @ Work
SNF & Casual Dining Brand Sponsorship Results

Awareness
+28%
stronger brand opinion

Consideration
+37%
more likely to consider brand
next time they want to go out to eat

Conversion
+6%
lift in restaurant foot traffic for
viewers exposed to the campaign
2021: Moments Fueling the Cultural Conversation

Q1
- 1 Year Since the Start of COVID Q1
- Black History Month February
- Earth Day April 22nd
- International Women’s Day March 8th
- National Burrito Day April 1st
- Decision 2020 Inauguration Jan 20th

Q2
- Fast 9 Movie Release May 28th
- Latin American Music Awards April
- Pride Week/ Month June
- Juneteenth June 19th
- Pride Week/ Month June
- World Economic Forum May 18th – 21st

Q3
- Pride Week/ Month June
- National Avocado Day July 31st
- Pride Week/ Month June
- Back to School Q3
- National Hispanic Heritage Month Sept 15th – Oct 15th
- Back to School Q3

Q4
- Back to School Q3
- National Hispanic Heritage Month Sept 15th – Oct 15th
- National Hispanic Heritage Month Sept 15th – Oct 15th
- Earth Day Apr 22nd
- Pink Power (Breast Cancer Awareness) October

NBCUniversal
THE BIGGEST MOMENTS: 2021 + 2022
Immediate, Massive Reach to Millions of Consumers

Projected viewers

Jul 23 – Aug 8 2021
221M

Feb 4 – Feb 20 2022
188M

Feb 6 2022
122M

Nov 21 – Dec 18 2022
37M

Source: Nielsen
WHAT’S NEXT
NBCU THOUGHT LEADERSHIP & RESTAURANT CATEGORY STRATEGIES

THOUGHT LEADERSHIP

- Lessons Learned During 2020
- One Platform for Purpose
- Maximizing Creative Impact
- Future of OTT/Streaming
- Multi-Cultural Moments
- Brand Loyalty

CATEGORY STRATEGIES

- Driving Creative Breakthrough - Restaurants
- Restaurant Category Assessment - 2020
- Food Delivery Trends
- Leveraging NBCU Digital to Drive On & Off-Premise Orders
Thank you