



Restaurant Playbook

Restaurant Playbook Overview

Explore NBCUniversal's
latest perspectives & insights
into the Restaurant industry.

Our Approach

At NBCUniversal, we have a legacy of working with a diverse range of Restaurant partners to build their brands & businesses. In 2024, NBCU worked with 60+ Restaurant advertisers across the below sub-categories.



QSR



Fast
Casual



Casual
Dining



Fine
Dining



Pizza



Delivery
Services

This playbook has been created based on NBCU's:

- Ongoing industry evaluation
- Conversations with Restaurant advertisers & agencies
- Proprietary category intelligence
- Continual marketplace analysis
- Examination of consumer attitudes towards the Restaurant industry

Restaurant Playbook Contents

An Overview

of NBCUniversal's latest Restaurant perspectives, insights, and strategic considerations.

Marketplace Dynamics



Media Trends & Observations



Brand & Business Imperatives



NBCUniversal Playbook





'25 Restaurant Industry Dynamics

Current Restaurant Category Dynamics

To drive traffic and maintain sales, restaurants are blending their traditional mass-reach strategies with increasing investments in advanced targeting







Headwinds

- **Menu price inflation** remains above grocery store increases, pushing consumers towards dining at home¹
- **QSRs are losing share** as their core customers, low-income diners, cut back and visit less often²
- **Labor** remains a persistent challenge, with changes in immigration laws creating worker shortages, wage inflation, and production delays³
- **Lack of prime real estate** is slowing down expansion of growing restaurant brands⁴

Tailwinds

- Brands pivoting to **value-based meals and messaging** (Chilli's, McDonald's, Taco Bell, etc.) continue to see success and are heavily leaning into media/marketing to support these strategies
- Mass reach media (e.g., live events, sports, etc.) remains important to maintain **top-of-mind awareness** and **cultural status**
- **Ongoing menu innovation** to drive incremental visits⁵ results in a need for turnkey media
- Despite costs, **consumers remain committed to dining out**; they are focused on promotions, loyalty perks, and other methods to **establish affordability**

As competition & consumer spending patterns evolve,
brands across Restaurant sub-categories are focused on showcasing value and innovating their menus

<div>QSR & Fast Casual</div>	<div>Casual Dining</div>	<div>Delivery</div>	<div>Food-at-Home <i>Restaurant Competition</i></div>
<p>Heightened value competition – from existing & new QSR/FC players, full-service restaurants, and grocery – alongside a decrease in consumer traffic is challenging the category.</p> <p>Outperformers including growing brands and those leaning heavily into menu innovation.</p> <div>-1.6% Decline in QSR visits in Q1'25 vs. Q1'24. Fast Casual was flat¹</div>	<p>As consumers question rising QSR/FC prices, Casual Dining brands have an opportunity to win share of food wallet by showcasing the value of the sit-down experience.</p> <div>-1.6% Expected 2025 sales forecast for full-service restaurants²</div>	<p>Food delivery adoption and usage continues to grow, particularly with young, urban consumers.</p> <p>Data collection is fueling the growth of delivery media networks, which is resulting in more customers won for both delivery platforms and their restaurant + grocery partners.</p> <div>+6.6% Expected 2025 sales forecast for U.S. Online Food Delivery³ Current market penetration at 53%</div>	<p>With food-away-from-home inflation higher than food-at-home, consumers are shopping more at grocery stores, leaning on prepared foods & frozen items, and re-assessing meal kits.</p> <div>69% of consumers said they are eating more at home, with 85% of that group saying they are doing so to save money⁴</div>

Restaurant Media Trends to Watch

Restaurant brands are increasing investments into premium content across platforms to maintain high awareness and consideration in their effort to grow share of wallet against food-competition

Steady Growth into Streaming



+16%

Increase in **streaming**, driven by +26% increase in **programmatic streaming** as brands look for premium content with flexibility to move dollars as business needs fluctuate

Fueling Food Fandom via Sports



+18%

Increase in **sports** content across both **linear** (+18%) and **streaming** (+7%) as brands seek to achieve cultural relevance through mass-reach live tentpoles

Leaning into Linear



+9%

Increase in **Broadcast Entertainment** and +5% into **Hispanic** as restaurants seek out engaged audiences

Staying in the conversation with Digital



+27%

Into **digital** platforms, with +129% increase into **shortform** and +8% in **social**

As a result of these industry dynamics, **we are seeing Restaurant brands & portfolios prioritize a few key objectives**

DRIVE

Cultural Relevance & Brand
Differentiation



REMAIN

Top of Mind During
Key Meal Moments



BUILD

Brand Loyalty



BOOST

Foot Traffic and Online
Orders





'25/26 Restaurant Playbook

Each month,
NBCUniversal
content
reaches

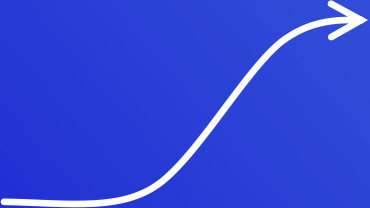
286M





P2+ Proj. 2026



Across
80M
Households

*the audiences
that matter to you*



62M	
QSR Consumers	
58M	
Heavy Casual Dining Consumers	
37M	
Frequent Delivery Service Users	
23M	
Hispanic P18+ QSR/Restaurant Patrons	

Source: Based on NBCU's in-house audience insights using 1P and 3P data; date range: May 2025; base: HH; Audience segments derived from MRI audience comps from May 2025 Cord Evolution (SP25 USA) study applied to P18+ NBCU Crossplatform Reach.

Leverage the power of NBCUniversal's **content & audiences** to drive brand and business impact.

Drive Cultural
Relevance &
Brand Differentiation



Remain Top of
Mind During Key
Meal Moments



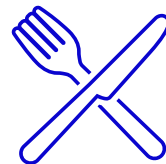
Build Brand
Loyalty



Boost Foot
Traffic and
Online Orders



NBCUniversal's Restaurant Playbook



01.
Align With Fan-
Favorite IP to **Boost
Cultural Relevance**

02.
Drive Cravings and
Orders

03.
Maximize Orders
during Key **Meal
Moments**

04.
Use Data to Deliver
Business Objectives

← POWER OF →

IP Alignment

Streaming Ad Innovations

Streaming Ad Innovations

1P Data

Commerce

Contextual Targeting

Restaurant brands continue to lean into pop culture and IP to drive cultural relevance and brand differentiation

84%

of consumers say **brand-franchise collaborations** impact purchase decisions and likelihood to buy increases if they're a fan¹



And our Restaurant partners are aligning with our IP to connect with passionate fans and drive impact

+73%

higher likeability for **restaurant in-show marketing integrations** vs. ads in commercial time²

+47%

stronger brand recall for **custom content** vs. restaurant competitive norms²

+71%

higher likeability and +20% stronger emotional engagement for **official sponsors** vs. other restaurant brands²

Source: 1. *Eandom*. 2. NBCU internal analysis

Your brand can align with NBCU's iconic content and IP across platforms to boost cultural relevance

LIVE EVENTS

+74%

unaided ad recall
& awareness for restaurants

192i

avg. search
engagement
index for
restaurants



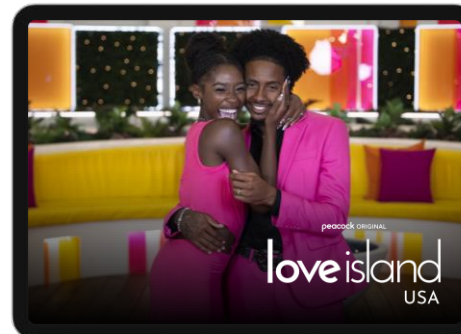
PEACOCK

+10%

consideration intent for
restaurants

+121%

foot traffic
visit rate for
restaurants



SOCIAL

1.3B

total followers across big 5 social
platforms

445M

monthly
engagements



Source: NBCU proprietary data; NBCU Ad Impact Database 4Q23-2025, 52 Campaigns across 22 Brands NBCU measured Restaurant & QSR Live Programming 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 (192).; NBCU Ad Impact Database 2020-2025, 37 Campaigns across 15 Brands Peacock measured Restaurant & QSR campaigns Custom research, vendors vary. Average of exposed vs. control cells for NBCU. Top 2 box

Upper Funnel with Ad Innovations

Drive dining inspiration and orders through Peacock Ad innovations

Majority of NBCU ad innovation category spenders grew spend YoY in 1H'25, with 8 growers and 5 new clients

Ad Innovations @ NBCU [Click here](#)

Product Names [link](#) to One Pagers

Awareness

Spark curiosity

by breaking through a crowded landscape + establishing a connection to the brand


Binge Ad



+19%
Brand memorability vs. Midroll for Category


Remind users to take a snack break and reward them with an ad-free bingeing experience

Spotlight Ad




+97%
Brand Memorability vs. Midroll for Category

Take ownership of a 'food holiday' or busy delivery day through owning the first impression of the day



Additional Innovations:
[Curator Ad](#), [Pod Bounce](#), [Solo](#), [Cinematic](#), [Sports Suite](#)

Key:

CTV

Mobile

Web

Targeting


Direct To*

Research

Fuel discovery

by actively engaging viewers


Engagement Ad



+28%
Message Memorability vs. Midroll for Category


Create an interactive experience that previews new menu items, promotes local in-store pickup, or drives online ordering

Pause Ad



+22%
Ad Memorability vs. Midroll for Category

Inspire a meal or snack break through highlighting LTOs or promotions while seamlessly driving to app



Source: 1. NBCU Internal Spend Analysis. 2. Phoenix MI Brand Effect- June 2025 digital measurement of tagged campaigns on Peacock. October 2023 – June 2025. Reported metrics above minimum sample threshold. vs Midroll compares against Midroll performance for that demo. PMI does not track Message Memorability for display ads (i.e. Pause Ads). Limited to sample 35+ per demo of brand.

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Full Funnel with Commerce Innovations

Drive consumer engagement through Commerce-Driven Ad Innovations

Commerce Innovation
@ NBCU [Click here](#)

Awareness, Research & Narrowing Choice

Spark Curiosity, Fuel discovery, & Drive Ordering Action
by exploring what's available & informing decision-making, all while building connections with the brand

78% of Peacock streamers are likely to order while watching content



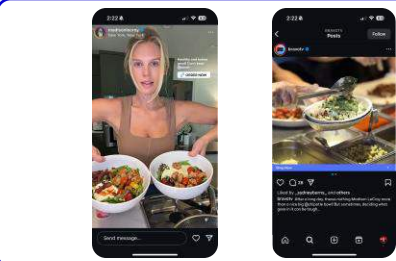
Virtual Concessions
Stay top of mind and turn cravings into instant orders, right from wherever fans are watching



Shoppable Pause Ad
When viewers pause their viewing experience, a static ad appears, encouraging them to scan to order during their break.



ShoppableTV In-Show Integration
Seamlessly embed restaurant brands into premium content, boosting engagement as talent prompts instant shopping via on-screen QR code



Social Commerce
Drive seamless restaurant purchases across social, reaching millions through our network handles

+85% Lift in search engagement for QSR & restaurant brands

+19% Lift in purchase intent for QSR & restaurant brands

Up to 12x Stronger scan engagement rate than QSR category benchmarks

Key: CTV Mobile Web Targeting Direct To*

Changes in lifestyles and consumer preferences have resulted in an expansion of meal moments



Traditional

Conventional Meal Moments:
Breakfast, Lunch, and Dinner

1/2

Of Americans typically eat lunch around 12/1pm and dinner between 5-7pm

Strong emphasis on traditional mealtimes with family for Hispanic HHs, as

61%

of foreign-born Hispanics don't snack daily

+



Evolved

Less traditional about meal-times, meal-sizes, and meal content to cater to their individual lifestyles

29%

Of U.S. adults consider a bowl of cereal to be equally a snack or a meal

91%

Of U.S. adults snack every day

77%

Of Americans believe adults should be allowed to order from the kids' menu

29%

of consumers dine out by themselves weekly or more often (~40% for millennials and gen z)

Maximize Orders During Meal Moments

~ 1/2 of Americans watch TV while eating meals and ~1/3rd look at their phones

Time-Based

Run before/during key mealtimes



Morning News / Breakfast



Prime Time / Dinner

Content-Based

Align with content tied to peak mealtime rituals (gameday, family movie night)



Sports



Movie

Contextual

Build brand and product awareness through relevant moments



Making, Eating, & Discussing Breakfast in Love Island

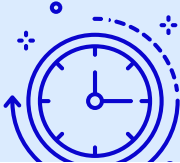


Dining Out in Bel Air

Layer on Innovation



Time of Day Shoppable Pause Ads
to drive orders during mealtimes



Virtual Concessions
to facilitate group dining moments

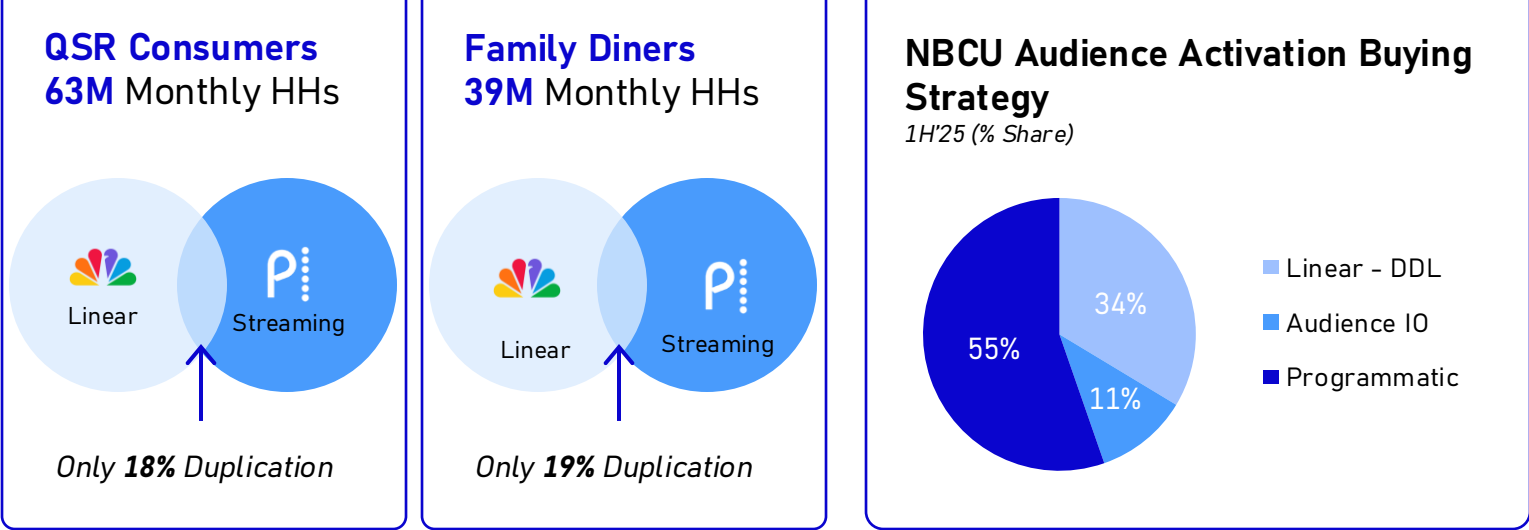


Pause Ads
to boost cravings and consideration

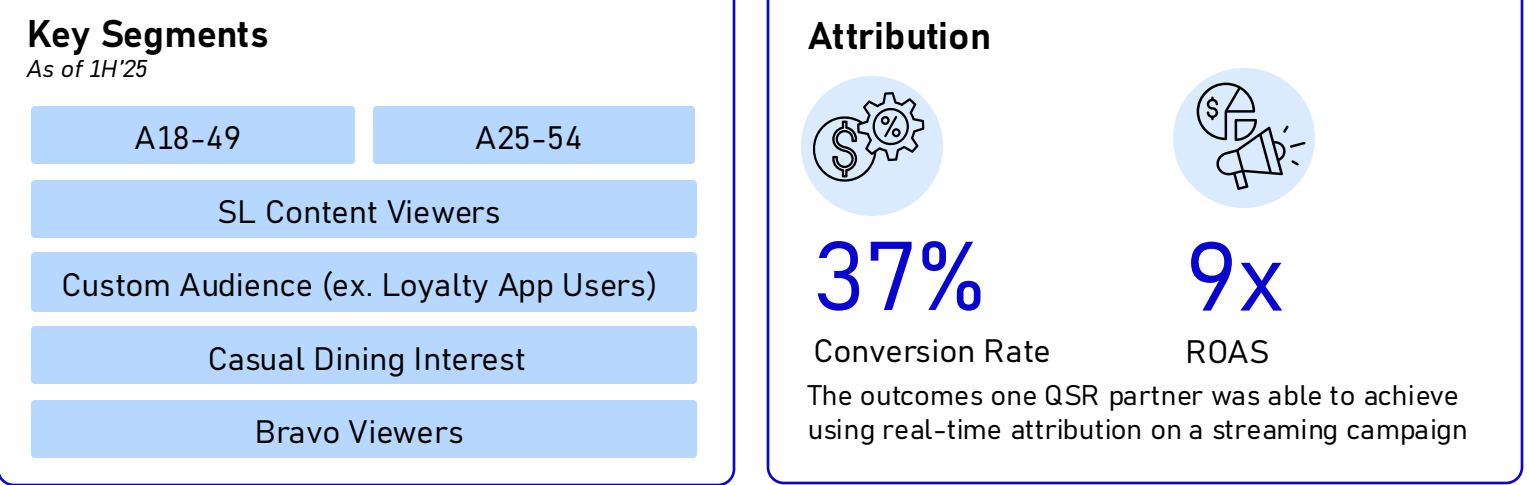


Use Data to Maximize Reach, Target Key Customers & Measure Business Outcomes

As key consumers fluidly move across platforms, restaurant brands are investing more into advanced audiences (+28%) to effectively follow them



Data-driven campaigns also allow restaurants to reach valuable customer groups and measure effectiveness



Opportunities to enhance data-driven buys across NBCU's premium portfolio

60% of restaurant advertisers are using 1P data to personalize campaigns

Live Sports & Events



Curated Content Packages

Popular on Peacock

ex. the office loveisland USA YELLOWSTONE

Peacock Shows

ex. voice POKER FACE Real Housewives

Peacock Films

ex. LOVE HURTS WICKED

Peacock Top 10 Rail

ex. Top 10 Shows or Movies Today

NBCU Shows/Networks

ex. NBC bravo E!

Premium Live Events

ex. CHRISTMAS IN ROCKEFELLER CENTER billboard DE LA MÚSICA LATINA LIVE FROM

Ad Innovations

Now programmatically-enabled!

PMP with upfront investments

- Burned-In Ad
- Immersive Ad
- Canvas Ad
- Canvas Carousel Ad

PG deals



Contextual Targeting

Drive authentic connections and actions by aligning your brand messaging with positive, brand-suitable moments with new contextual solutions powered by AI

Custom contextual
via direct IO and PG
Align your brand's creative cues with key moments in premium NBCU content to boost relevance and drive action.

Emotional alignment
via direct IO and PG
Build connections by aligning your brand's emotional tone with key moments in premium content

Opportunities above are non-exhaustive and subject to exclusivities & PG/PMP-specific packages or parameters (ex. campaign minimums). Ad Innovations exclude mobile inventory & are available for :30 units (or longer) only

Creative Showcase:

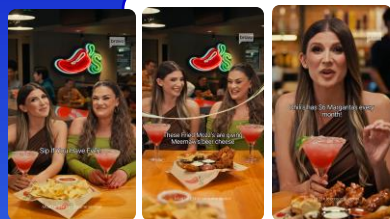
How Restaurant brands have aligned with NBCU premium content and best-in-class storytelling



TOP CHEF

Relevant Brand Extensions in the Right Content

Chipotle's flavor-packed integration – where chef-testants were asked to turn their Chipotle orders into new gourmet dishes – brought the fast casual's "53 real ingredients" message to life across platforms, in addition to driving awareness of its newest Toronto location



bravo
the valley

Elevating the Power of Social with Fan-Favorite IP

Across a trio of social-first videos, *The Valley* stars Brittany Cartwright and Janet Caperna served up some candid reminders that sometimes the perfect mom's night out starts with a margarita (or two) and a table full of Triple Dippers at Chili's



POPEYES

love island
BEYOND THE VILLA
peacock original

Sponsoring Summer Passion to Inspire Purchase

Popeye's sponsored *Love Island: Beyond the Villa* with a high-impact month-long presence across Peacock with shoppable commerce units and contextual category targeting delivered to its key audience



LATE
NIGHT
WITH SETH MEYERS

Partnering with Beloved Talent to Educate Viewers

Starbucks used custom content featuring Seth and his writer, Lutz, to evangelize the coffee brand's vast holiday menu beverage, while underscoring the Starbucks pillars of community and connection



PARIS 2024

Turning Group Viewing into a Group Dining Moment

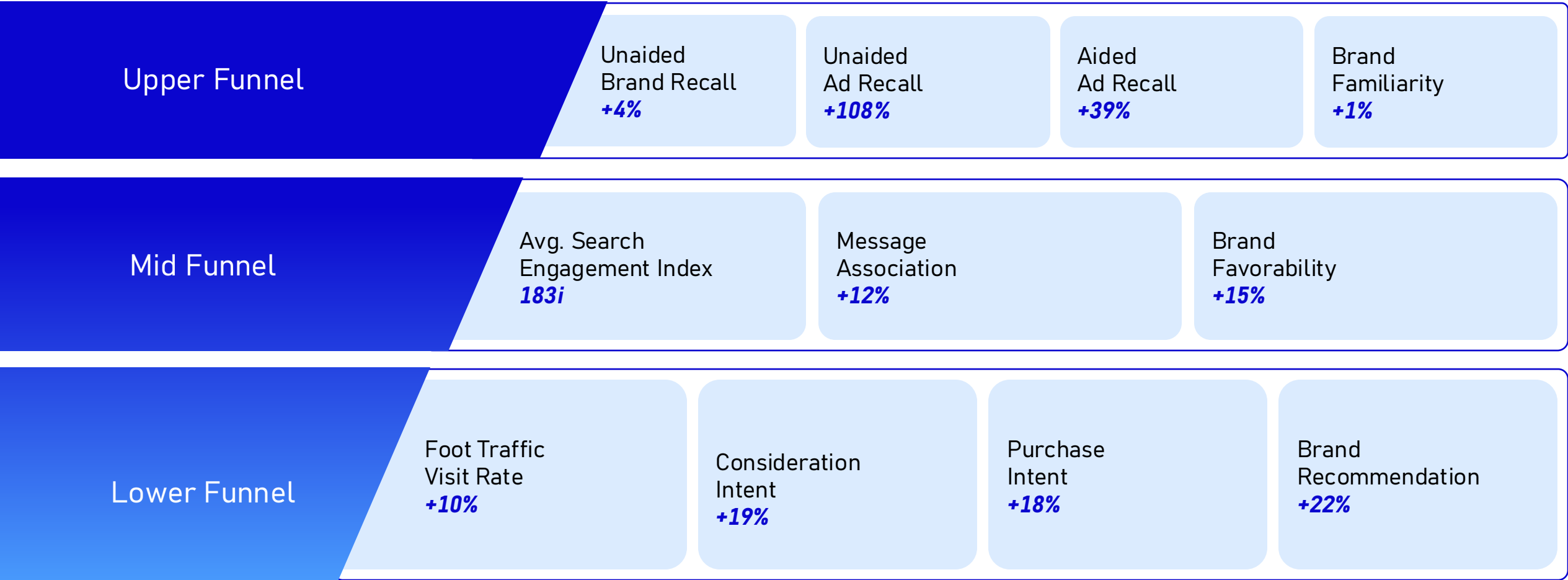
With the aid of Domino's, Mike Tirico gave viewers a rundown of blockbuster events alongside a seamless ordering experience during the Paris Olympics, serving up both helpful content and the opportunity to level up the moment with delicious pizza



Restaurant Impact at **NBCU**

Restaurant Proven impact across client KPIs

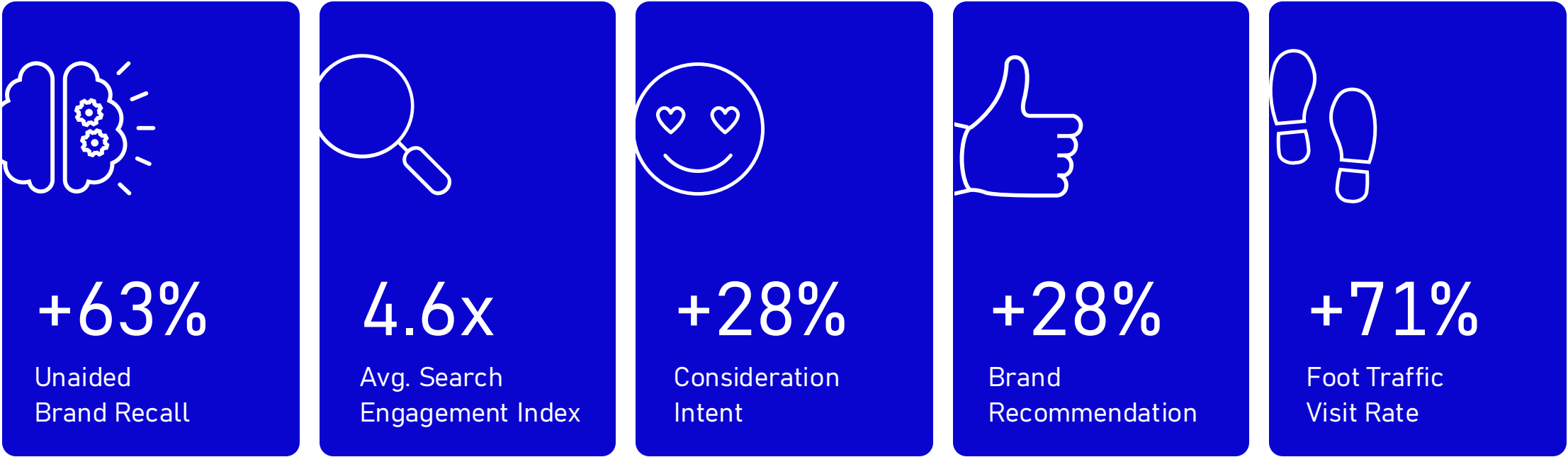
NBCU Restaurant Campaigns – Test vs. Control



Restaurant

Campaigns across more than one platform are more effective

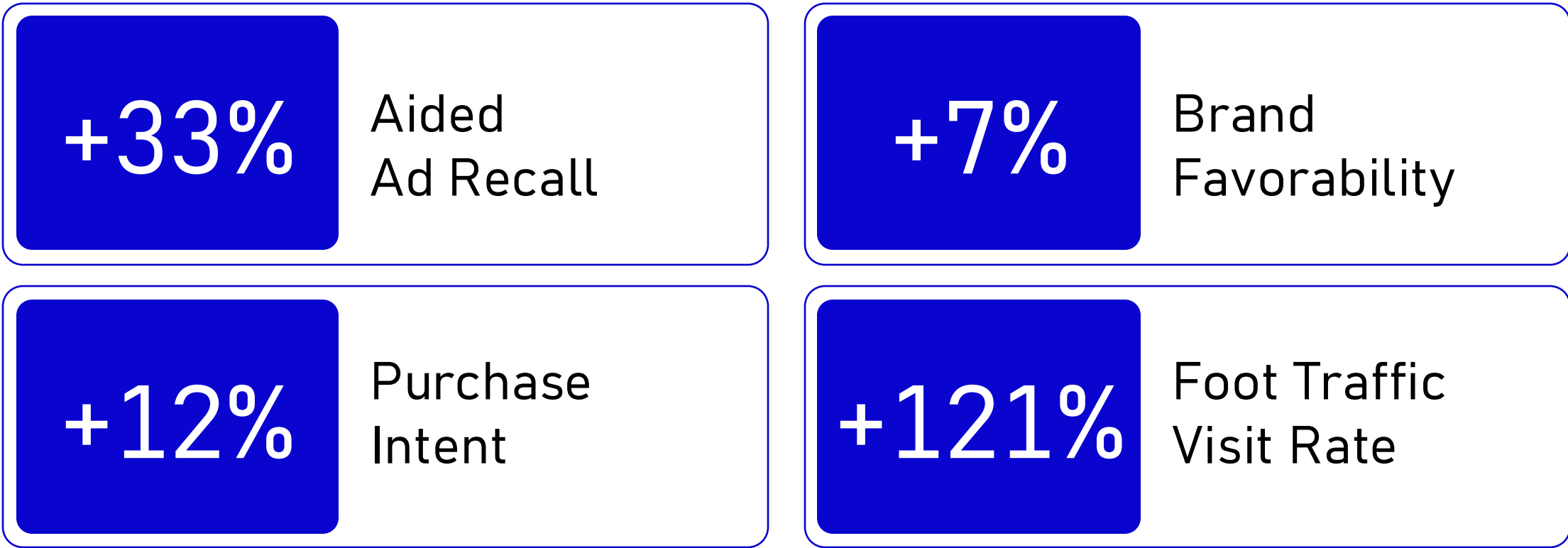
Restaurant Category NBCU Campaigns:
Multi-Platform vs. Single Platform
% Lift



Restaurant

Proven **Peacock** impact across client KPIs

NBCU Restaurant Campaigns – *Test vs. Control*



Source: NBCU Ad Impact Database 2020-2025, 37 Campaigns across 15 Brands Peacock measured Restaurant & QSR campaigns
Custom research, vendors vary. Average of exposed vs. control cells for NBCU. Top 2 box

NBCU offers measurement opportunities providing full-funnel insights for Restaurants

	Buy Side Activation	Clean Rooms	NBCU Measurement Opportunities (Sell-Side Measurement)	
Awareness	✓		Brand Lift Study	Brand Favorability Ad Awareness Recommendation Intent
Consideration	✓	✓	Search Engagement	Real-Time Outcomes Measurement (Attribution) Site / App Visitation (Incrementality)
Conversion	✓	✓	Real-Time Outcomes Measurement (Attribution) Site / App Visitation (Incrementality) Foot Traffic Study Sales Lift (1P)*	

Dedicated NBCU Insights Team provide:

- Restaurants category consultation and recommendations
- Sponsorship and audience impact analysis

*Requires client to permission data



Restaurant Case Studies



NBCU partnered with a leading QSR chain to run a campaign across NBCU's premium streaming portfolio, with **always-on attribution against key client objectives**, including app installs, registrations, and purchases.

9x Return on Ad Spend

3%

App Install
Conversion

37%

Purchase
Conversion Rate

79%

Registration
Conversion Rate

CASE STUDY

Chicken QSR Chain x NBCU Geo-targeted Foot Traffic Attribution

A national QSR chain wanted to increase foot traffic to store locations and purchases on site.

Using Spot On, the chicken chain ran a geo-targeted campaign across 70 DMAs to specifically reach A18-49 and chicken QSR diners across NBCU premium streaming portfolio.



186K Total Exposed Store Visits (within 14-days)	+15.4% Lift in overall QSR visits	4x ROAS
\$3.52 Campaign Cost per Attributed Visit	\$2.4M Sales Revenue	1.8% Conversion Rate



Restaurant Category Resources

Restaurant Category Resources

Category Trends & Strategic Recommendations



Regularly Updated
Category Updates



25/26 UF Recap by
Category



Restaurant Trend
Forecasting



Restaurant Value
Perception

Strategic Media Insights & Opportunities



Older Audiences
& TV



Gen Z Insights and
Opportunities



The Rise of Women's
Sports

Thought-Leadership & Insights



The Future of
Advertising:
Entertainment Ads



Relevance by
Design

Coming soon



Ad Ethics Series

Restaurant Playbook

NBCU Restaurant Category
Strategy Team:

Adam Daniele
Cynthia Jung
Andrea Illan

