



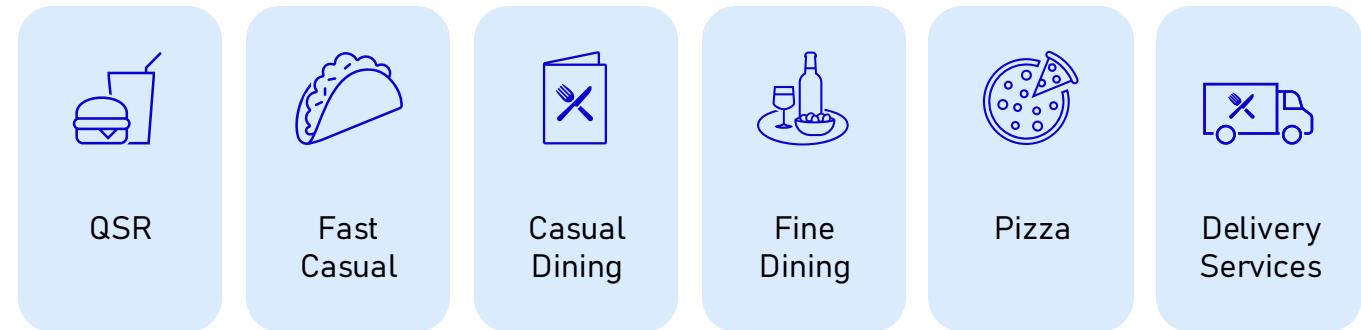
Restaurant Playbook

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.



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

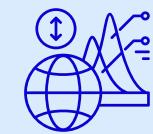
An Overview

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

QSR & Fast Casual	Casual Dining	Delivery	Food-at-Home Restaurant Competition
<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> <p>-1.6% Decline in QSR visits in Q1'25 vs. Q1'24. Fast Casual was flat¹</p>	<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> <p>-1.6% Expected 2025 sales forecast for full-service restaurants²</p>	<p>Food delivery adoption and usage continues to grow, particularly with young, urban consumers.</p> <p>+6.6% Expected 2025 sales forecast for U.S. Online Food Delivery³ Current market penetration at 53%</p>	<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> <p>69% of consumers said they are eating more at home, with 85% of that group saying they are doing so to save money⁴</p>

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



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



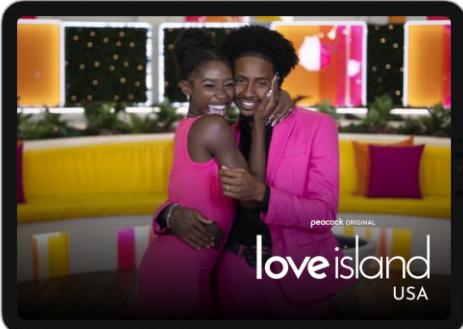
PEACOCK

+10%

consideration intent for restaurants

+121%

foot traffic visit rate for restaurants



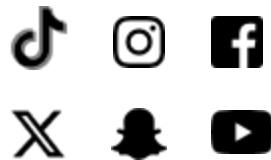
SOCIAL

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

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



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



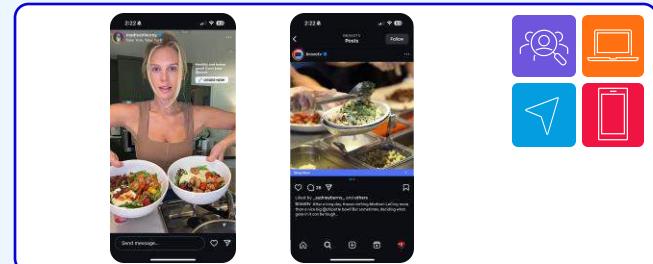
Shoppable Pause Ad

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*

 A legend with five icons: a yellow computer monitor for CTV, a red smartphone for Mobile, an orange laptop for Web, a purple magnifying glass for Targeting, and a blue share button for Direct To.

Source: 1. NBCU Commerce Data

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

91%

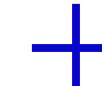
Of U.S. adults snack every day

29%

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

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



Time of Day
Shoppable Pause Ads
to drive orders
during mealtimes



Virtual Concessions
to facilitate group dining moments



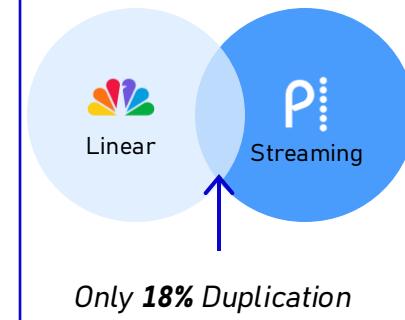
Pause Ads
to boost cravings and consideration



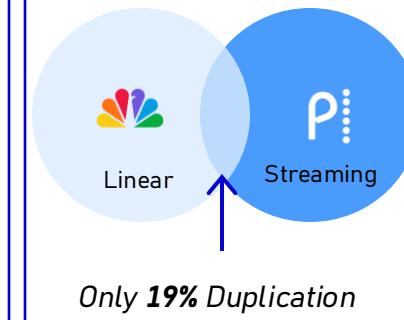
Use Data to Maximize Reach, Target Key Customers & Measure Business Outcomes

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

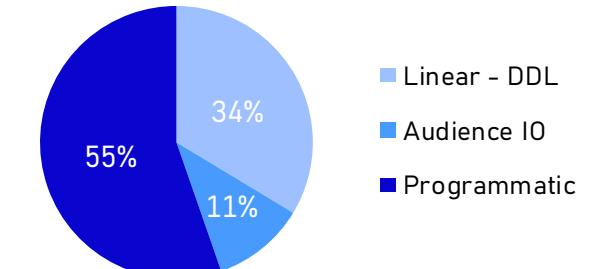
QSR Consumers
63M Monthly HHs



Family Diners
39M Monthly HHs



NBCU Audience Activation Buying Strategy
1H'25 (% Share)



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

Key Segments

As of 1H'25

- A18-49
- A25-54
- SL Content Viewers
- Custom Audience (ex. Loyalty App Users)
- Casual Dining Interest
- Bravo Viewers

Attribution



37%

Conversion Rate



9X

ROAS

The outcomes one QSR partner was able to achieve using real-time attribution on a streaming campaign

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. *THE GREEN* *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* *PREMIOS 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

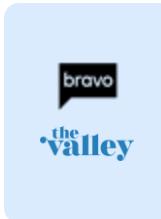
via direct IO and PG
Build connections by aligning your brand's emotional tone with key moments in premium content

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



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



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



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



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



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



Source: NBCU Ad Impact Database 2017-2025, 143 Campaigns across 32 Brands NBCU measured Restaurant and QSR 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 (183).

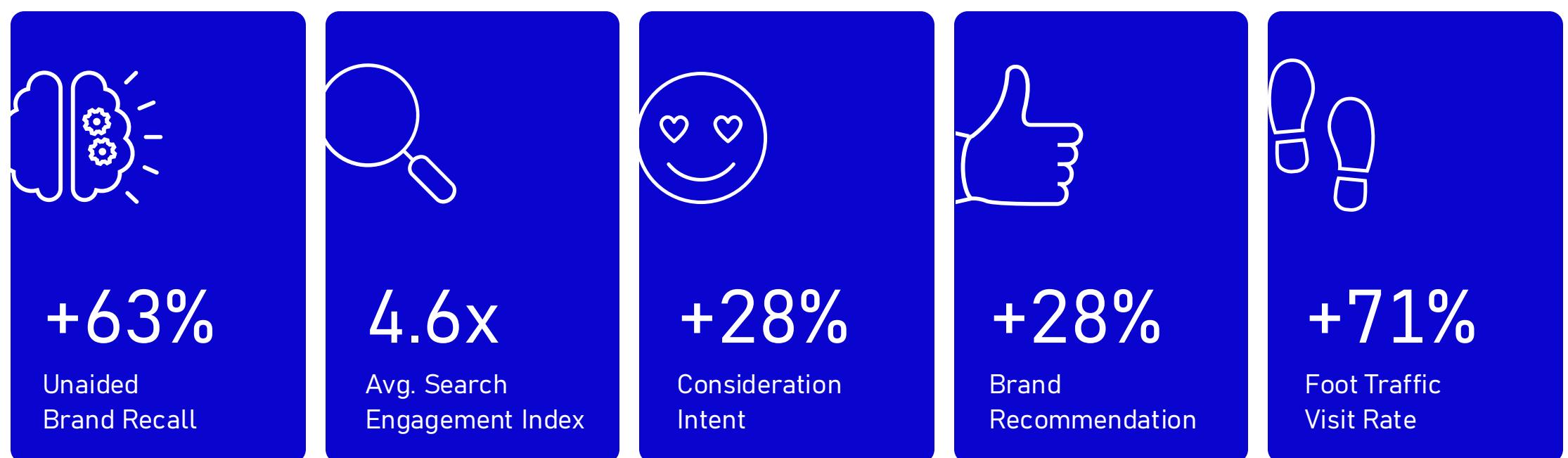
Restaurant

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*

+33%

Aided
Ad Recall

+7%

Brand
Favorability

+12%

Purchase
Intent

+121%

Foot Traffic
Visit Rate

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 <i>Brand Favorability</i> <i>Ad Awareness</i> <i>Recommendation Intent</i>	Dedicated NBCU Insights Team provide: <ul style="list-style-type: none"> – Restaurants category consultation and recommendations
Consideration	✓	✓	Search Engagement Real-Time Outcomes Measurement (Attribution) Site / App Visitation (Incrementality)	<ul style="list-style-type: none"> – Sponsorship and audience impact analysis
Conversion	✓	✓	Real-Time Outcomes Measurement (Attribution) Site / App Visitation (Incrementality) Foot Traffic Study Sales Lift (1P)*	



Restaurant Case Studies



CASE STUDY:
REAL-TIME OUTCOMES

QSR x NBCU Streaming

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



Ad Ethics Series

Coming soon

Restaurant Playbook

NBCU Restaurant Category
Strategy Team:

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