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NBCUniversal

# RESTAURANT 2025 YEAR IN REVIEW

Industry *Highlights* & Media Trends

as of March 2026

# Agenda

1

## Restaurant Landscape

Current Landscape & FY'25 Media Trends

2

## Restaurant @ NBCU Update

Media Trends, Creative Showcase

3

## Restaurant Upcoming Opportunities At NBCU



# Current **Restaurant** Category Dynamics

Restaurants are increasingly challenged by rising costs and lowered demand for dining out; mass-reach platforms to encourage social & group dining is critical to driving traffic and sales

## Headwinds



Economic ambiguity, higher food costs and delivery fatigue driving down order values<sup>1</sup>

Consumers are focused on value: cutting down on dining out and high-priced items<sup>2</sup>

GLP-1 usage & increased attention on health is reinforcing value<sup>2</sup>

Labor challenges persist due to minimum wage hikes & immigration policy<sup>3</sup>

## Tailwinds



Value-based meals & messaging to win back core & low-income diners

Identifying & winning cultural moments (e.g. Super Bowl) to capitalize on social & group dining

Refocusing on loyalty programs (e.g. McDonald's, Subway) to drive value & frictionless experience

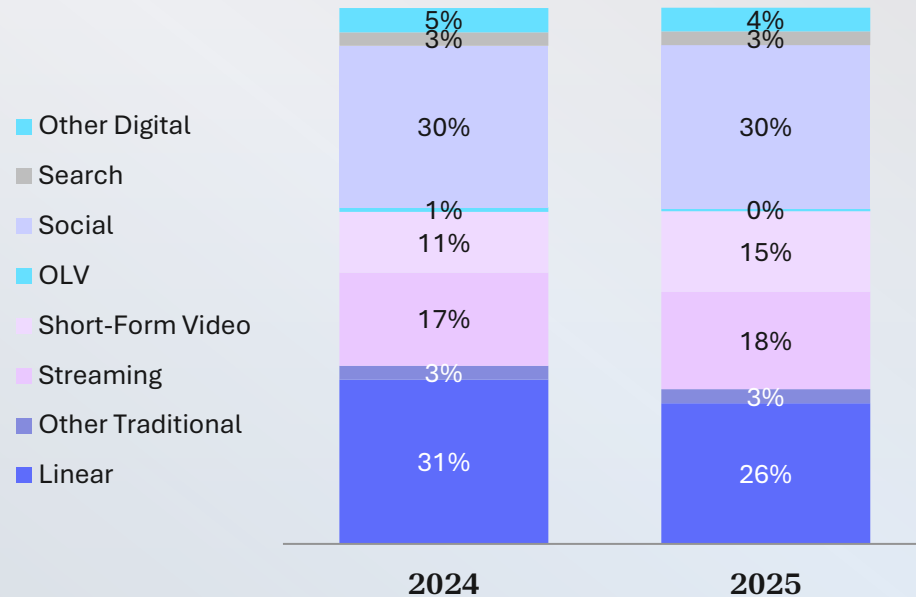
Ongoing menu innovation to cater to changing dietary preferences (e.g. protein, fiber, smaller)

# Restaurant Marketplace Spend

The category continues to tap into cultural moments as it prioritizes streaming, social, and performance channels

## Restaurant Category Media Mix

Share of Spend, in %



Traditional vs. Digital % Split	2024	2025
	33% / 67%	29% / 71%

### Total Spend

**+11% YoY**

Driven by digital growth (+18%)

### Streaming

**+16%**

Fueled by increases across Programmatic (+19%) and Direct (+10%)

### Short Form

**+47% YoY**

And accounts for 21% of total Digital spend

### Linear Spend

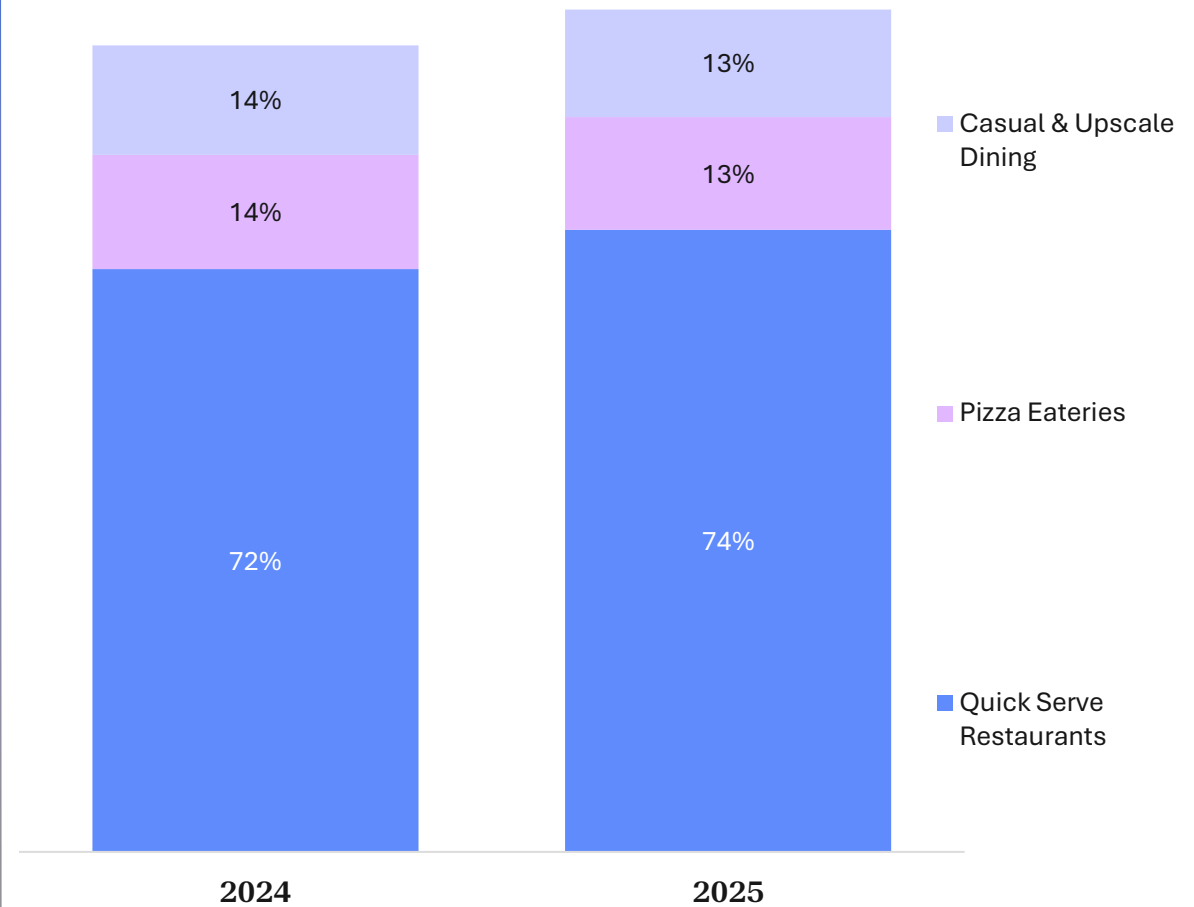
**-5% YoY**

Fueled by declines across both Local (-9%) and National (-5%)

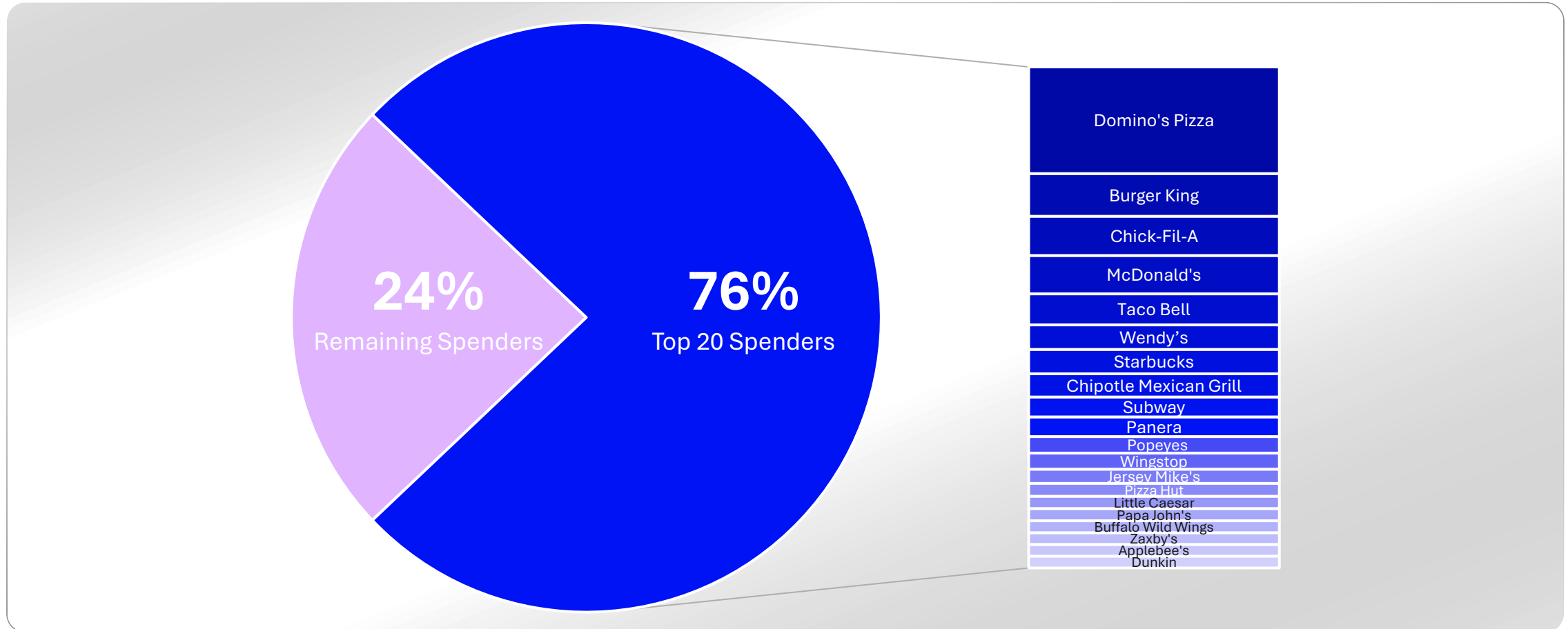
# Restaurant Marketplace Media Spend

Restaurant media investment growth was fueled by the [QSR \(+7%\)](#) subcategory which continues to drive the majority of restaurant spend.

## Restaurant Media Spend by Subcategory *Share of Total*



# The **top 20 2025** restaurant spenders made up **76%** of total industry spend



# RESTAURANT NBCU SPEND

2025 vs. 2024

As restaurants navigate macroeconomic ambiguity, media is becoming increasingly focused on efficiency – whether that’s through balancing investments across platforms or looking to programmatic for flexibility.



## CROSS-PLATFORM

investments remain a key strategy for reaching audiences at scale.

**+36%**

in Linear Broadcast Entertainment

**+8%**

in Linear News

**+18%**

in Digital Sports



## ADVANCED

audience growth continues as restaurants seek to drive incremental visits & sales from higher value customer segments:

- 1<sup>st</sup> Party Segments
- SL Content Viewers
- QSR Frequent Diners
- Fast Food Enthusiasts

**+31%**

in advanced audience buying paths

**+155%**

in digital audience IO

**+62%**

in digital programmatic



## STREAMING

is helping restaurants drive full-funnel results effectively, offering mass reach with conversion-driving products.

**+29%**

across all Streaming

**+75%**

in Programmatic on Peacock



## AD INNOVATIONS

are helping restaurants break through the clutter, with brands increasingly diversifying & trialing new products beyond Pause Ads.

**+21%**

in Ad Innovations overall

**+79%**

in Spotlight Ads

**+149%**

in Engagement Ads

## How **Restaurant Brands** are aligning with NBCU premium content & talent to tell their story



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.



DUNKIN'

WICKED  
FOR GOOD

### Cultivating Cultural Relevance with IP

On set between takes of *Wicked: For Good*, Cynthia and Jonathan weave a vision of Oz that includes Dunkin'. As ideas on new Dunkin' drinks and foods fly between the stars, Dunkin's integration authentically embeds the brand within pop culture in a fresh and fun way.

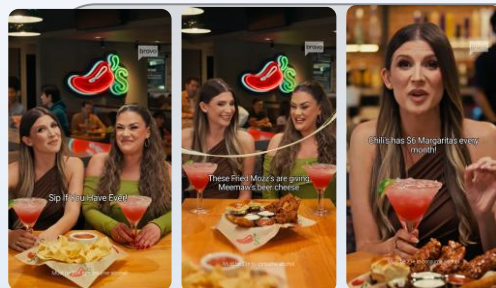


POPEYES

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.



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.

# 2026 **RESTAURANT** Predictions



**4 key topics** are top of mind for restaurants this year as they try to maintain profit margins and keep consumers interested as preferences shift.

## Restaurant as Experience Curators

Restaurants are increasingly serving as experience curators, not just operators. Brands across categories (retail, entertainment, CPG, etc.) are seeking out restaurant partnerships to drive cultural relevance and foot traffic.

Restaurants can align these strategic partnerships with high-attention media strategies to amplify their voices and stay top of mind with tapped-in consumers.

**100%+**

Coach reported seeing double to triple digit increases retail store sales in locations that have a coffee shop.<sup>1</sup>

## Immigration Impact on Labor & Traffic

Restaurants are highly reliant on immigrant employees and are struggling with employee recruitment and retention given new policies. At the same time, immigrant communities are reducing restaurant visits due to fear. This is not only a tactical business issue but also a brand stance challenge.

Restaurants must balance workforce support with community sensitivity to instill trust during a delicate time.

**75%**

of U.S. Hispanic consumers now report going to restaurants less frequently.<sup>2</sup>

## Menu Manifestations

The need to respond to Gen Z & social trends quickly will result in innovations focused on sauces, flavors, drinks, and toppings; items that can be quickly introduced without revamping full menus and keeping costs low. This will continue to manifest via wellness trends, global flavors, and pop culture-inspired innovation.

Restaurants can align launches with moments that help highlight the freshness, cultural relevance, and scale of these innovations.

**39%**

of consumers are hopeful and more optimistic that menus will offer more newness this year.<sup>3</sup>

## Portion Sizing Gets Smaller

Restaurants are making portion sizes smaller due to increased conversations around moderation and lower appetites due to GLP-1s usage. This is allowing restaurants to protect margins by maintaining price points while reducing costs.

Restaurant brands can tell the story of intentional eating, moderation, and quality in trusted, premium environments and align with narratives where wellness already lives.

**35%**

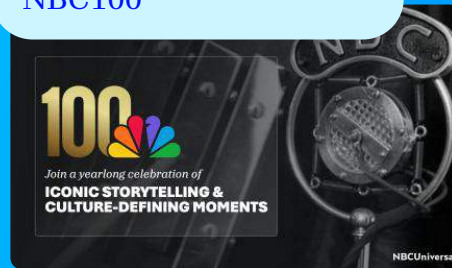
of restaurant consumers reported ordering smaller portion sizes in late 2025 for health-related reasons.<sup>4</sup>

# 2026 Opportunities for the **Restaurant Category**

## WWE Saturday Night



## NBC100



## The Paper



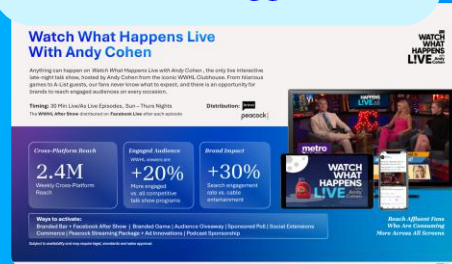
## Minions & Monsters



## Access



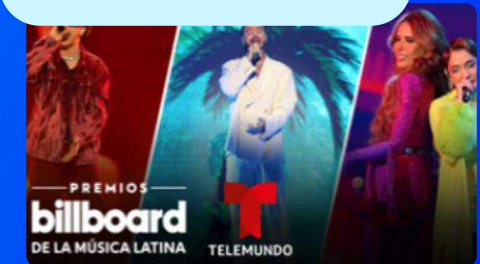
## Watch What Happens Live



## Emmys



## Premios Billboard



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**THANK YOU**

**NBCU Restaurant Category Strategy Team:**

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