

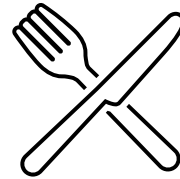
# One Platform for Restaurants

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**NBCUniversal**

EVERY  
INDUSTRY  
HAS BEEN

CHANGED  
FOREVER



## KEY RESTAURANT TRENDS AND PRIORITIES

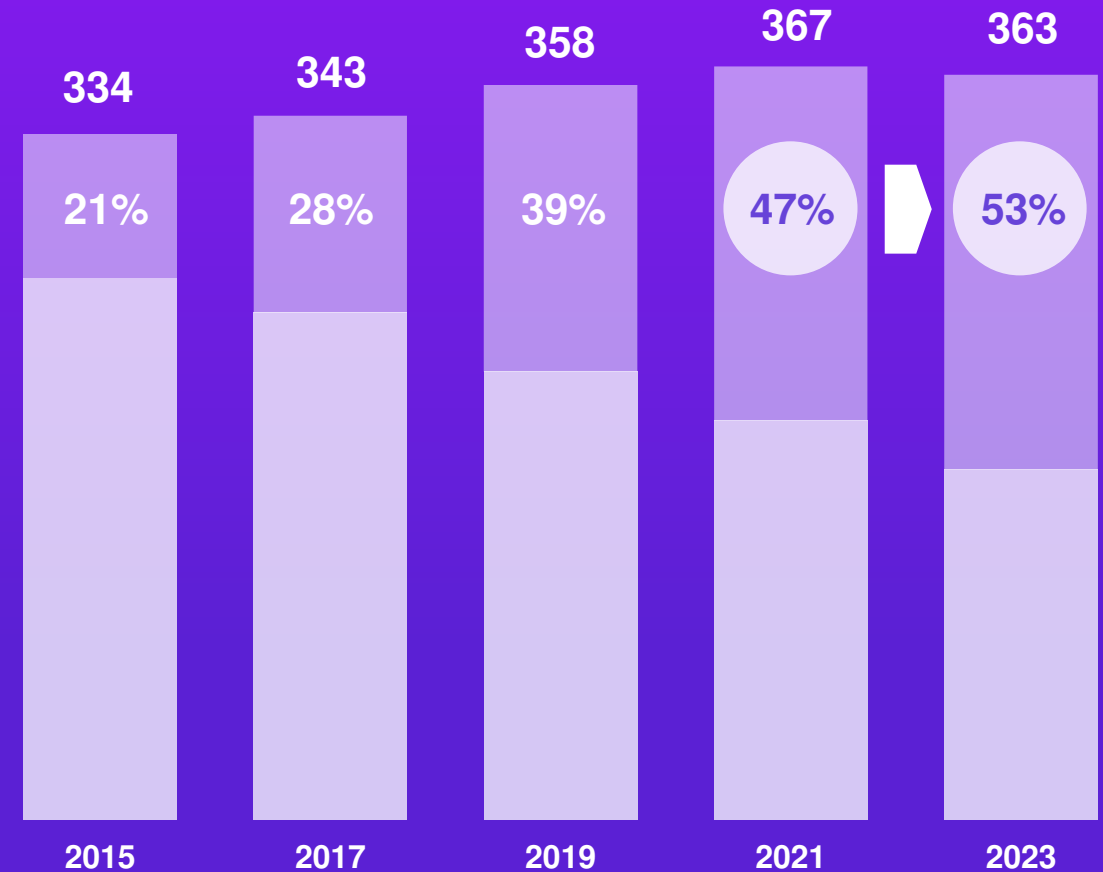
- Continued investments in digital ordering
- Purpose driven messaging around community and sustainability remains a focus
- Evolved layouts / drive thrus to accommodate off-premise dining
- Menu innovation around healthy and comfort foods
- Breakfast daypart expected to regain strength

# CONSUMERS ARE DRIVING MEDIA CONSUMPTION & VIDEO GROWTH

## Industry U.S. Video Forecast

Mins Per Person Per Day

● Streaming ● Linear



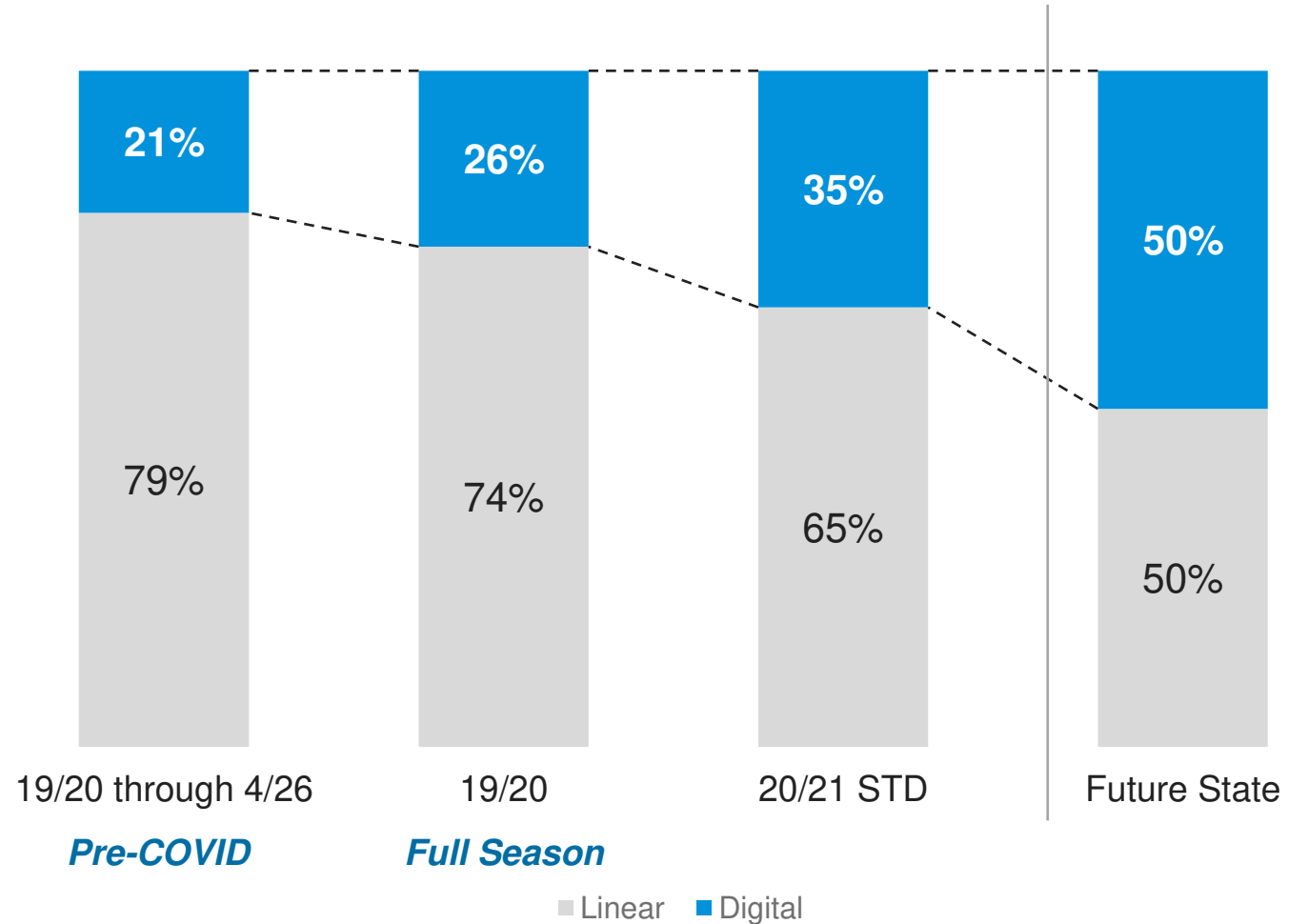
# NBCU IS FOLLOWING THE MARKET TREND

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



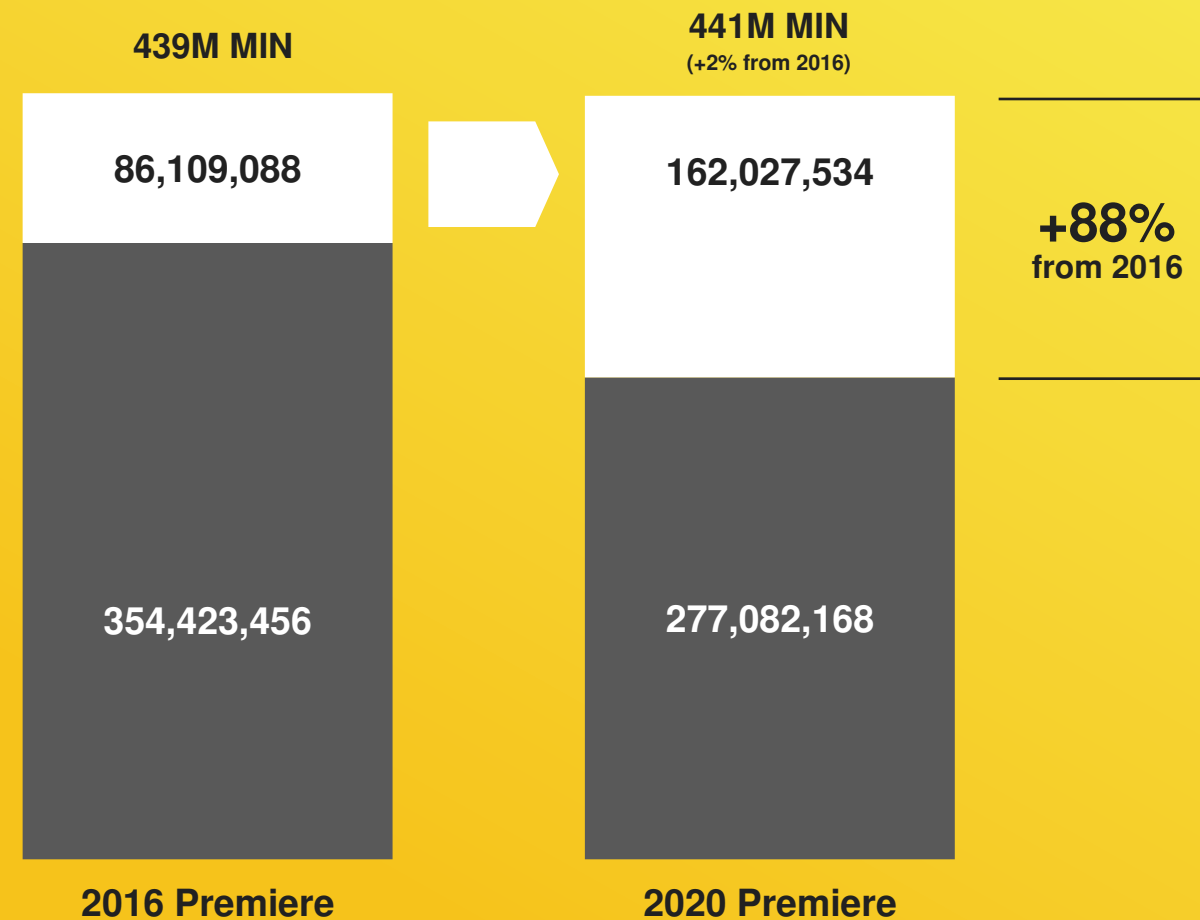




**MEET YOUR  
CONSUMERS  
WHEREVER  
THEY ARE**

## SATURDAY NIGHT LIVE

● Digital ● Linear



Source: Linear: Nielsen Media Research, L7, Time Spend Viewing TV = AA\*Duration. Digital: DAVD. Includes short form and long form (on domain, Peacock, and YouTube only). Digital viewing thru first week (10/3/20 – 10/10/20), US only on YouTube

# ONE PLATFORM EQUALS AD BUYING SIMPLIFIED

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



NATIONAL LINEAR TV



SET-TOP BOX VOD



CONNECTED TV



DESKTOP



MOBILE

NBCUNIVERSAL ONE PLATFORM™

# 97%

total video  
consumption  
is on “big  
screen”





# 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



# DELIVERING AUDIENCES AT SCALE



## 63MM

**Heavy QSR  
Consumers**  
Average cross-  
platform reach



## 75/25

**Linear / Digital Mix**

**The Real  
Housewives**  
OF ATLANTA

**NOTICIAS  
TELEMUNDO**



**Premier  
League**

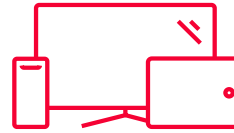


**WATCH  
WHAT  
HAPPENS**  
with  
**LIVE** Andy  
Cohen

Source: YouGov Profiles, 12-6-20 Set, 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 ; Mix based on P18-49 minutes



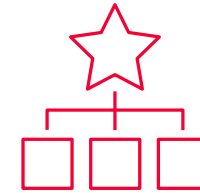
# WHY DOES NBCU ONE PLATFORM WORK?



**DELIVERS MORE  
IMPRESSIONS**

**+10%**

Basis point  
improvement on  
in-flight delivery



**DELIVERS  
RICHER MIX**

**+13%**

Impressions towards  
a richer mix



# CAPITALIZE ON A HIGH-QUALITY AUDIENCE

THAT PRIMARILY WATCHES OTT ON THE TV SCREEN



40%

**YOUNGER**

42.8 OTT vs. 59.5 Linear  
Avg. Age



60%

**MORE AFFLUENT**

\$98K OTT VS. \$61K Linear  
Avg. HHI



50M/50F

**SKEW**

OTT VS. 42M/58F Linear



77%

**CTV VIEWERSHIP**

OTT Audience Only,  
97% TV Viewership on a TV  
Screen for Combined  
OTT/Linear

# LOOKING AHEAD...

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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



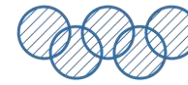
## AUDIENCE FIRST STRATEGY

- +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

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# 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



\$5.87

Cost Per Install

## 2. AUDIENCE FIRST STRATEGY

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# NBCU ONE PLATFORM CONTENT CAN DELIVER RESTAURANT AUDIENCES AT SCALE

**109.6M**

Heavy/Frequent QSR  
Consumers

**31.2M**

Millennials

**15.9M**

Food Delivery Users

**80.2M**

P55+

**16.0M**

Sports Fans

**95.9M**

Heavy/Frequent Mobile  
App Users

**53.7M**

College Students

**27.7M**

Moms

**57.8M**

Multiculturals

**15.9M**

Restaurant Loyalty  
Program Members

**26.2M**

Hispanics

**45.3M**

Gamers



# 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 conquering); and/or 1P data to target (or suppress) existing customers/loyalists

KANTAR SHOPCOM

EPSILON™

## LOCATION-BASED DATA

Target consumers with a high propensity to visit a restaurant category / set of specific restaurants

4INFO PlaceIQ  
NinthDecimal

## BEHAVIORAL / PSYCHOGRAPHIC

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

MRI | SIMMONS  
experian. EPSILON™

## ABILITY TO LAYER ON ADDITIONAL ATTRIBUTES

(HH W/ KIDS, PARENTAL DECISION MAKER, ETC.)

EPSILON™

experian. MRI | SIMMONS

# ADSMART ADVANCED TARGETING & OPTIMIZATION

Data-driven delivery by  
platform



Your advanced  
audience



## 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



Self-service

# ADSMART DATA DRIVEN LINEAR: FULL-FUNNEL IMPACT



Sources: Retail Brand Lift: KMB & NBCU (Q1-Q2'18); QSR Foot Traffic: Data + Math & NBCU (Q2'19); QSR Web Visitation: iSpot & NBCU (Q3'20); QSR Sales Lift: Epsilon & NBCU (Q1-Q2'29); Retail Sales Lift: LiveRamp & NBCU (Q4'18)



# **3. CONNECTING WITH HISPANIC AUDIENCES**

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# 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

120i

Ordered via Kiosk

131i

Mobile App pre-order

129i

Used mobile loyalty program

158i

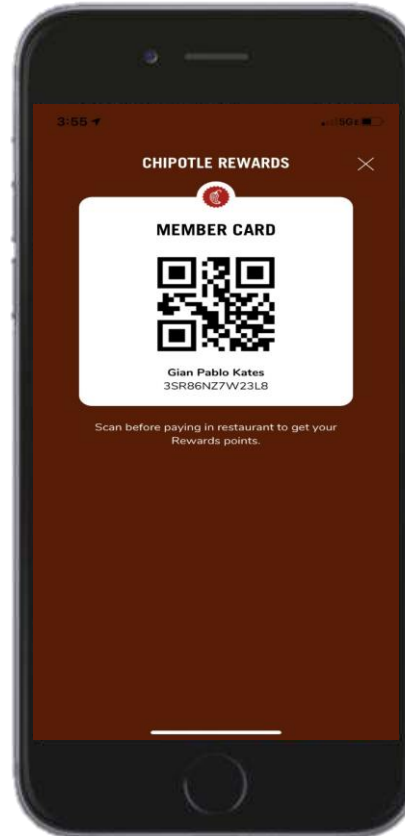
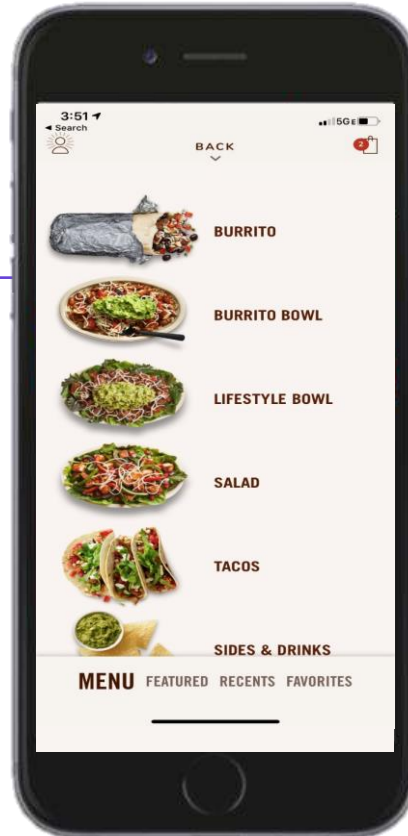
Ordered via 3rd party delivery app



# 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)

# 4. HARNESSING THE POWER OF TENTPOLES

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# 2021/2022 TENTPOLE PROGRAMMING & EVENTS





# 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**

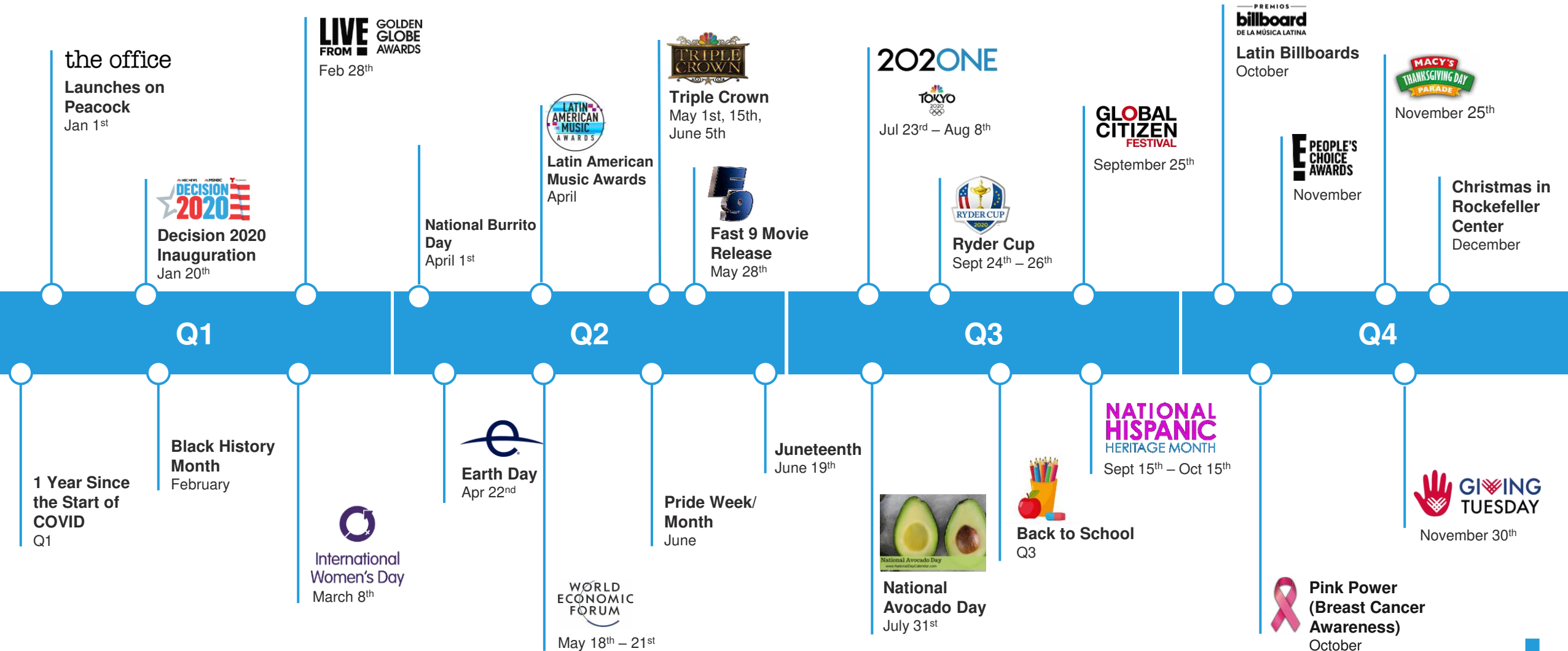
**+6%**

**lift in restaurant foot traffic for**  
viewers exposed to the campaign



NBCUniversal  NBC SPORTS GROUP

# 2021: Moments Fueling the Cultural Conversation





# THE BIGGEST MOMENTS: 2021 + 2022

Immediate, Massive Reach to Millions of Consumers



Jul 23 – Aug 8 2021

221M

Projected viewers



Feb 4 – Feb 20 2022

188M

Projected viewers



Feb 6 2022

122M

Viewers in 2020



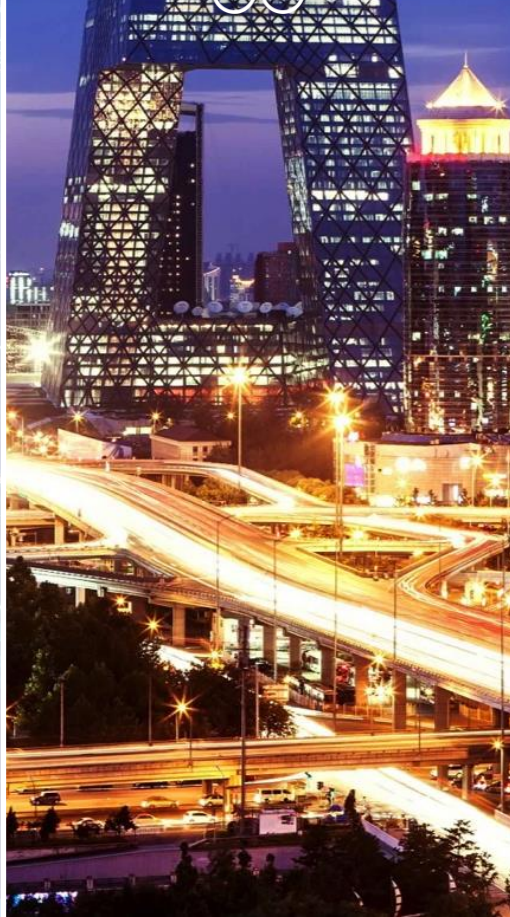
Nov 21 – Dec 18 2022

37M

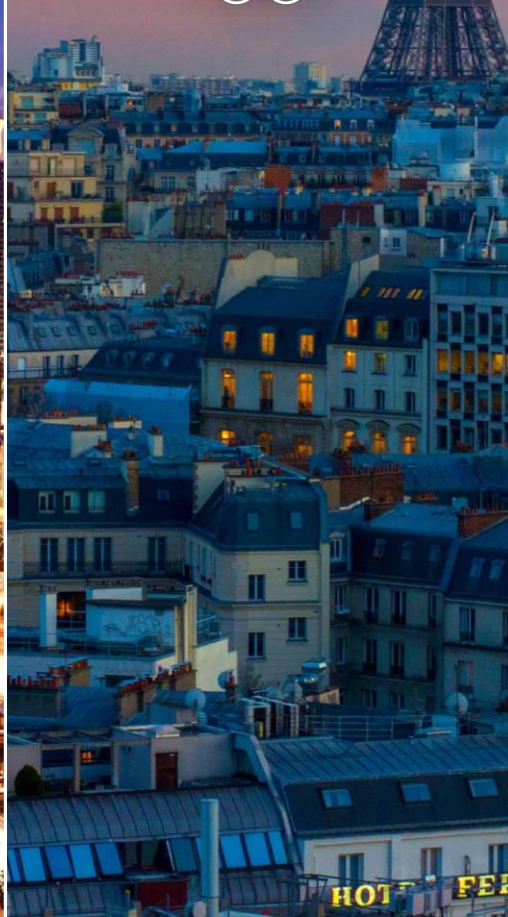
Viewers in 2018



2020NE



PARIS 2024



MILANO CORTINA 2026





# WHAT'S NEXT

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# NBCU THOUGHT LEADERSHIP & RESTAURANT CATEGORY STRATEGIES

## THOUGHT LEADERSHIP



Lessons Learned  
During 2020



One Platform  
for Purpose



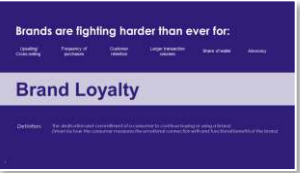
Maximizing  
Creative Impact



Future of  
OTT/Streaming



Multi-Cultural  
Moments



Brand Loyalty

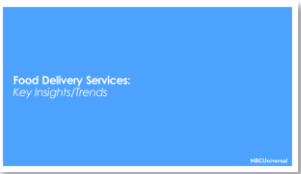
## CATEGORY STRATEGIES



Driving Creative  
Breakthrough -  
Restaurants



Restaurant  
Category  
Assessment - 2020



Food Delivery  
Trends



Leveraging NBCU  
Digital to Drive On &  
Off-Premise Orders





# Thank you

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**NBCUniversal**