

APRIL 2023

NBCUniversal

Understanding Meal Moments Today



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Note

This deck can be used in its entirety but is best used as a modular catalogue of slides to pull from based on the needs of your clients and the products you want them to focus on





Overview

How meal moments are evolving



Over the last several years, the nature of the pandemic and the adaptation of hybrid work have created and normalized a new set of behaviors, including how we eat.

As a result, we are witnessing an evolution of meal moments.



The pandemic accelerated changes in dining behavior, creating a renewed focus on socialization, convenience, and health

We identified four core forces of change



Hybrid Lifestyles & Socialization

The return of socialization has resulted in excitement and the "eventization" of group dining moments. At the same time, individuals hold different eating habits throughout the day depending on if they're WFH or in the office.



Increased Demand for Convenience

The availability and range of meals beyond standard mealtimes have increased as restaurants launch new technology, services, and products that focus on allowing consumers to get the food they want, when, and how they want.



Renewed Focus on Health

Staying at home during the pandemic placed a new attention on physical health, nourishment, sustainability, and intuitive eating. This has changed what, when, and how people eat throughout the day.



Expanding Range of Dining Behaviors

Different consumer segments (ie. Gen Z, MC, Families) exhibit unique dining behaviors (ie. more takeout, more group dining, more sustainable). As some grow their purchasing power, restaurants are balancing where they invest.

These forces are resulting in more diverse eating habits & lifestyles, as well as an expansion of what we consider 'meal moments'



Traditional

Conventional Meal Moments:
Breakfast, Lunch, and Dinner

41%

Of U.S. adult diners eat three separate meals a day.¹

52%

of consumers follow a specific diet or eating pattern.⁴



Evolved

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

55%

Of consumers report a higher likelihood to eat a snack across all three standard mealtimes.²

62%

American workers claim that they eat lunch at their desks even when working in person.⁵

12%

Of remote workers skip lunch to work longer.³

17%

Of Americans have subscribed to a meal kit delivery service.⁶

What do these behaviors actually look like?

Eating **only when hungry** rather than the three standard mealtimes



Gen Z diners prioritizing **local, low-calorie, organic, sustainable, and plant-based options**, as they often chose the food they want before the restaurant¹

Relying on meal kits, takeout, delivery, drive-thrus, etc. in order to **eat in the most convenient way**



Eating **when work schedules allow** and eating differently (different foods, diffwhen working from home, hybrid, or in person

Eating **less** during standard mealtimes and **snacking more** throughout the day



Using the **excuse of big cultural and sporting events** to get together and eat together



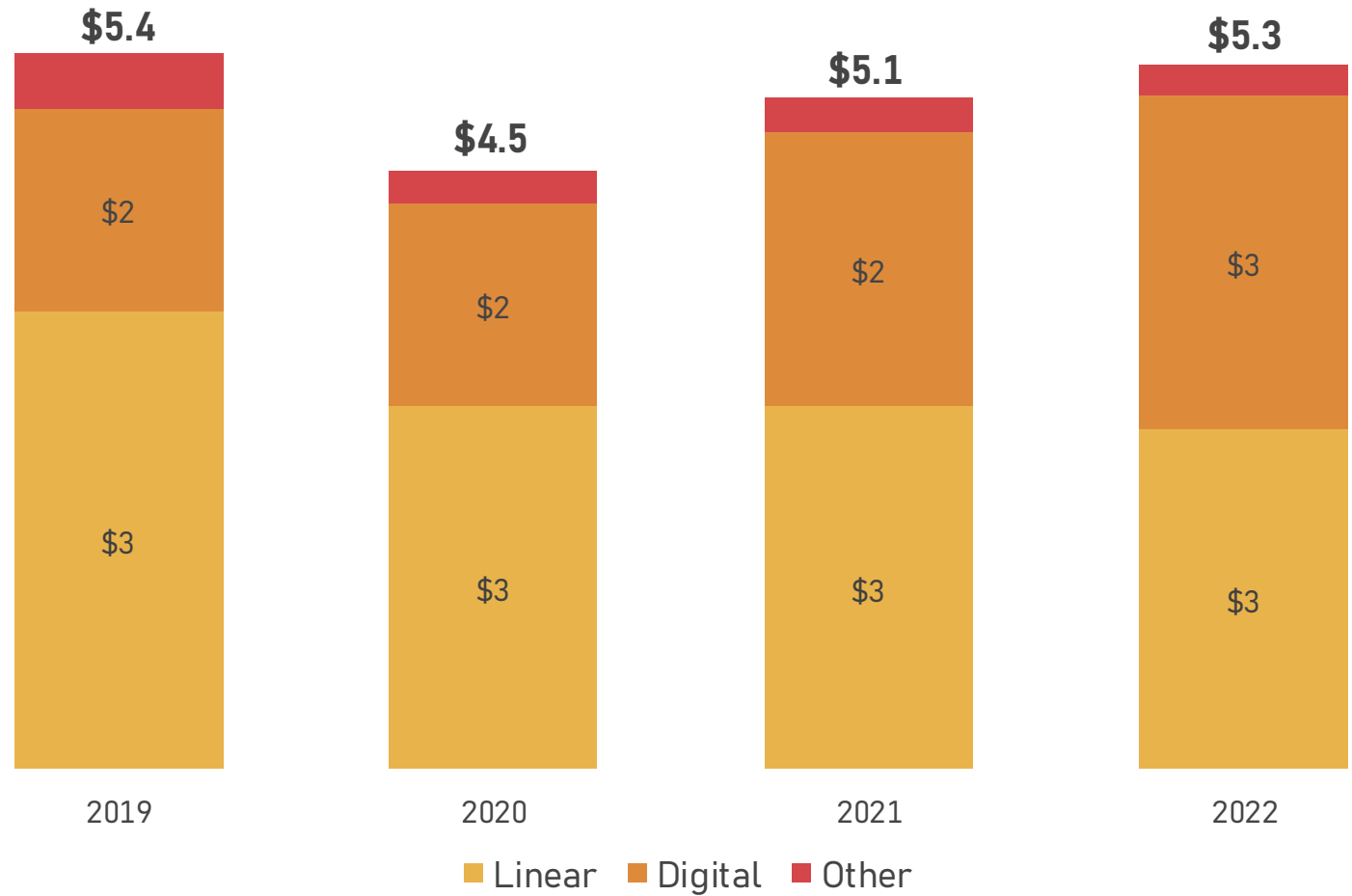
Strategic Solutions

Ways to capitalize on the change



In an effort to cover this widening definition of meal moment, brands have been increasing investments to maintain top-of-mind awareness with customers

Restaurant Category Ad Spend (Billions)
2019-2022



To supplement a top-of-mind awareness strategy, brands can tap into a range of meal moment-specific strategies

It is no longer enough to solely target customers by specific times of day. We now need to create solutions by need state and audience, as well as target by time, mindset, activities, etc.

Contextually Relevant



Place ads in the moments that are relevant to the content or to the mindset of your audience.

Interactive & Engagement



Leverage interactive ads that drive engagement and orders when consumers are seeking food.

Incentive & Event-Based



Use rewards and incentives to elevate value to your consumers when they're planning their next order.

Targeted



Target diners by dining behavior, consumption behavior, meal moments, location, apps, and more.

Timed



Reach consumers at specific times when they're most likely to be thinking about their next meal.

NBCU –Specific Media and Marketing Solutions

Contextual Intelligence



Use NBCU's ad technology to reach premium audiences in premium content at the right moments.

Commercial Innovation, Apple News, Anzu



Leverage interactive ads, Peacock Pause Ads, Apple News' Tap-to capabilities, Shoppable, etc.

Fandango, Live Events



Tap into live/experiential moments (movie night, sports viewing party) and a catalogue of rewards to attract consumers.

AdSmart



Use NBCUnified audience insights to identify key audiences and reach them via AdSmart.

Day Parts



Leverage traditional dayparts in new ways on NBCU platforms to achieve mass reach at key times of the day.

How to bring it all together

“Eventizing” & Creating a Tentpole Meal Moment Event

Example: Big 10 Championship Test & Learn

2 weeks before

Week of

Day of

Post campaign

Day Of:

- Peacock Pause Ad to order
- Curator Ad with related content
- Shoppable TV (QR code to order)

Measurement & Attribution

Week Of:

- Fandango Rewards
- Apple News tap-to app or tap-to map
- Apple News event takeover
- Peacock Pause Ad for app download
- Shoppable TV (QR Code to Order)

Supplement Throughout (High Impact Frequency):

- Events, Tentpoles, and Other Live Events
- Prime
- Anzu
- Social Synch

Peacock Audience Extension (Efficient Reach)

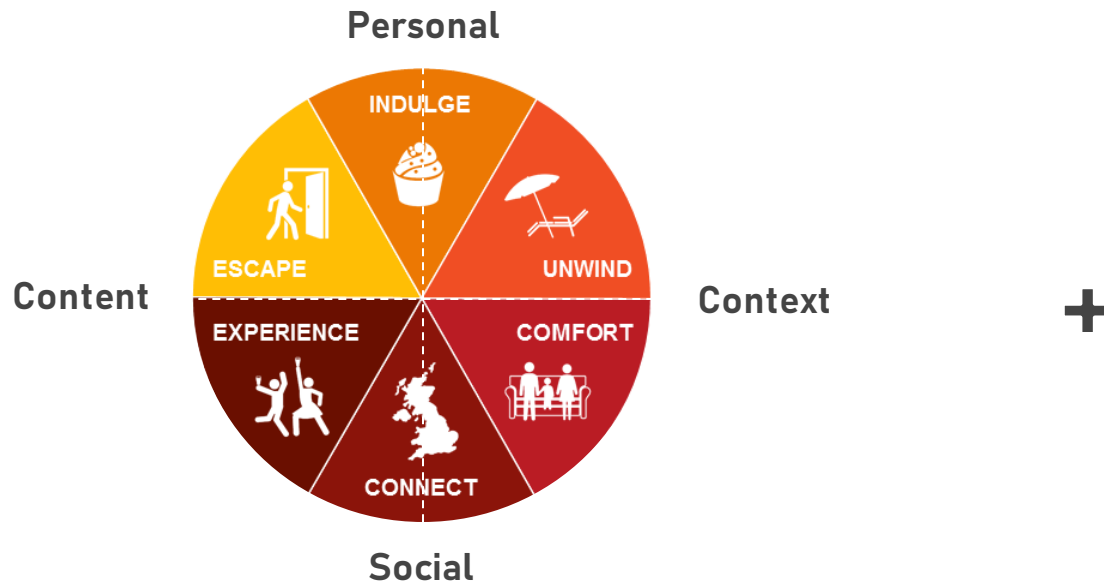
AdSmart (Frequent Diners, Current Customers, etc.)



Contextual Intelligence to Align with Mindset & Content

Leverage **content need states** to inform **contextual ad innovations** for maximum impact

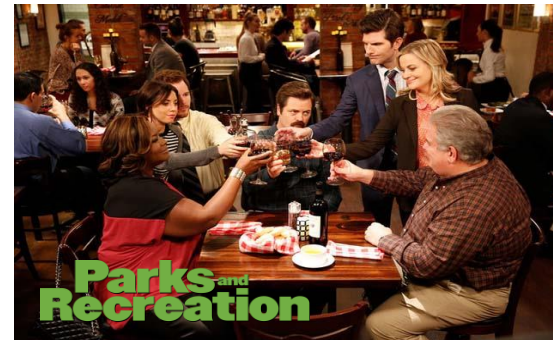
Aligning to Audience Mindset & Need States



Understanding **content need states** affords insight into **other aspects of a consumer's mindset**. Consumers' looking to unwind (i.e. binging *The Office*) are likely alone while consumers' engaging in comfort or experience programming are likely in a group setting, which also has indirect impacts on their food preferences in these moments.

Aligning to Contextually Relevant Content

Go beyond aligning with the right programming by matching brand messaging with dining, snacking, and other meal moments within content



AI-powered proprietary technology scans episode-level video metadata, scripts, and closed captioning and can categorizes content accordingly based on General Genre, IAB taxonomy, or News Theme. Intra-content level categorization opens a new level of alignment where brands can place their ads near the **same foods, dining moments, and/or meals that are happening on screen**.



Commercial Innovation, Apple News, & Anzu to Interact and Engage

88% of viewers are **more likely to remember the brand** when engaged with innovative ads



Peacock Ad Innovation

Drive awareness and create seamless food ordering opportunities with Peacock's unique ad offering including Binge Ads, Trivia Engagement Ads, Pause Ads, Contextual Alignment, Interactive Clock Countdown, etc.



Apple News

Drive conversion with Apple News' actionable solutions including tap-to capabilities that can take users to map, app download, restaurant menu, site, etc. to seamlessly drive diners to order and meaningfully engage with restaurants.



Anzu

Activate in the most popular metaverse experiences and leverage location and daypart targeting capabilities to boost awareness and drive gamers to engage with restaurants at the times of day when it matters the most.



NBCU Social Studio

Partner with Social Studio to create multi-platform custom content to drive brand affinity and create meal moments out of the most viral occasions on social media.



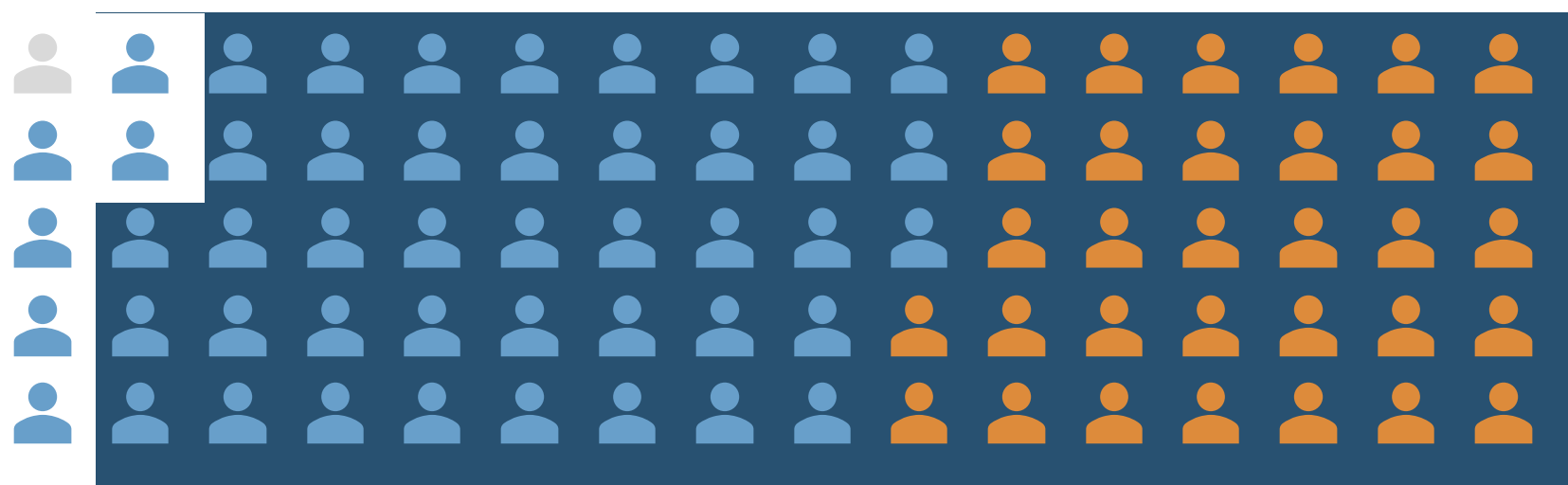
Attention Lab

Leverage NBCU's in-house creative and insights specialists to maximize viewer attention, brand affinity, and emotional connection in order to stay top of mind when consumers are more likely to think about their next meal.



Peacock Gives Marketers the Opportunity to Reach More of the Consumers They Want without Unnecessary Frequency

QSR EXAMPLE



The average QSR campaign reaches

less than 8%

of Peacock monthly viewers

79M

People
Per Month

73M

Restaurant Goers

32M

Heavy Fast Food
Consumers

Source: Peacock Reach; comScore VideoMetrix Multi-platform, Dec'22. Category buyer stats: MRI composition applied to Peacock Reach data. Frequency based on Conviva data – average monthly exposures per advertiser..



Our Partnership w/ Kochava can help Measure & Drive Business Impact

Always-on self-service attribution for **NBCU streaming media** with a May 2023 soft launch and general availability in Q4 2023

Self-service real-time performance reporting and monitoring

In-flight optimization based on campaign performance

Inclusive of both **direct IO** and **programmatic campaigns**

VALUE PROPOSITION

01.

Quantifies impact of NBCU digital within holistic measurement of media performance

02.

Monitor performance across a wide selection of KPIs through always-on self-service UI

03.

Get started with minimal lift – whether you are an existing MMP client or not

KPI MEASUREMENT EXAMPLES



App Install



Content View



Product View



Add to Cart /
Completed Purchase



Product Search



Website Visit /
Activity



Commercial Innovation, Apple News, & Anzu to Interact and Engage: Peacock Ad Innovation

Solo Ad



76% View through rate per visit
with Solo vs. w/o Solo

Engagement Ad

POWERED BY BRIGHTLINE



+59% Total Interaction Rate

Pause Ad



+43% Ad Memorability

Curator Ad



95% Agree "I appreciate that the
brand curated the collection
of Peacock shows."

Spotlight Ad



+11% Message Memorability vs.
Standard midroll

Binge Ad



+16% Message Memorability
Vs. Midroll

Pod Bounce



29% Brand memorability

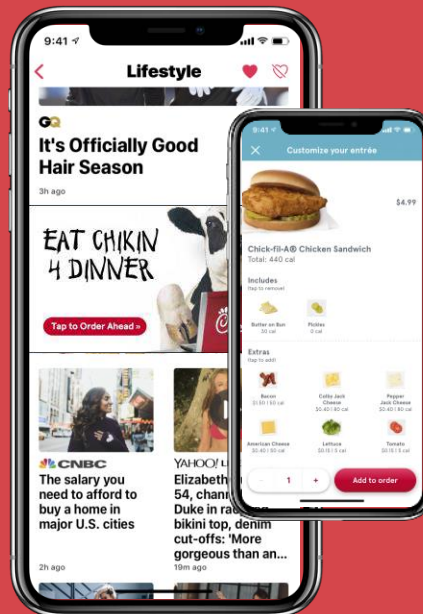


Commercial Innovation, Apple News, & Anzu to Interact and Engage: **Apple News**

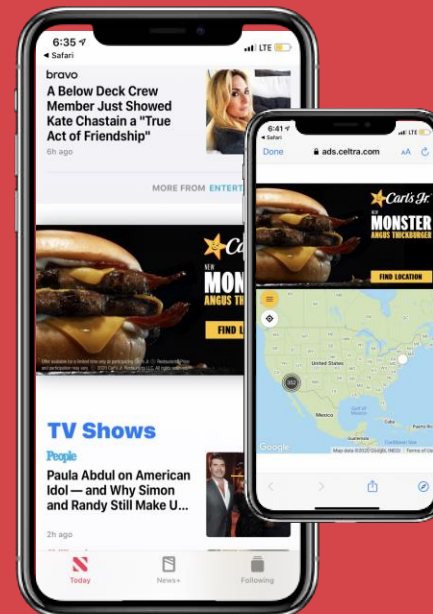
40.7M / 65.7%

Apple News users visited a fast-food restaurant **six or more times** in the last 30 days.

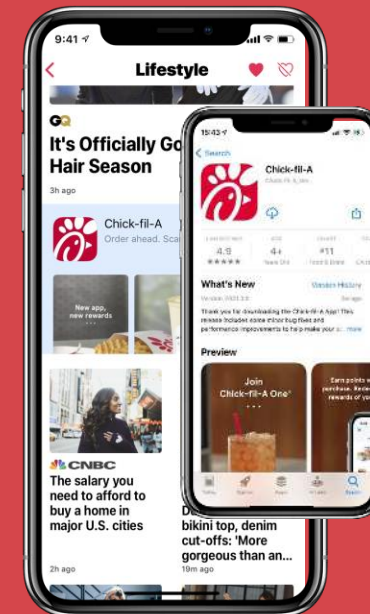
Tap-to Menu



Tap-to Map




Tap-to-App





Commercial Innovation, Apple News, & Anzu to Interact and Engage: Anzu

Strategic Target
80% of gamers **eat and drink while gaming**



Restaurant

Access to the restaurant diner through precise targeting

Contextual

Entertainment, Sustainability, Nature, Health, Exercise, Lifestyle Food, Food Delivery, Placement, Publisher

Behavioral

Lifestyle, Health, Entertainment, Nature, Conquest Competitive Food Groups

Demos

HHI
Millennials
Gen Z
Families

Device

Dayparting
Mealtimes
Hyperlocation
Connection

Platform

Roblox
Console
Mobile
PC



Fandango Network & Rewards to Incentivize Action & Lean into Event-based Dining

As changes in dining habits continue to evolve, the relationship of meal moments and entertainment is also evolving. Restaurants can capitalize on this relationship by activating with Fandango solutions.



Store Locator

Drive users to visit restaurant locations with **Store Locator** units on Fandango's theater showtime pages and **Enhanced Ticket** in the Fandango app.

--

Fandango Network users are **more likely to spend money on activities** before and after seeing a movie in theaters.

--

KPI's: acquisition, foot traffic, digital traffic



Fandango Rewards

Leverage Fandango Rewards to build restaurant brand loyalty and incentivize consumers to engage with your brand through customizable, scalable physical or digital rewards.

--

Entertainment rewards influence behavior 2-3X more than coupons or discounts.

--

KPI's: acquisition, foot traffic, digital traffic, awareness, loyalty



Live Events

90%

of Americans watch big sporting events at family-friendly gatherings, potluck parties, and parties with die-hard sports fans that all involve group dining moments.¹

81%

of frequent NBCU viewers consume sports content because it gives them something to watch with friends/family.²

Sources: 1. [Wegryn Enterprises](#). 2. NBCU Data

Leverage our premier sports offering to capitalize on the meal moments created by major sporting events



#1 Show in Primetime, 12 Consecutive Years

23 Games

20 Primetime Games + 3 Playoff Games (TBD time)



30-Year Partnership, 2 Iconic Brands

7 Games

2 Primetime Games + 5 Afternoon Games



Big Ten Football Kicks Off in 2023

24 Games

12 Primetime Games + 12 Afternoon Games

54 Premier Football Games



AdSmart / NBCUnified:

Leverage Data to Strengthen Relationships with Key Consumers

Leverage a data first approach to learn more about diners' meal moments / dining behaviors and maximize your chance of conversion

Leverage NBCUnified to mine for audience insights....

... expand through lookalike modeling... and target through AdSmart



High Spenders

Total Audience: 88M

Overlap with
NBCU IDs: 72M

82%



Health-Conscious

Total Audience: 127M

Overlap with
NBCU IDs: 100M

79%



Young Diners

Total Audience: 29M

Overlap with
NBCU IDs: 22M

75%





Day Parts: Rethinking Traditional Meal Moment Targeting

Leverage NBCU's capabilities and offering to reach audiences across programs, dayparts, and channels at key times of the day when diners are planning or considering their future meals

Traditional Linear Dayparts	ie. Early Morning for Breakfast / Lunch Early Fringe & Prime for Dinner / Late Night Late Night for Breakfast next morning
+	
Cross-Platform	Expand traditional dayparting to digital, mobile, and streaming
Sub-category Customization	Take into consideration when and how consumers plan for their day/weeks using audience, dining, or 1P insights ie. Week(s) ahead for a meal-kit Night before for on-the-go breakfast



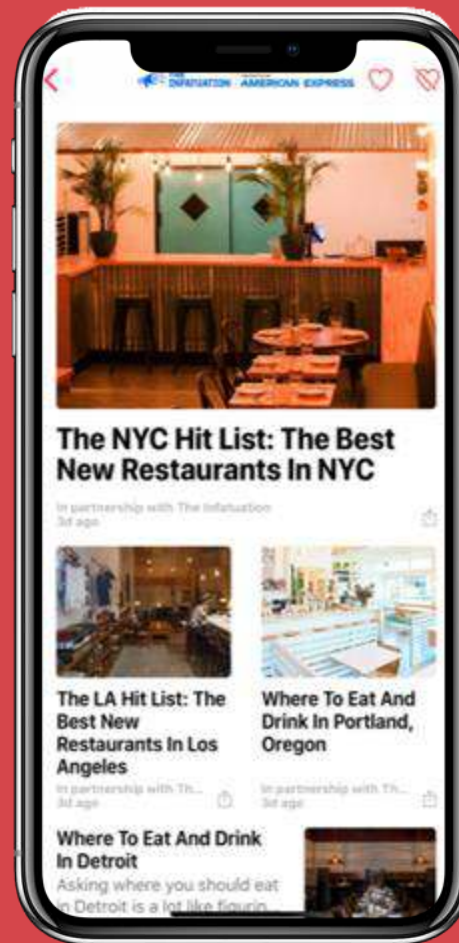
Case Studies

Why we know these solutions work



1. Case Studies: Apple News

Apple News is a **trusted space** for food content.



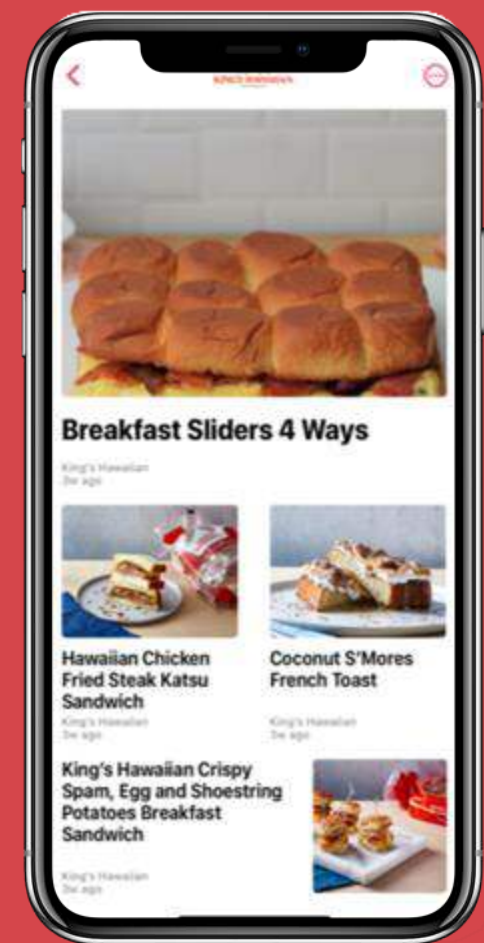
Experience

The right meal has the power to transport you to a tropical paradise or back to your grandmother's kitchen; inspire readers and spark their imagination



Entertain

We're all looking for a little inspiration now and then. Be the resource readers are looking for whether they are planning the perfect date night or dinner party



Eat

The mouthwatering image stopped us dead in our tracks... now what? Teach readers something new with a delicious recipe guide.

2. Case Studies: The Fandango Network

Applebee's x Fandango Rewards Store Locator Unit

Objective

- Applebee's came to NBCU to align their brand with the much-anticipated Top Gun sequel, Top Gun Maverick, and to increase spend in their restaurants by offering a ticket offer with Fandango when consumers spent over a certain threshold.

Solution

- NBCU utilized Fandango's custom store locator unit to drive foot traffic to Applebee's restaurants. This creative was featured on Fandango's theater showtimes pages and urged users to enjoy a meal before the movie.
- Consumers who reached the qualifying spend were eligible to upload their receipts to a custom promo site for purchase verification. Once verified, Fandango emailed consumers their promo code.

The Locator Unit CTR Performed 2X Over Benchmark

The image displays the Fandango website interface with a custom Applebee's x Top Gun Maverick locator unit. The unit features a movie poster, a promotional offer "GET A FREE* MOVIE TICKET WHEN YOU SPEND \$25", and a map showing nearby Applebee's locations. A smartphone on the right displays the same unit on a mobile screen. A callout box points to the map with the text "Campaign Delivered 109% To Goal".

3. Case Studies: Foot Traffic



The challenge

Drive foot traffic

A major quick service restaurant wanted to leverage advanced targeting on linear TV to drive foot traffic to their restaurant locations during a limited-time promotion.

The insight

Mobile app users are looking for deals

Everyone wants a great deal, and this is especially true for consumers who order through mobile apps, and who are looking for the best deals on the go. To reach this deal-seeking audience, what better place to start than the client's own mobile app users?

The solution

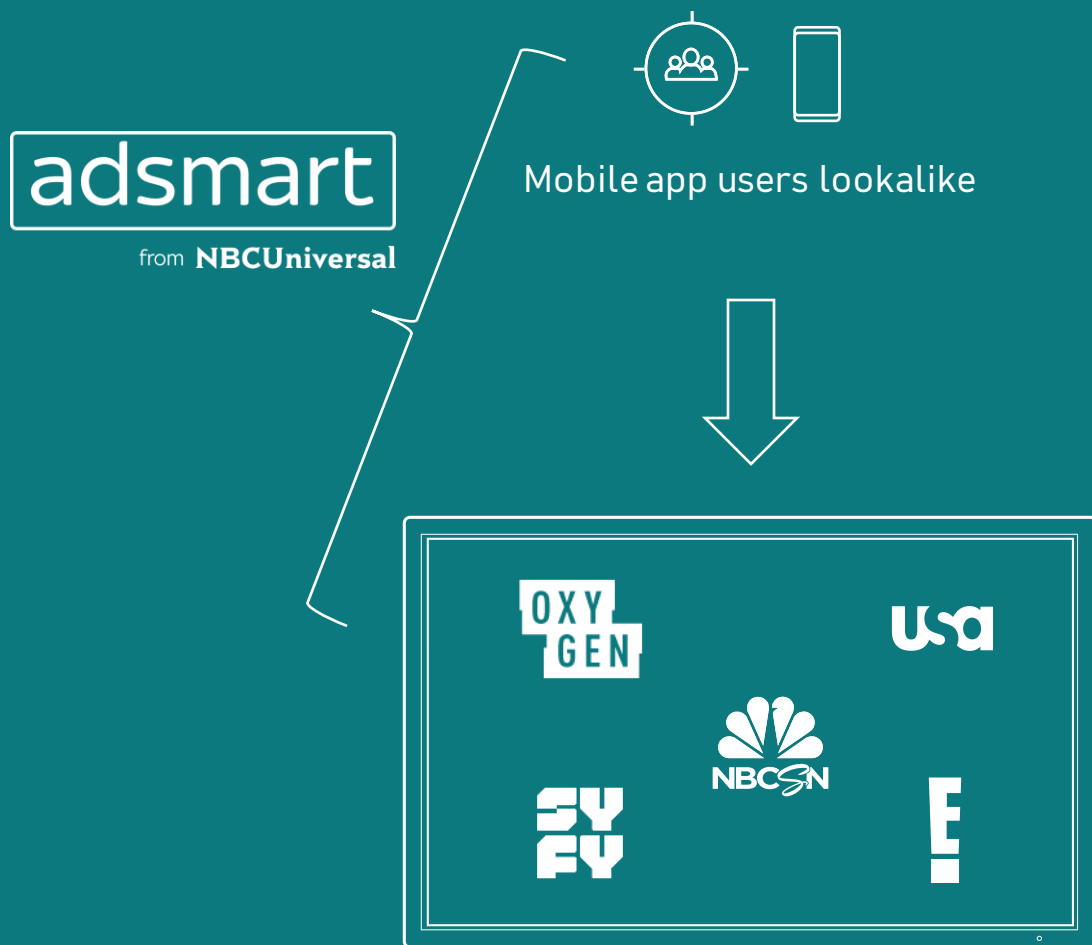
Target mobile app users via national TV

We partnered with the client to run an AdSmart national TV campaign optimized across our portfolio to reach a custom LiveRamp lookalike target modeled from the client's 1st-party database of mobile app users.

3.

Case Studies: The Approach

Advanced TV targeting to reach the right consumers across NBCU's linear portfolio.



The results

NBCU commissioned a custom Data Plus Math study to measure the incremental impact of the AdSmart campaign on driving foot traffic to the client's restaurant locations.

AdSmart campaign drove lift in foot traffic among all linear exposure groups

- +4.5%** overall lift in restaurant visitation (total HHs exposed to AdSmart campaign vs. total HHs exposed to non-AdSmart campaign)
- +5%** in-target lift in restaurant visitation (target HHs exposed to AdSmart campaign vs. target HHs exposed to non-AdSmart campaign)
- +4.5%** non-target lift in restaurant visitation (target HHs exposed to AdSmart campaign vs. target HHs exposed to non-AdSmart campaign), indicating a **strong halo effect**

AdSmart exposure among target HHs drove higher restaurant visitation, validating target

- +18%** higher in-target restaurant visitation vs. overall
- +22%** higher in-target restaurant visitation vs. non-target



4. Case Studies: QSR App Download

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

5. Case Studies: AdSmart DDL



The challenge

Drive foot traffic

A restaurant chain wanted to leverage advanced targeting on linear TV to drive customers to their locations.

The insight

Advanced TV targeting drives restaurant visitation

Using a cross-network approach, we focused on reaching the advertiser's target audience through our linear capabilities. By leveraging multiple networks, we have the possibility to significantly increase visitation from their target households.

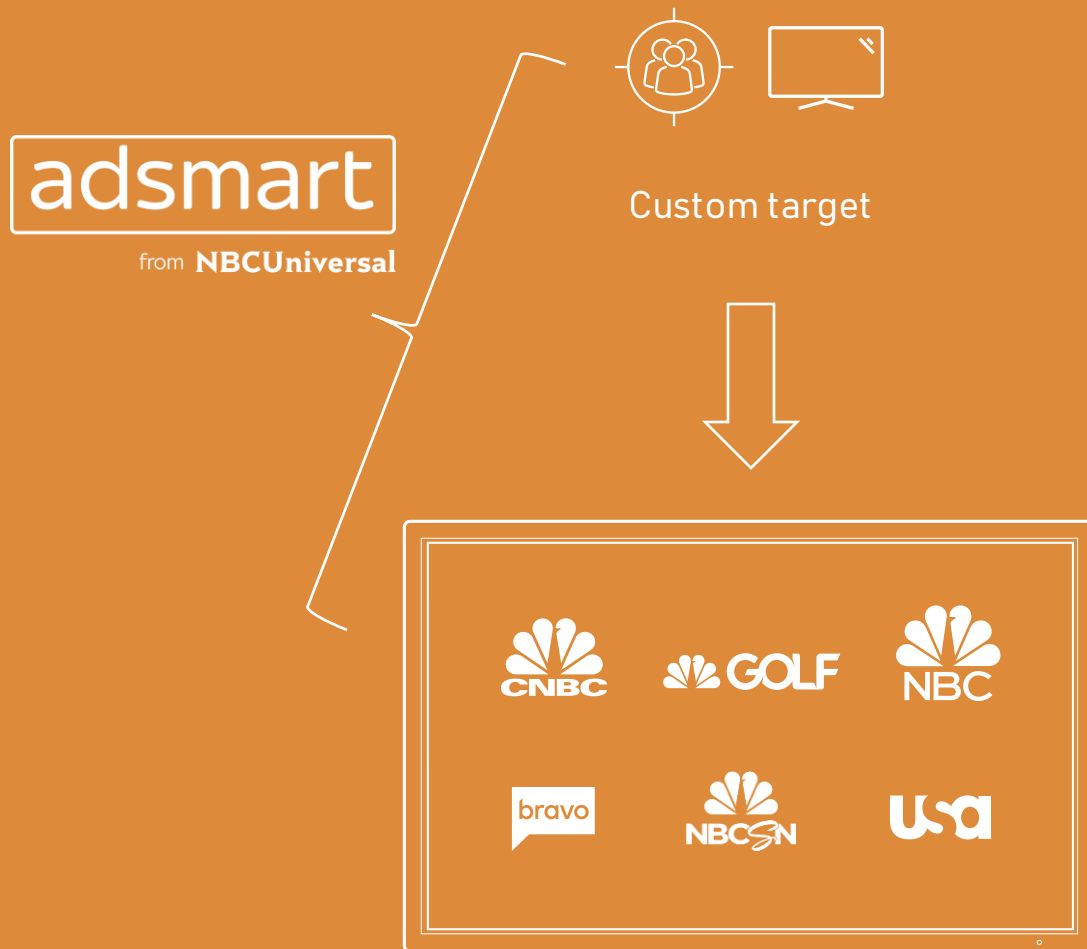
The solution

Target custom diner audience via national TV

We partnered with the client to run an AdSmart national TV campaign optimized across our portfolio to reach a custom “Modern Day Core Customer” audience instead of a traditional Nielsen demo.

5. Case Studies: The Approach

Advanced TV targeting to reach the right consumers across NBCU's linear portfolio.



The results

We commissioned a Data Plus Math custom study to measure the impact of the AdSmart campaign on the client's restaurant visitation rates.

Overall lift in foot traffic

+8% overall lift in restaurant visitation rates vs. unexposed

+20% overall lift in restaurant visits driven by AdSmart vs. non-NBCU

Target lift in foot traffic

+6% in-target lift in restaurant visitation vs. unexposed

+21% in-target lift in restaurant visits driven by AdSmart vs. non-NBCU

1.5x higher conversion impressions driven by AdSmart vs. non-NBCU

Non-target lift in foot traffic

+6% non-target lift in restaurant visitation rates vs. unexposed

+18% non-target lift in restaurant visits driven by AdSmart vs. non-NBCU



MARCH 2023

NBCUniversal

Thank You!





Additional Case Studies

Not Category Specific



Award Winning American Eagle Campaign 'Members Always' Club On Roblox



*Best
Gaming/Esports
Campaign*



OBJECTIVE

To promote their new Spring 2022 Members Always campaign and create a unique experience, American Eagle launched a virtual club within one of Roblox's most popular experiences.



SOLUTION

American Eagle partnered with Anzu and Livetopia to create a unique in-game experience where players can participate in several activities including swimming, playing tennis, dressing their avatar up in American Eagle outfits, and unlocking Ellie the Eagle as a playable pet.



RESULTS

1.5B+
LIFETIME VISITS

40 MILLION
MAU GLOBALLY



FEATURES



A **PLAYGROUND** full of interactive elements and surprises



A **POOL** with water slides, sun loungers, and water-guns



A **TENNIS COURT** where players compete against a member of the American Eagle avatar cast



SECRET ROOMS that are ready to be discovered and explored



ELLIE THE EAGLE, a playable pet wearing the American Eagle hoodie



SHOP the latest American Eagle 'fits and dress up their avatars

ShoppableTV is turning viewers into shoppers

Awareness

Reached

15MM

P2+ Total to Date*

Consideration

Drove fan acquisition

Brands' social media recorded a

+9%

Fan Growth VS YTD avg

Purchase

Average conversion rate:

2.6%

Industry BM is 2%
with first time
visitors at 1.5%

Our average
conversion rate is
30% higher than the
industry benchmark
for ecommerce
conversion

Case study



The challenge

Drive awareness & consideration

Brown-Forman wants to make Woodford Reserve everyone's go-to premium small batch bourbon and looked to leverage their Presenting Sponsorship of Kentucky's traditional event, the Kentucky Derby, to raise awareness and consideration for their traditional Kentucky brand.

The insight

Traditions matter

Traditions evoke a sense of comfort and belonging and ultimately bring people together. From extravagant derby hats to the garland of roses to mint juleps, you'd be hard pressed to find an event more synonymous with tradition than the Kentucky Derby. By tapping into this legacy, brands can become embedded in this tradition.

The solution

Natural brand & product integration

Through a combination of custom features, Toast the Derby & \$1,000 Mint Julep, and standard sponsorship elements, NBC Sports organically intertwined Woodford Reserve throughout the Kentucky Derby broadcast, seamlessly combining the spirit of Woodford Reserve with the legacy of the Derby.

The approach

Custom content



The results

Integration drove brand impact among Kentucky Derby viewers

4X more likely to recall seeing a Woodford Reserve ad in the last 30 days

59% of viewers had a **favorable opinion of Woodford Reserve** after seeing it advertised within the Kentucky Derby

30% of viewers would **consider Woodford Reserve** the next time they're buying whiskey

30% of viewers would **recommend Woodford Reserve**

Integration drove significant search impact

+130K additional people searched for Woodford Reserve immediately following the Kentucky Derby, **equivalent to the search engagement generated by 3** Woodford Reserve ads airing in competitive cable spots

+328% more likely to search for Woodford Reserve after seeing the Kentucky Derby integration than ads airing in competitive primetime cable programming

Digital ad innovation core opportunities



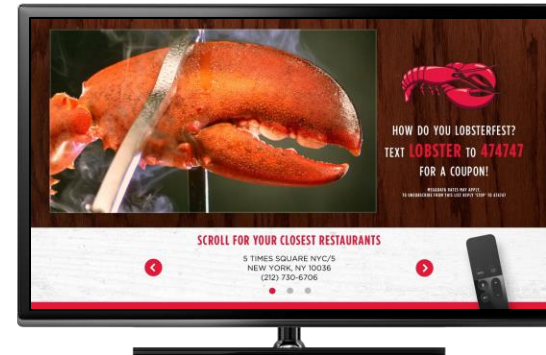
Ad extender

Enhancing brand commercials with extended content



Ad engager

Engaging customers with fun, interactive content



Ad intender

Providing consumers with meaningful, personalized information



Ad converter

Driving direct interaction with the brand

Digital ad innovation core opportunities

Ad extender

Enhancing brand commercials with extended content

3.5X industry CTR benchmark
3.9X industry time spent benchmark
 CTR **0.9%**
 Time Spent **47s**

- Video Gallery
- Image Gallery
- Questionnaire

Ad engager

Engaging customers with fun, interactive content

5.4X industry CTR Benchmark
 Interaction Rate
1.4%

- Unlock Content
- Trivia
- One-click interactions

Ad intender

Providing consumers with meaningful, personalized information

4.2X industry CTR Benchmark
 Interaction Rate
1.1%

- Store Locator
- Addressable Overlays
- Weather

Ad converter

Driving direct interaction with the brand

Conversion Rate
0.07%

- ShoppableTV
- App Download
- Coupon
- RFI



Case study



The challenge

Drive consideration & purchase intent for CPG

A leading CPG company wanted to increase consideration and purchase intent for their popular household mop brand.

The insight

Context matters

Consumers tend to pay more attention to advertisements that are relevant to the content they're watching. The strategic combination of audience targeting, compelling creative, and contextual alignment within the right show drives measurable impact for brands.

The solution

Contextual alignment via adsmart contextual

We leveraged our AdSmart Contextual platform to identify programming that was contextually aligned with the CPG brand's ad. NBCU's proprietary solution uses AI to identify the contextual moments that match a brand's message, ensuring not just that a brand's advertising is aligned with the right show but that it runs adjacent to highly relevant scenes across our national TV programming.



The approach



Contextual alignment with
The Profit

adsmart
from NBCUniversal



The results

We commissioned a custom Ipsos study to measure the impact of the contextual ad placement on driving brand KPIs for the advertised mop.

Contextual ad exposure drove lift across brand metrics

+9%

lift in relevance between
the show and the ad vs.
standard ad placement

+18%

lift in consumers looking in-
store for advertised mop vs.
standard ad placement

+24%

lift in consumers keeping an eye
out for deals for the advertised
mop vs. standard ad placement

+7%

lift in purchase consideration vs.
standard ad placement

“Ads that complement what I am watching make me think about the content more and I’m more likely to want to purchase one of said products.”

–Survey respondent



Case study



The challenge

Drive recommendation & ticket sales for movie release

A major studio wanted to increase word-of-mouth recommendations and drive ticket sales for the latest release in a popular action movie franchise.

The insight

Context matters

Consumers tend to pay more attention to advertisements that are relevant to the content they're watching. The strategic combination of audience targeting, compelling creative, and contextual alignment within the right show drives measurable impact for brands.

The solution

Contextual alignment via AdSmart Contextual

We leveraged our AdSmart Contextual platform to identify programming that was contextually aligned with the film's ad. NBCU's proprietary solution uses AI to identify the contextual moments that match a brand's message, ensuring not just that a brand's advertising is aligned with the right show but that it runs adjacent to highly relevant scenes across our national TV programming.



The approach



Contextual alignment with **Chicago P.D.**



The results

We commissioned a custom Ipsos study to measure the impact of the contextual ad placement on driving brand KPIs for the advertised luggage.

Contextual ad exposure drove brand & sales lift

+12% lift in favorability vs. standard ad placement

+30% lift in consumers talking about the film with friends, family, or colleagues vs. standard ad placement

+28% lift in ticket purchases vs. standard ad placement

"If you're watching an action show, then that means you like action and **you're more likely to want to watch an ad that has action in it.**"

–Survey respondent