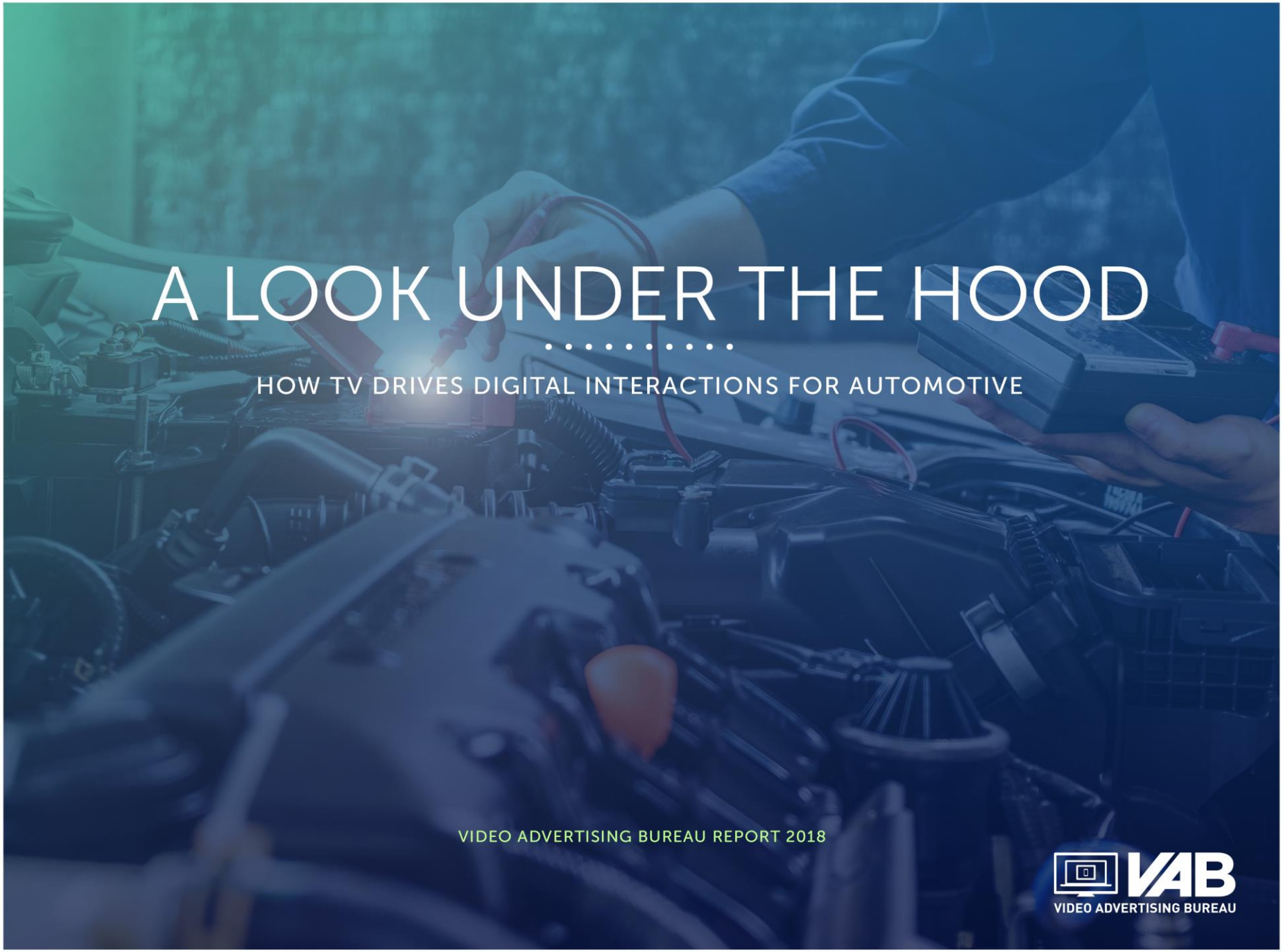

A LOOK UNDER THE HOOD

HOW TV DRIVES DIGITAL INTERACTIONS FOR AUTOMOTIVE

VIDEO ADVERTISING BUREAU REPORT 2018

VAB
VIDEO ADVERTISING BUREAU

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A Look Under The Hood: The Effects Of TV Spend On Digital Interactions

Automotive continues to be one of the largest category spenders in media and has even recently seen double-digit growth in TV advertising expenditures during the all-important fourth quarter time period when new model year vehicles are released.

While many automotive brands have increased their TV investment because savvy marketers know that it works, some brands have recently decreased their investment in TV and re-allocated their dollars to other platforms.

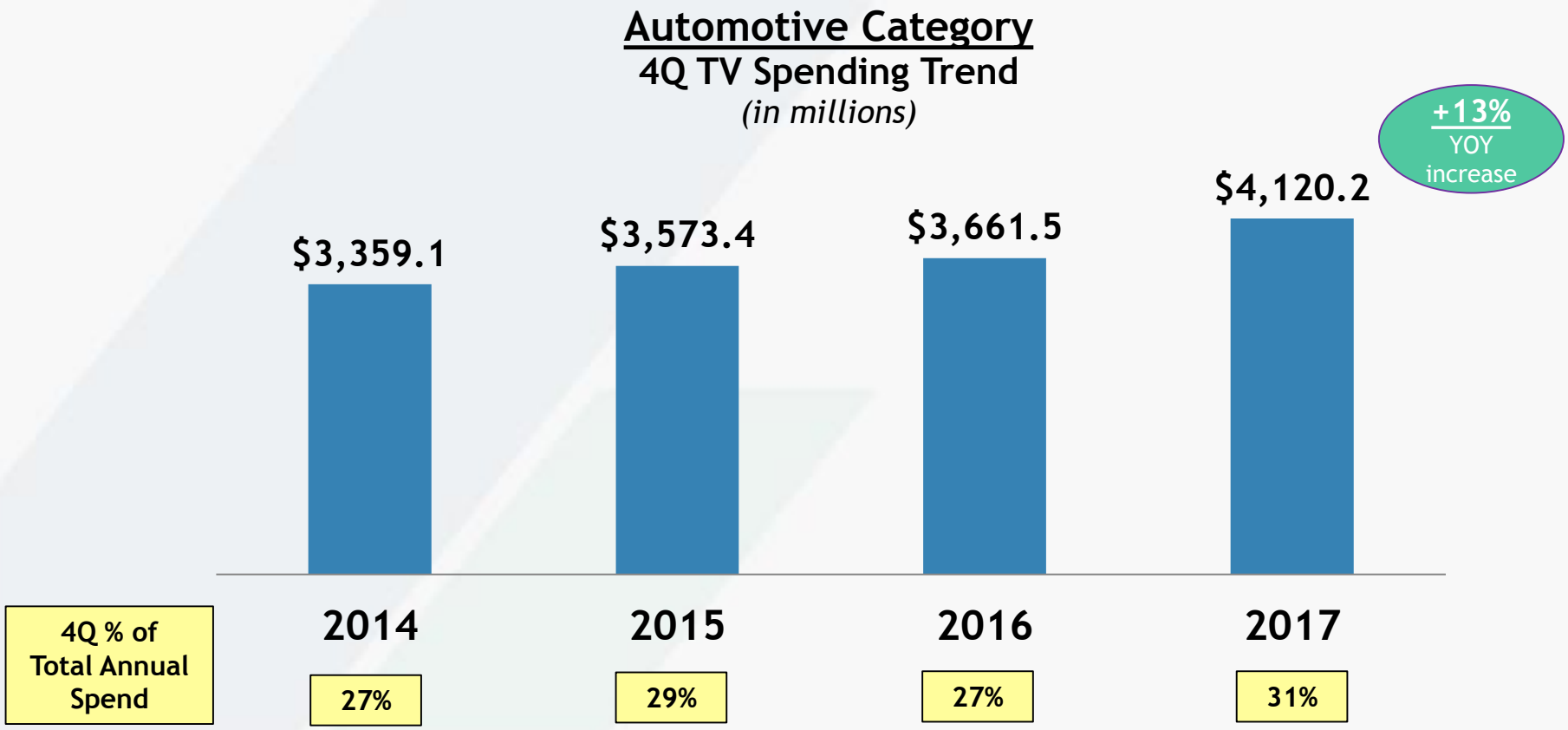
In this analysis we take a look under the hood of several top automotive manufacturers to examine the relationship between their TV spend and key digital metrics like website traffic, search queries, social actions and online video views.

Throughout the analysis, which focuses on a year-over-year comparison of the crucial 4Q time period, we provide numerous examples of how TV spend, both increases and decreases, has an effect on the desire of a consumer to further engage with a brand through online *investigation*, *conversation* and *exploration*.

This report, a follow-up to our 2016 automotive analysis entitled *Shifting Gears*, serves as another proof point in our series of analyses that showcases the strong correlation between TV investment and digital interactions across categories.

4Q Is Critical For The Automotive Category As New Model Year Vehicles Are Typically Released During The Fall Months

Category spend is skewed towards 4Q in support of the new model year vehicle launches and overall TV spending has increased by double-digits vs. the prior year



VAB: A LOOK UNDER THE HOOD

Source: VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), Oct – Dec of 2014-2017 (calendar months). AdIntel Categories: Autos, Trucks & Misc Vehicles: Dealer Assn, Dealerships, Factory.

VIDEO ADVERTISING BUREAU

4Q Analysis: Top 25 TV Spending Automotive Manufacturers Analyzed Across Both Foreign & Domestic Categories

- We analyzed the TV spend and key digital metrics – brand website traffic, search queries, social actions and online video views – for 25 automotive manufacturers based on a year-over-year 4Q comparison (4Q'16 vs. 4Q'17)
- The brands analyzed represent a cross-section of the category: domestic and foreign, luxury and economy, trucks and cars

Top 25 Automotive Manufacturer TV Advertisers

VAB: A LOOK UNDER THE HOOD

*The automotive manufacturers group reflects the top 25 TV spending brands in CY 2017 as measured by Nielsen AdIntel; all brands had $100MM+ in TV spending (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV) between their factory and dealer association categories.

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TV Spend vs. Website Traffic Correlation

"Total Universe" Findings:
A *Definitive* Correlation Between TV Spend & Website Traffic

<u>*19 of the 25 Automotive Manufacturers (76%)*</u> Analyzed Exhibited a Direct Correlation Between TV Spend & Website Traffic (4Q'16 vs. 4Q'17)

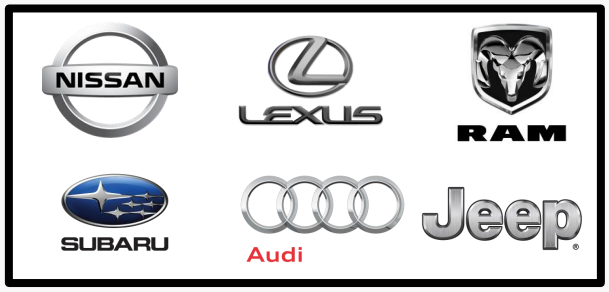
19 Brands

<u>11 Brands Were ↑ In Both TV Spend & Monthly Unique Visitors</u>

<u>8 Brands Were ↓ In Both TV Spend & Monthly Unique Visitors</u>

6 Brands

<u>*Lack of correlation* between TV Spend & Monthly Unique Visitors</u>



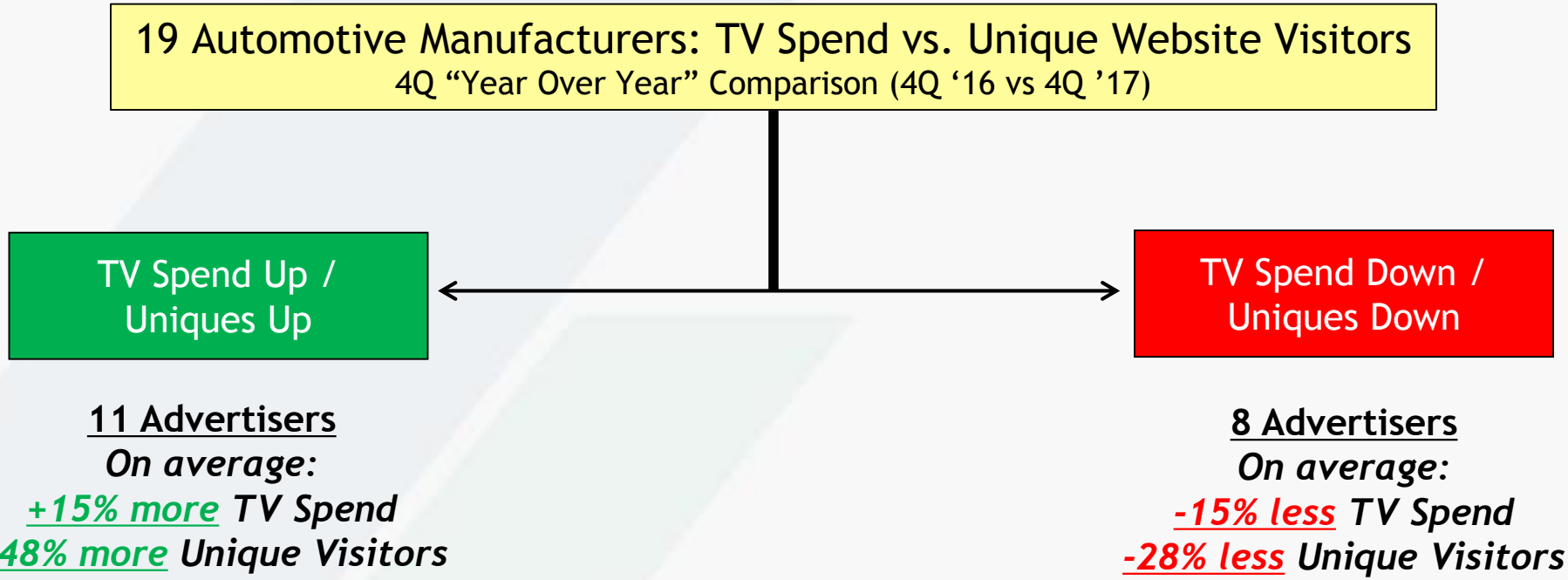
VAB: A LOOK UNDER THE HOOD

Source: VAB analysis of comScore mediametrix multiplatform media trend data; total audience (Desktop P2+, Mobile 18+), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). VAB analysis of Nielsen Ad Intel data, TV spend (natl cable TV, natl broadcast TV, Spanish lang broadcast TV, Spanish lang cable TV, spot TV, syndication TV), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). Figures are based on a monthly average within each quarter.

VIDEO ADVERTISING BUREAU

"Total Universe" Findings:
TV Spend Impact On Automotive Manufacturers With A Definitive Correlation

Shifts in automotive brands' TV spending aid in accelerating, or decelerating, their website traffic



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VIDEO ADVERTISING BUREAU

Domestic Auto Segment:
An *80%* Correlation Between TV Spend & Website Traffic

8 of the 10 Domestic Automotive Manufacturers (80%) **Analyzed Exhibited a Direct Correlation Between TV Spend & Website Traffic (4Q'16 vs. 4Q'17)**

8 Brands

5 Brands Were ↑ In Both TV Spend & Monthly Unique Visitors

3 Brands Were ↓ In Both TV Spend & Monthly Unique Visitors

2 Brands

Lack of correlation between TV Spend & Monthly Unique Visitors

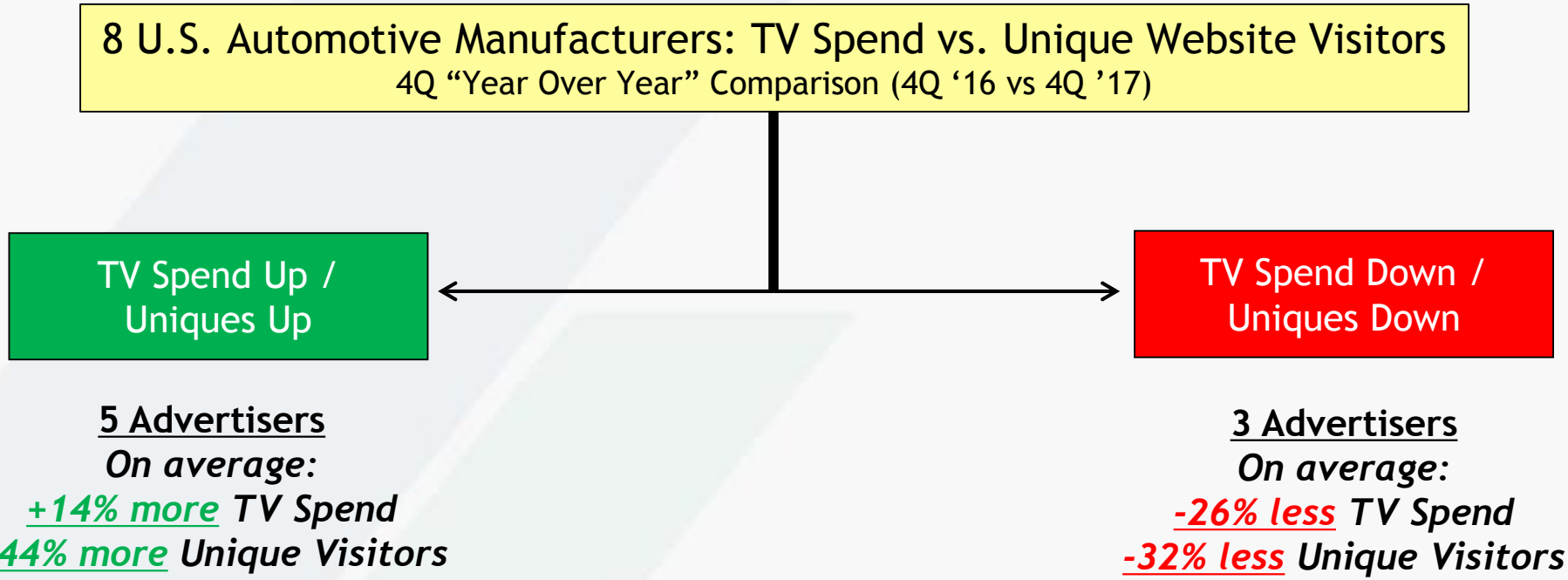
VAB: A LOOK UNDER THE HOOD

Source: VAB analysis of comScore mediametrix multiplatform media trend data; total audience (Desktop P2+, Mobile 18+), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). VAB analysis of Nielsen Ad Intel data, TV spend (natl cable TV, natl broadcast TV, Spanish lang broadcast TV, Spanish lang cable TV, spot TV, syndication TV), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). Figures are based on a monthly average within each quarter.

VIDEO ADVERTISING BUREAU

Domestic Auto Segment:
TV Spend Impact On Domestic Auto Manufacturers With A Definitive Correlation

Shifts in automotive brands' TV spending aid in accelerating, or decelerating, their website traffic



VAB: A LOOK UNDER THE HOOD

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VIDEO ADVERTISING BUREAU

Domestic Auto Segment:
Examples Of Brands Who Saw A Spike In Web Traffic With Increased TV Spend

The below chart reflects the changes in average TV spend and website traffic between 4Q '16 & 4Q '17

TV Spend Up, Website Traffic Up
4Q "Year Over Year" Comparison (4Q '16 vs 4Q '17)

Avg Monthly TV Spend (000):	Ford	Lincoln	Chevrolet	Buick
Oct '16 - Dec '16:	$93,818	$27,862	$113,885	$19,603
Oct '17 - Dec '17:	$109,973	$38,813	$120,732	$23,378
% Difference:	+17%	+38%	+6%	+19%

Avg Monthly Unique Visitors (000):				
Oct '16 - Dec '16:	5,342	813	3,285	826
Oct '17 - Dec '17:	7,097	1,098	4,917	1,116
% Difference:	+33%	+35%	+50%	+35%

VAB: A LOOK UNDER THE HOOD

Source: VAB analysis of comScore mediametrix multiplatform media trend data; total audience (Desktop P2+, Mobile 18+), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). VAB analysis of Nielsen Ad Intel data, TV spend (natl cable TV, natl broadcast TV, Spanish lang broadcast TV, Spanish lang cable TV, spot TV, syndication TV), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). Figures are based on a monthly average within each quarter.

VAB VIDEO ADVERTISING BUREAU

Domestic Auto Segment:
Examples Of Brands Who Decreased Their TV Spend And Saw A Decline In Their Website Traffic

The below chart reflects the changes in average TV spend and website traffic between 4Q '16 & 4Q '17

TV Spend Down, Website Traffic Down
4Q "Year Over Year" Comparison (4Q '16 vs 4Q '17)

	Cadillac	DODGE	CHRYSLER
Avg Monthly TV Spend (000):			
Oct '16 - Dec '16:	$23,151	$20,613	$19,592
Oct '17 - Dec '17:	$20,628	$16,627	$9,827
% Difference:	**-11%**	**-19%**	**-50%**
Avg Monthly Unique Visitors (000):			
Oct '16 - Dec '16:	1,044	1,471	1,234
Oct '17 - Dec '17:	750	1,030	759
% Difference:	**-28%**	**-30%**	**-39%**

VAB: A LOOK UNDER THE HOOD

Source: VAB analysis of comScore mediametrix multiplatform media trend data; total audience (Desktop P2+, Mobile 18+), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). VAB analysis of Nielsen Ad Intel data, TV spend (natl cable TV, natl broadcast TV, Spanish lang broadcast TV, Spanish lang cable TV, spot TV, syndication TV), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). Figures are based on a monthly average within each quarter.

VAB VIDEO ADVERTISING BUREAU

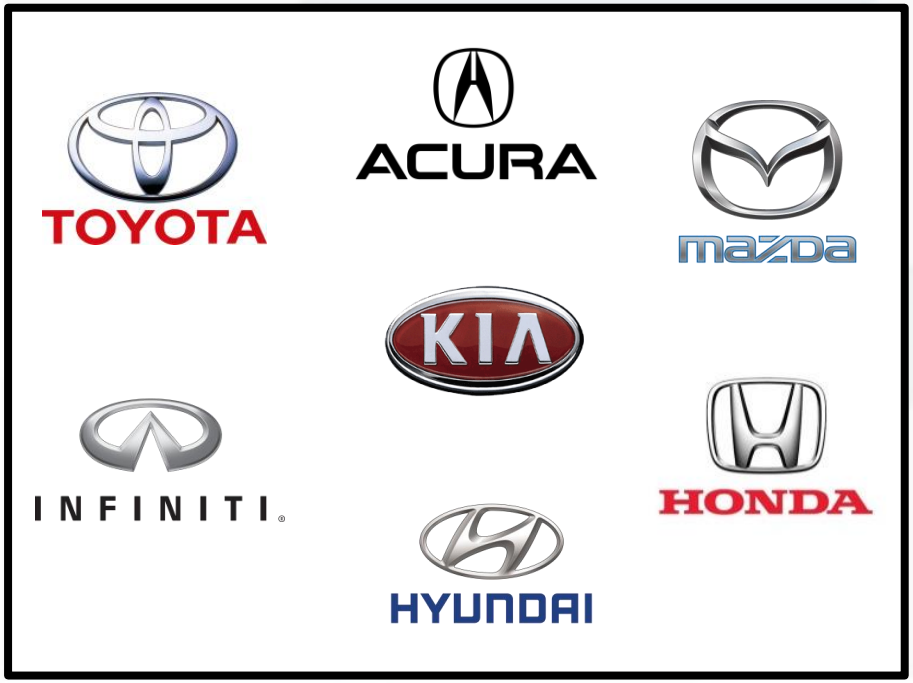
Asian Auto Segment:
An *70%* Correlation Between TV Spend & Website Traffic

7 of the 10 Asian Automotive Manufacturers (70%) **Analyzed Exhibited a Direct Correlation Between TV Spend & Website Traffic (4Q'16 vs. 4Q'17)**

7 Brands

3 Brands Were ↑ In Both TV Spend & Monthly Unique Visitors

4 Brands Were ↓ In Both TV Spend & Monthly Unique Visitors



3 Brands

Lack of correlation between TV Spend & Monthly Unique Visitors

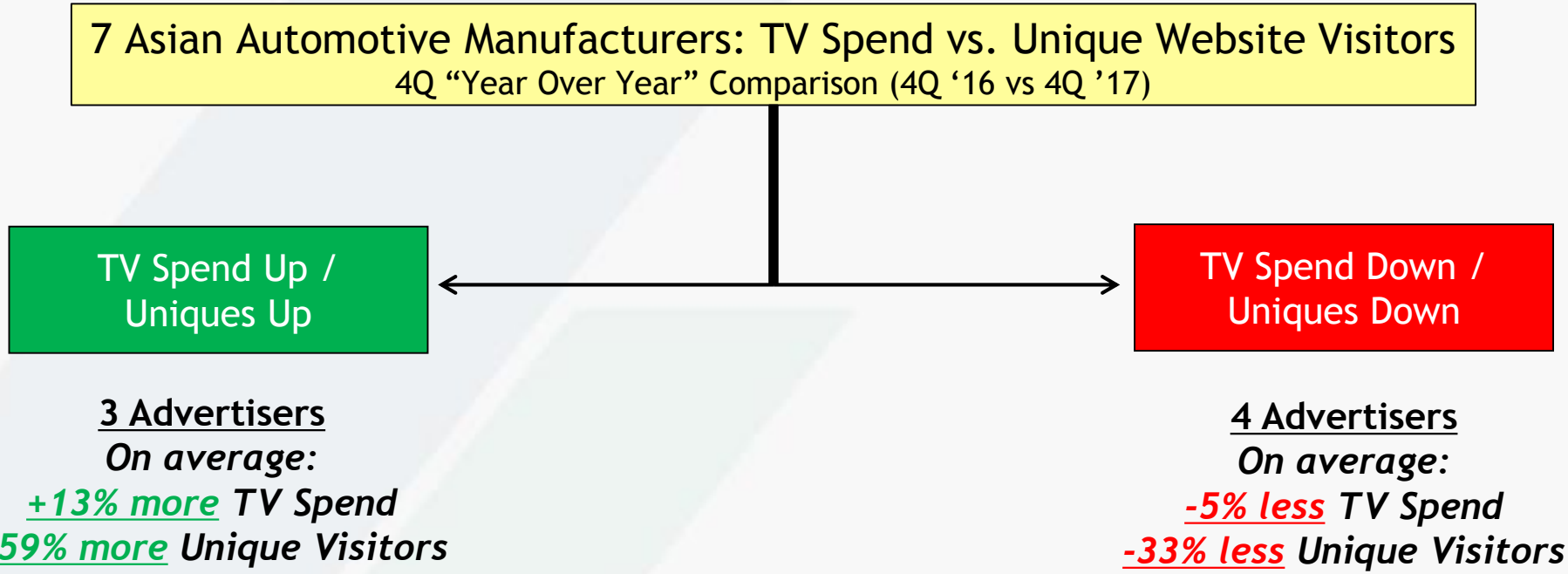
VAB: A LOOK UNDER THE HOOD

Source: VAB analysis of comScore mediametrix multiplatform media trend data; total audience (Desktop P2+, Mobile 18+), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). VAB analysis of Nielsen Ad Intel data, TV spend (natl cable TV, natl broadcast TV, Spanish lang broadcast TV, Spanish lang cable TV, spot TV, syndication TV), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). Figures are based on a monthly average within each quarter.

VAB VIDEO ADVERTISING BUREAU

Asian Auto Segment:
TV Spend Impact On Asian Auto Manufacturers With A Definitive Correlation

Shifts in automotive brands' TV spending aid in accelerating, or decelerating, their website traffic



VAB: A LOOK UNDER THE HOOD

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VIDEO ADVERTISING BUREAU

Asian Auto Segment:
Examples Of Brands' Demonstrated TV Spend / Website Traffic Correlation

The below chart reflects the changes in average TV spend and website traffic between 4Q '16 & 4Q '17

	4Q "Year Over Year" Comparison (4Q '16 vs 4Q '17)				
	TV Spend Up, Website Traffic Up			TV Spend Down, Website Traffic Down	
Avg Monthly TV Spend (000):	TOYOTA	HONDA	HYUNDAI	INFINITI	mazda
Oct '16 - Dec '16:	$83,034	$49,882	$41,003	$24,189	$16,551
Oct '17 - Dec '17:	$91,357	$56,063	$49,248	$21,490	$15,683
% Difference:	+10%	+12%	+20%	-11%	-5%
Avg Monthly Unique Visitors (000):					
Oct '16 - Dec '16:	3,817	3,125	1,390	648	1,441
Oct '17 - Dec '17:	5,457	6,289	1,506	581	1,354
% Difference:	+43%	+101%	+8%	-10%	-6%

VAB: A LOOK UNDER THE HOOD

Source: VAB analysis of comScore mediametrix multiplatform media trend data; total audience (Desktop P2+, Mobile 18+), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). VAB analysis of Nielsen Ad Intel data, TV spend (natl cable TV, natl broadcast TV, Spanish lang broadcast TV, Spanish lang cable TV, spot TV, syndication TV), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). Figures are based on a monthly average within each quarter.

VAB VIDEO ADVERTISING BUREAU

European Auto Segment:
An *80%* Correlation Between TV Spend & Website Traffic

4 of the 5 European Automotive Manufacturers (80%) **Analyzed Exhibited a Direct Correlation Between TV Spend & Website Traffic (4Q'16 vs. 4Q'17)**

4 Brands

3 Brands Were ↑ In Both TV Spend & Monthly Unique Visitors

1 Brand Was ↓ In Both TV Spend & Monthly Unique Visitors

Mercedes-Benz

BMW

LAND ROVER

1 Brand

Lack of correlation between TV Spend & Monthly Unique Visitors

Audi

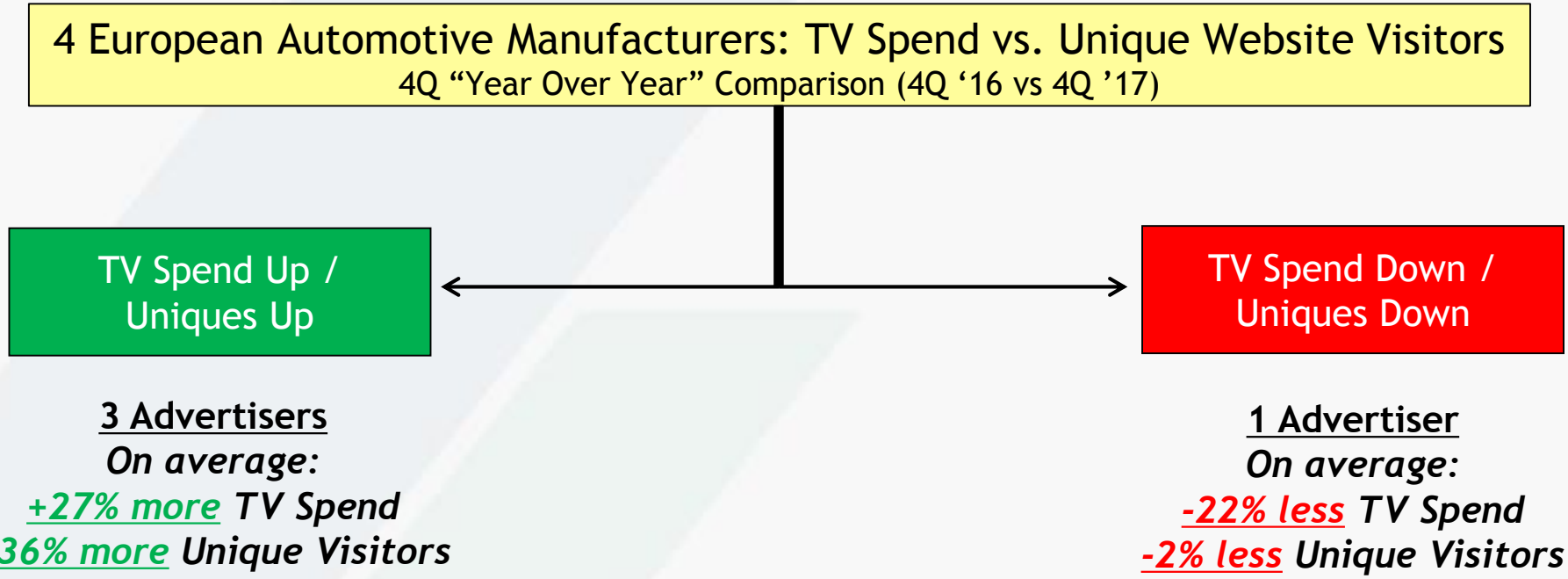
VAB: A LOOK UNDER THE HOOD

Source: VAB analysis of comScore mediametrix multiplatform media trend data; total audience (Desktop P2+, Mobile 18+), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). VAB analysis of Nielsen Ad Intel data, TV spend (natl cable TV, natl broadcast TV, Spanish lang broadcast TV, Spanish lang cable TV, spot TV, syndication TV), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). Figures are based on a monthly average within each quarter.

VAB VIDEO ADVERTISING BUREAU

European Auto Segment:
TV Spend Impact On European Auto Manufacturers With A Definitive Correlation

Shifts in automotive brands' TV spending aid in accelerating, or decelerating, their website traffic



VAB: A LOOK UNDER THE HOOD

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VIDEO ADVERTISING BUREAU

European Auto Segment:
Examples Of Brands' Demonstrated TV Spend / Website Traffic Correlation

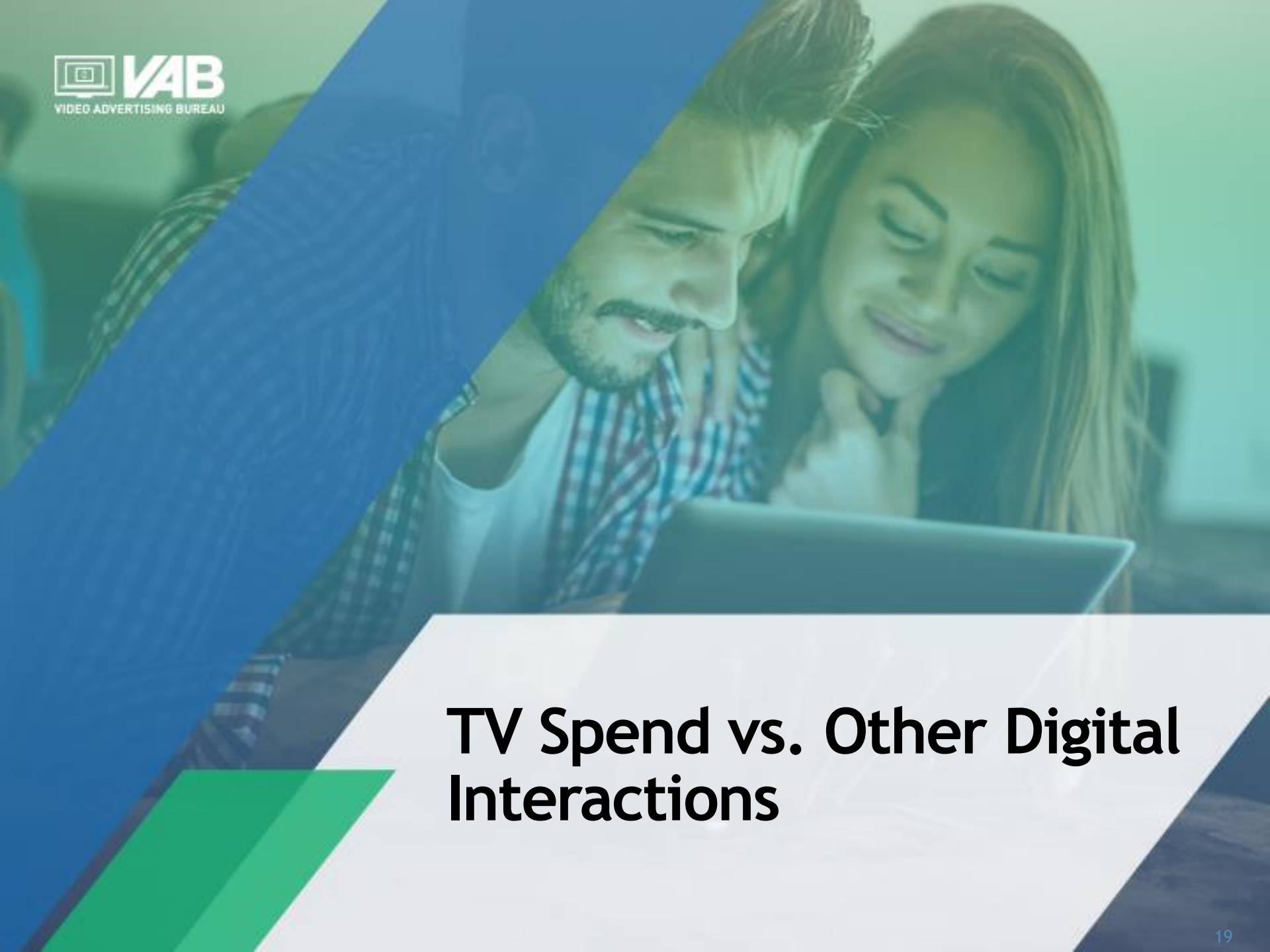
The below chart reflects the changes in average TV spend and website traffic between 4Q '16 & 4Q '17

	4Q "Year Over Year" Comparison (4Q '16 vs 4Q '17)			
	TV Spend Up, Website Traffic Up			TV Spend Down, Website Traffic Down
				Mercedes-Benz
Avg Monthly TV Spend (000):				
Oct '16 - Dec '16:	$51,375	$17,687	$6,620	$44,377
Oct '17 - Dec '17:	$59,499	$26,818	$9,570	$34,469
% Difference:	+16%	+52%	+45%	-22%
Avg Monthly Unique Visitors (000):				
Oct '16 - Dec '16:	1,170	1,698	487	1,501
Oct '17 - Dec '17:	1,293	2,555	718	1,472
% Difference:	+10%	+50%	+48%	-2%

VAB: A LOOK UNDER THE HOOD

Source: VAB analysis of comScore mediametrix multiplatform media trend data; total audience (Desktop P2+, Mobile 18+), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). VAB analysis of Nielsen Ad Intel data, TV spend (natl cable TV, natl broadcast TV, Spanish lang broadcast TV, Spanish lang cable TV, spot TV, syndication TV), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). Figures are based on a monthly average within each quarter.

VIDEO ADVERTISING BUREAU



TV Spend vs. Other Digital Interactions

Investigation: Increased TV Spend Has A Propensity To Drive An Even Greater Amount Of Search Queries

Sampling of Brands: TV Spend vs. "Search Queries" Q4 YOY % Increase

4Q "Year Over Year" Comparison (4Q '16 vs 4Q '17)

Category	Brand	TV Spend	Search Queries
Domestic	LINCOLN	+38%	+135%
Domestic	GMC	+6%	+92%
Asian	HONDA	+12%	+83%
Asian	TOYOTA	+10%	+31%
European	BMW	+52%	+143%
European	LAND ROVER	+45%	+170%

VAB: A LOOK UNDER THE HOOD

Source: VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). Search queries based on VAB analysis of iSpot.tv data and reflects TV commercial-related searches (Google, Bing, Yahoo!). Search queries are correlated to TV ad airing data.

VAB VIDEO ADVERTISING BUREAU

Investigation: Conversely, Search Queries Declined Proportionally With Decreases In TV Spend

Sampling **of Brands: TV Spend vs. "Search Queries" Q4 YOY % Increase**

4Q "Year Over Year" Comparison (4Q '16 vs 4Q '17)

Category	Brand	TV Spend	Search Queries
Domestic	CHRYSLER	-50%	-51%
Domestic	DODGE	-19%	-27%
Asian	mazda	-5%	-15%
European	Mercedes-Benz	-22%	-24%

VAB: A LOOK UNDER THE HOOD

Source: VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). Search queries based on VAB analysis of iSpot.tv data and reflects TV commercial-related searches (Google, Bing, Yahoo!). Search queries are correlated to TV ad airing data.

VAB VIDEO ADVERTISING BUREAU

Conversation: Increased TV Spend Also Drives Greater Brand Engagement On Social Media Platforms

Sampling of Brands: TV Spend vs. "Social Actions" Q4 YOY % Increase

4Q "Year Over Year" Comparison (4Q '16 vs 4Q '17)

Category	Brand	TV Spend	Social Actions
Domestic	BUICK	+19%	+74%
Domestic	Ford	+17%	+184%
Asian	HONDA	+12%	+29%
Asian	HYUNDAI	+20%	+60%
European	VW	+16%	+305%
European	LAND ROVER	+45%	+779%

VAB: A LOOK UNDER THE HOOD

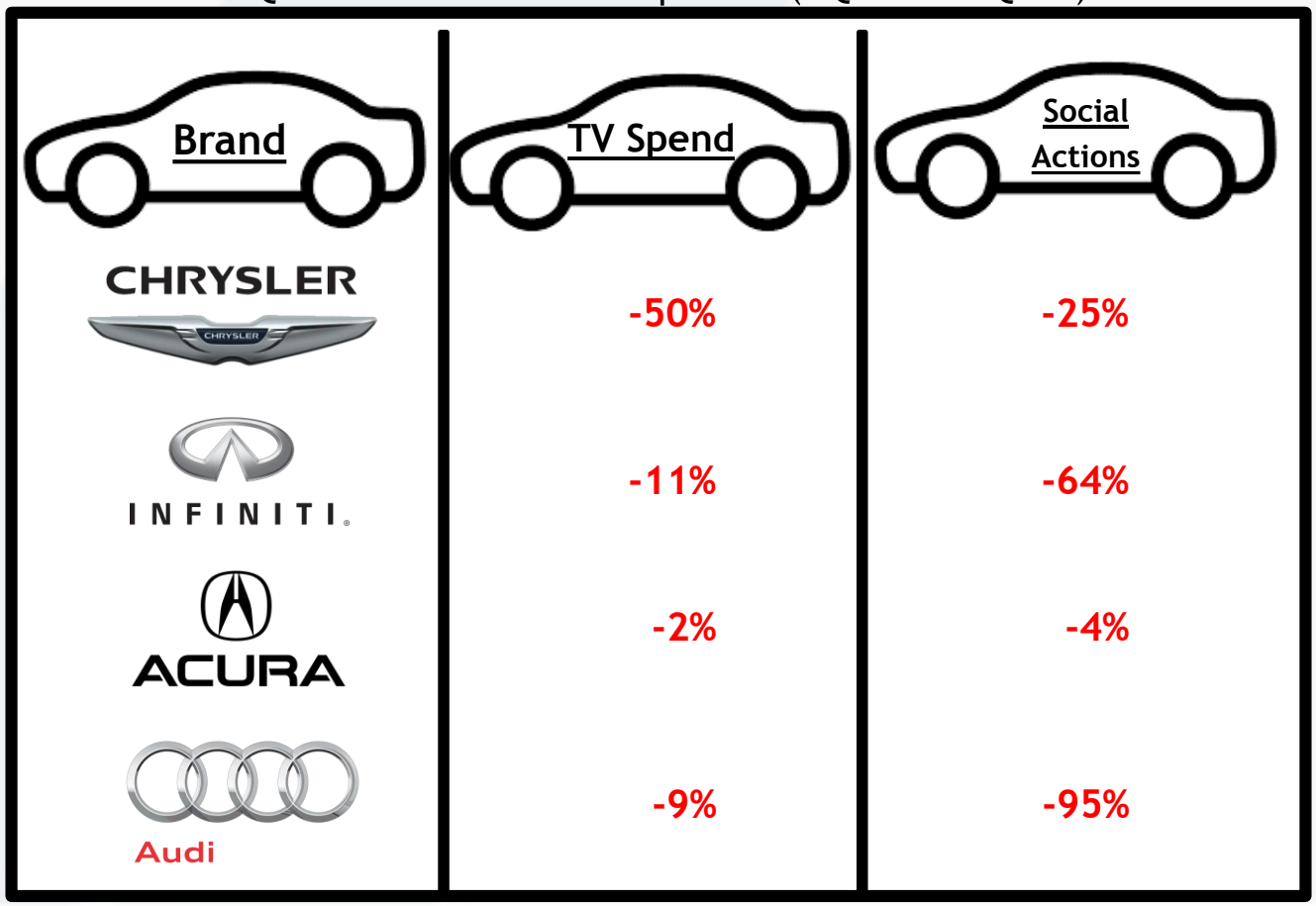
Source: VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). Social actions (posts, likes, shares and comments related to TV ads on Facebook, Twitter, YouTube, iSpot.tv). Social actions are correlated to TV ad airing data.

VAB VIDEO ADVERTISING BUREAU

Conversation: However, Social Chatter Decreased For Brands Who Spent Less On TV

Sampling **of Brands: TV Spend vs. "Social Actions" Q4 YOY % Increase**

4Q "Year Over Year" Comparison (4Q '16 vs 4Q '17)



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VAB VIDEO ADVERTISING BUREAU

Exploration: Increased TV Spend Also Drives Consumers Online For Repeat Viewings Of A Brand's Television Ad

Sampling **of Brands: TV Spend vs. "Online Video Views" Q4 YOY % Increase**

4Q "Year Over Year" Comparison (4Q '16 vs 4Q '17)

Category	Brand	TV Spend	Online Video Views
Domestic	Ford	+17%	+170%
Domestic	Chevrolet	+6%	+598%
Domestic	RAM	+9%	+32%
Asian	Honda	+12%	+173%
European	Volkswagen	+16%	+193%

VAB: A LOOK UNDER THE HOOD

Source: VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). Online Video Views are based on VAB analysis of iSpot.tv data and reflects earned, not promoted, online video views of TV ads (YouTube, iSpot.tv). Online Video Views are correlated to TV ad airing data.

VAB VIDEO ADVERTISING BUREAU

Exploration: But Online Viewing Of A Brand's TV Ads Declines As Their Television Spend Decreases

Sampling **of Brands: TV Spend vs. "Online Video Views" Q4 YOY % Increase**

4Q "Year Over Year" Comparison (4Q '16 vs 4Q '17)

Category	Brand	TV Spend	Online Video Views
Domestic	Cadillac	-11%	-44%
Asian	SUBARU	-6%	-38%
Asian	INFINITI	-11%	-87%
European	Audi	-9%	-99%

VAB: A LOOK UNDER THE HOOD

Source: VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). Online Video Views are based on VAB analysis of iSpot.tv data and reflects earned, not promoted, online video views of TV ads (YouTube, iSpot.tv). Online Video Views are correlated to TV ad airing data.

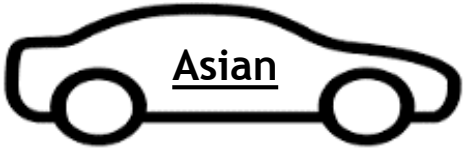
VAB VIDEO ADVERTISING BUREAU

By And Large, Brands With Increased TV Spend Saw Much Greater Online Consumer Engagement And Vice Versa

19 of the 25 Automotive Manufacturers (76%) **Analyzed Exhibited a Direct Correlation Between TV Spend & Website Traffic (4Q'16 vs. 4Q'17)**

Of The Automotive Manufacturers With A Definitive Correlation…

On average:

	TV Spend ↑	TV Spend ↓
Total	*+15% more* TV Spend *+48% more* Unique Website Visitors	*-15% less* TV Spend *-28% less* Unique Website Visitors
Domestic	*+14% more* TV Spend *+44% more* Unique Website Visitors	*-26% less* TV Spend *-32% less* Unique Website Visitors
 **Asian**	*+13% more* TV Spend *+59% more* Unique Website Visitors	*-5% less* TV Spend *-33% less* Unique Website Visitors
European	*+27% more* TV Spend *+36% more* Unique Website Visitors	*-22% less* TV Spend *-2% less* Unique Website Visitors

VAB: A LOOK UNDER THE HOOD

Source: VAB analysis of comScore mediametrix multiplatform media trend data; total audience (Desktop P2+, Mobile 18+), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). VAB analysis of Nielsen Ad Intel data, TV spend (natl cable TV, natl broadcast TV, Spanish lang broadcast TV, Spanish lang cable TV, spot TV, syndication TV), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). Figures are based on a monthly average within each quarter.

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