

January 2025

NBCUniversal

Auto x Understanding Time Lag

Part of the Importance of Advertising Series

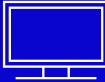


We know

New vehicle intenders find TV ads informative and memorable

47%

of new vehicle intenders say
TV ads provide useful
information about **new
products/services***



New vehicle
intenders are

10%

more likely than gen pop to
say ads seen **while
streaming** are more
memorable*



We know

TV is an important part of the advertising mix for auto manufacturers

A Mix of Linear & Streaming Yields Optimal Reach

Reach All Potential Buyers



Linear TV **Builds Brand Familiarity & Drives Search**

Impact Pre-Journey Behavior



TV Creates a **Strong Connection Between Ad Awareness, Brand Consideration & Purchase Intent**

Stay Top of Mind Through the Journey



Consistent Presence of TV **Impacts Funnel Metrics**

Stand Out from the Competition



Purpose

Understand the time lag for the auto category

from when stopping TV spend
(linear + streaming)
to when awareness and
registrations are impacted
Manufacturers only



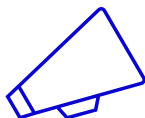
Key Takeaways of Understanding Timing

Findings demonstrate and further strengthen the alignment between the role channel and its performance against upper and lower funnel

Awareness

Stopping TV spend impacts auto's awareness metrics more quickly than stopping all media spend

Awareness of mass auto brands is impacted more quickly vs. luxury auto brands when TV is stopped
9 months vs. 10 months mass vs. luxury



Registrations

The time lag between stopping TV spend and the impact on registrations varies between mass and luxury auto brands

Registrations for luxury auto brands are more sensitive to stopping TV spend compared to mass
7 vs. 10 months luxury vs. mass

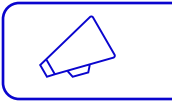


Stopping TV
spend impacts
auto brands'
awareness levels
more quickly
than stopping all
media spend

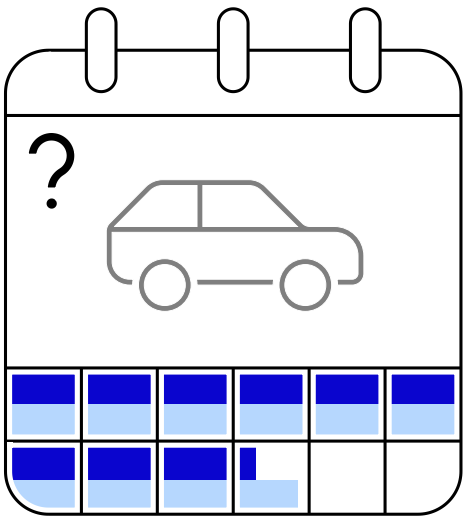
Impact is felt sooner
for mass auto brands
than luxury brands

Sources: NBCU Analysis of mass and luxury auto brands 2019-August 2024; total awareness against all respondents via Morning Consult; Spend via Media Radar; Additional details in notes

Avg. Number of Months Until Awareness is Impacted
2019-Aug 2024 Analyzed



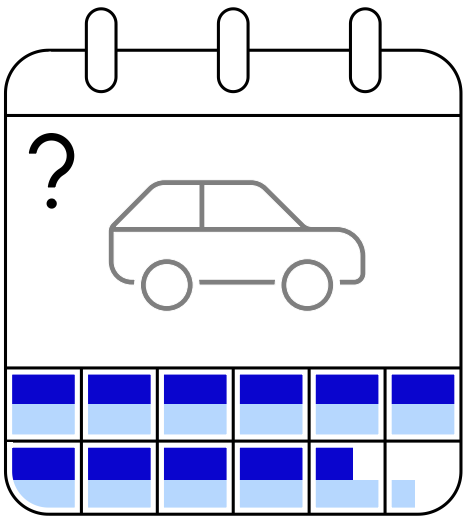
TV (Linear / Streaming)
Spend



Mass: 9.2 months

Luxury: 9.7 months

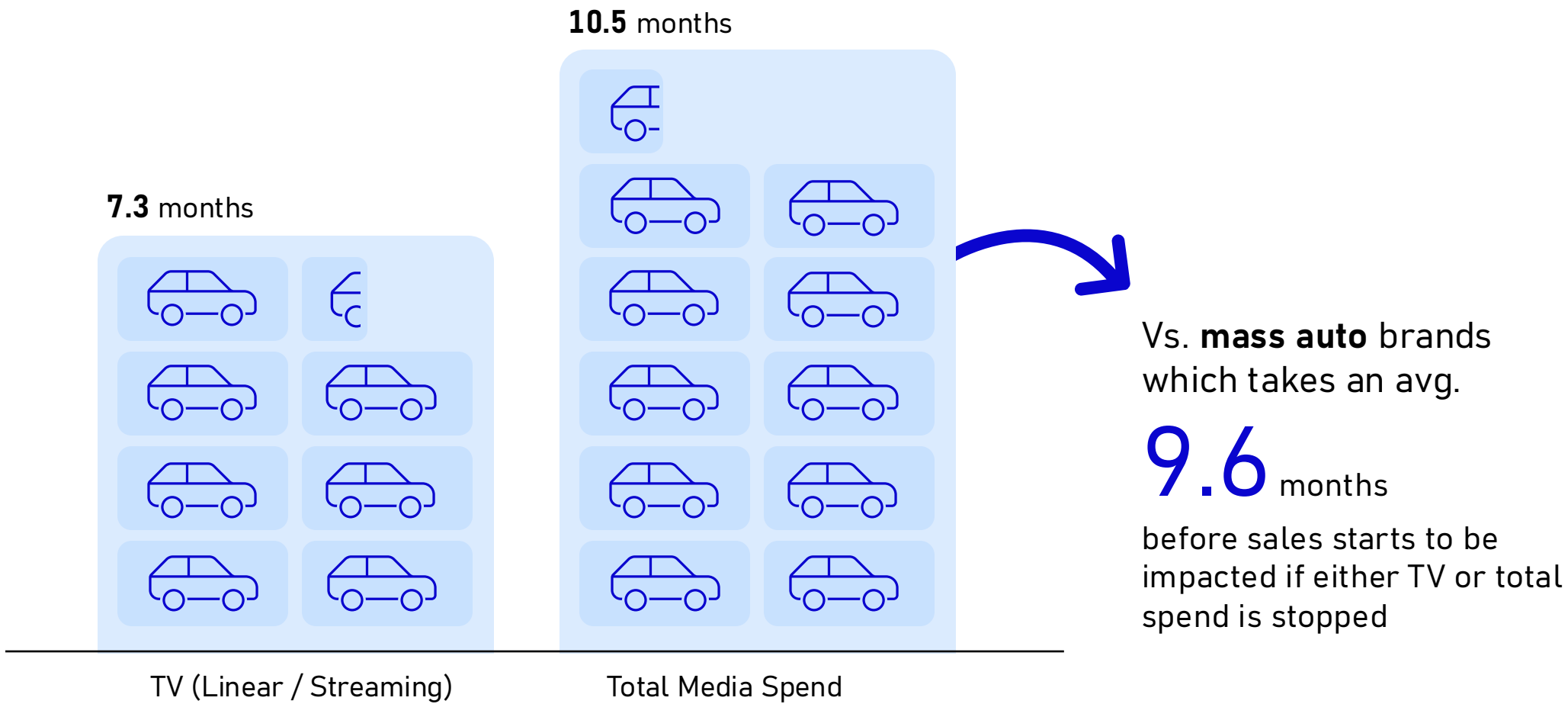
Total Media
Spend



Mass: 10.5 months

Luxury: 11.4 months

For luxury auto brands,
cutting TV spend impacts registration 1.4x faster
than cutting total media spend



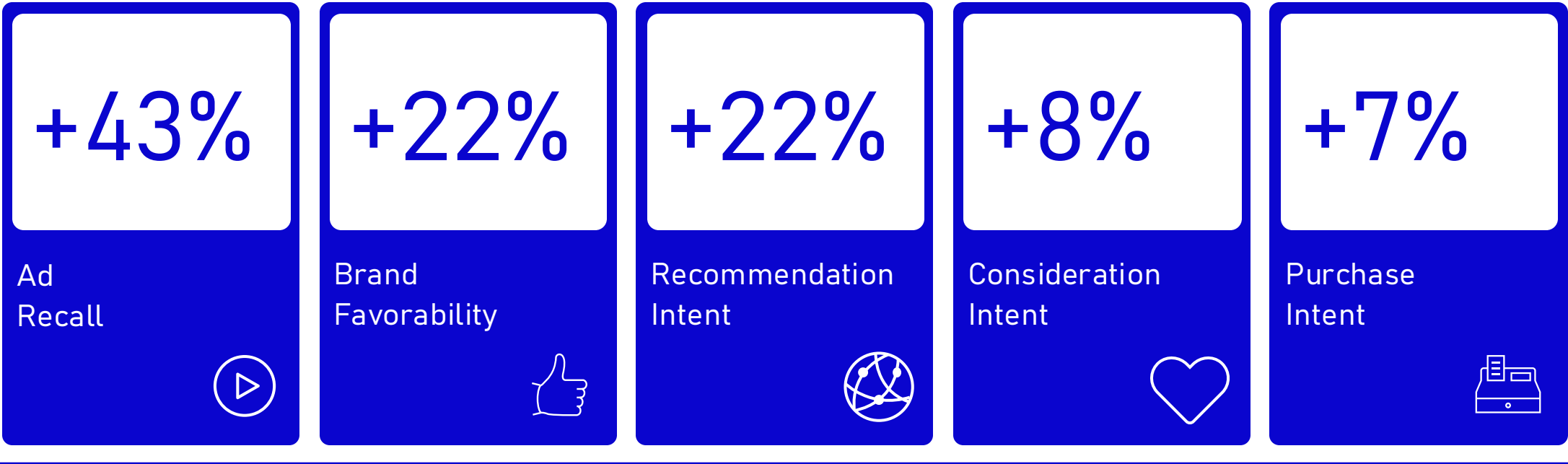
At NBCU,

Everything we do propels performance for our auto partners

by leveraging our cross-platform scale to drive results

Auto Category NBCU Campaigns: Multi-Platform vs. Single Platform

% Lift



Source: NBCU Ad Impact Database 2017-2023, 96 Single Platform Campaigns v. 90 Mult-Platform Campaigns
Custom research, vendors vary. Average of test cells for 2+ platforms vs. single platform campaigns

NBCU's premium content, ad innovations, & audience capabilities create a best-in-class experience for advertisers and viewers

Key Capabilities

Content That's Premium & Trusted

Meet audiences in brand safe content across linear and streaming that is rooted in culture and aligns with their passions



- Originals/IP
- Live events & programming tied to key cultural moments (e.g., sports, competition)



Innovation That Drives Engagement

Fuel discovery and action at every touchpoint – creating a frictionless experiences for audiences on Peacock



- Ad innovations (e.g., Engagement, Pause Ads)
- Limited Interruption (e.g., Watch With, Binge & Highlight Ads)



Data As The Foundation

Identify & target qualified leads (core prospects, new/younger audiences), inform ad placements at scale and across screens



- Data-driven strategies (e.g., aud. targeting, contextual targeting, aud. targeting + indexing, SL targeting)
- National/local campaigns



Measurement With Proven Impact

Understand cross-platform campaign reach and performance against KPIs



- Auto-specific partners (e.g., S&P Global Mobility, Experian)
- Captures impact against your goals (e.g., drive to dealership)



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Thank You

Interested in learning more? Please contact the Auto Category Strategy Team
Melissa Perron, *Sr Manager* | **Nikita Tolani**, *Director* | **Megan Ryan**, *VP*



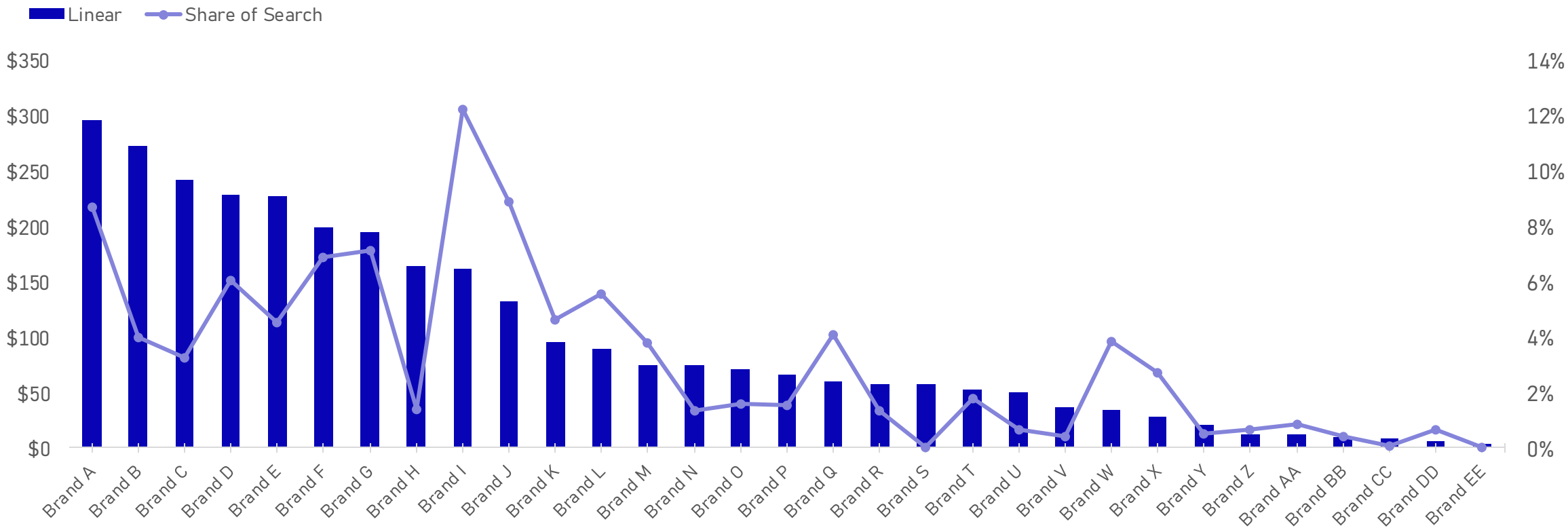
Key Learnings & NBCU Best Practices

Key learnings indicate a positive correlation between linear ad spend and search share

Linear Ad Spend (\$Millions) vs. Share of Search

July 2023 – June 2024 | Brands Shown in Descending Order Based on Linear Ad Spend

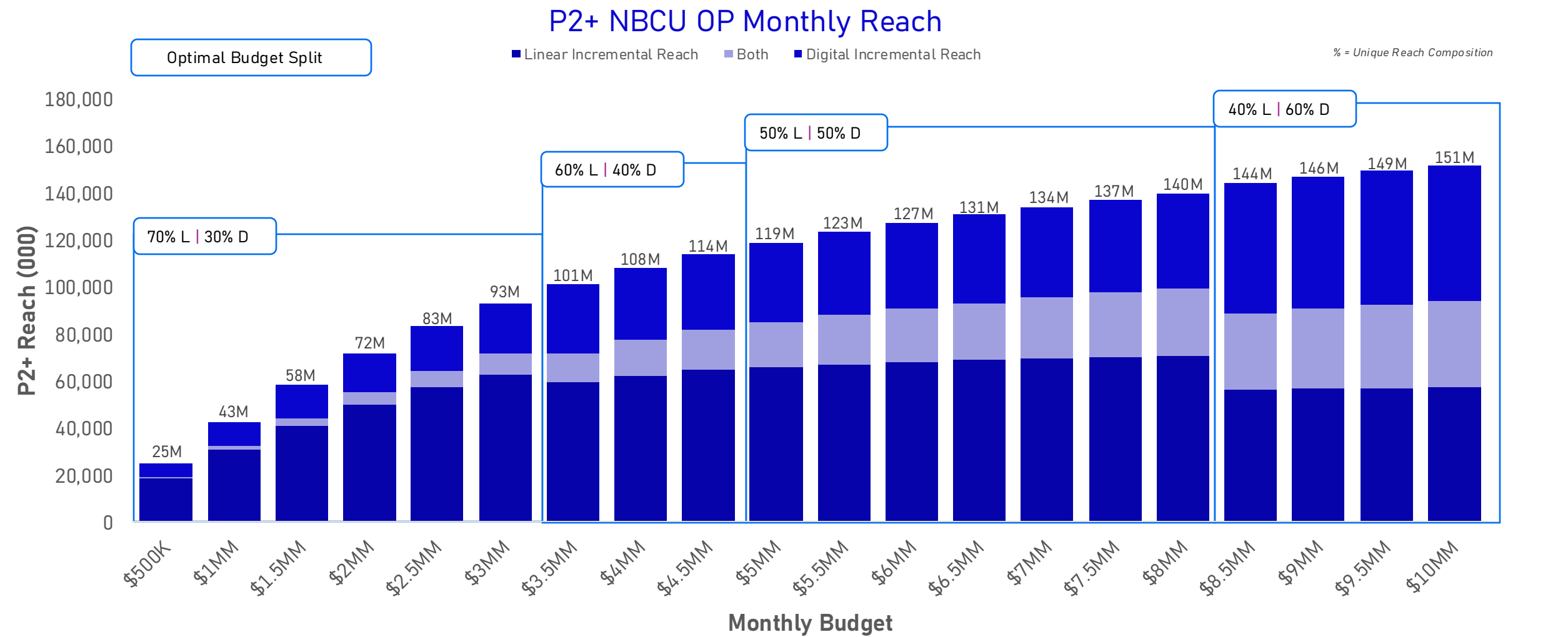
Correlation:
Linear Ad Spend & Search: 0.70



Source: Linear Ad Spend – Media Radar, Auto Brands, July '23 – June '24, Broadcast and Cable; Search Data – EDO, Luxury and Non-Luxury Brands, July '23 – June '24.

Best practices reveal how to achieve optimal reach and frequency with linear and streaming

For cross-platform campaigns, incremental scale grows as investment grows



Source: Nielsen (NMI), November 2023, P2+, Proxies applied, P2+ CPMs applied, frequency capped at 2 per flight