

NBCUniversal

AUTO

2025 YEAR IN REVIEW

Industry Highlights and Media Trends

Agenda

1

Auto Landscape

Current Landscape & FY'25 Media Trends

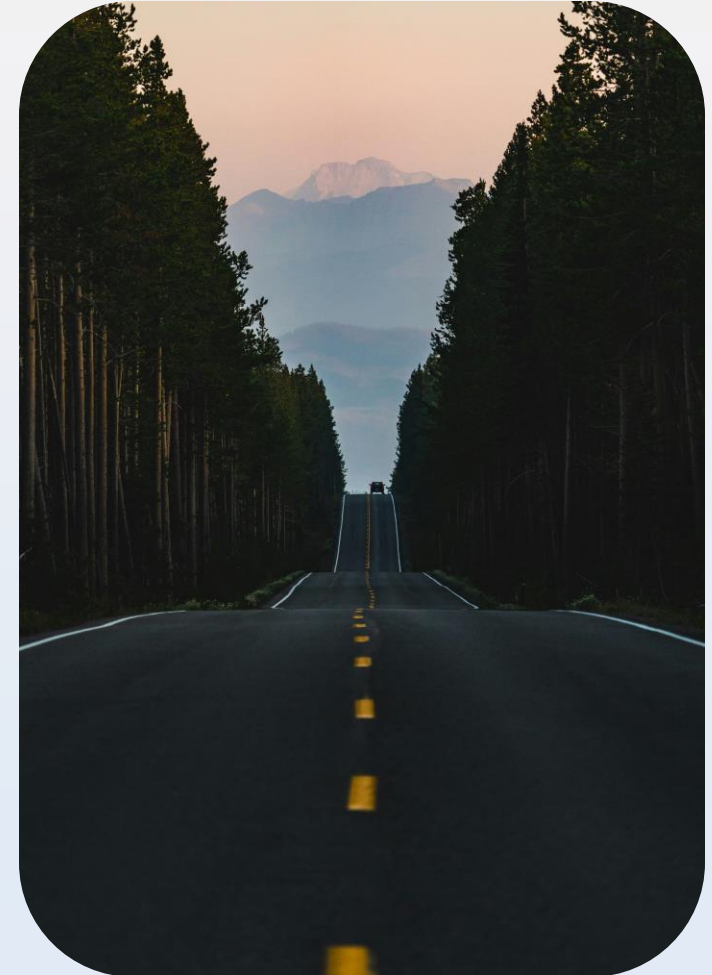
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Auto @ NBCU Update

Media Trends, Creative Showcase

3

Auto Upcoming Opportunities At NBCU



Current **Auto** Category Dynamics

Sales forecasted to soften while outlook stabilizes as the category shifts to multi-energy strategies

Headwinds

Ongoing volatility drives shifts in portfolio, advertising, & pricing strategies

New vehicle launches -10% YoY¹

Fiscal strain is cooling demand & sales in the short-term

2026 light vehicle sales -2% YoY¹

EV adoption slows as incentives fade and regulatory dynamics shift

Low population growth and aging fleets are gradually suppressing demand

Tailwinds

Affordability starting to show signs of improvement

e.g., lower loan rates & transaction prices²

Growing interest in hybrids pushing OEMs toward multi-energy strategies

Used & CPO sales projected to become bright spots

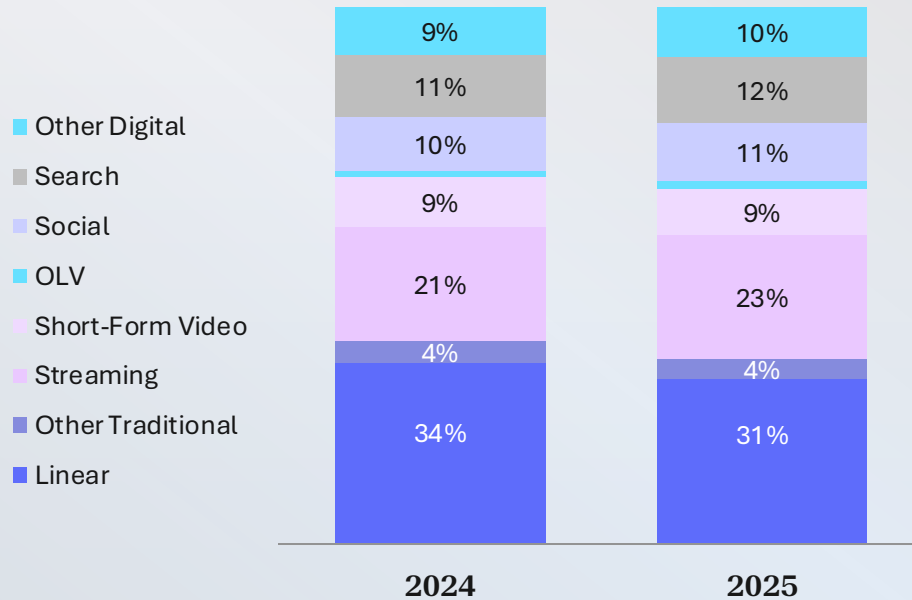
Sharp improvement in dealer assurance in Q1, cautiously optimistic for Spring sales²

Auto Marketplace Spend

Investment remains concentrated in premium video and high-impact environments via cultural moments, despite softer spend

Auto Category Media Mix

Share of Spend, in %



Traditional vs. Digital % Split	2024	2025
	38% / 62%	35% / 65%

Total Spend

-8% YoY

Reflective of macro dynamics

Streaming

-2% YoY

While streaming share of premium video +4pps & programmatic spend +2%

Short Form & Social

-5% YoY

With share of spend maintained

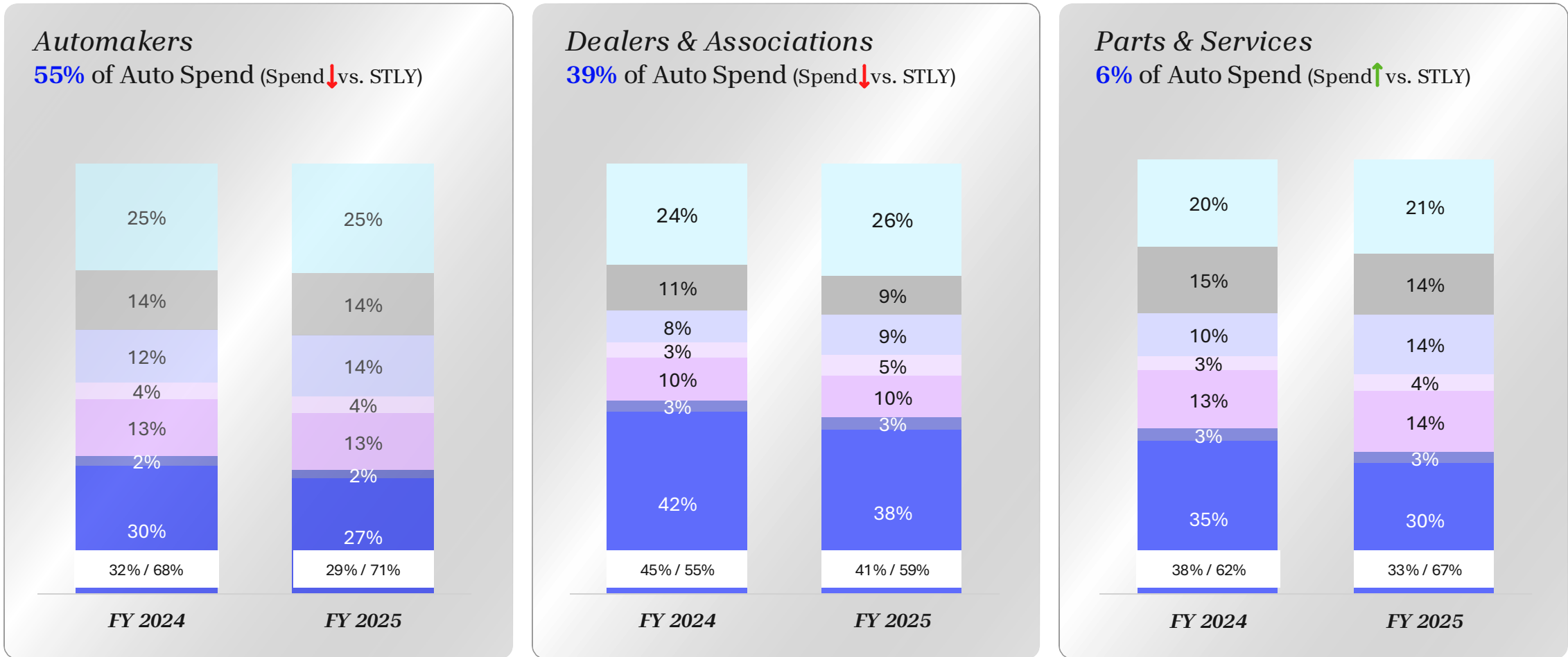
Linear Spend

-16% YoY

Leveraging linear for cultural moments: Sports (62% SoS), ELG (10%)

Auto Marketplace Spend By Sub-category

Auto OEM and Parts & Services subcategories continue the shift to digital while Dealers remain more balanced



■ Linear
 ■ Other Traditional
 ■ Streaming
 ■ Short-Form Video Platforms
 ■ Social
 ■ Search
 ■ Other Digital
 Traditional / Digital %

AUTO NBCU SPEND

2025 vs. 2024

NBCU Auto spend is evolving, in line with marketplace dynamics

concentrating in premium environments & culturally-relevant moments.



LINEAR

continues to deliver broad reach via sports & entertainment spend

62%

in Sports share

12%

in Entertainment share



STREAMING

gains momentum powered by premium, culture-forward content

+20%

in Digital Sports

+18%

in Peacock Prog.



AD INNOVATIONS

that are aligned to awareness and discovery saw increased investment

AWARENESS

Spotlight (+7%)

Curator (+36%)

Pod Bounce (+70%)

DISCOVERY

Pause Ad (+17%)



SOCIAL

is rising, tapping into more amplification opportunities

1.5x

spend in social

Creative & Innovation

Across The Marketplace

Sports Custom Content



Mercedes x Amazon's Custom 'NBA on Prime Video' Vignettes

Mercedes GLS tapped Amazon Ads to create 4 branded content videos with their sportscaster – NBA legend Dirk Nowitzki – who “goes missing” from the show. They find him in the GLS enjoying massage seats, blue lighting and sound.



Humor-Driven Creative

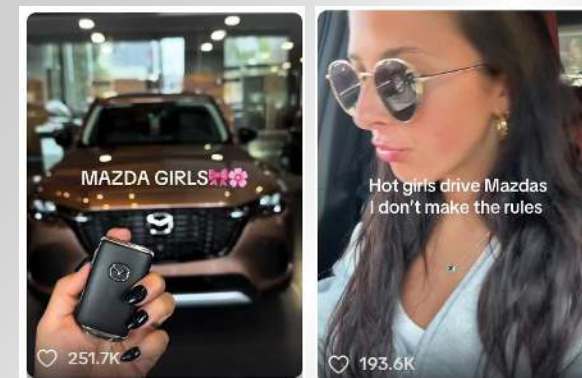


Jeep's Cheeky 'The Family SUV' Campaign ft. Iliza Shlesinger

With a provocative, buzz-driving boast that Grand Wagoneer is big enough to “make a whole family” inside, Jeep showcases its SUV's advantages and busts family category cliches.



Social Promotion



#MazdaGirls TikTok Creator Campaign

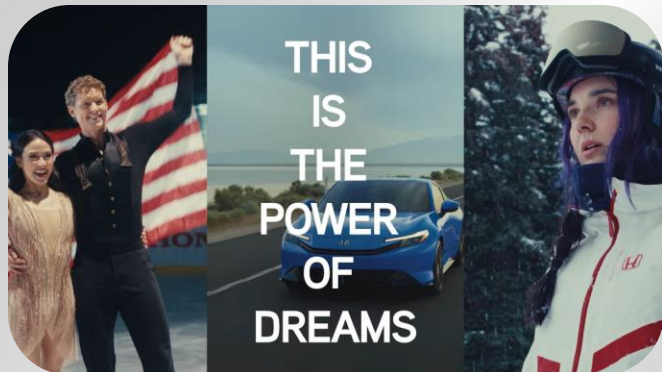
Jumping off GirlTok culture and existing Mazda owner/fan content, the brand joined in as a fan and commented, replied, stitched and amplified #MazdaGirls – driving social virality and press.



Creative & Innovation

Across NBCU

Big Moment in Sports



Honda's Winter Olympics' First

As USA's official auto partner, Honda debuted its adaptive "This Is the Power of Dreams" campaign, mixing athlete and engineering stories and dynamically integrating same-day highlights across screens.



Custom Content



Ford BlueCruise x NBCU Talent Show Off "Hands Free"

To showcase Ford BlueCruise's hands-free driving, NBCU and Ford teamed up to create custom content with Courtney Lopez & Zuri Hall that drove home the benefits of connected vehicles.



Streaming



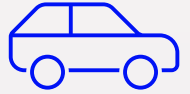
Mazda's 360 Peacock Sponsorship

Mazda returned to brand sponsorship with takeovers of Peacock comedies, a Modern Explorers campaign targeting 'Active Connected Families' and a Pod Bounce ad supported by Advanced Audience Targeting.



2026 **AUTO** Predictions

These are 5 key topics as the auto industry balances the push and pull between consumer and seller control as well as an evolving policy landscape.



Loyalty Drop-Off

As consumers desire more choice and less commitment, loyalty to brands, powertrains, and models is declining.

Nurturing core relationships and expanding into growth audiences will be critical to long-term market resiliency.

+10pps

YoY growth in consumers who say they consider 3+ brands when starting the car-buying process, reaching 53% in 2025¹

The Affordability Divide

In today's K-shaped economy, higher-income buyers drive the auto market as affordability pressures lead others to delay purchases and hold onto cars longer.

Media strategies that pair brand building with performance will engage both future and active buyers.

-11pps

decline in share of new vehicle sales to <\$75k HHIs in 2025 vs. 2019; >\$150k gained +13pps²

EV Reality

Autos are entering a state of realism on EVs, recalibrating expectations and balancing demand with policy changes, shifting focus across fuel types, especially hybrids.

Autos will continue to seek flexible ad opportunities as they adapt messaging in an evolving landscape.

2x

Hybrid share of sales was nearly twice that of pure EVs in 2025 (16% for hybrids vs. 9% EVs)³

Rethinking The Road To Purchase

While consumers value in-person car buying, digital tools are playing a bigger role. 3rd party retailers face growing competition as new buying models & agentic AI emerge.

Innovative advertising tactics that help brands stand out will bring the buying experience directly to consumers.

80%

of buyers and sellers are open to using AI to support their vehicle purchase decisions, with 26% already using it¹

The Auto & Tech Collision

Brands are ramping up robotics investments, advanced sensors, and AI to modernize production and autonomous capabilities as they prepare for the future.

Premium content and events can be a platform for brands to promote new capabilities and reinforce positioning as leaders in the future of tech & mobility.

48%

of the world's top automakers are already piloting advanced robotics in their factories⁴

NBCUniversal

THANK YOU

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