

# A LOOK UNDER THE HOOD

.....  
HOW TV DRIVES DIGITAL INTERACTIONS FOR AUTOMOTIVE

VIDEO ADVERTISING BUREAU REPORT 2018



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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.

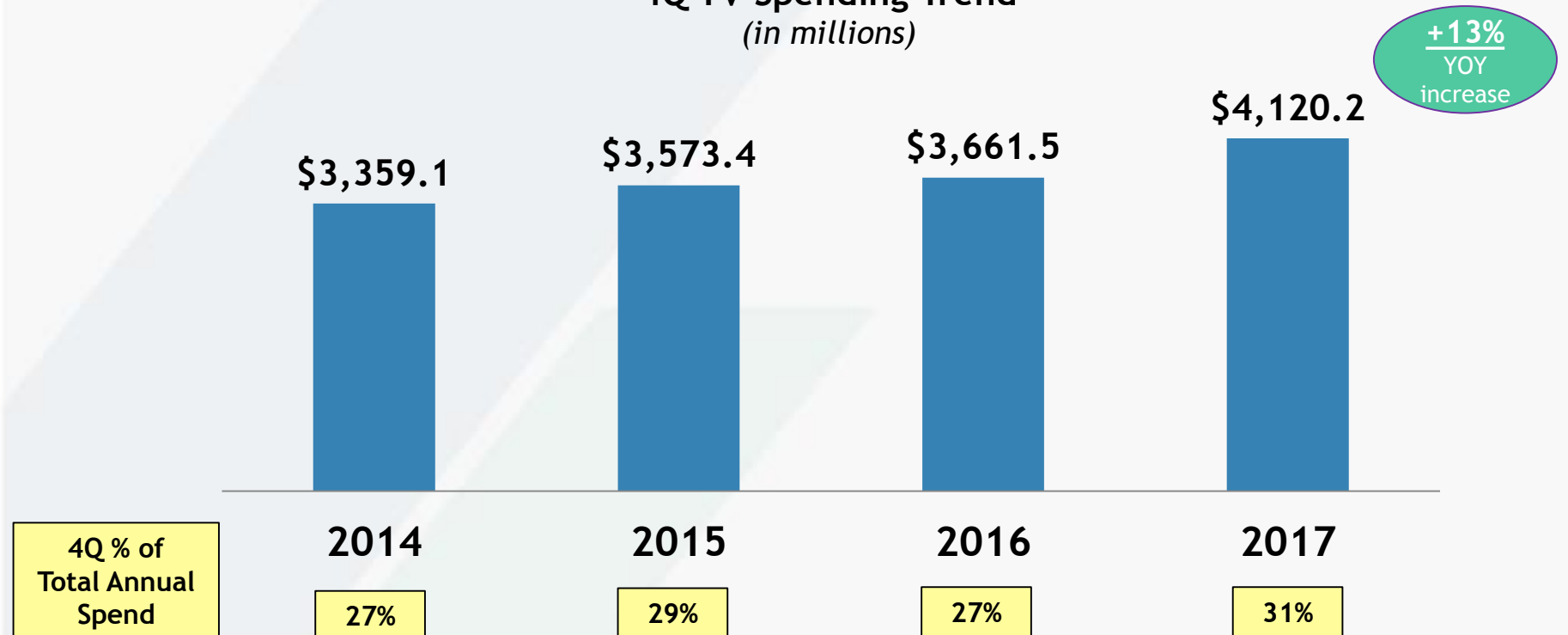
Throughout the analysis, which focuses on a year-over-year comparison of the crucial 4Q time period, we provide numerous examples of how TV spend, both increases and decreases, has an effect on the desire of a consumer to further engage with a brand through online *investigation*, *conversation* and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

## Automotive Category 4Q TV Spending Trend *(in millions)*



### 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.

# 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.





# TV Spend vs. Website Traffic Correlation

# “Total Universe” Findings: A Definitive Correlation Between TV Spend & Website Traffic

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

## 19 Brands

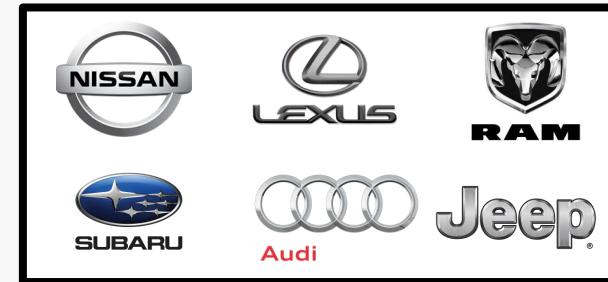
11 Brands Were  In Both TV Spend & Monthly Unique Visitors

8 Brands Were  In Both TV Spend & Monthly Unique Visitors



## 6 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.

# “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

19 Automotive Manufacturers: TV Spend vs. Unique Website Visitors  
4Q “Year Over Year” Comparison (4Q ‘16 vs 4Q ‘17)

TV Spend Up /  
Uniques Up

11 Advertisers

*On average:*

**+15% more TV Spend**

**+48% more Unique Visitors**

TV Spend Down /  
Uniques Down

8 Advertisers

*On average:*

**-15% less TV Spend**

**-28% less 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.

# 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 mediаметrix 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.

# 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

8 U.S. Automotive Manufacturers: TV Spend vs. Unique Website Visitors  
4Q "Year Over Year" Comparison (4Q '16 vs 4Q '17)

TV Spend Up /  
Uniques Up

5 Advertisers

On average:

+14% more TV Spend

+44% more Unique Visitors

TV Spend Down /  
Uniques Down

3 Advertisers

On average:

-26% less TV Spend

-32% less 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.

# 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)

		 L I N C O L N	 C H E V R O L E T	 B U I C K
<u>Avg Monthly TV Spend (000):</u>				
Oct '16 - Dec '16:	\$93,818	\$27,862	\$113,885	\$19,603
Oct '17 - Dec '17:	\$109,973	\$38,813	\$120,732	\$23,378
<b>% Difference:</b>	<b>+17%</b>	<b>+38%</b>	<b>+6%</b>	<b>+19%</b>
<u>Avg Monthly Unique Visitors (000):</u>				
Oct '16 - Dec '16:	5,342	813	3,285	826
Oct '17 - Dec '17:	7,097	1,098	4,917	1,116
<b>% Difference:</b>	<b>+33%</b>	<b>+35%</b>	<b>+50%</b>	<b>+35%</b>




## 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.

# 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)

	 <i>Cadillac</i>		
<u>Avg Monthly TV Spend (000):</u>			
Oct '16 - Dec '16:	\$23,151	\$20,613	\$19,592
Oct '17 - Dec '17:	\$20,628	\$16,627	\$9,827
<b>% Difference:</b>	<b>-11%</b>	<b>-19%</b>	<b>-50%</b>

<u>Avg Monthly Unique Visitors (000):</u>			
Oct '16 - Dec '16:	1,044	1,471	1,234
Oct '17 - Dec '17:	750	1,030	759
<b>% Difference:</b>	<b>-28%</b>	<b>-30%</b>	<b>-39%</b>

## 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.


# Asian Auto Segment:

## A 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.

# 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

7 Asian Automotive Manufacturers: TV Spend vs. Unique Website Visitors  
4Q "Year Over Year" Comparison (4Q '16 vs 4Q '17)

TV Spend Up /  
Uniques Up

3 Advertisers

On average:

**+13% more TV Spend**

**+59% more Unique Visitors**

TV Spend Down /  
Uniques Down

4 Advertisers

On average:

**-5% less TV Spend**






**-33% less 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.

# 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	
					
<u>Avg Monthly TV Spend (000):</u>	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
<b>% Difference:</b>	<b>+10%</b>	<b>+12%</b>	<b>+20%</b>	<b>-11%</b>	<b>-5%</b>
<u>Avg Monthly Unique Visitors (000):</u>					
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
<b>% Difference:</b>	<b>+43%</b>	<b>+101%</b>	<b>+8%</b>	<b>-10%</b>	<b>-6%</b>


## 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.

# 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



## 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.

# 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

4 European Automotive Manufacturers: TV Spend vs. Unique Website Visitors  
4Q "Year Over Year" Comparison (4Q '16 vs 4Q '17)

TV Spend Up /  
Uniques Up

3 Advertisers

On average:

**+27% more TV Spend**

**+36% more Unique Visitors**

TV Spend Down /  
Uniques Down

1 Advertiser

On average:

**-22% less TV Spend**

**-2% less 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.

# 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



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.



# 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		+6%	+92%
Asian	 HONDA	+12%	+83%
Asian	 TOYOTA	+10%	+31%
European		+52%	+143%
European		+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.

# 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		-50%	-51%
Domestic		-19%	-27%
Asian		-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.

# 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		+17%	+184%
Asian	 HONDA	+12%	+29%
Asian	 HYUNDAI	+20%	+60%
European		+16%	+305%
European		+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.

# 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)






Category	Brand	TV Spend	Social Actions
Domestic	 	-50%	-25%
Asian	 INFINITI.	-11%	-64%
Asian	 ACURA	-2%	-4%
European	 Audi	-9%	-95%

## 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.

# 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		+17%	+170%
Domestic	 CHEVROLET	+6%	+598%
Domestic	 RAM	+9%	+32%
Asian	 HONDA	+12%	+173%
European		+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.

# 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%

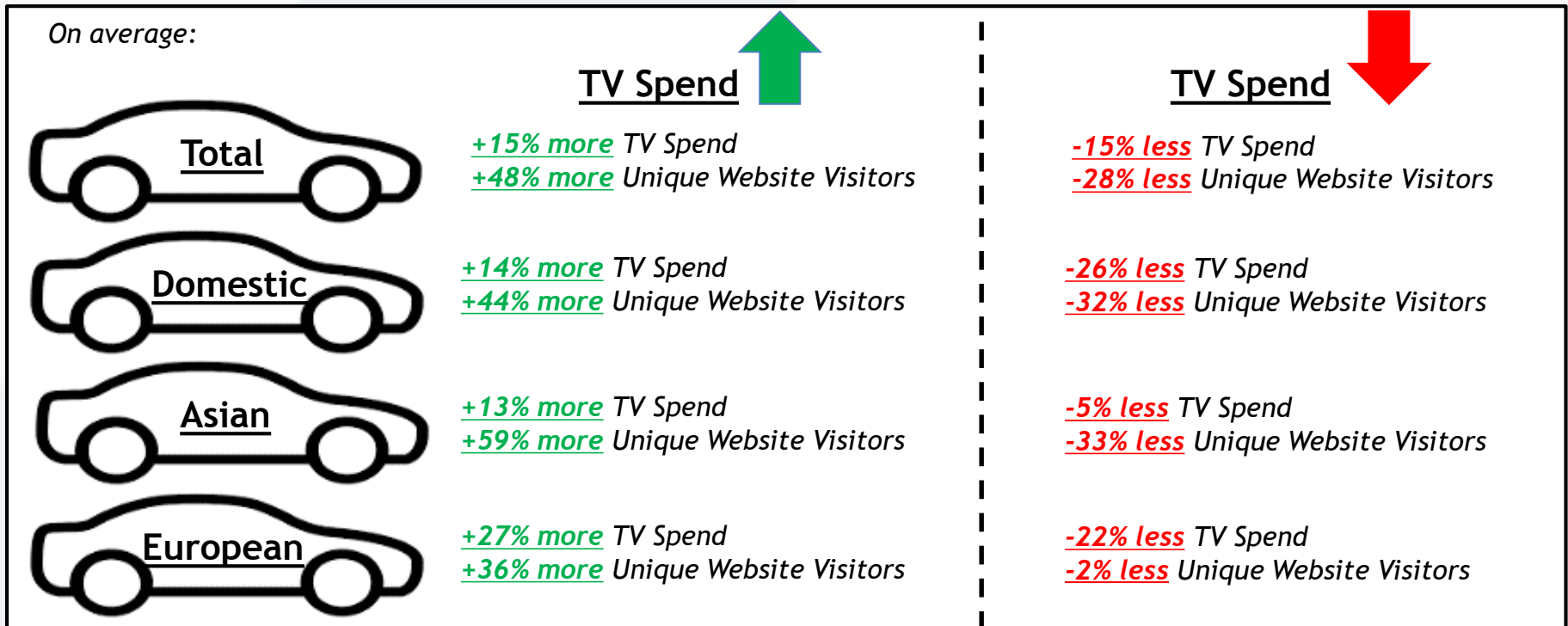
## VAB: A LOOK UNDER THE HOOD

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.

# 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...*



## VAB: A LOOK UNDER THE HOOD

Source: VAB analysis of comScore mediameatrix 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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