

# 2020 MID-YEAR AUTOMOTIVE REVIEW

Quarterly context and industry trends.

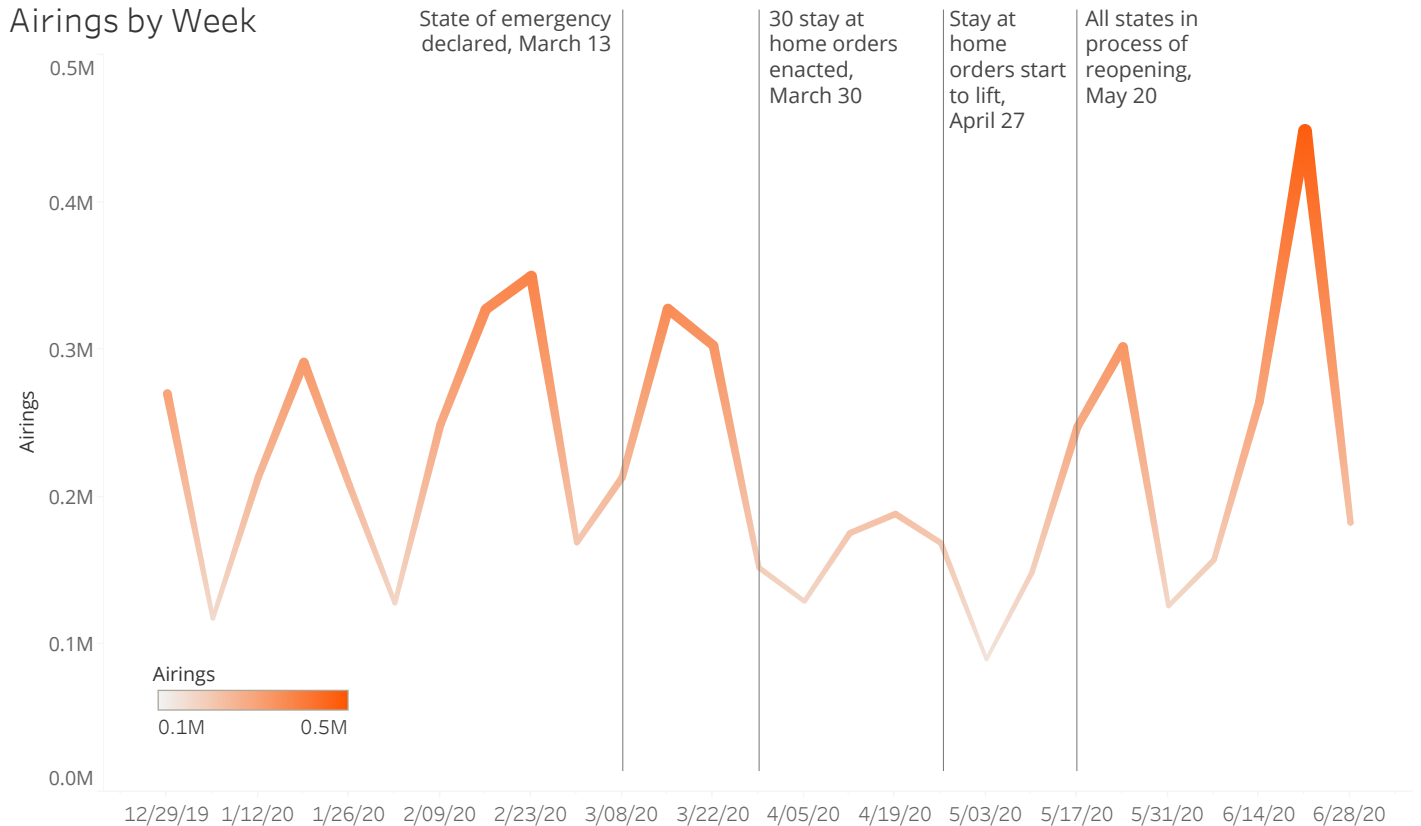
The automotive industry is rebounding from the stay-at-home orders that started in April and damaged automotive sales. As these orders have lifted across all 50 states, auto advertising efforts are returning to more normal levels as compared to 2019 and Q1 2020.

Q1 saw relatively normal levels of ad activity for the industry since Covid-19 did not impact daily life in earnest until mid-March. Q2 took a big hit in April, but airings are returning to levels near that of January and February. In fact, June 2020 was only **100K** airings short of June 2019 levels indicating that recovery is happening quickly.



## COVID-19 IMPACTS AIRINGS

- Q1 2020 saw a total of **3.1M** ad airings for Tiers 1 and 2
- Q2 2020 saw a total of **2.6M** ad airings for Tiers 1 and 2
- Q2 2020 experienced a **13.4%** decrease in airings from Q1 due to Covid-19 closures



### 2019 VS. 2020 AIRINGS - TIER 1 & 2

	2019	2020	% CHANGE
<b>JANUARY</b>	0.96M	0.94M	-3%
<b>FEBRUARY</b>	1.07M	1.06M	-1%
<b>MARCH</b>	1.32M	1.10M	-17%
<b>APRIL</b>	1.22M	0.69M	-43%
<b>MAY</b>	1.29M	0.84M	-34%
<b>JUNE</b>	1.23M	1.15M	-7%

- Airings in January and February 2020 were squarely comparable to airings in January and February 2019
- March saw a sharp decline in 2020 airings versus 2019 airings
- April 2020 was the month hit hardest, coming in 43% lower than April 2019
- May and June 2020 show signs of recovery, with June ending near “normal” levels of ad airings - signaling good news for the industry

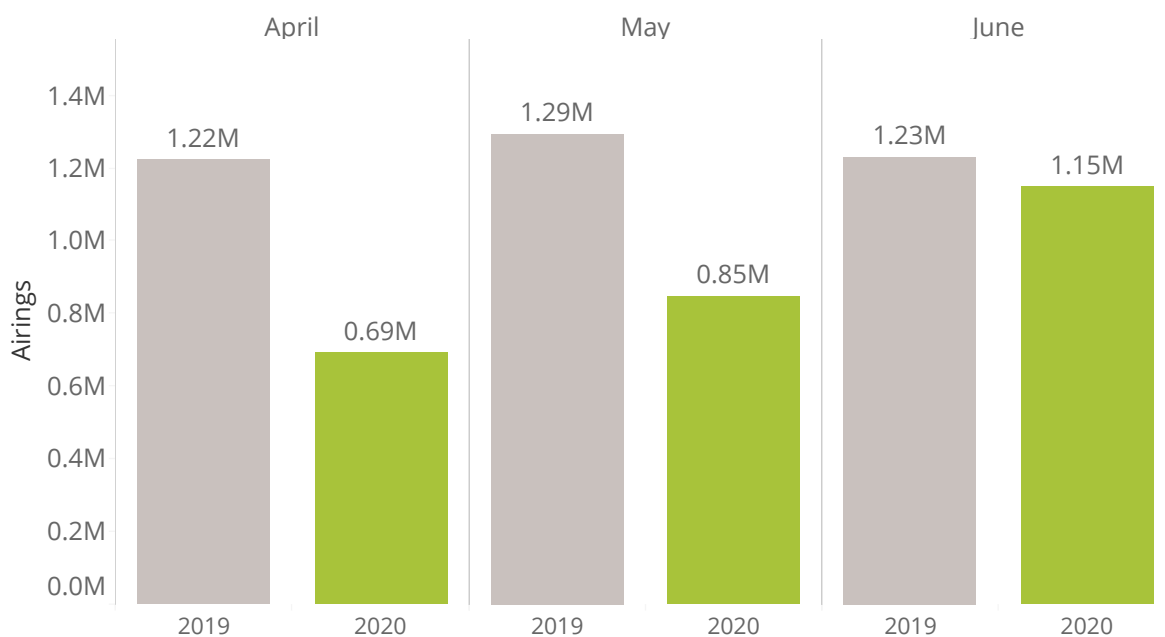


### DEEP DIVE: Q2 2020

- Tier 1 ads aired a total of **1.8M** times in Q2 - vs. **2.0M** times in Q1
- Tier 2 ads aired a total of **826K** times in Q2 - vs. **1.0M** times in Q1
- Tier 2 ads had **~\$245M** dollars behind them in Q2 - vs. **~\$309M** in Q1

### Q2 2019 vs. Q2 2020

Total Airings Tiers 1 and 2  
Q2 2019 vs. Q2 2020



- Overall, Q2 2020 saw **25%** fewer ads than did Q2 2019
- Q2 2020 saw airings totals with more volatility than 2019 - from a low of **0.7M** in April to a good recovery number of **1.1M** in June
- Ad airings in Q2 2020 increased **66%** from April to June - signaling a rebound in on-air activity for Tier 1 and 2 advertisers

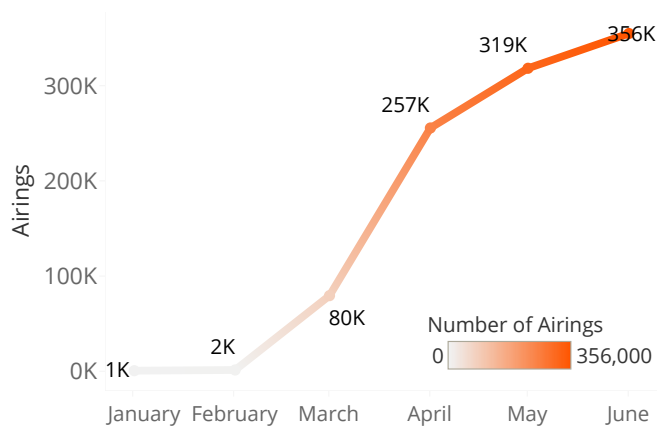


## MID-YEAR AUTOMOTIVE REVIEW

### Q2 Ad Trends - Tiers 1 and 2

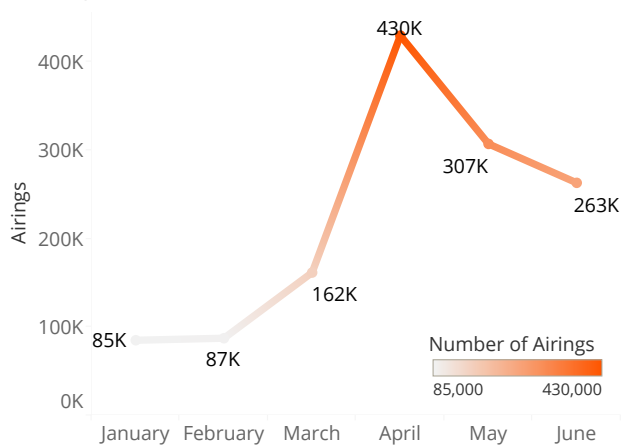
Q2 2020 had several defining trends: the number of ads mentioning “online shopping” or “home delivery” increased dramatically, messaging around customer support and/or service-related ads increased, and daypart allocation shifted.

"Online Shopping" and "Home Delivery"  
Ad Airings



- Ad transcriptions containing references to “online shopping” or “home delivery” in Q2 increased **1,012%** over Q1
- The top three advertisers airing this messaging were Chevrolet, Ford, and Toyota

Supportive Messaging: "We're Here for You"  
Ad Airings



- Ad transcriptions show that messages of customer support and/or service in Q2 increased by **199%** over Q1
- Support-focused ads rose sharply between March and April, peaking at **430K** airings

- Daypart allocation changed over the course of Q2 - Daytime and Prime Access were the two dayparts most affected
- Daytime had **25%** fewer airings than Q1 and Prime Access had **23%** fewer airings than Q1
- Most volatility was seen in April. By June, daypart allocation percentages were back to levels comparable to Q1



## Q2 TOPLINES

### Top Three Car Sizes by Airings - Tiers 1 and 2

Compact CUV	600K
Full Size Pickup	190K
Traditional Midsize	177K

### Top Three Models by Airings- Tiers 1 and 2

Chevrolet Equinox	184K
Hyundai Tucson	122K
Toyota Camry	115K

### Top Three Advertisers by Airings - Tier 1

Ford	260K
Toyota	232K
Nissan	176K

### Top Three Advertisers by Airings and Spending - Tier 2

Honda	172K	\$48M
Ford	171K	\$37M
Toyota	123K	\$31M

### Top Three Markets by Airings - Tier 2

Boston, MA	21K
New York, NY	20K
Miami, FL	19K



Advertising Analytics provides foundational data vital to informed decision making. Ad occurrence data is accessed through real-time, intuitive dashboards that provide detailed insight into automotive advertising and shorten decision making time.

For more information or to request a demo, please email [rmcguire@advertisinganalyticsllc.com](mailto:rmcguire@advertisinganalyticsllc.com)