DEALERS’ GUIDE TO
THE NEW TV
A NEW ERA OF ADVERTISING
DEALERS’ PATH TO SUCCESS

For many years, dealers have reflexively thought about TV as news, sports, top networks, and primetime. Although that is very effective when you are upper-funnel focused, the lower-funnel requires a different toolkit. It calls for a change in how you plan, buy, and evaluate TV.

We are in the first act of helping dealers understand how to grow their business through data and advertising technology in The New TV environment. Data has enabled TV to become a full-funnel solution, moving beyond awareness to influence lower-funnel purchase behaviors. Greater accountability goes hand-in-hand with this shift. Just as in digital media, TV advertising can be tied to tangible outcomes, both on and offline.

Welcome to The New TV.

TODD HAUSER
VP, Automotive Strategy
DEALER MARKETING CHALLENGES

DYNAMIC INDUSTRY CHANGE CALLS FOR SHIFTING GEARS

The auto industry has gone through an abundant amount of change in recent years. Because audiences are consuming media in a multitude of new ways, influencing in-market shoppers and boosting showroom visits has become increasingly more difficult.

However, dealers are some of the most sophisticated marketers in the space. Properly evaluating strategies and tactics is what they do best. Testing and learning has become the norm for advertisers in the industry. This has put a big premium on the ability to measure and inspect strategies with the most up-to-date data and analytic advancements.

Make TV as accountable as digital – or more.


“40% of dealers say proving the ROI of their marketing activities is their top marketing challenge.”
THE NEW TV LANDSCAPE

WHAT IS THE RIGHT MEDIA TO REACH POTENTIAL RETAIL CUSTOMERS?

TV has undergone a dramatic transformation over the past 20 years. Consumers have unprecedented access to a proliferation of content. Advertisers have unprecedented access to new sources of data. Combined, these two trends have shaped The New TV landscape.

For viewers, it all starts with content. In addition to the actual amount of new content now available, there are other factors changing consumers’ viewing behavior. Primary among these are changes in distribution channels and access to content across devices.

All of these changes add up to more time spent viewing The New TV. In fact, despite myths of TV’s demise, households spend 43 minutes more with TV daily than in 1983.²

The New TV encompasses linear TV, OTT (over-the-top), and all the other acronyms: TVE (TV everywhere), VOD (video on demand), SVOD (subscription VOD), AVOD (ad-based VOD), IP Video, and the rest.

Comcast Spotlight estimates it would take a full year of 24/7 viewing to watch all the new shows produced in 2018.

VIDEO REACHES A LOT OF PEOPLE, FOR A LOT OF TIME³

- 23% of adults watch video on a tablet weekly
- 27% of adults watch video on a PC weekly
- 50% of adults watch video through connected devices weekly
- 60% of adults watch video on smartphone weekly
- 91% of adults watch TV/video weekly

Over 2 hours per week
Over 2 hours per week
Over 5 hours per week
Over 2 hours per week
Over 35 hours per week

THE NEW TV LANDSCAPE

DATA IS THE KEY TO FINDING AUTO INTENDERS

Opportunities are emerging for automotive advertisers to use more robust data. At Comcast Spotlight, we utilize viewership data to provide insights into what, how, when, and how long audience segments are watching TV.

This data enables more granular insights about how particular consumer segments in local markets are viewing - and hence how they can be reached with your message.

Let’s say a dealer in Portland, OR is trying to sell trucks. With insights from Comcast’s viewership data, 79,000 households in Portland are identified as being in-market for a pick-up truck, whereas only 20 households are identified using traditional methods.

This larger sample size creates a viable understanding of how truck purchasers watch, in turn opening up a new opportunity for marketers.

Comcast viewership data can provide insights into:

- 2 trillion viewing events per year
- 3 billion hours of viewing per month

THE NEW TV IN ACTION:

Use viewership data to reach new auto intenders

**SAMPLE SIZE COMPARISON (HH)**

<table>
<thead>
<tr>
<th></th>
<th>Comcast</th>
<th>Traditional</th>
</tr>
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<tbody>
<tr>
<td>National</td>
<td>17,000,000</td>
<td>200,000</td>
</tr>
<tr>
<td>Local Market: Portland</td>
<td>380,000</td>
<td>2,000</td>
</tr>
<tr>
<td>Portland: In-Market for Pick-Up</td>
<td>79,000</td>
<td>20</td>
</tr>
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5. Source: Comcast Internal Viewership Data, FY 2018
THE 3 STEP PATH TO SUCCESS

Translate Knowledge into Data

Follow Data to Take Advantage of All Premium Content

Make TV as Accountable as Digital – or More

#TheNewTV
STEP ONE
Translate knowledge into data

ADVANCEMENTS IN TARGETING

BUILDING A FULL FUNNEL

All of this new data means auto advertisers can focus on two equally important campaign goals. You can continue to use the traditional upper-funnel tactics that build the customer relationship, creating awareness and forming a positive opinion of your dealership, even if they are not ready to buy. And now you can also move down the sales funnel to focus on driving sales by targeting those in-market to buy a vehicle, similar to the way you target audiences in digital media.

To make that shift, you must reach your target audience wherever they are watching. It’s not so much about how many households are watching a given program, but how many households in the target audience segment are watching. Generally, this requires marketers to move beyond the top networks, dayparts, and programs that are used to build awareness.

THE NEW TV IN ACTION:
Build a data-infused campaign with one or more of 20 in-market auto audience targets to drive sales.

<table>
<thead>
<tr>
<th>FOLLOW THE AUDIENCE</th>
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<tbody>
<tr>
<td><strong>AUDIENCE</strong></td>
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<tr>
<td><strong>GOAL</strong></td>
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<tr>
<td><strong>CONTENT</strong></td>
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<table>
<thead>
<tr>
<th><strong>Audience Focus</strong></th>
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<tbody>
<tr>
<td>Owns a SUV</td>
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<tr>
<th>NEW VALUE PROPOSITION</th>
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<tr>
<td><strong>CONTENT</strong> continues to drive upper funnel impact</td>
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<tr>
<td>Data allows TV advertisers to focus on specific targets and their buying behaviors</td>
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<tr>
<td>TV can now be used for mid and lower level funnel tactics</td>
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The New TV is a full funnel solution.
CASE STUDY

WEST COAST CHEVROLET DEALER

Use New TV tactics to transition from a legacy planning and buying method to a data-driven strategy targeting new vehicle intenders.

Lift in New Vehicle Intender Frequency

Lift in New Vehicle Intender Reach

CASE STUDY: NEW VEHICLE DEALER

BETTER RESULTS WITH “NEW TV” TARGETING

SET-UP

This dealer was only buying a few networks during the evening.

THE CHANGE

They increased their investment and implemented a data-driven strategy using The New TV targeting capabilities.

RESULTS

Their reach of New Vehicle Intenders increased from 19% to 36% and their frequency increased from 1.5 to 2.0 with +153% total target impressions.

METRICS

<table>
<thead>
<tr>
<th></th>
<th>Target: New Vehicle Intenders</th>
<th>Legacy</th>
<th>Data-Driven</th>
<th>Network</th>
<th>Commercials</th>
<th>Reach</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>42</td>
<td>391</td>
<td>36%</td>
<td>2.0</td>
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<tr>
<td></td>
<td></td>
<td>11</td>
<td>65</td>
<td></td>
<td></td>
<td>19%</td>
<td>1.5</td>
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<td></td>
<td></td>
<td></td>
<td>36%</td>
<td>36%</td>
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<td>+153%</td>
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6. Source: Comcast Internal Viewership Data (Q4 2018)

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**STEP TWO**
Follow data to take advantage of all premium content

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**THE NEW TV IN ACTION:**
Utilize a cross-platform campaign to engage your in-market shopping audience prior to their online search to ensure they consider your dealership first.

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**CROSS-PLATFORM DELIVERY – TAKE ADVANTAGE OF ALL PREMIUM CONTENT**
Starting with a well-defined segment and data-driven insights as outlined in Step One, Comcast Spotlight has helped dealers and advertisers run over 150 campaigns across 25 markets. From these campaigns, we have aggregated learnings that will help advertiser’s achieve better reach with their New TV advertising.

Tactics that are proven to maximize an advertiser’s reach include using a broader mix of networks, running schedules over a longer period of time, and using complementary video formats.

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**DEVICES OWNED**

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<tr>
<th>Device</th>
<th>Ownership Percentage</th>
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<tbody>
<tr>
<td>Desktop or Laptop</td>
<td>94.3%</td>
</tr>
<tr>
<td>Tablet</td>
<td>66.6%</td>
</tr>
<tr>
<td>Smartphone</td>
<td>89.8%</td>
</tr>
</tbody>
</table>

**LET'S TAKE A LOOK AT WHERE AUTO INTENDERS ARE SPENDING THEIR TIME.**

- 83.9% have watched cable in the past 7 days
- 68.2% watch 10+ hours of TV per week
- 41.7% spend 10+ hours online per week

**CROSS-PLATFORM DELIVERY – ADD DIFFERENT FORMATS**
Linear TV campaigns that added premium Video On Demand (VOD) to the mix increased reach by an incremental 17%.

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Exposure to TV can now be tied to tangible outcomes, including online activity. Comcast Spotlight’s attribution capabilities allow an advertiser to measure website traffic before and after a TV flight, including lift in visitors within 30 minutes of its ads airing as well as during the course of the campaign. It’s all about discovering how your offline advertising is impacting online results.

NEW CUSTOMER DASHBOARD SHOWS THE CHANGE IN YOUR WEB TRAFFIC

At Comcast Spotlight, we’re ready to prove our impact on your business. The latest addition to our suite of IMPACT attribution products shows the effectiveness of your Spotlight campaign on your web traffic. Instant IMPACT provides you with insights about your web traffic in the 30 minutes following the airing of your linear campaign spots.

With Instant IMPACT, you’ll have access to a custom dashboard showing changes in your website activity. Dig into the data using filters for various campaign metrics, from day and hour to creative and zone-level activity.

THE NEW TV IN ACTION:
Utilize your immediate visitor dashboard to optimize and measure the IMPACT of your campaign in driving auto shoppers to your website.
CASE STUDY®

TENNESSEE NEW VEHICLE DEALER

- Transitioned from a legacy planning & buying method
- Changed to a data-driven strategy using The New TV targeting new vehicle intenders

Lift in Direct/Organic Sessions: 42%
Lift in New Users: 37%
Lift in Lifetime Warranty Conversion (referenced in commercial): 63%

THE ANALYTICS PROVE OUR IMPACT

CAMPAIGN/MEASUREMENT DETAILS

Client Name: Tennessee Nissan Dealer
Analysis Period:
- Prior Period: Dec 1, 2018 - Dec 31, 2018
- Current Period: Jan 1, 2019 - Jan 31, 2019

Campaign Details:
- Zones: Dickson, Fort Campbell, Clarksville, and Cadiz
- Strategy: Comparing two time frames with different advertising strategies. Jan (more networks broader dayparts) vs Dec (less networks narrow dayparts) for similar budget

<table>
<thead>
<tr>
<th>CAMPAIGN ZONE PERFORMANCE</th>
<th>Change in Campaign Zones</th>
<th>Dec 1, 2018 - Dec 31, 2018 vs. Jan 1, 2019 - Jan 31, 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>AWARENESS</td>
<td></td>
<td></td>
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<tr>
<td>Lift in Total Sessions</td>
<td>+37%</td>
<td>(2333 vs. 3304)</td>
</tr>
<tr>
<td>Lift in Direct/Organic Sessions</td>
<td>+37%</td>
<td>(2383 vs. 3260)</td>
</tr>
<tr>
<td>Lift in New Users</td>
<td>+42%</td>
<td>(5559 vs. 7616)</td>
</tr>
<tr>
<td>CONSIDERATION</td>
<td></td>
<td></td>
</tr>
<tr>
<td>INTENT</td>
<td>+42% Lift</td>
<td>(364 vs. 168)</td>
</tr>
<tr>
<td>PURCHASER FUNNEL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CAMPAIGN ZONE PERFORMANCE</td>
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</table>

THE RESULTS

CAMPAIGN/MEASUREMENT DETAILS

Campaign Zones Period over Period | Dec 1, 2018 - Dec 31, 2018 vs. Jan 1, 2019 - Jan 31, 2019


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TRANSPARENT REPORTING

NOTHING TO HIDE

After crafting the perfect message and finding the ideal audience, the last thing you want to worry about is whether you’re going to receive transparent reporting.

At Comcast Spotlight, we are committed to providing clients with reports and materials that are clear and easy to read, providing detailed metrics. We take it a step further and interpret the data to gain valuable insights, helping us to inform your campaign and ensure optimization.
SUMMARY:

SO WHAT IS THE NEW TV?

The New TV is about new viewing experiences for consumers that are ushering in big changes—and big opportunities—for dealers.

From a consumer perspective, TV viewing has been nothing short of transformed. Billions of dollars are invested in content development annually and viewers have near unlimited access to it.

For auto advertisers, strong consumer engagement, quality environments, and increased time spent viewing make The New TV an unparalleled marketing channel. In addition, advances in advertising technology are enabling more data-driven capabilities for targeting and measurement, making The New TV a full funnel marketing solution.

The path to success for dealers includes three pillars: turning knowledge into actionable data, following that data wherever it leads, and measuring outcomes to ensure and improve campaign success. Dealers who follow these steps are achieving better results in The New TV world—one that continues to evolve, deliver, and delight.

THE NEW TV IS

- Powerful new content meriting $67 billion per year in investment, tempting you to spend years of your life watching it.
- Multi-device access to new and old video content commanding attention for more than 5 hours per day—65% more time than non-video.
- Using viewership data to provide insights into how, when and how long audience segments are watching TV. At Comcast Spotlight, dealers can utilize one or more of the 20 in-market auto intenders audience segments.
- Opportunity to use premium video for full funnel marketing goals.
- Proof that full funnel video yields measurable results.
With advertising, it's not about outspending your competition; it's about outsmarting them. That's where we can help. We have a robust team of automotive advertising experts across the country to partner with you on delivering your dealership business goals.

You will not only work with an Automotive Advertising Expert but also get a team of advertising professionals across disciplines to work for you on your campaign (marketing, research, interactive, creative).

To learn more about Comcast Spotlight's Advertising Solutions, visit: ComcastSpotlight.com/Auto

Or call us at 888.877.9799 to work with you on the best advertising plan for your business.