



# THE NEW TV

REDEFINING VIDEO  
FOR VIEWERS AND  
ADVERTISERS

COMCAST  
SPOTLIGHT™



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# EXECUTIVE SUMMARY

TV has undergone such transformation over the past decade that a new name is needed to fully represent this evolved medium. Comcast Spotlight, and others, including the Interactive Advertising Bureau, have dubbed it “The New TV.” In short, The New TV offers consumers unprecedented access to new content and advertisers unprecedented access to new sources of data. This paper explains why and how TV has undergone this transformation, and more importantly, how advertisers can take advantage of The New TV to drive the best results.

For viewers, it all starts with content. Programming has been on a 20-year journey, moving from mainstream fare to increasingly more sophisticated storytelling. This shift has been fueled in part by technology, with increasing distribution and access points putting controls squarely in the hands of the consumer. Despite the occasional proclamation that TV is on the decline, in truth the overwhelming supply of high quality content and unfettered access has pushed total video consumption to new highs.

Of course, this fundamental shift in what and how viewers watch comes with new opportunities and challenges for advertisers. The biggest change is data. There’s more of it, and there’s more demand for it. Data can now be applied to TV in ways that span from targeting to attribution, rendering TV a full-funnel solution.

As a result, advertising strategies to reach today’s consumers need to change. Success in The New TV environment requires letting go of some long-held beliefs and embracing new learnings that local and other advertisers around the country are discovering as they test data-driven strategies.

This paper offers practical advice on best practices culled from aggregated trends and case studies of Comcast Spotlight advertising clients who are successfully navigating The New TV landscape.



## KEY TAKEAWAYS

- The New TV is a redefined medium that encompasses linear, OTT, and all the other acronyms: TVE, VOD, SVOD, AVOD, IP Video, and the rest. This medium is thriving; quality content and access to that content has never been stronger, pushing viewer engagement and time spent watching video to high levels.
- New access points and technological advancements have resulted in a proliferation of data that has opened up new ways for TV advertisers to reach consumers throughout the full marketing funnel.
- Moving beyond some long-held myths and incorporating the realities of The New TV landscape into TV buying strategies will help advertisers achieve significantly greater results.
- A 3-step roadmap can help advertisers achieve success on The New TV: translate customer knowledge into actionable data; follow that data to whichever premium content it leads; measure the results with accountable metrics to connect the marketing funnel.
- Proof points exist: advertisers who are following this roadmap are achieving, measurable gains in both upper-funnel reach and lower-funnel metrics such as consideration and intent to purchase.

## **DESIRE FOR A NEW SET OF ADVERTISING TOOLS**

The impetus behind redefining TV and video comes from our clients. At Comcast Spotlight, we have the privilege of speaking with advertising clients across the country, from large corporations to local businesses. Recently, it seems they are all asking for the same thing. They want addressability. They want more accountability. They want TV to act more like digital media.

## **IS IT WORTH IT?**

In the same breath, some clients indicate that they are less interested in traditional linear—which, according to some, is “dead”—and intend to move spend to digital. Other skeptical clients will indicate they are passionately interested in OTT. So we stepped back and took a look at the larger perspective. If “TV is dead” and audiences are abandoning the medium, then why bother investing in new tools and tactics like addressable? Some of those same clients will also make a personal reference to bingeing on a new show, reminding us of the memorable phrase of FX CEO John Landgraf that we are at a moment of “Peak TV,” with almost too much good content to watch. How can all these things be

true at the same time? How can we be at “TV is Dead” and “Peak TV” at the same time?

## **NOT JUST NEW TACTICS — A DYNAMIC, EVOLVED MEDIUM**

The answer, of course, is that audiences are not abandoning TV, but are engaging with it in new ways, pushing time spent, reach, and engagement to record highs—The New TV. The arrival of this new medium might have been easy to miss. While some elements of it have been widely commented on, such as the content phenomenon known as Peak TV, other changes attracted less press. Nonetheless, programming investment, a proliferation of distribution channels, big data, and advertising innovation are all reshaping the medium. The transformation in video is real and broad in its implications for audiences and advertisers.

## **BUT TAKING ADVANTAGE OF IT WILL REQUIRE CHANGE**

We also know that fundamental change is required for advertisers to capture the full value of this data-enabled, new TV. Many TV advertisers have been following the same protocols in their approach to TV for many years, fueled

by commonly held assumptions—we can call them myths—about TV. Although these dated protocols may not be the best way to drive optimal results in The New TV world, change is hard, and fear of negative consequences is always a concern—even when the data telling clients to change is often right in front of them.

## **A (VERY) EARLY LOOK AT BEST PRACTICES**

With this in mind, in addition to describing the transformation itself, we have analyzed over 150 advertising campaigns currently running on The New TV, in local markets, with the goal of developing early best practices. In doing so, we’ve identified learnings that lay the groundwork for local advertisers interested in audiences and accountability. We hope that in a few years this will become the standard way people buy TV and we look back and smile at the simplicity of these learnings. For now, however, these best practices are already driving significant improvement for our clients. Local advertisers are firmly on the path, and together we’ll define the course for The New TV.

Good Reading!

**The Comcast Spotlight Research Team**

# THE NEW TV



## A CONSUMER'S PERSPECTIVE: RICHER CONTENT, UNFETTERED ACCESS

TV has quietly evolved over twenty years. Critics of the medium will often compare the *M\*A\*S\*H* finale in 1983—the highest-rated telecast of all time with a 60.2 HH Rating—to one of today's top-rated shows to illustrate the sharp contrast in TV's ability to attract a mass audience.<sup>1</sup> The truth is, in 2018, households spend 43 minutes more with TV daily than in

1983.<sup>2</sup> The time is simply spread across more content, and accessed in more ways. Audiences are empowered to decide what they want to watch, and when they want to watch it. And because of this, audiences continue to flock to TV in all its current manifestations.

### CONTENT CHANGES

So how did we get here in terms of this proliferation of content? It's been a 20-year journey, as content transformed from big-tent, mainstream fare to more sophisticated storytelling.

### THE EVOLUTION OF THE NEW TV

Early TV was about bringing people together around a common set of shows. These shows had broad appeal. They were safe. TV was entirely mainstream.

This all changed with the debut of The New TV. Programming branched beyond the mainstream to encompass more niche audiences. Characters were allowed to be more multi-dimensional. The New TV could be quirky. Clever. Fresh.

The New TV's evolution can be segmented into three distinct periods.

1. Source: Nielsen, Top 100 Telecasts of all time by Ratings through 9/25/18, based on HH Ratings.

2. Source: Nielsen, Average Daily TV Viewing Hours & Minutes, 2018 = broadcast year 2017-2018, 1983 = broadcast year 1982-1983, HH viewing.

## COMCAST SPOTLIGHT'S TIMELINE OF THE NEW TV'S EVOLUTION

HERE IS OUR TAKE ON THE INDUSTRY  
CHANGES THAT SHAPED THE NEW TV

### Phase I — 1999-2007: The Sopranos Era

In 1999, The New TV emerged with the debut of *The Sopranos*. *The Sopranos* cracked open TV by introducing into the TV format the richness of character, the great writing, and the violence and sex of great feature films.

*The Sopranos* also paved the way for other high-quality shows, like *Sex & the City*, *The Wire*, and *Dexter*. Importantly, however, during Phase I, most of these shows appeared on premium content networks, where the controversial content was protected by a paywall.

### Phase II — 2007-2012: The Mad Men Era

In the summer of 2007, The New TV entered its second phase with the launch of *Mad Men* on AMC. Shows like *Breaking Bad* and *The Walking Dead* followed, bringing the quality and sophistication of this new programming to advertising-supported basic cable channels.

### Phase III — 2013-2018: House of Cards to This is Us

In Phase III, subscription video on demand (SVOD) content producers, including Netflix, entered the scene in a big way. Kicking off in 2013 with *House of Cards*, and moving to *Orange Is the New Black*, *Transparent*, and a host of others, these subscription services pushed the envelope—and upped the competition. As a result, the industry at large responded, and we're seeing greater investment in innovative content across the board, including network shows like NBC's *This is Us*, and USA's *Mr. Robot*.

It would  
take over  
a year to  
watch all  
original  
scripted  
content  
produced  
in 2018

## PEAK TV, 2018 AND BEYOND

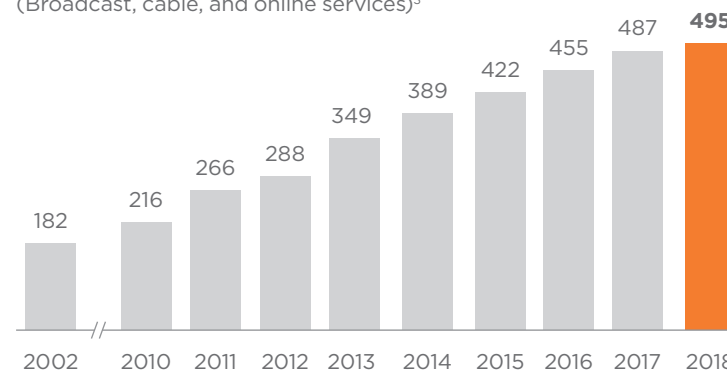
The culmination of the three periods above brings us to the period that has been called "Peak TV."

In addition to the output of traditional TV producers, SVOD producers have pushed the medium over the edge, making it a great time to be a consumer of video content.

Investment has been escalating, with content producers now spending \$67 billion per year to make these shows (MoffettNathanson Research 2018 Forecast for Production/Program Spending). Moreover, the number of scripted shows now in production has risen from slightly more than 200 in 2010, to almost 500 in 2018 (Graph 1). If most viewers feel there is not enough time in the day to watch all the programming available, they're right: Comcast Spotlight research estimates that it would take a full year of 24/7 viewing to watch all of the new content produced in 2018.

Of course, 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.

ESTIMATED NUMBER OF ORIGINAL SCRIPTED SERIES  
(Broadcast, cable, and online services)<sup>3</sup>



3. Source: Estimated Number of Scripted Series: FX Networks Research. 1/2/18.

## NEW DISTRIBUTION AND ACCESS

### ACCESS CHANGES

In the past, consumers' access to premium TV and video content was generally limited to cable TV or satellite providers. Today, there are many more pipes, or access points, to view programming.

Content is carried by services ranging from MVPDs like Comcast, Spectrum, Verizon Fios, or Direct TV, to over-the-air access provided by broadcast TV, to SVOD providers that carry content for fees over broadband, to TV Everywhere apps that allow you to stream content as part of an MVPD's home subscription service. These services and apps, in turn, are available on many devices, including smart TVs, smartphones, tablets, video game consoles, and over-the-top devices. Massive investment in technology has followed the massive production of content, creating more vehicles to carry the content to viewers. All of this combined creates an ecosystem designed to make video available in every person's pocket, all of the time.





## HOW CHANGES IN ACCESS AFFECT VIEWING BEHAVIOR

### The Rise of Binging

Changes in access to content adds a new dimension to the viewing experience—time. Since viewers are no longer limited by the linear model, series can be enjoyed in their entirety at the viewer's discretion. This has led to the phenomenon of binge watching.

As example, in the early days of TV, it took eight years to watch every episode of *Full House*. But in this world of The New TV, 30,000 people watched all eight years of episodes in one month on Hulu. (Hulu Insights, "There's No Such Thing as Too Much TV, 6/26/2018).

### Evergreen Content: What's Old is New

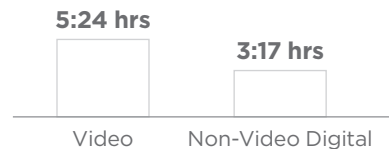
The *Full House* example illustrates the evergreen effect on content that new access models provide. With older shows now available at the click of a remote, viewers are discovering, or re-discovering, favorite series from their past. Shows like *Friends* and *The Office* are gaining new popularity. So in addition to the deluge of new programming, viewers can also access shows from TV past, making choices even more robust.

### More Time Spent Viewing

All of these changes add up to more time spent watching video. Video viewing has followed the general trend of always-on access and

continues to outpace other non-video media in time spent. This trend can be measured and stated in a variety of different ways, but here are some of the headlines:<sup>4</sup>

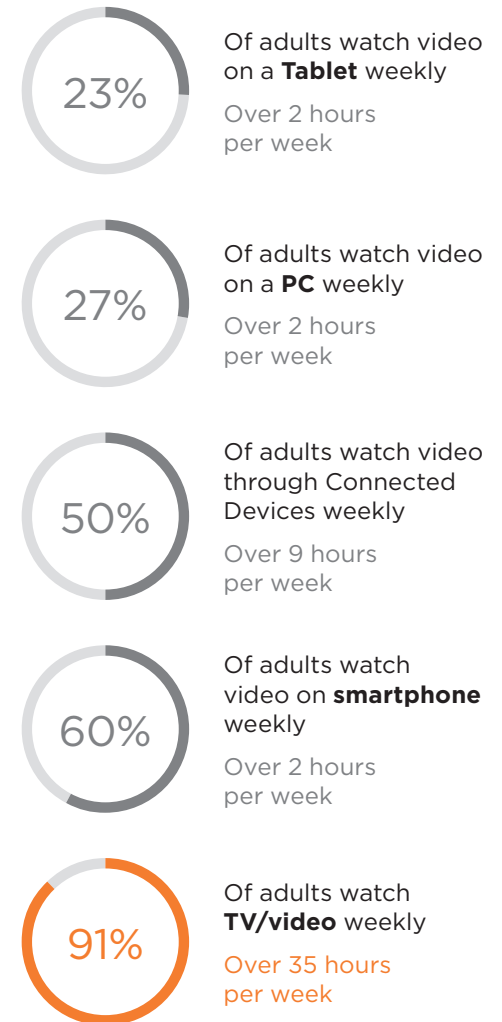
- Video remains the main driver of media usage—adults spend over 5 hours a day (5:24) watching TV/video.
- Adults spend 65% more time with video (5:24) than non-video digital (3:17).



- Adults watch TV/video on non-traditional devices or formats for between 2 and 9 hours per week.
- 91% of adults watch TV/video weekly (inclusive of live linear, DVR time-shifted, and viewing on connected devices), for a total of 35 hours on average.

All of this additional video viewing offers more opportunity for advertisers to connect with viewers. The New TV comprises the highest-quality video content, continuously accessible, with highest levels of consumer engagement, and unparalleled reach. Now, as discussed in the next section, advertisers can apply data to that viewing, with targeting and attribution, making TV a full funnel solution.

## VIDEO REACHES A LOT OF PEOPLE, FOR A LOT OF TIME<sup>5</sup>



4. Source: Nielsen Total Audience Report Q2 2018, daily time spent with video.  
5. Source: Nielsen Total Audience Report Q2 2018.



# A MARKETER'S PERSPECTIVE: NEW DATA, SMARTER ADVERTISING

Besides new access to a proliferation of quality content, data is the other factor that makes TV new, specifically as it relates to advertising. Data has created a whole new value proposition for TV. So, while new viewing options have made TV more complex, data helps to solve some of the challenges created by this complexity by making TV advertising smarter.

## TARGETING AND MEASUREMENT ADVANCES

Data comes in many forms, including first-party data from advertisers. Matching that data to media behaviors and then measuring media outcomes, however, still relies in large part on traditional media measurement providers.

Those providers are evolving in their approach in response to The New TV landscape. comScore was a pioneer in using return path data (RPD). Nielsen is joining in with plans to release a RPD-fueled currency. However, for the most



SAMPLE SIZE COMPARISON (HH):  
Comcast STB Data vs. Traditional Survey Method<sup>6</sup>

	Comcast	Traditional
National	17,000,000	200,000
Local Market: Portland	380,000	2,000
Portland: In-Market for Pick-up	79,000	20

6. Source: Comcast Internal Viewing Data, 3Q18 HH counts and Scarborough In-tab Estimates, National Dec 2016 - May 2018 and Local Market Feb 2017 - Feb 2018.



part—especially in local markets—advertisers and their agencies are still using panel-based data.

Opportunities are emerging for local advertisers to access more robust data from other types of companies—like Smart TV manufacturers and MVPDs—to add insights on viewing behavior within those local markets.

For instance, companies like Comcast, an MVPD, are able to utilize viewing data from their set-top boxes (STBs), without disclosing individual customer information to the advertisers.

Looking at Comcast (as an example), the cable provider can examine what, when, and how long audience segments are watching linear TV for live, DVR, and VOD programming. In aggregate, this encompasses 2 trillion viewing events per year, 3 billion hours of viewing per month, across 40 states and nearly 80 markets (Comcast Internal Viewership Data, FY 2018). This aggregated viewing data enables more granular insights about how particular consumer segments, in local markets, are viewing—and hence how they can be reached with advertising.

The chart above shows what this STB data means to local advertisers. Let's say an auto dealer in Portland, OR is trying to sell trucks. With insights from Comcast's STB segment data, appended with third-party data, like Polk, 79,000 households in Portland are identified as being in market for a pick-up truck, whereas only 20 households are identified using typical panel-based surveys. This larger sample size creates a viable understanding of how truck purchasers watch, in turn opening up a new opportunity for marketers.

**NEW OPPORTUNITIES FOR TV ADVERTISERS—BUILDING TOWARD A FULL-FUNNEL SOLUTION**

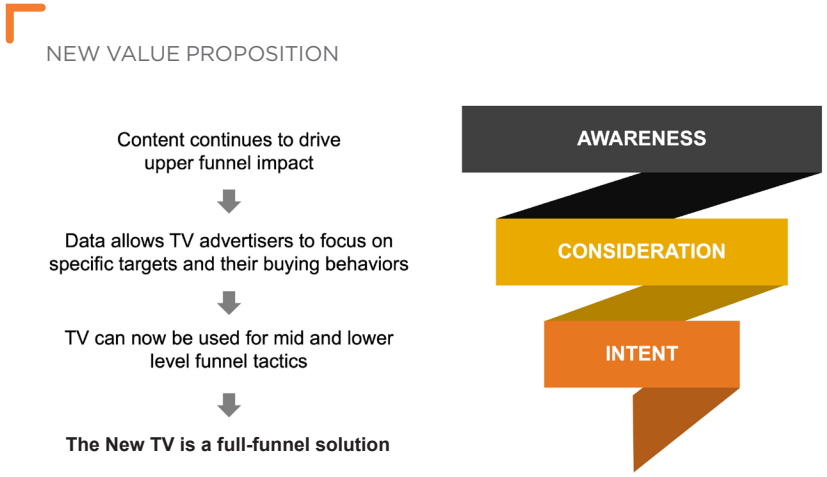
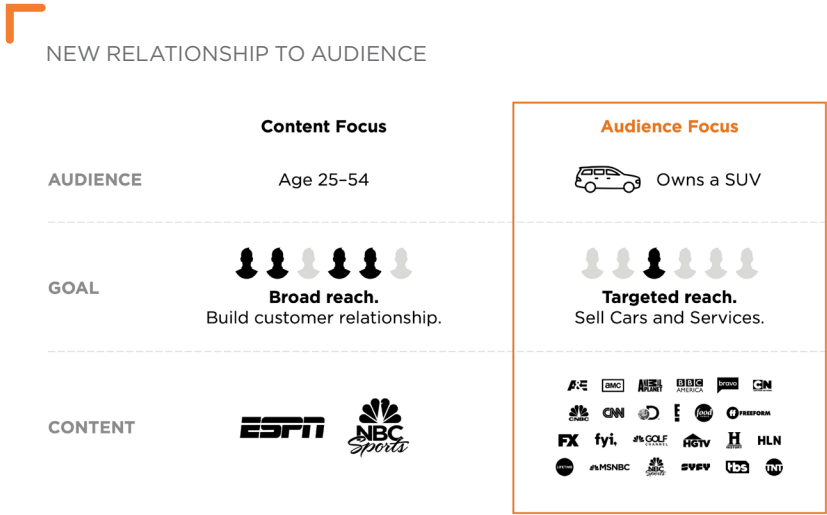
In traditional TV ad buying, advertisers focus on building upper-funnel awareness. The target audience is purposely kept broad, like Adults 25-54, because marketers want to make a good impression on as many potential customers as possible by using carefully chosen content. The goal is that when these customers are ready to buy a product or service, they will think favorably of the advertised brand. While it is also true that data itself has an influence on the approach, data that comes from a small sample could limit the advertiser’s understanding of the customer to the broadest segments—age and gender. Upper-funnel advertising through the lens of content was and is effective, but it constrains advertisers from doing more with the powerful medium of TV and premium video.

With the granularity of the data now available, marketers don’t need to stick to a broad demo target. For instance, auto dealers can focus on those in-market to

buy a vehicle, similar to the way they target audiences in digital media. Access to new data expands their capabilities. New data allows advertisers to use the power of The New TV’s content, distribution, and reach, to move down the sales funnel, shifting campaign goals from building awareness to driving sales.

Likewise, the focus begins to shift from selecting content to reaching customers. Marketers can begin to build reach and frequency to their consumer target; to do that, they must follow their audience wherever they are watching. It’s not so much about how many people are watching a given program or network, but how many members of the desired audience are watching. Generally, this requires marketers to move beyond the top networks, dayparts and programs.

Content and broad appeal programming will continue to drive awareness just as they have always done. But now, by using data to reach an audience that includes the most likely customers, these targeted campaigns can be used to build consideration and intent, making TV and premium video a full-funnel solution.





# DRIVING ADVERTISING RESULTS ON THE NEW TV

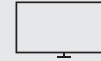
As discussed, an upper funnel TV approach is about building a customer relationship; creating awareness among customers so that—even if they are not ready to buy today—they will have a positive opinion when they are ready. Big data allows marketers to focus on the customers who are ready to buy now. In this case, the ad campaign becomes about the viewers, more than the program. For instance, the foodie who watches *Top Chef* in primetime doesn't stop being a foodie when she fires up her CNBC app at 6AM. In order for marketers to take full advantage of The New TV—and TV as a full-funnel solution—advertising needs to be planned, bought and sold in a new way.

## A NEW WAY OF THINKING: BREAKING THROUGH THE MYTHS

Some assumptions in the industry about how TV is watched have proven tenacious. These myths made advertisers believe that TV viewing was simpler than it was; and as viewing changed, the myths held strong. Advertisers, we were told, could simply pick the top genres, or networks, all in prime time, and their campaigns would be successful. The reality, however, is that with The New TV, these adages are no longer true. With so many viewing options, no two viewers are watching in the same way. In fact, there are over 820 billion unique network combinations available to advertisers even if they are choosing just 10 networks. While this can seem overwhelming, it also represents a wide open opportunity to optimize a television campaign to meet an advertiser's specific goals—to make the campaign as successful as it can be. But first, advertisers must let go of the myths surrounding television buying.

Why is debunking these myths so important? Because in The New TV world, advertisers who understand these new realities and incorporate them into their buying strategies achieve substantially better results than those who adhere to the old rules.

7. Source: Comcast Internal Viewership Data, Q3 2018.



### THE NEW TV REALITIES<sup>7</sup>

#### MYTH

Only top networks get reach

#### REALITY

The Top 5 ad-supported cable networks make up only 14% of total time spent viewing. In fact, the average household watches an average of 17 different cable networks per month.

#### MYTH

Primetime is the only valuable daypart

#### REALITY

Two-thirds of all viewing occurs outside of primetime. An advertising schedule that uses primetime exclusively is only tapping into 31% of all viewing.

#### MYTH

Only sports and news are viewed live

#### REALITY

The vast majority of viewing—87% is still live.

## THE 3 STEP PATH TO SUCCESS IN NEW TV



Translate  
Knowledge  
into Data



Follow Data to  
Take Advantage  
of All Premium  
Content



Make TV as  
Accountable as  
Digital—or More

## THE 3 STEP PATH TO SUCCESS IN NEW TV

Comcast Spotlight has worked with many clients to identify ways to transform advertising campaigns to align with the principles of The New TV. This path includes three major steps outlined below and illustrated with real-world learnings from our ongoing work with clients testing The New TV strategies.

### 1 STEP ONE TRANSLATE KNOWLEDGE INTO DATA

As discussed in the previous section, The New TV audiences are fragmenting and consumers' viewing patterns are becoming more individualized. While using standard age and gender targeting to build awareness has an important place in the budget, using data to uncover deeper consumer insights will augment these results. Comcast Spotlight clients are the experts on their customers. What is required is to transform that knowledge into segments that can be used in advertising.

As example, a regional pizza chain in the Portland area recognized that its customers fell into three broad segments. The first, what they called the CEO of Food, is moms with children, who need to get dinner on the table quickly and easily. The second, Sport Fans, order pizza to accompany their favorite televised sporting events. And its third target segment, "Other" Pizza Diners, is defined as young men who don't want to cook, love pizza, and are on a limited budget when it comes to dining out.

### TURNING KNOWLEDGE INTO DATA<sup>8</sup>

Client



**PIZZA SHOP**  
Portland, OR

Segment A



**CEO OF FOOD**  
Women 35-54 with presence  
of children age 4+

Segment B



**SPORTS FANS**  
Adults showing interest  
in general sports

Segment C



**"OTHER" PIZZA DINERS**  
Males 18-44 with HHI less  
than \$50K

8. Source: Comcast Internal Data, Jun 2018; Client-provided customer data; Comcast residential subscribing households, a subset of the full footprint interconnect.

These are each unique audiences. Each views TV and video differently. So after an advertiser defines a segment, the next step is choosing the right media to reach those consumers. If working with robust viewing data, the advertiser can understand what networks and timeslots their segments are viewing, and in what concentration—showing where the advertiser will want to place ads to maximize reach.

In the example below, the ranker for “Other” Pizza Diners —again, the young male audience with limited income—shows that networks like Tru TV, MTV and Comedy Central have the highest concentration of “Other” Pizza Diners, while networks like Discovery, FX and ESPN have the highest raw number of “Other” Pizza Diners. Balancing a schedule between high reach and high concentration networks allows advertisers to achieve proper reach and frequency against the target, while maintaining an effective CPM.

By contrast, as shown in the comparison chart, in order to effectively reach the CEO of Food, advertisers must add networks like E!, Bravo and ESPNU. Sports Fans show yet another viewing profile, as shown in the chart. Today, advertisers have the data and targeting capabilities to effectively and efficiently target their desired audience.

#### TOP 10 INDEXING NETWORKS<sup>9</sup>

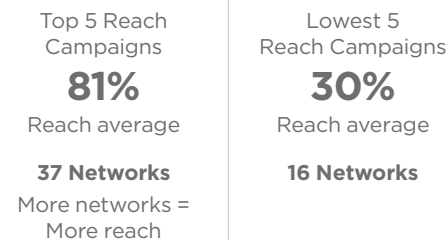
CEO OF FOOD	SPORTS FANS	OTHER PIZZA DINERS
TruTV	ESPN	Tru TV
Freeform	GOLF	MTV
CMT	CMT	Comedy Central
MTV	ESPN 2	Freeform
Comedy Central	Comedy Central	FX
E!	NFL Network	TBS
ESPNU	Pac 12 Net	CMT
FX	Fox Sports 1	SYFY
Bravo	Tru TV	VH1
TBS	Freeform	NFL Network

## 2 STEP TWO FOLLOW DATA TO 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 advertisers run over 150 campaigns across 25 markets. From these campaigns, we have aggregated learnings that will help advertisers achieve better reach with their New TV advertising. Tactics that have proven to maximize advertiser’s reach include using a broader mix of networks, running schedules over a longer period of time and using complementary video formats.

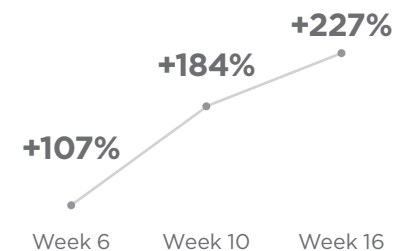
### Run Broad and Deep<sup>10</sup>

- The 5 highest reaching campaigns achieved 81% reach, and ran on 37 networks, on average.
- The 5 lowest reaching campaigns achieved 30% reach, and ran on 16 networks, on average.



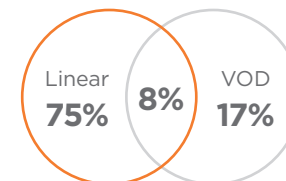
### Run Long<sup>11</sup>

- In week 5, on average, campaigns delivered 107% increase in reach over week 1.
- In week 10, on average, campaigns delivered 184% increase in reach over week 1.
- Growth continued through week 15, when on average, campaigns delivered a 227% increase in reach over week 1.



### Add Different Formats<sup>12</sup>

- Linear TV campaigns that added premium digital video to the mix increased reach by an incremental 17%.



9. Source: Comcast Internal Viewership Data, Q3 2018. Portland Market, “CEO of Food” defined as Women aged 35-54 with Children aged 6+; “Sports Fans” defined as Adults showing a general interest in sports; “Pizza Diners” defined as Men aged 19-44 with household income of < \$40,000. 10. Source: Comcast Internal Viewership Data. Summary across 85 Audience Intelligence campaigns. Q2 2016 through Q4 2017. 11. Source: Comcast Internal Data 4Q’16-2Q’18. Counts are within Comcast Only Residential Subscribing Households. A subset of the Full Footprint Interconnect. Analysis is based on the middle performing Audience Intelligence campaigns (~120 campaigns). 12. Source: Comcast Internal Data, March 2018. Target Segments are based on Comcast Only Residential Subscribing Households, [March, 2018], appended with Experian data, [2018].

### 3 STEP THREE MAKE TV AS ACCOUNTABLE AS DIGITAL—OR MORE

As discussed in the prior section, data has enabled TV to become a full-funnel solution, moving beyond awareness building to influence lower-funnel purchase behaviors. Greater accountability goes hand-in-hand with this shift. Just as in digital media, television advertising can now be tied to tangible outcomes, including online activity.

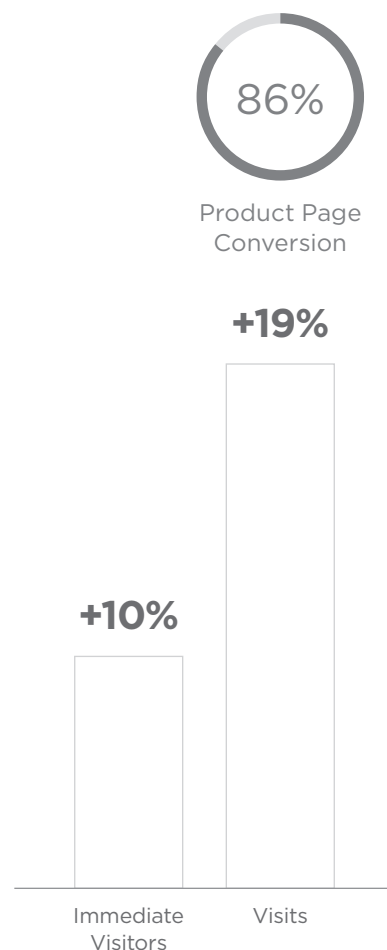
#### Website Attribution: One Measure of Success

Comcast Spotlight is working with clients to measure the success of a television campaign in driving visitors to their websites.

Our website attribution studies have found that TV drives website success metrics. The graph (right) shows a comparison of an auto dealer's website traffic before and after a TV campaign flight. This client's site saw a 10% lift in website visitors within 30 minutes of its ads airing ("Immediate Visitors"), as well as a +19% increase in total website visits during the length of the campaign.

In addition, during the course of the campaign, 86% of Immediate Visitors went to the Vehicle Display Page. Vehicle Display Page conversion is an important metric for auto dealers, as it's the best proxy for dealers to determine if a website visitor is actually interested in purchasing a particular vehicle on their lot.

#### WEBSITE ATTRIBUTION<sup>13</sup>



13. Source: Instant IMPACT powered by Internal Viewership Data. Q2 2018. Comparison of metrics before and after campaign flight for single client.

#### HOW WEBSITE ATTRIBUTION FOR TV WORKS



Audience Segment



If within 30  
minutes of seeing  
an Ad on TV...



A unique viewer  
goes to the website  
(Direct/Paid/  
Organic Search)



Becomes an  
Immediate Visitor

## THE NEW TV TACTICS DRIVE STRONGER ATTRIBUTION

The following case study offers an excellent example of how the new realities of TV buying can be used to drive stronger advertising results.

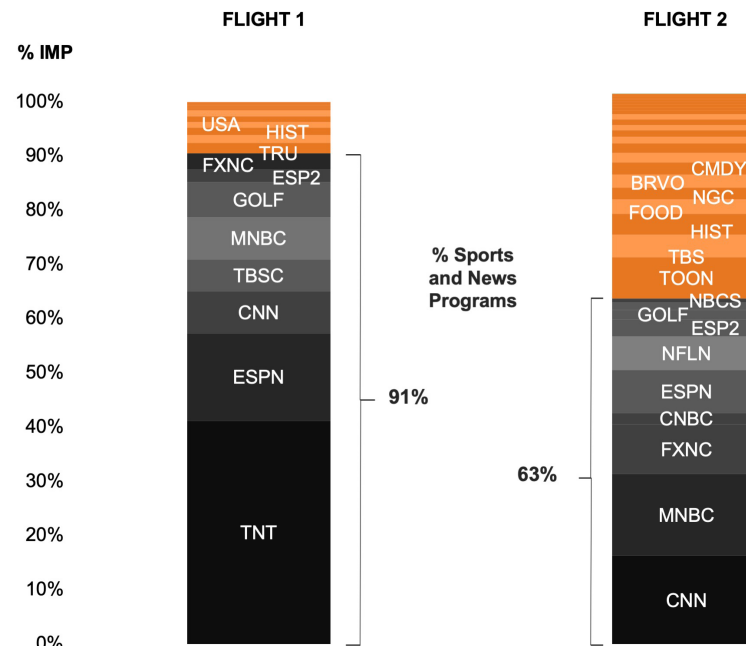
Comcast Spotlight compared two different flights from an auto dealer client to understand the dynamics that drove performance. Both flights aired across 30+ networks, but *Flight 2* achieved a higher reach and drove more website visits.

Why? *Flight 1* utilized an approach to TV video that's almost exclusively content-focused. Given an early spring timeframe, the client deployed 91% of total impressions against sports and news programming, including March Madness programming. Aligning a media strategy with content that enhances a brand is important and this strategy will generate reach. In fact, *Flight 1* reached 48% of its target households — halfway there. But it's not a complete strategy.

*Flight 2* balanced content and audience. It also used news and sports programming, but significantly enhanced the buy with a variety of other networks that produced broader, more effective reach. *Flight 2* delivered 14% more impressions, 25% greater household reach, and most importantly, more potential customers who wanted to learn more about the cars being advertised. *Flight 2* produced a 7% lift in Immediate Visitors to the dealer's website and 13% lift over the course of the campaign, compared to 2% and 5% for *Flight 1*. In addition, the conversion rate of Immediate Visitors was more than double in *Flight 2*.

In essence, *Flight 1* is an exclusively upper funnel campaign, while *Flight 2* combines upper funnel and mid/lower-funnel tactics. The differential in results shows the power of a full-funnel approach. These types of results are only a small indicator of the type of new results local advertisers can achieve using the New TV.

## WEBSITE ATTRIBUTION: DIFFERENTIATED TACTICS<sup>14</sup>



Results	Flight 1	Flight 2
Impressions	881K	<b>1MM</b>
Household Reach	48%	<b>60%</b>
Immediate Visitor Lift	+2%	<b>+7%</b>
Visit Lift	+5%	<b>+13%</b>

14. Source: Instant IMPACT powered by Comcast Internal Viewership Data, 2018. Flight comparison for single client.





# 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 advertisers.

From a consumer perspective, TV viewing has been nothing short of transformed. Programmers and creators are investing \$67 billion per year in content development. Simultaneously, nearly unlimited access to content libraries via video on demand and subscription services, has made classic TV series available in their entirety, tempting viewers to spend years of their lives watching it!

For advertisers, strong consumer engagement, quality environments, and increased time spent viewing make The New TV an unparalleled marketing channel. In addition, new access points for viewing video, coupled with advances in advertising technology, are enabling more data-driven capabilities for targeting and measurement. The New TV is a full funnel marketing solution, where awareness building—always a strength of TV—meets attribution capabilities generally associated with digital media.

While employing new advertising strategies to succeed in the The New TV world requires change, there is proof that making these strategic shifts is worth it. The path to success includes three pillars: turning knowledge into actionable data, following that data wherever it leads, and measuring outcomes to ensure and improve campaign success. Advertisers 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.
- Application of big data to video, surfacing new audience segments.
- Opportunity to use premium video for full funnel marketing goals.
- Proof that full funnel video yields measurable results.
- Opportunity for advertisers to apply the three challenges to their business.

