



2026 U.S. AUTOMOTIVE OTT / STREAMING RESEARCH REPORT

The Streaming Accountability Gap

How Automotive Retailers Can Capture the Power of CTV Without Paying for Opacity

A dealer-focused examination of media economics, placement quality, format integrity, pacing, attribution, and transparent CTV execution.

Final Report | August 2026

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About This Research

This report examines the U.S. OTT and streaming video marketplace through the operating realities of automotive retail. It combines current audience and advertising-market research, programmatic supply-chain studies, public documentation, 74 usable dealership survey responses, and eight dealer or agency interviews supplied by Pasch Group. The purpose is to help dealers separate the genuine power of connected television from the opacity, fee stacking, inventory dilution, and attribution overclaiming that can undermine execution.

RESEARCH POSITION CTV is neither automatically superior nor inherently wasteful. It becomes more valuable when a dealer can verify the screen, publisher or app, supply path, media cost, audience, frequency, pacing, and business outcome - and when correlation is not mislabeled as causation.

Dealer Stream is evaluated as a case study in a more transparent automotive streaming model because the attached interviews repeatedly identified its reporting, placement controls, targeting, pacing, and campaign segmentation as differentiators. Pasch Group has not independently audited every impression, publisher relationship, attribution method, or campaign result described by interviewees or vendors. Product-specific statements are therefore labeled as interview findings, public claims, or independently documented facts.

Methodology and Limitations

- Market evidence: Nielsen, IAB, BIA Advisory Services, Borrell Associates coverage, ANA, IAB Tech Lab, and other industry-standard sources published through August 19, 2026.
- Dealer evidence: 74 usable U.S. dealership responses from the individual-response survey export after excluding one response flagged by the supplied quality file, plus qualitative interviews with automotive marketing leaders and agency executives. Survey and interview results are directional and are not statistically representative of all U.S. dealers.
- Outcome evidence: website visits, store visits, leads, trade acquisitions, and sales match-backs are reported as vendor or interviewee metrics unless a controlled lift design is identified.
- Financial evidence: programmatic supply-chain benchmarks describe the broader digital ecosystem. They support the risk thesis but do not prove that any specific dealer vendor applies the same fees or practices.
- Terminology: this report distinguishes CTV (television-screen streaming) from OTT (internet-delivered video across devices) and OLV (online video in web or app environments). Vendors often blur these categories; dealers should not.

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Executive Summary

The American television market has already crossed the behavioral tipping point. In May 2026, streaming represented 48.6% of U.S. television watch-time, compared with 20.4% for cable and 19.2% for broadcast. In the ad-supported portion of television, streaming captured 46.6% of viewing in the first quarter of 2026. Advertiser budgets are following: IAB projects connected TV spending to grow 13.8% in 2026 while linear TV declines 1.7%. Digital video overall is expected to exceed \$80 billion in 2026. [1][2][3]

For automotive retailers, the logic is compelling. A dealership can combine television's sight, sound, motion, and large-screen impact with household targeting, first-party audience activation, ZIP-code control, sequential messaging, frequency management, and outcome measurement. The channel can reach previous customers, lost service customers, lease maturities, website visitors who did not convert, in-market shoppers, conquest households, Spanish-language audiences, fixed-operations opportunities, and community-partnership audiences. Unlike a broad DMA broadcast buy, a dealer can build campaigns around the geography and customer segments most likely to create enterprise value.

But the same programmatic machinery that creates precision also creates distance between the dealer and the media. A dealer may contract with an agency that contracts with a reseller, which contracts with a DSP or managed-service platform, which buys through one or more SSPs or exchanges before an impression reaches a publisher. At each step, economics, data, and accountability can become less visible. The Association of National Advertisers (ANA) found that only 36 cents of each dollar entering a DSP effectively reached a consumer in its 2023 open-web study. ANA's 2025 benchmark showed meaningful improvement, but also confirmed that working-media economics and measurable delivery still require active governance. [8][9]

CENTRAL FINDING The biggest automotive streaming problem is not a lack of reach; it's not reaching the right people. Dealers also lack verifiable control over what was purchased, where it ran, how much of the dealer's budget became media, whether delivery continued throughout the month, and whether reported outcomes were incremental.

The Pasch Group dealer survey reinforces that conclusion. Among quality-screened dealership respondents, 94% of those answering the budget question expected streaming investment to remain stable or increase over the next six months. Yet 64% had been frustrated by reports listing unfamiliar channels, 58% had not received show-level reporting, half lacked or were unsure about unblended CPMs by tactic, and 53% said their vendor had not discussed fraud. Nearly all respondents said substituting display or OLV for streaming television constitutes a different product and that streaming vendors should meet a Google Ads/Meta-style transparency standard. [21]

Seven Findings for Dealer Leadership

1. **Streaming is now core television, not an experimental extension.** Audience behavior and ad spending have shifted decisively. Dealers should plan one integrated video portfolio, not separate "TV" and "digital video" silos.
2. **Quality and quantity are not interchangeable.** A large impression total or low CPM may reflect FAST inventory, long-tail apps, OLV, mobile screens, duplicated auctions, or non-transparent resale rather than the premium programming a dealer believed it purchased. Price and scale must be evaluated with publisher, program type, device, format, reach, frequency, and outcome quality.
3. **Format mixing destroys comparability.** A proposal labeled "OTT" can contain CTV, OLV, display, audio, and retargeting. Those formats have different economics and experiences. Each requires a separate budget, CPM, impression count, and outcome view.
4. **Placement transparency must be impression-level or close to it.** A logo slide showing Hulu, Prime Video, Paramount+, or Peacock is not proof of delivery. Dealers need an app or publisher report, device/screen split, deal type, and ideally log-level or third-party verification.
5. **Attribution should be a ladder, not a single magic number.** Exposure, completed view, website visit, qualified action, store visit, sold vehicle, and incremental lift are different levels of evidence. Match-backs establish association unless an appropriate control or modeled counterfactual is used.
6. **Pacing is an operating control.** A dealer that goes dark mid-month loses continuity and may distort frequency. Daily pacing, remaining-budget forecasts, alerts, and documented make-good rules belong in every campaign review.
7. **Dealer Stream interviews describe a quality-first alternative.** Across eight perspectives, interviewees repeatedly cited clearer placement reporting, premium inventory, smaller segmented campaigns, first-party activation, controlled

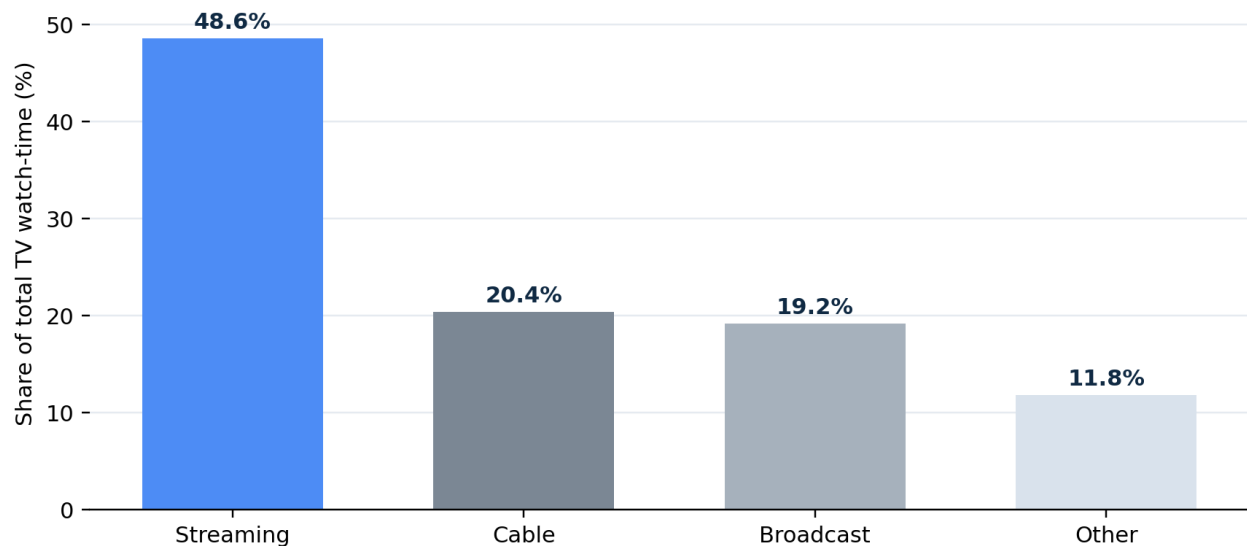
pacing, hands-on optimization, and increased real-world ad recognition. These are meaningful signals, but campaign claims still require independent validation and standardized measurement.

The Dealer Mandate

Dealers should stop buying “OTT” as a bundled line item. They should buy a defined outcome architecture with explicit media, audience, supply-path, device, placement, pacing, creative, and measurement controls. The recommended standard in this report requires a dealer to know:

- how much of the invoice is media versus agency, platform, data, verification, creative, and reseller margin;
- the percentage of spend and impressions delivered to CTV, OLV, display, audio, and other formats;
- the apps, publishers, device types, screens, geographies, dayparts, reach, and frequency actually delivered;
- whether inventory was direct, programmatic guaranteed, private marketplace, curated marketplace, or open exchange - and how many intermediaries were involved;
- whether campaigns paced to plan and remained live throughout the intended period;
- how identity resolution, first-party data, location data, website visits, and sales match-backs were generated and governed;
- what evidence shows incremental business impact, not merely that an exposed household later appeared in another dataset.

Streaming now commands nearly half of U.S. television viewing



Source: Nielsen, The Gauge, May 2026. Total viewing includes ad-supported and ad-free content.

Figure 1. U.S. television viewing by platform, May 2026. [1]

1. Marketplace Overview

Streaming television is no longer a niche channel layered onto a linear plan. It is the largest single mode of television consumption in the United States, a fast-growing advertising category, and a technology layer that can connect audience strategy with household-level delivery. The automotive retail opportunity is significant because dealerships have geographically concentrated markets, valuable first-party data, frequent monthly offer changes, and multiple profit centers that benefit from targeted video.

1.1 What Dealers Are Actually Buying

Term	Practical definition	Dealer implication
Linear broadcast	Over-the-air scheduled television distributed by local stations and networks.	Broad reach and cultural impact; limited household precision and outcome data.
Linear cable	Scheduled channels delivered through cable or satellite systems.	Can target zones and programming, but reach is tied to pay-TV distribution.
Streaming TV	Consumer-facing umbrella for television programming delivered over the internet.	Useful plain-language category, but not precise enough for a media invoice.
CTV	Streaming video delivered to a television screen through a smart TV, streaming device, or console.	Large-screen, usually non-click experience; household targeting and premium context can justify higher CPMs.
OTT	Internet-delivered video across connected TVs, phones, tablets, and computers.	Broader than CTV; an “OTT” proposal may contain materially different screens and inventory.
OLV	Video advertising inside websites or mobile/desktop apps.	Often lower CPM and clickable, but not equivalent to television-screen inventory.
FAST	Free ad-supported streaming television, such as platform-owned channels and services.	Can provide scale and valid viewing, but quality and audience fit vary by service and content.
Addressable TV	Different households receive different ads within compatible television delivery.	Supports audience precision across selected linear or streaming environments.

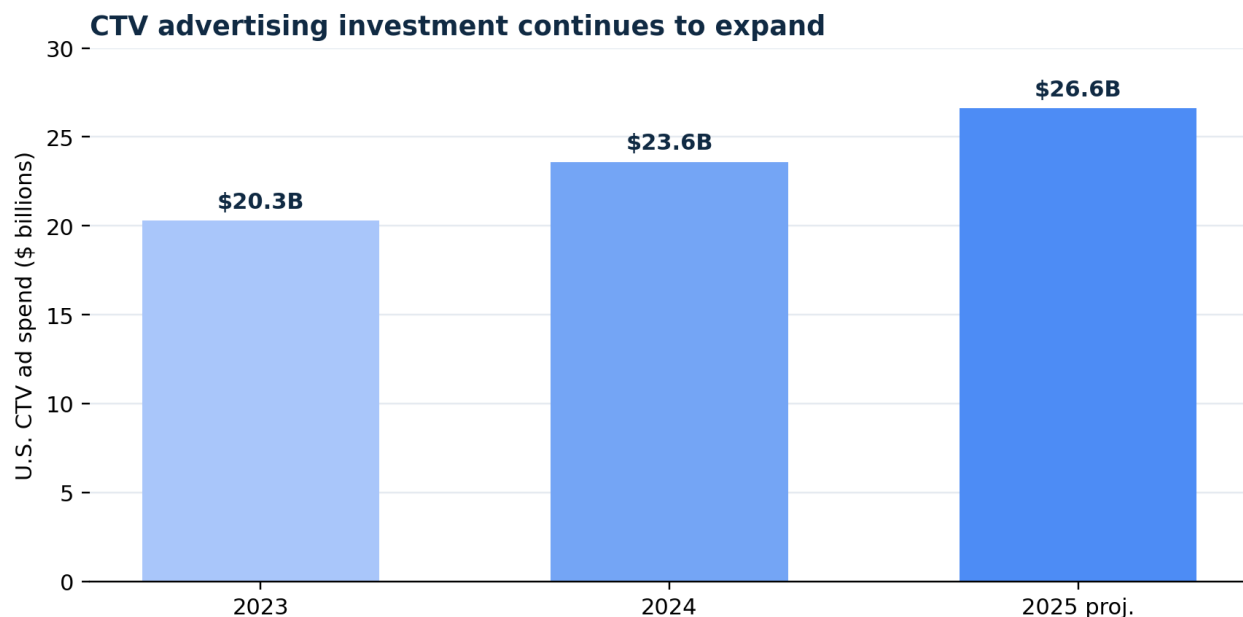
BUYING RULE Never accept “OTT/CTV” as the only format label. Require separate CTV, OLV, display, audio, and other line items with their own spend, impressions, CPM, screen mix, and results.

1.2 Audience Migration Has Become Structural

Nielsen reported that streaming reached 48.6% of total U.S. television usage in May 2026, while cable and broadcast totaled 39.6%. Streaming's share of ad-supported television reached 46.6% in the first quarter of 2026. The important dealer implication is not simply that “more people stream.” It is that streaming now carries premium entertainment, news, sports, and live events that previously anchored linear schedules. Prime Video's May 2026 share was boosted by live sports, while major streaming distributors continued to post platform highs. [1]

This does not make broadcast obsolete. Live local news, major sports, and high-reach events can remain efficient in specific markets. The decision should be based on incremental reach, geography, audience composition, and campaign purpose. A dealer may use broadcast for fast market-wide fame and CTV for controlled household reach, or use CTV alone where linear spillover and minimums are economically unattractive.

1.3 Advertising Dollars Are Following the Viewer



Source: IAB 2025 Digital Video Ad Spend & Strategy Report. 2025 figure is projected.

Figure 2. U.S. connected TV advertising spend, 2023-2025 projection. [4]

IAB estimated CTV ad spend at \$20.3 billion in 2023 and \$23.6 billion in 2024, with \$26.6 billion projected for 2025. Its January 2026 outlook projects CTV to grow another 13.8% in 2026 while linear TV declines 1.7%. IAB separately projects total U.S. digital video - CTV, social video, and OLV - to surpass \$80 billion in 2026. [2][3][4]

Local-market evidence points in the same direction. BIA called CTV/OTT the fastest-growing local media channel in its 2024 forecast, projecting 53.8% year-over-year growth. BIA estimated Tier 3 new-car dealers would spend \$112 million on local CTV inventory in 2024, placing them among the five largest local CTV verticals. [5][6]

A Borrell forecast published in early 2022 expected dealer streaming and OTT spending to reach \$2.16 billion in 2025, compared with \$437.1 million for broadcast television and \$131.1 million for cable. That older forecast should be treated as directional rather than as a verified 2025 actual, but it documented the industry's intended reallocation: dealer streaming spending had already passed \$1 billion in 2019 and was forecast to more than double by 2025. [7]

1.4 Why Automotive Retail Is Suited to CTV

Dealer asset or need	CTV capability	Strategic use
Customer and service database	Privacy-safe audience onboarding	Owner loyalty, lost service, declined work, trade cycle, lease maturity.
Website behavior	Household or identity-based retargeting	Model interest, VDP visitors, non-converting high-intent actions.
Sales geography	ZIP and household controls	Concentrate media where the dealership actually sells and services vehicles.
Multiple profit centers	Separate campaigns and creative	New, used, fixed operations, collision, acquisition, recruiting, and community.
Monthly incentives	Fast creative and trafficking changes	Rotate offer, APR, payment, inventory, and evergreen messages.

Dealer asset or need	CTV capability	Strategic use
High-consideration purchase	Sequential reach and frequency	Build familiarity before paid search or a lead form captures demand.
Dealer/OEM overlap	Complementary audience and publisher planning	Avoid duplicating Tier 1/Tier 2 reach; add local why-buy and offer relevance.

1.5 The CTV Buying Chain

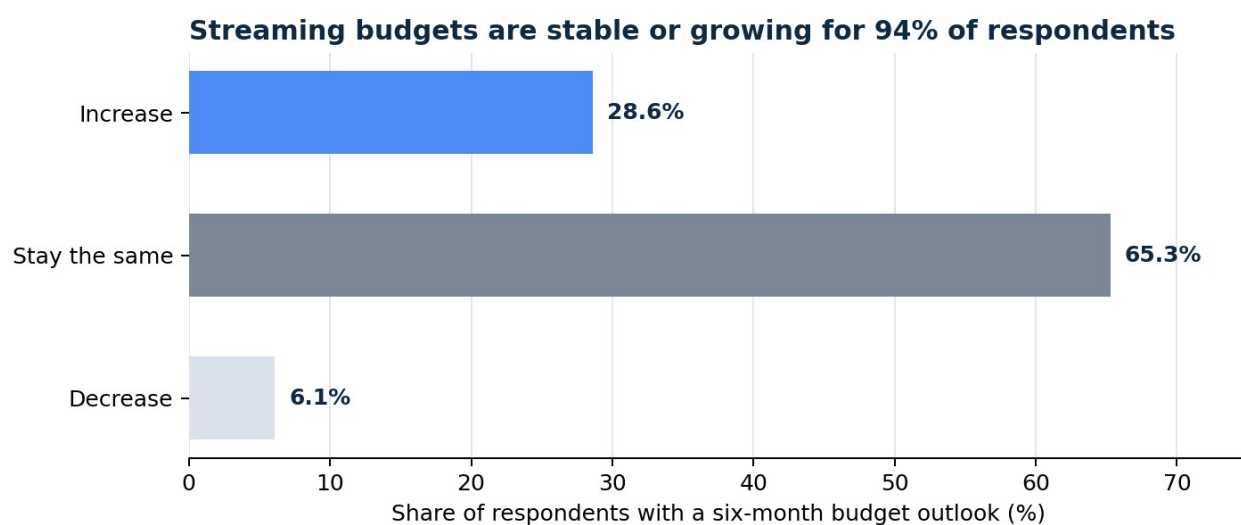
A streaming impression can travel through several commercial and technical relationships. The dealer funds an agency or managed-service partner. That buyer may use a DSP, data providers, identity services, verification vendors, and one or more deal packages. On the sell side, publishers, distributors, SSPs, exchanges, and resellers may all participate. Some intermediaries add legitimate value: aggregation, targeting, fraud control, forecasting, creative delivery, billing, or measurement. The problem is not that every intermediary takes a fee. The problem is when the dealer cannot identify the intermediary, the fee, or the value.

KEY DISTINCTION When an agency says that they buy “direct,” that is not a sufficient answer. In CTV, direct can refer to a publisher contract, a private deal ID, an authorized reseller, or simply a short supply path. Ask for the actual seller, deal type, supply-chain object, and publisher/app delivery report.

1.6 Automotive Dealer Survey: Individual-Response Evidence

In July 2026, Pasch Group conducted a survey and collected 102 survey responses from dealers. This report isolates 75 respondents who identified as employees of U.S. franchise or independent dealerships, then excludes one response flagged by the supplied response-quality file. The resulting analytical base is 74 usable dealership responses. Because survey branching produced different question-level denominators, every percentage below uses the number who answered that specific question. The sample is directional rather than statistically representative: 58 of 70 respondents answering the job-role question identified as dealership marketing leaders. [21]

Adoption is already broad. Of the 70 usable dealership respondents who answered the budget-status question, 61 (87%) said streaming TV/OTT was currently in their marketing budget, eight said it was no longer included, and one had never invested. Among 49 respondents providing a six-month outlook, 14 planned to increase investment, 32 expected to hold steady, and only three planned to decrease it.



Source: Pasch Group Streaming Media Survey, 2026. n=49 answering this question.

Figure 3. Six-month dealer streaming budget outlook. [21]

The survey also shows a gap between apparent access to reporting and confidence in its usefulness. Seventy-four percent of 42 respondents said their vendor could identify publishers or networks with impression counts, and 76% said the vendor distinguished major inventory categories. At the same time, 64% of 45 respondents had expressed frustration when reports showed unfamiliar channels, 58% had not received show-level reporting, and 50% either did not receive or did not know whether they received unblended CPMs for STV, OLV, display, and audio.



Source: Pasch Group Streaming Media Survey, 2026. Question-level n=42-46.

Figure 4. Dealer expectations compared with current reporting practices. [21]

Survey signal	Result	Dealer implication
Budget outlook	46 of 49 (94%) will maintain or increase spending.	Streaming is becoming a durable budget category, not a test line item.
Vendor selection	Top factors: every-dollar transparency (32/49), ZIP delivery (31/49), premium vs open exchange (26/49).	Dealers want controllable supply and geography, not CPM alone.
Placement confidence	27 of 42 (64%) personally saw a dealer ad on a major streaming app in the prior three months.	Recognition is meaningful evidence of presence, but not representative reach or incrementality.
Format integrity	45 of 46 (98%) consider display/OLV substitution a different product.	Format shifts require explicit approval and separate reporting.
Fee transparency	44 of 46 (96%) want Google Ads/Meta-style fee and tactic disclosure.	The market expectation is an auditable media-cost waterfall.
Fraud education	24 of 45 (53%) said the vendor had not discussed fraud.	Verification and credit policy should be part of the sale and review process.

SURVEY CONCLUSION Dealers are not rejecting streaming. They are asking for a more mature buying standard: transparent economics, explicit format boundaries, recognizable placement, granular geography, reliable frequency data, fraud controls, and attribution that does not confuse correlation with causation.

2. Industry Challenges

The challenges reported by dealers are consistent with broader programmatic research: working-media loss, multiple intermediaries, incomplete placement data, inconsistent measurement, and optimization toward inexpensive supply rather than valuable outcomes. These risks do not invalidate CTV. They define the controls required to buy it responsibly.

2.1 Lack of Financial Accountability

A dealer invoice often shows one “media” number even when that amount includes agency compensation, DSP fees, SSP fees, data, identity resolution, verification, creative, managed service, reseller margin, and publisher inventory. Without a financial waterfall, a dealer cannot know the net media budget or compare vendors on a like-for-like basis.

ANA's 2023 programmatic supply-chain study found that only 36 cents of each dollar entering a DSP effectively reached a consumer. The finding came from open-web programmatic data rather than an automotive CTV-only sample, so it should not be copied onto a dealer invoice as an assumed loss rate. It does, however, establish that programmatic transaction cost and media productivity are material governance issues. [8]

The industry is improving. ANA's Q3 2025 benchmark reported that the share of spend reaching publishers rose to 47.1%, non-measurable CTV impressions fell from 28% to 9.2%, and private marketplaces accounted for 81.6% of spend. The lesson is constructive: transparency improves when buyers use better data, curated supply, verification, and direct commercial controls. [9]

DEALER REQUIREMENT Every proposal should disclose gross invoice, agency/service fee, platform fee, data fee, verification fee, creative fee, reseller or principal margin, net media, taxes, and credits. If a fee cannot be quantified, the dealer cannot evaluate the economics.

2.2 Placement on Poor-Quality or Misrepresented Inventory

“Streaming” contains premium subscription services, free ad-supported television, long-tail apps, embedded web players, mobile video, and inventory whose identity can be incomplete or misrepresented. The ad may be technically valid while still failing the dealer's objective - for example, appearing on a small screen, in a low-attention app, outside a relevant content environment, or through an unauthorized supply path.

Jounce Media research cited by Digiday found that nearly half of CTV bid requests in a 2021 study involved multi-hop supply chains, which can reduce publisher revenue and create fraud vectors. A 2025 CIMM report noted that an average CTV platform authorized roughly 30 SSPs to sell its inventory in 2024, double the prior year's number. More authorized sellers can create scale, but also increases duplicated auctions and supply-path complexity. [13][14]

Quality must be defined in the contract rather than left to marketing language. A “premium” allowlist should identify accepted publishers or apps, permitted screens and devices, minimum video completion rate (VCR) or measurability standards, invalid-traffic controls, excluded content categories, open-exchange limits, and the procedure for crediting non-compliant delivery.

2.3 Understanding Publisher Inventory and Different Cost Structures

Not all premium inventory is the same. A subscription streaming service carrying studio programming or live sports, a free ad-supported television service, a publisher-owned app, and a curated programmatic package may all reach a television screen, but they offer different content, audience scarcity, ad loads, buying rights, and supply paths. Within a single publisher, live events, tentpole programming, general entertainment, and remnant availability can also carry materially different prices.

Those differences create distinct CPM structures. Direct or tightly controlled deals for scarce programming and high-demand audiences generally cost more than broad FAST, run-of-network, long-tail, or open-market supply. Data, identity resolution, verification, technology, and reseller layers can add further cost. A higher CPM is not automatically better, and a lower CPM is not automatically efficient; the dealer must evaluate the content environment, screen, audience, reach, frequency, supply path, and business objective together.

The practical lesson is quality versus quantity. Dealers are often shown a familiar platform or technology name and infer that the commercials will appear in that platform's most recognizable programming. That inference can be wrong. For example,

access through Amazon DSP does not by itself prove delivery on Prime Video; the underlying placement may be a different Amazon property, third-party app, FAST channel, or other programmatic supply. Likewise, a publisher logo does not establish the show, deal type, screen, or share of spend delivered there. Dealer Stream's PMP education guide calls this the "inventory illusion" and recommends reverse-engineering publisher CPM from spend and impressions to test whether the delivered inventory matches the premium story presented during the sale. [22]

Inventory level	What creates value	What the dealer must verify
Scarce premium and live programming	High-demand content, constrained supply, strong attention, and direct or tightly controlled access.	Named publisher and programming category, deal type, television-screen delivery, spend, impressions, households, and CPM.
Premium general entertainment	Recognizable subscription or publisher-owned environments with broader availability.	Exact app or publisher, content eligibility, screen mix, frequency, and whether access is direct, guaranteed, or PMP.
FAST and curated CTV	Scale, addressability, and efficient reach across ad-supported channels or selected supply.	Channel/app allowlist, curation rules, ad load, measurability, supply path, and separately reported CPM.
Long-tail or open-market supply	Potentially low-cost reach and flexibility, with greater variability in context and provenance.	App identity, authorized seller, device, fraud controls, exclusions, and limits on budget share.

DEALER REQUIREMENT Require publisher-level disclosure of spend, impressions, households reached, and CPM. Premium inventory tiers should be defined in writing, priced separately, and reconciled to the publishers and supply paths that actually delivered.

2.4 Lack of Detailed Placement Reporting

A proposal that displays streaming-service logos creates an expectation that the dealer will appear in those environments. But a post-campaign summary may report only aggregate impressions, CPM, and video completion rate (VCR). Those metrics do not establish publisher, app, program, device, screen, deal, geography, or time of delivery. VCR is an engagement metric showing how much of a video was played; it is not a conversion, click, visit, or other consumer action.

CTV measurement remains technically fragmented. IAB Tech Lab describes inconsistent signals across platforms and is developing standards for impression validation, creative IDs, and cross-screen measurement. A buyer should therefore distinguish between what a vendor can technically observe, what a publisher allows it to disclose, and what appears in the dealer dashboard. [12][15]

Reporting should identify at minimum: app or publisher, spend, impressions, CPM, households reached, frequency, device type, screen type, geography, daypart, creative, audience, video completion rate (VCR), invalid-traffic or verification status, and outcome metrics. Program-level reporting is valuable when available, but app-level and deal-level transparency are the minimum realistic standard for most programmatic CTV buys.

2.5 Blending Low-Cost Display or OLV Into Higher-Cost Video Campaigns

Several interviewees described a recurring pattern: a dealer approves an OTT or streaming budget but later learns that a meaningful share of that budget funded OLV or display. Those formats may be useful for retargeting, site visits, or sequential messaging. The problem is misclassification. A \$7 display CPM, a \$14 OLV CPM, and a \$30-\$60 premium CTV CPM do not represent the same consumer experience. Combining them can lower the blended CPM and cost per visit while making the campaign appear more efficient than the television-screen delivery actually was.

This creates a perverse incentive. If an agency is compensated through an undisclosed markup or principal resale, lower-cost inventory can create more margin or make aggregate performance look better. ANA's media-transparency work found non-transparent practices, rebates, and principal transactions across U.S. media buying, including digital and television. ANA recommends contract controls to prevent multiple affiliates from adding undisclosed markups. [10][11]

NON-NEGOTIABLE A dealer should approve the percentage of budget allowed in CTV, OLV, display, audio, and any other format before launch. Reallocation between formats requires written approval. Report each format separately.

2.6 Daily Spending Gaps and Mid-Month Blackouts

CTV inventory is auction-based and variable. A campaign can overpace when bids, targeting, or inventory settings allow spending too aggressively, or underpace when audience, geography, frequency, and publisher constraints are too tight. Either condition can damage performance. Overpacing may exhaust budget before month-end; underpacing can create a late-month rush into lower-quality inventory or leave funds unused.

Pacing is a standard programmatic control, not an optional service feature. Major DSP campaign objects support daily maximums and lookahead pacing. The dealer's reporting should show planned cumulative spend, actual spend, remaining budget, projected completion, days active, and any day with zero or anomalous delivery. [20]

For always-on awareness, dealers should set a daily or weekly tolerance band and require alerts. A useful operating rule is to investigate cumulative variance above or below 10%, document material reallocations, and prevent “catch-up” spending from violating publisher, device, audience, or frequency standards.

2.7 The Reseller and Supply-Path Problem

Reselling is not automatically harmful. A reseller may aggregate fragmented publishers, provide local service, manage minimums, apply automotive data, or unify reporting. The risk appears when resale adds cost without control, obscures inventory origin, duplicates auctions, or weakens the buyer's right to inspect data.

Recent industry commentary describes a CTV “reseller reckoning.” Jounce's position, as reported by Digiday, is that resold auctions may either waste a portion of the budget through unnecessary fees or expose the buyer to fabricated supply. Even when an impression is real, each additional hop can complicate price integrity, frequency, attribution, and accountability. [14]

Question	Acceptable evidence	Red flag
Who is the contractual media seller?	Named entity and role.	“Our partners” without names.
Who owns the DSP seat?	Dealer, agency, vendor, or disclosed partner.	No access and no export rights.
How is inventory sourced?	Deal types, seller names, authorized paths.	“Direct” without a definition.
How many commercial hops?	Supply path or fee waterfall.	Unknown resellers or affiliates.
Can delivery be audited?	Log-level export or independent verification.	Only a branded summary PDF.
What happens to non-compliant delivery?	Credits, make-goods, and deadlines.	No contractual remedy.

2.8 Lack of Attribution to Vehicle Sales

CTV can be measured more deeply than traditional television, but more data does not automatically create causal proof. A household that saw an ad and later visited the website or purchased a vehicle may also have seen paid search, OEM media, direct mail, social, email, marketplace listings, or a competitor. Exposure match-backs identify overlap. They do not isolate what would have happened without the ad.

The automotive purchase cycle further complicates monthly reporting. A buyer may be exposed in one month, shop in another, and purchase later. Service and acquisition campaigns may have different windows. Attribution analysis should therefore examine multiple windows and deduplicate exposures across campaigns. However, DSP, SSP, and partner data can arrive with meaningful aggregation latency, so 48-hour, 7-day, 14-day, and 30-day views may be incomplete or

inconsistent in real time. Once the reporting period has closed and the source data has stabilized, those windows can be analyzed retrospectively with greater confidence; vehicle sales may require a 30-90 day observation horizon depending on the strategy.

The strongest practical designs use holdout households, matched markets, geo experiments, time-based tests, or a credible media-mix/incrementality model. These methods estimate lift against an unexposed or counterfactual baseline. They should sit above ordinary match-backs in the evidence hierarchy.

Evidence level	What it shows	What it does not prove
1. Delivery	Impression, publisher/app, device, completed view.	Attention, visit, lead, or sale.
2. Response	Website visit, branded search, QR/vanity action.	That streaming caused the action.
3. Physical behavior	Attributed dealership or service visit.	Purpose, quality, or incrementality.
4. Business match-back	Lead, RO, trade, or sold vehicle in an exposed household.	That the outcome would not have happened otherwise.
5. Incremental lift	Difference versus a valid control or modeled baseline.	Perfect individual-level causation; models still have assumptions.

2.9 Privacy, Identity, and Data Governance

The most powerful dealer use cases leverage customer files, website identity, household graphs, mobile location, and sales data. Dealers should treat these as governed data products, not casual list uploads. Contracts should define permissible purpose, consent and notice responsibilities, retention, security, sub-processors, deletion, consumer requests, data sale or sharing restrictions, clean-room or hashing methods, and whether the vendor may reuse dealer data to benefit other advertisers.

3. Dealer Interviews

The attached research files contain eight dealer or agency perspectives. The interviews are not a market survey, but the consistency of the themes is important. Leaders in different regions and roles repeatedly described disappointment with opaque bundled buys, unclear placement, cheap inventory, weak pacing, and match-back claims. They also described a different experience when they could see channels, control geography and format mix, use first-party audiences, and run smaller specialized campaigns.

3.1 Tracy Beyer — Lou Bachrodt Family of Dealerships

“Controlled spending is super important. You don’t want to be dark three weeks out of the month.”

— Tracy Beyer, Director of Marketing

Beyer described a roughly \$5,000 monthly streaming budget used for in-market, consideration, service, Spanish-language, and evergreen awareness. Her June Chevrolet example reported \$1,000 in spend, 27,880 impressions, 8,200 households, a 96% video completion rate (VCR), 382 website visits, and 18 Foursquare-attributed dealership visits. She emphasized the ability to see when and where ads played and to keep delivery active throughout the month.

The strategic lesson is not the apparent cost per visit; those results require methodology review. The lesson is that a modest budget can be structured around defined audiences, specific creative, controlled frequency, and visible pacing rather than spread across a broad market.

3.2 Stephanie Bodine Wiley — Abstrakt Marketing Group / Suntrup Automotive

“People had no idea what they were buying. There could be several resellers in the middle.”

— Stephanie Bodine Wiley, Agency Director

Wiley emphasized first-party customer lists, website identity data, network selection, ZIP-level analysis, and cross-channel sequencing. Her operating approach treats CTV with the same discipline as paid search: analyze the dealership’s real sales geography, remove low-value areas, layer customer data, and revisit the plan rather than setting it and forgetting it.

She also warned against judging a push medium on a 30-day last-click basis. Long-term sales, service, and loyalty outcomes need longer observation windows and should be interpreted with other media activity in mind.

3.3 Lisa Gener — Former CMO, Cavender and Covert

“Many dealers do not know the difference between OTT, OLV, and online display, and that is where I see dealers getting burned the most.”

— Lisa Gener, former CMO

Gener provided the report’s clearest example of format dilution. In a prior campaign, she reported that 50% of a large “streaming” budget was allocated to OLV and display, including low-quality gaming and foreign sites. She also described a \$33 CTV CPM with 30% of OTT spend placed on Samsung TV Plus rather than the premium environments emphasized during the sale.

After changing her buying approach, she focused on CTV, defined core channels, ZIP codes, time controls, Spanish-language placements, and multiple targeted campaigns. Her key observation was not simply that ads were recognized; it was that a dealer could run purpose-built campaigns without defaulting to a single expensive mass-reach buy.

3.4 Aaron Paton — Suntrup Automotive Group

“We wanted to dial into households instead of having commercials play four hours away.”

— Aaron Paton, Sales Director

Paton described the transition from broad St. Louis television and radio to granular ZIP-code and household strategies. His team reviewed two years of sales by ZIP code, removed areas with little meaningful share, and aligned paid search and

streaming geography. He valued channel reporting and the ability to connect an exposed household with a subsequent website visit, while remaining skeptical of conquest and sales match-back “voodoo science.”

His experience also cautions against assuming that the most prestigious app creates the best result. Prime Video delivered significant exposure but fewer website conversions in one period, while the Roku Channel performed better. Placement quality and audience fit must be evaluated together.

3.5 Jeff Vaughn and Brendan Crews — Cable Dahmer

“We tried 15 to 20 platforms. We spent enough to test them, but employees and customers rarely said they saw the spots.”

— Cable Dahmer marketing leadership

Cable Dahmer's leaders described prior “OTT” vendors as delivering more banner impressions than streaming spots and also reporting low-cost visits from OLV or display. They accepted a higher CPM and cost per visit when the campaign showed delivery on higher-quality platforms and produced more real-world ad recognition. Their operating model combined a group brand buy with tight-radius store campaigns and fixed-operations offers.

Importantly, they framed OTT as influence rather than automatic unit attribution. That distinction should be preserved. Customer comments, offer recall, website visits, and store activity can support a contribution story without claiming that every matched sale was caused by CTV.

3.6 Jarrod Kilway — Casa Auto Group

“I look at streaming as both a branding and a performance channel, starting with the audience I want to target.”

— Jarrod Kilway, VP of Digital Operations

Kilway described a sophisticated orchestration model: use a known audience from a community sponsorship, direct mail, website data, or another platform; add OTT messaging; connect it to dealer-funnel communications; and test creative hypotheses. In one reported Q4 initiative, Casa targeted 7,700 baseball and soccer fan registrants with a vehicle-acquisition campaign and attributed 1,839 website visits, 761 leads, and 218 acquired trades to the broader activation. Those figures are commercially significant but require deduplication and a control design before they can be interpreted as incremental lift.

He also described active daypart changes, midweek reviews, demographic analysis, and a strict limit on OLV. This is the clearest expression of “Google Ads-style segmentation” for CTV: separate audience, geography, message, budget, and result rather than buying one undifferentiated streaming campaign.

3.7 Gary LaDue — Modern Automotive

“There is no standardized formula for website attribution. I want to see the first 48 hours, first week, and second week.”

— Gary LaDue, CMO

LaDue brought a deliberately balanced view. Modern Automotive has used Compulse, CDP-activated retargeting, and Dealer Stream for different layers of the funnel. He described big-screen controls, first-party model retargeting with very small budgets, broader in-market campaigns, and premium-placement campaigns. He also wants better attribution-window reporting and frequency testing.

His framework supports a portfolio rather than a winner-take-all vendor decision. A dealer can use direct CDP audiences for lower-funnel retargeting, a scalable in-market provider for mid-funnel reach, and a quality-controlled premium plan for brand and offer delivery. The common requirement is comparable reporting and data governance across all layers.

3.8 Richard del Rosario — Motor City Buick GMC and Lexus

“They spent \$6,000 out of the \$20,000 because they wanted to throttle it. They really took the time to make sure that it was going to spend well.”

— Richard del Rosario, Marketing Director

Del Rosario contrasted two approaches to pacing and budget stewardship. In a prior campaign, he reported relatively flat delivery followed by a sharp month-end surge, including approximately \$13,000 of a \$20,000 budget spent during the final three days. He questioned whether the late volume represented the intended in-market audience and ultimately stopped the campaign rather than continue spending under the same conditions. The experience illustrates why “budget fully spent” is not, by itself, evidence of a successful campaign.

After moving to Dealer Stream, del Rosario reported that the first month used only about \$6,000 of the same \$20,000 authorization. He viewed the under-spend positively because the team throttled delivery while validating ZIP codes, audience settings, and performance rather than forcing impressions to exhaust the budget. He also valued continuous campaign visibility, pre- and post-delivery verification described through Dealer Stream’s Blockboard relationship, and the ability to apply household income, gender, geography, and model strategy without separate data charges.

The campaign architecture evolved from eight or nine model-specific campaigns into three broader vehicle-category strategies designed to improve household frequency across a large geography. Dealer Stream reportedly used website-visit signals to identify ZIP codes receiving impressions without corresponding site activity and was able to recommend reductions. Del Rosario said the dealership achieved its operating objective in four of the five months after onboarding, but explicitly declined to attribute the result entirely to Dealer Stream. That restraint is important: the interview supports disciplined execution and contribution, not isolated causal proof.

3.9 What the Interviews Collectively Say

Repeated theme	Observed dealer value	Research caution
Ads are finally being noticed	Confidence that delivery occurs in relevant environments.	Anecdotal recognition is not representative reach or lift.
Premium channel visibility	Brand safety, attention, and owner confidence.	Publisher name alone does not prove program quality or audience fit.
Smaller segmented campaigns	More messages, departments, and audiences without mass-market minimums.	Over-segmentation can shrink reach and raise frequency.
First-party and website audiences	Relevance for loyalty, service, model interest, and non-converters.	Identity match quality and privacy obligations must be audited.
ZIP-level planning	Less geographic spillover and better coordination with paid search.	Historical sales geography can reinforce old share patterns.
Visible pacing and budget restraint	Fewer dark periods, less forced month-end delivery, and more predictable presence.	Full spend is not the objective; document under-spend, over-spend, and intentional daypart/seasonality.
Pre- and post-delivery verification	Greater confidence that the inventory, device, geography, and audience signals are credible.	Vendor-described controls should still be reconciled to independent or log-level evidence.
Website/store/sales reporting	A clearer line from exposure to behavior.	Match-back is correlation unless a counterfactual is established.

4. Dealer Stream Excellence

Dealer Stream emerges from the interviews as a case study in how automotive CTV can be bought with greater discipline. The evidence does not justify declaring any provider universally superior. It does identify a practical excellence model that dealers can demand from Dealer Stream and every competing partner.

4.1 The Excellence Model

- 1. Quality-first inventory** Define the inventory tier, programming environment, television-screen requirement, and supply path before launch; do not optimize primarily to the largest impression total or lowest CPM.
- 2. Placement transparency** Report channel or app, spend, impressions, CPM, reach, frequency, geography, creative, and outcomes.
- 3. Format integrity** Separate CTV, OLV, display, and audio; cap or prohibit unapproved format shifts.
- 4. Segmented campaign architecture** Run distinct sales, service, used, acquisition, Spanish, loyalty, model, and retargeting campaigns with explicit budgets.
- 5. Active pacing and optimization** Monitor throughout the month; adjust daypart, geography, audience, creative, and publisher with documented reasons.
- 6. First-party activation** Use dealer-controlled customer and website audiences in a governed, privacy-conscious process.
- 7. Independent verification** Use log-level or third-party evidence to validate human delivery, geography, screen, and supply quality.
- 8. Outcome discipline** Connect exposure to behavior, but state attribution windows, identity method, deduplication, and the difference between influence and incrementality.

4.2 Evidence Available Today

Dealer Stream's Blueprint reporting documents show that dealers can view channel, CPM, impressions, households, ZIP codes, and identity-resolved website visits. Public reporting also confirms a 2025 partnership with Blockboard for pre- and post-campaign verification and log-level reporting. AdExchanger independently covered the partnership. [17][18]

The interview file adds consistent user evidence: premium-platform delivery, smaller targeted campaigns, format controls, reporting by channel, all-month pacing, first-party audience use, creative support, and more frequent ad recognition. These statements are meaningful qualitative validation because they come from multiple roles and dealer groups. They are not a substitute for an audit of raw delivery and business outcomes.

4.3 Dealer Stream Research Scorecard

Dimension	Evidence in this research	Draft assessment	What should be validated next
Placement detail	Blueprint claims plus repeated interview reports.	Strong	Export sample log-level delivery; reconcile to invoice and dashboard.
Premium inventory	Repeated app examples, dealer recognition, and PMP education materials.	Promising	Reconcile each inventory tier to exact publisher/app spend, impressions, households, CPM, screen mix, and deal type.
Format integrity	Interviewees describe low OLV shares or explicit caps.	Strong where contracted	Verify format-level budget and impression split for each campaign.
Pacing	Interviewees report all-month visibility and active reviews.	Strong qualitative evidence	Audit daily spend, zero-delivery days, variance alerts, and make-goods.
Segmentation	Multiple small campaigns across profit centers and audiences.	Clear differentiator	Test reach/frequency and minimum viable audience thresholds.
Identity and outcomes	Website/store visit and household-level reporting described.	Useful but method-sensitive	Document identity graph, attribution windows, deduplication, privacy, and false-match rate.
Sales incrementality	Several reported business outcomes.	Not yet established	Run dealer-level holdout or matched-market tests and publish methodology.
Economics	Interviewees value fewer reseller layers and quality over low CPM.	Directionally positive	Provide fee waterfall, net media, supply path, and independent invoice reconciliation.

4.4 Where Dealer Stream Should Raise the Bar Further

- Publish a standard media-cost waterfall showing gross invoice, net media, platform, data, verification, creative, and service fees.
- Provide downloadable daily delivery and app-level logs that reconcile to the dealer invoice and third-party verification.
- Standardize definitions for CTV, OLV, display, household, individual, qualified website visit, store visit, and attributed sale.
- Provide retrospective attribution-window analysis at 48 hours, 7 days, 14 days, 30 days, and an appropriate sales horizon once source data has stabilized after the reporting period. Disclose DSP, SSP, and partner aggregation latency, and clearly distinguish provisional dashboard data from finalized window analysis.
- Add holdout or matched-market experimentation as a routine option for dealer groups with enough scale.
- Report incremental reach against the dealer's broadcast, cable, OEM, and other CTV buys where data access permits.
- Make frequency distribution visible, not only average frequency, so dealers can see both underexposed and oversaturated households.
- Document data governance, match rates, sub-processors, retention, consumer-choice handling, and dealer data reuse restrictions.

5. Dealer Operating Standard

A dealer does not need to become a programmatic trader. They need a procurement and measurement standard that forces vendors to expose the decisions that materially affect performance. The following framework can be used in an RFP, monthly review, or pilot agreement.

5.1 The Pasch Group Streaming Accountability Standard

Control	Minimum dealer requirement
Objective	Define the business job: market fame, incremental reach, model consideration, fixed ops, acquisition, loyalty, website retargeting, recruiting, or event activation.
Audience	Name every first-, second-, and third-party audience; document source, match method, size, exclusions, and privacy basis.
Geography	Use actual sales/service data, competitive opportunity, drive time, and strategic growth areas - not only a circular radius or the full DMA.
Format	Pre-approve separate CTV, OLV, display, audio, and interactive budgets. No silent substitution.
Screen and device	State television-screen minimum, mobile/desktop maximum, and treatment of consoles, tablets, and unknown devices.
Supply path	Disclose DSP, SSP/exchange, deal type, seller, reseller role, and material intermediaries.
Inventory quality	Define publisher/app allowlist, exclusions, brand-safety rules, invalid-traffic controls, and measurable-impression requirements.
Economics	Show gross fee waterfall and net media. Separate service compensation from media cost.
Pacing	Show daily plan versus actual, tolerance band, remaining budget, zero-spend days, and projected month-end completion.
Frequency	Set campaign and household caps; report distribution, not only average.
Creative	Identify offer, version, language, duration, audience, and flight. Confirm OEM/co-op compliance where relevant.
Measurement	Use the evidence ladder; state windows, identity method, deduplication, and whether results are descriptive, attributed, or incremental.
Data access	Provide dashboard access and downloadable raw or log-level data with dealer retention and portability rights.
Remedies	Define credits and make-goods for wrong format, geography, screen, publisher, invalid traffic, pacing failure, or missing reporting.

5.2 Monthly Dealer Dashboard

MONTHLY MANAGEMENT VIEW Use this one-page dashboard structure to reconcile budget, delivery quality, audience exposure, creative performance, and business outcomes before approving the next month.

View	Required metrics	Management question
Budget	Gross, fees, net media, spend to date, remaining.	Did the dealer receive the working media it approved?
Pacing	Daily plan/actual, variance, active days, projected finish.	Will the campaign stay live and finish within tolerance?
Delivery	CTV/OLV/display split, publisher/app, screen, device, geography.	Where did the ad actually run?
Audience	Target size, matched size, reach, frequency distribution, exclusions.	Did we reach enough of the intended households with sufficient frequency?
Creative	Version, language, message, spend, completion, outcome.	Which message worked for which audience?
Quality	Measurable rate, IVT, app transparency, blocked/credited impressions.	Was delivery human, visible, and compliant?
Outcomes	Site visits, ASC actions, store visits, leads, ROs, trades, sales, windows.	What happened after exposure, and how certain are we?
Incrementality	Holdout lift, market-share change, branded search, MMM contribution.	What likely would not have happened without the campaign?

5.3 A 90-Day Pilot Blueprint

1. Weeks 0-2 - Baseline and contract. Capture 90 days of branded search, direct traffic, ASC actions, leads, visits, sales, ROs, market share, and other media. Approve formats, publishers, screens, fees, pacing, frequency, data rules, and attribution windows.
2. Weeks 3-6 - Launch three campaigns. Use one evergreen/in-market campaign, one first-party or website-retargeting campaign, and one profit-center campaign such as service, used acquisition, or Spanish-language outreach. Keep budgets and creative separate.
3. Weeks 7-10 - Optimize with controls. Adjust geography, daypart, creative, frequency, and publisher only when the dashboard supports a documented hypothesis. Do not relax quality controls merely to force full spend.
4. Weeks 11-13 - Evaluate. Reconcile invoice to delivery, compare format-level economics, review attribution by window, and estimate incrementality using holdouts or matched baselines where feasible. Decide which campaign should scale, change, or stop.

5.4 Recommended Dealer Tests

Test	Design	Decision supported
Publisher quality	Same audience/creative; premium allowlist vs broader curated supply.	Whether premium context improves qualified response enough to justify CPM.
CTV vs OLV	Separate budgets and creatives; no blended reporting.	True format economics and the role of OLV retargeting.
ZIP strategy	Core sales ZIPs vs strategic growth ZIPs with matched controls.	Defend existing share or invest in conquest growth.
Creative hypothesis	APR vs payment vs discount vs why-buy, rotated within audience.	Which message produces attention and downstream quality.
Frequency	Two or more controlled cap ranges.	The point of diminishing return and ad fatigue.
Attribution window	48-hour, 7-, 14-, 30-, and 60/90-day views.	Response decay and realistic sales-cycle contribution.
Incrementality	Geo or household holdout where scale permits.	Causal lift beyond match-back correlation.

Final Conclusions

Automotive retail has reached the point where streaming television should be managed as a core media capability. Consumers have moved. Premium programming and live sports have moved. Advertising investment has moved. Dealers can now use television with the precision of a digital audience platform and the creative impact of the largest screen in the home.

The opportunity is real, but so is the accountability gap. When a dealer buys an opaque bundle, the same budget can be transformed into a mix of CTV, OLV, display, data, platform fees, agency fees, and reseller margin that bears little resemblance to the premium television plan described in the sales meeting. A low blended CPM or cost per visit can conceal that dilution. A logo slide can conceal weak placement detail. A sales match-back can conceal the absence of incrementality.

The remedy is not to abandon programmatic CTV. It is to govern it. Dealers should demand financial transparency, format integrity, app-level delivery, device controls, curated supply paths, pacing visibility, frequency discipline, data rights, and a measurement ladder that separates exposure, response, match-back, and lift.

The dealer interviews show why this matters. Executives who had rarely seen their campaigns previously now described more frequent recognition after shifting to a quality-controlled model. They reported the ability to target actual sales geographies, use first-party and website audiences, run specialized messages, cap low-cost formats, and stay live across the month. Those experiences are directionally powerful because they describe control returning to the advertiser.

Dealer Stream is a meaningful case study in that change. Its apparent strengths - detailed reporting, premium inventory emphasis, campaign segmentation, active optimization, pacing, and verification - align with the controls this research recommends. The next step is to make those strengths independently auditable and methodologically consistent: fee waterfalls, log reconciliation, standardized definitions, attribution windows, frequency distributions, and incrementality tests.

FINAL RECOMMENDATION Do not approve the next streaming budget until the vendor can show what percentage becomes media, what percentage reaches a television screen, where every material block of spend will run, how the campaign will pace, and how outcomes will be distinguished from causation.

The 12 Questions Every Dealer Should Ask

DEALER MEETING CHECKLIST Ask these questions before approving a proposal, renewing a vendor, or accepting an attribution report. Clear answers should be documented in the contract, dashboard, or campaign export.

#	Question to ask	Control being tested
1	Exactly how much of my invoice becomes net media?	Working-media economics
2	What percentage of spend is CTV, OLV, display, audio, and other formats?	Format integrity
3	What percentage is guaranteed to run on a television screen?	Television-screen delivery
4	Clearly show which publishers received impressions and households, and disclose CPM by each publisher.	Placement transparency
5	Which supply paths and resellers are involved, and what value does each add?	Supply-path accountability
6	Can the delivery report be reconciled to log-level or third-party verification?	Independent verification
7	What are the daily pacing controls, alerts, and month-end make-good rules?	Pacing and remedies
8	What is the household frequency distribution, not just the average?	Reach and frequency control
9	How are first-party, website, location, and sales data matched and protected?	Data governance
10	What are the attribution windows and deduplication rules?	Attribution methodology
11	Which metrics are observed, attributed, modeled, or proven incremental?	Evidence and incrementality
12	Can I export the data and retain it if I change agencies or platforms?	Data ownership and portability

Appendix A: Dealer Buyer Checklist

Strategy and audience

- ☐ Written campaign objective and primary KPI
- ☐ Audience source, size, match method, exclusions, and refresh cadence
- ☐ Sales/service geography analysis and intentional growth markets
- ☐ Coordination with OEM, LMA, broadcast, cable, paid search, social, and direct mail

Media and economics

- ☐ Gross-to-net fee waterfall
- ☐ CTV/OLV/display/audio budget split
- ☐ DSP, SSP/exchange, deal type, and reseller disclosure
- ☐ Publisher/app allowlist and exclusions
- ☐ Television-screen minimum and unknown-device maximum
- ☐ Daily pacing and monthly delivery tolerance

Quality and verification

- ☐ App transparency and measurable-impression standard
- ☐ Invalid-traffic, fraud, brand-safety, and TV-off controls
- ☐ Independent verification and log export
- ☐ Credit/make-good rules for non-compliant impressions

Measurement and data

- ☐ Reach and frequency distribution
- ☐ Creative- and audience-level results
- ☐ Attribution windows and identity methodology
- ☐ Website/store/sales deduplication
- ☐ Holdout, matched-market, or incrementality option
- ☐ Dealer data ownership, retention, deletion, portability, and sub-processors

Appendix B: Glossary

Term	Definition
Ad-supported viewing	Television viewing in environments that carry advertising; excludes ad-free consumption.
Allowlist	Approved publishers, apps, devices, or content environments.
Attribution window	Period after an exposure during which a later action may be associated with the campaign.
Video completion rate (VCR)	Share of started video impressions reported as played through the defined completion point. VCR measures video engagement, not a conversion, click, visit, or other consumer action.
Deal ID	Identifier used to transact a negotiated or curated programmatic inventory package.
DSP	Demand-side platform used by buyers to bid on or purchase advertising inventory.
Frequency	Average or distribution of impressions delivered to a household or person.
Holdout	Comparable group intentionally not exposed, used to estimate incremental lift.
Identity resolution	Method for associating devices, browsers, households, or customer records.
Incrementality	Outcomes estimated to have occurred because of the advertising, above a counterfactual baseline.
Match-back	Association of exposed identifiers with later visits, leads, ROs, or sales.
Net media	Amount used to purchase inventory after fees and margins, subject to the buyer's definition.
PMP	Private marketplace: restricted programmatic inventory transacted through negotiated access or deal IDs.
SSP	Supply-side platform used by publishers or sellers to make inventory available.
Supply path	Sequence of sellers and technology platforms between publisher inventory and the buyer.
Working media	The portion of budget that purchases exposure rather than services, data, technology, or margin.

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