

EXCERPT FROM FULL GUIDE

ADDRESS FOR SUCCESS

How Addressable TV Delivers Full-Funnel Outcomes

VAB
VIDEO ADVERTISING BUREAU

What is Addressable TV?

Addressable TV is the use of technologies to enable advertisers to selectively deliver ads to individual households via cable, satellite, and Internet Protocol television (IPTV) delivery systems and set-top boxes (STBs).

As of 2018, there were 64MM Addressable TV HHs across all DMAs, representing more than 54% of TV HHs

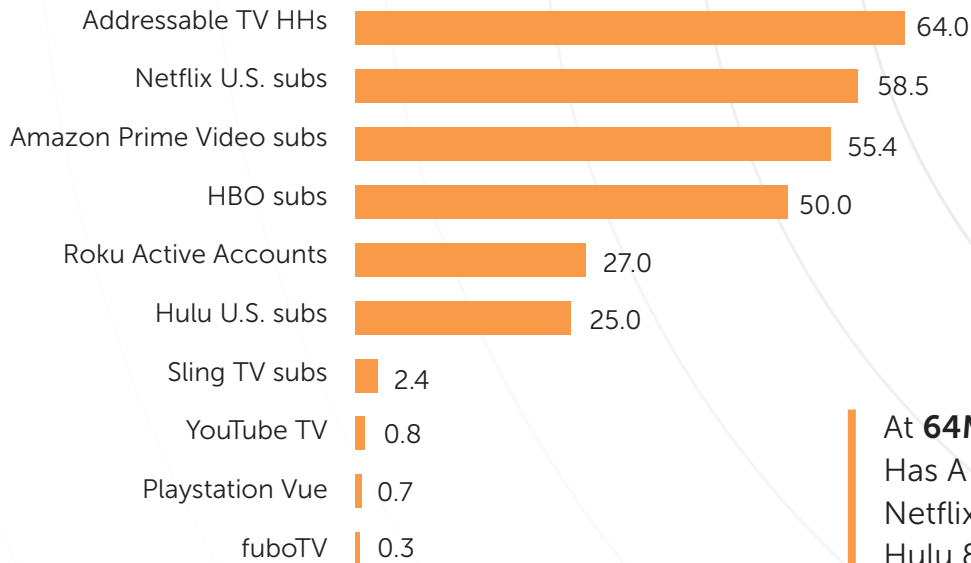


Source: FreeWheel, A Buyer's Guide to the New Living Room, October 2018; eMarketer, July 2018. Note: includes targeted TV ads delivered on a home-by-home basis via cable and satellite boxes; includes video-on-demand (VOD); excludes connected TV, smart TV and over-the-top (OTT)

Addressable TV Fast Facts

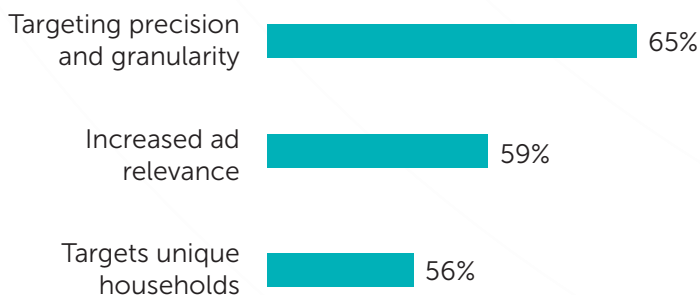
How Big is Addressable TV?

U.S. Only (in millions)



At **64MM** HHHs, Addressable TV Has A Larger Footprint Than Netflix, Amazon Prime Video, Hulu & Other Popular Subscription Platforms

Addressable TV's Top Benefits



62%

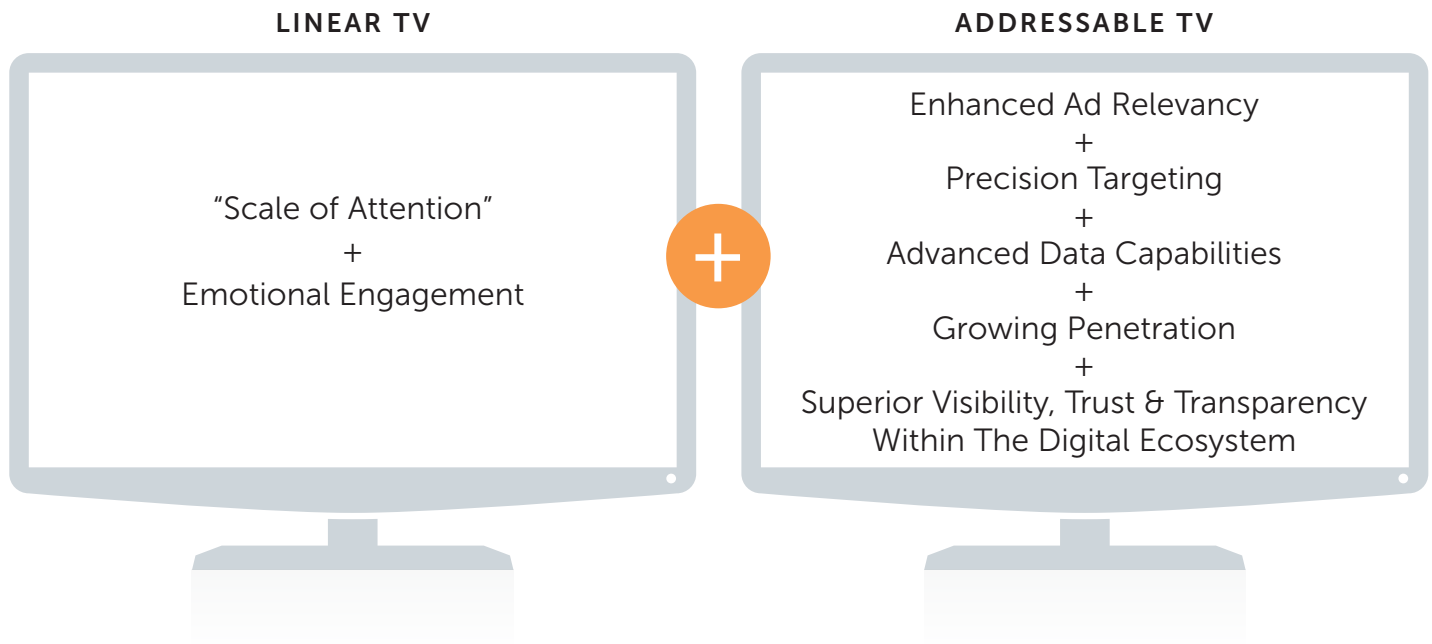
of Advertisers Using Addressable Already Believe It Is A Valuable Part Of Their Media Buy

40%

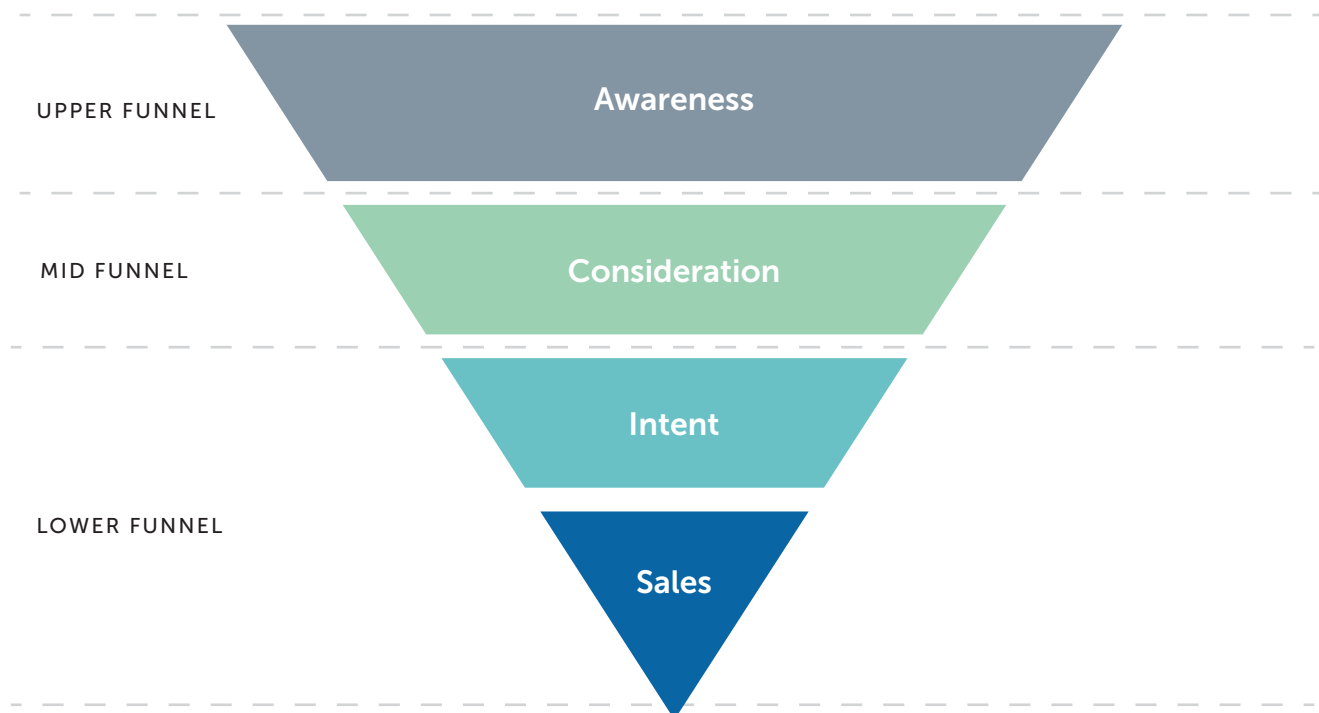
of U.S. Addressable TV agency & marketing professionals say they are now making a significant investment in the platform

Source: Addressable TV HHHs FreeWheel, A Buyer's Guide to the New Living Room, October 2018. Netflix – company financial reports for Q4 2018. Amazon Prime – Q4 '17 data from SNL Kagan published April '18. HBO – AT&T company financial reports for Q4 2018; includes HBO NOW. Roku – January '19 data from Roku Blog (Roku defines active accounts as the number of distinct user accounts that have streamed content on the platform in the last 30 days). Hulu – company financial reports for FY 2018 published January '19. Sling TV – Q3 '18 data from SNL Kagan published December '18. YouTube TV – Estimated July 2018, Fast Company & CNBC. Playstation Vue – Estimated December 2017, Fast Company & Ben Bajarin. fuboTV – MoffettNathanson, MEDIA REDEF, 2018; Xandr, Ahead of the Curve: Addressable TV Insights; Advertiser Perceptions Addressable TV State of the Industry, March/April 2017. Q: Please rank the top 5 benefits of Addressable TV advertising. Q: Which of the following best describes your current approach to Addressable TV advertising? Base: Total Respondents.

The Benefits Of Linear TV With The Enhancements Of Addressable TV Delivers Full-Funnel Business Outcomes For Advertisers



Linear TV Combined With Addressable TV Drives Consumer Awareness, Interest & Action Through the Purchase Funnel





“Full-Funnel” Case Study: How Addressable TV Lifts Campaign Metrics Through The Purchase Funnel

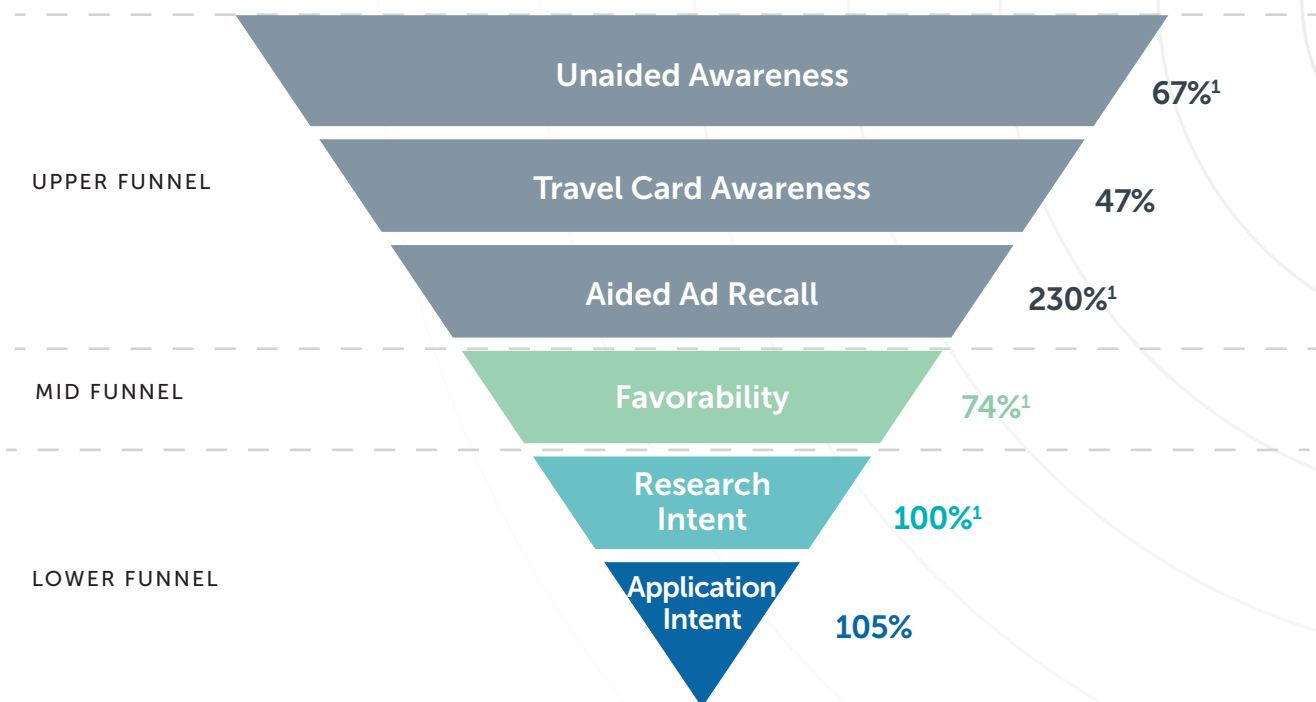
Execution

Addressable campaign for a Travel Credit Card brand ran on Xfinity TV / VOD targeting active and inactive travel card and Experian lookalike models for the brand’s frequent fliers.

Addressable exposed and control cells were recruited following the campaign to collect survey-based attitudinal data.

Key Takeaways

- After consumer exposure to Addressable TV content, the brand saw a lift in awareness & intent to research and apply for the credit card.
- Commercials successfully reinforced the card’s key attributes among those exposed to the brand’s messaging.
- Low exposures (1-4x) positively influenced subscribers, however frequencies of 5x+ proved to be the optimal amount for memorability, metric gains, and attribute reinforcement.



Source: Kantar Millward Brown, Travel Card: Comcast Addressable TV Brand Lift Advertising Research, January 2018. Sample Size for Addressable Audience: Addressable Control – n=101, Addressable Exposed – n=141; Flight dates: 10/2/2017 – 11/19/2017; Control respondents were weighted to match the exposed sample; ¹Significant increase at 90% confidence.



CATEGORY: CRUISE LINE
 FUNNEL STAGE: AWARENESS
 CAMPAIGN: Q1 2018



Objective

A widely recognizable cruise company wanted to ensure their brand stood out among consumers, opting to use their ad spend to increase awareness and recall. Their target segments were members of their loyalty program and consumers who have sailed 3+ in last three years.

Results

The Addressable campaign turned the tide for the cruise line, elevating the brand's position in awareness and recall metrics. When comparing the target group vs. the control group, the campaign generated:

+200%

Surge in Unaided TV Ad Awareness

+87%

Lift in Aided TV Ad Awareness

+25%

Growth in Aided Ad Recall

+8%

Uptick in Aided Brand Awareness

Source: Xandr, Campaign Flight: Q1 2018. Case study results are based on individual campaign factors. Xandr makes no performance warranties. Control represents 10% of DTV HHs within the target that did not receive exposure to the addressable ad. Source: Kantar Millward Brown.

CASE STUDIES



CATEGORY: TRAVEL
 FUNNEL STAGE: CONSIDERATION
 CAMPAIGN: Q2 2018 – Q3 2018



Objective

A travel advertiser wanted to increase brand favorability and elevate brand perception among their target audience of "high propensity" travelers.

Results

Household Addressable TV campaign achieved significant lifts in both upper and lower-funnel measures and brand attributes, driving a positive impact at 4+ frequency.

+13%

Lift in Favorability

Exposure to the campaign generated a higher opinion of the brand.

+25%

Lift in Likelihood to Seek Info

After exposure, there was increased likelihood to learn more about the brand.

**+8%
+23%**

Lift in Key Brand Attributes

More likely to associate the brand with relaxation, among other key perceptions.

Source: Verizon Media, HHA Case Studies, December 2018; Campaign Flight: 2Q'18 – 3Q'18, Reporting based on 4+ Frequency.

CASE STUDIES



CATEGORY: FINANCIAL

FUNNEL STAGE: INTENT

CAMPAIGN: Q4 2016 – Q1 2017



Objective

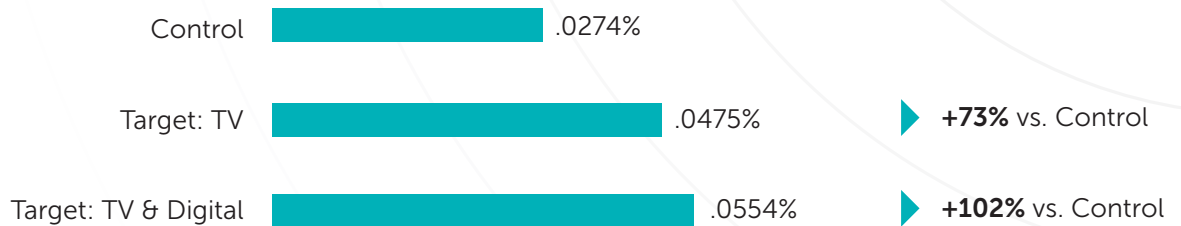
An online financial planning company was looking to increase account sign-ups through strategic marketing tactics. Their target segments were people with \$100K+ investible assets & tech enthusiasts.

Results

Households exposed to both TV and digital ads generated a **+102%** lift in account sign-ups vs. the control, and a **16%** lift over households that just saw a TV ad.

Households exposed to only a TV ad generated a **+73%** lift over the control.

HH Account Sign-Ups



Source: Xandr 2018; Campaign flight: Q4 2016 – Q1 2017. Case study results are based on individual campaign factors. Xandr makes no performance warranties. Control: Represents 10% of DTV HHs within the target that did not receive exposure to the addressable ad. Source: Internal Business Analytics and secondary data provider for targeting.

CASE STUDIES



CATEGORY: AUTOMOTIVE (TIER 1)

FUNNEL STAGE: SALES

CAMPAIGN: Q3 2017



Objective

Increase sales by reaching auto-intenders watching premium content on Ads Everywhere platforms (Spectrum TV App & STB VOD) in Q3 2017.

Results

- Addressable targeting led to incremental purchases and incremental sales lift of **\$730K**.
- Exposed audiences had **15%** lift in buy-rate vs. the control group (those in target buy not exposed to campaign).
- **95%** average ad completion rate.



Source: Charter Spectrum Reach, 2018; Campaign period: 7/3/17 – 9/24/17; Incremental Sales (\$) = sum of (MSRP * number of Incremental Sales by model). Average ad completion rate defined as percentage of total impressions that were viewed continuously for 100% of the length of the ad.

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