



DO WE HAVE CONSENSUS?

How the Ad Community's Media Behaviors Became America's "Norms"

 2017 REPORT



Contents

Overview	3
Concept & Methodology.....	4
Advertising Community Respondent Profile	5
Lifestyle Comparisons	10
Media Usage	16
Preferences & Perceptions	25
TV Consumption.....	42
Contact Information	47

Raise Your Hand If...

You've been to an industry conference recently where a seemingly all-knowing marketing guru, media futurist or digital "expert" asked you to put your hand up in response to his "provocative," but leading, question such as...

- ...Except sports and big specials, how many of you here still watch live TV?
- ...For the TV you do watch, how many here are time-shifting all the commercials?
- ...How many people here couldn't live without your smartphone?
- ...How many people here watch most of their video content on a mobile device?
- ...How many people here watch more content on streaming apps than TV?

You then looked around the ballroom, saw nearly everyone else's hand up and immediately assumed this behavior naturally projects out across the American population.

But just because you, an advertising professional, possess these behaviors does that mean everyone else in this country does too?

This report set out to address this very question with a survey conducted among the advertising community across the spectrum of decision-making disciplines. Results in regards to our lifestyle, device ownership and media consumption were compared to syndicated research for the average population to show the true contrast between "the advertising industry bubble" and the "average everyday American."

The goal of this report is to determine if we let our own unique lifestyle and media consumption habits inadvertently affect our views...

Concept & Methodology

Our goal was to investigate how the advertising community compares to the general public and explore their perceptions about 'typical' American media behavior



Advertising Community

- Commissioned a custom online study by *Research Now*
- 250 respondents who must be currently employed full time at a media, full service or digital / social agency or as a marketer / advertiser at a brand
- In-field February 6th – 16th, 2017



“Average American”

- Third-party syndicated research (e.g. Nielsen, comScore, GfK MRI, etc)
- Replicated exact wording of syndicated questions in custom study
- Utilized most current data available for Adults 18+

A woman with curly hair, wearing a plaid shirt and jeans, stands in the center of a meeting room, presenting to a group of people. She is holding a folder. To her left is a whiteboard with various diagrams and text. The room has large windows in the background. A large, colorful diagonal graphic (purple, green, blue) is overlaid on the right side of the image. The text 'Who Are Our Advertising Community Respondents?' is overlaid in white on the left side.

Who Are Our Advertising Community Respondents?

Digital

APP
WEBSITE
EMAIL



Testing

Brand

○○○
○○○

COMMUNITY

Ideas from all
strength of product

IDEAS

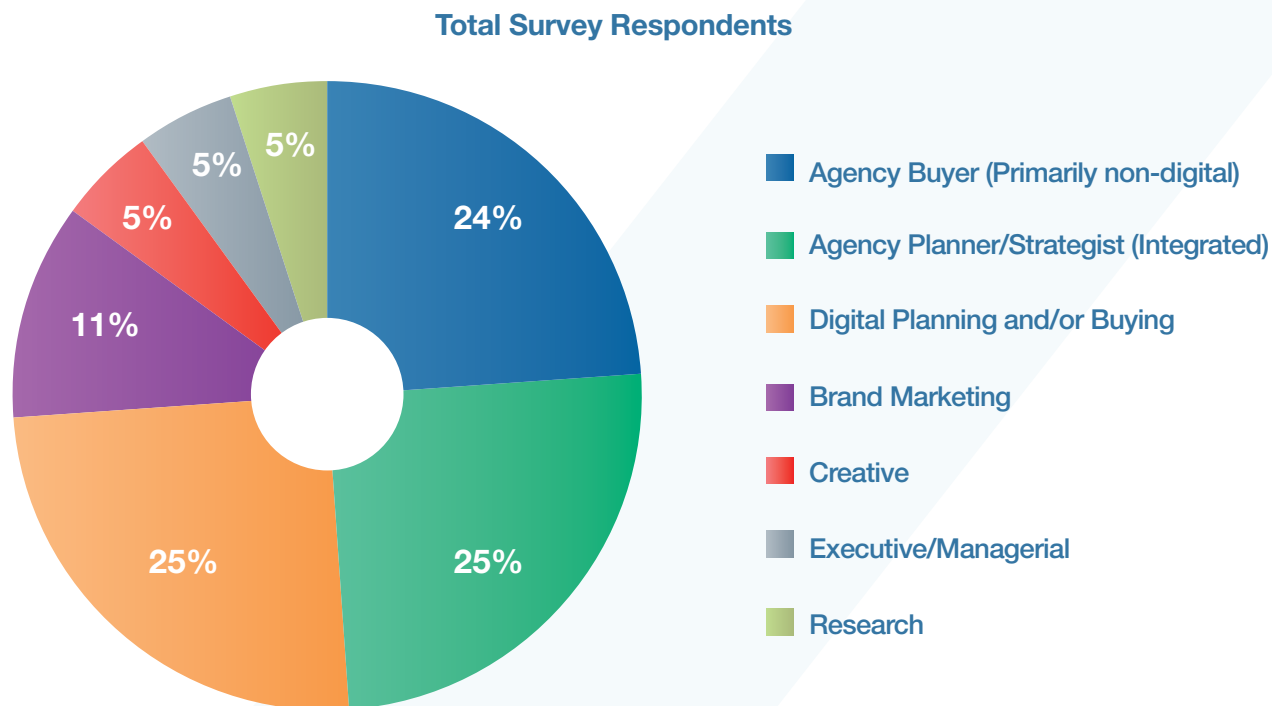
What work?
APPROVAL !!

50% PRINT
30%

35%

74% Of Respondents Have An Integrated Media Strategy Or Media Investment / Buying Background

How do you best describe your primary function at work?

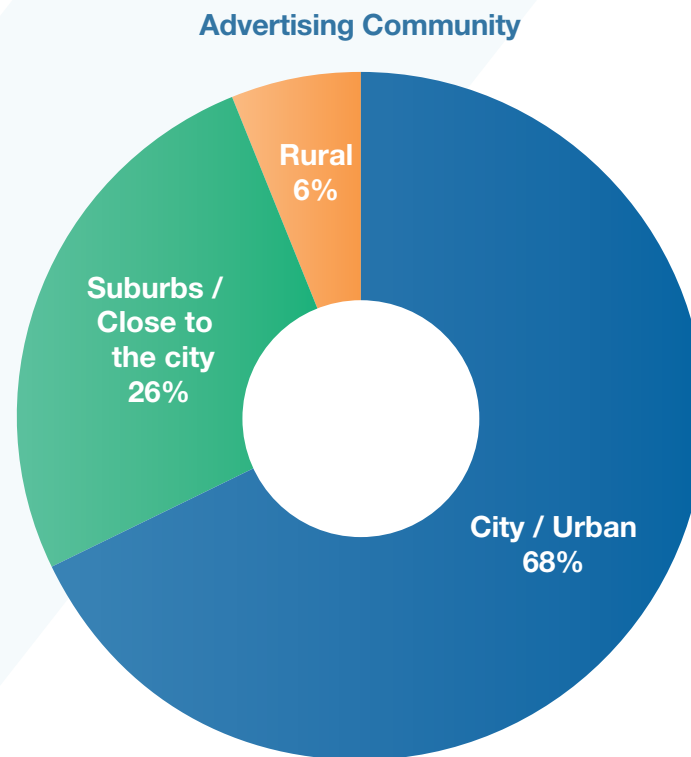
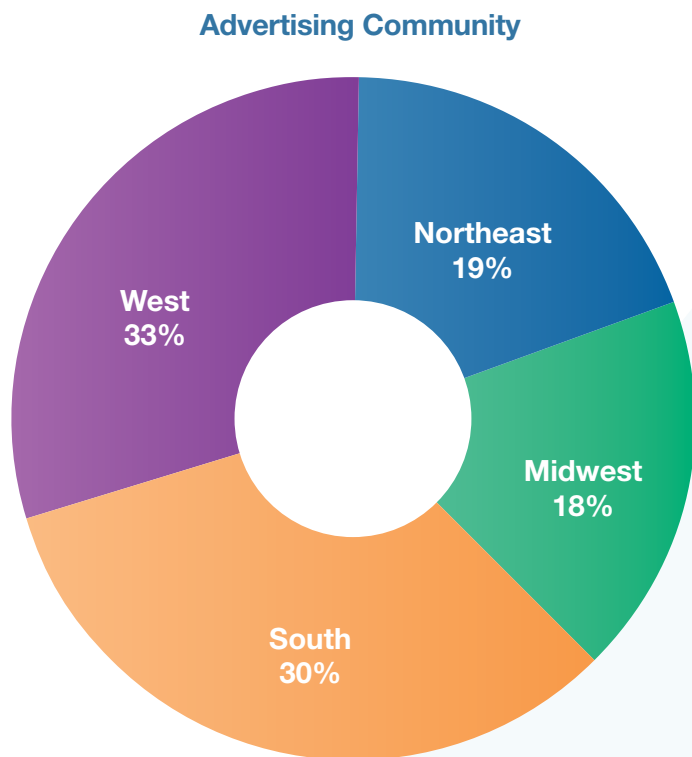


- Position titles represent a cross section of the industry – from junior level to senior executive
- 71% currently work at an ad agency (full service, digital / social or media)
- 29% currently work at an advertiser / marketer

Source: VAB / Research Now "Advertising Community" Survey, February 2017. Q11: Which one of these best describes your primary function at work? (select one). Respondents = 254

Even Though Our Respondents Were Spread Across The Country, They Reside Primarily In Urban Areas

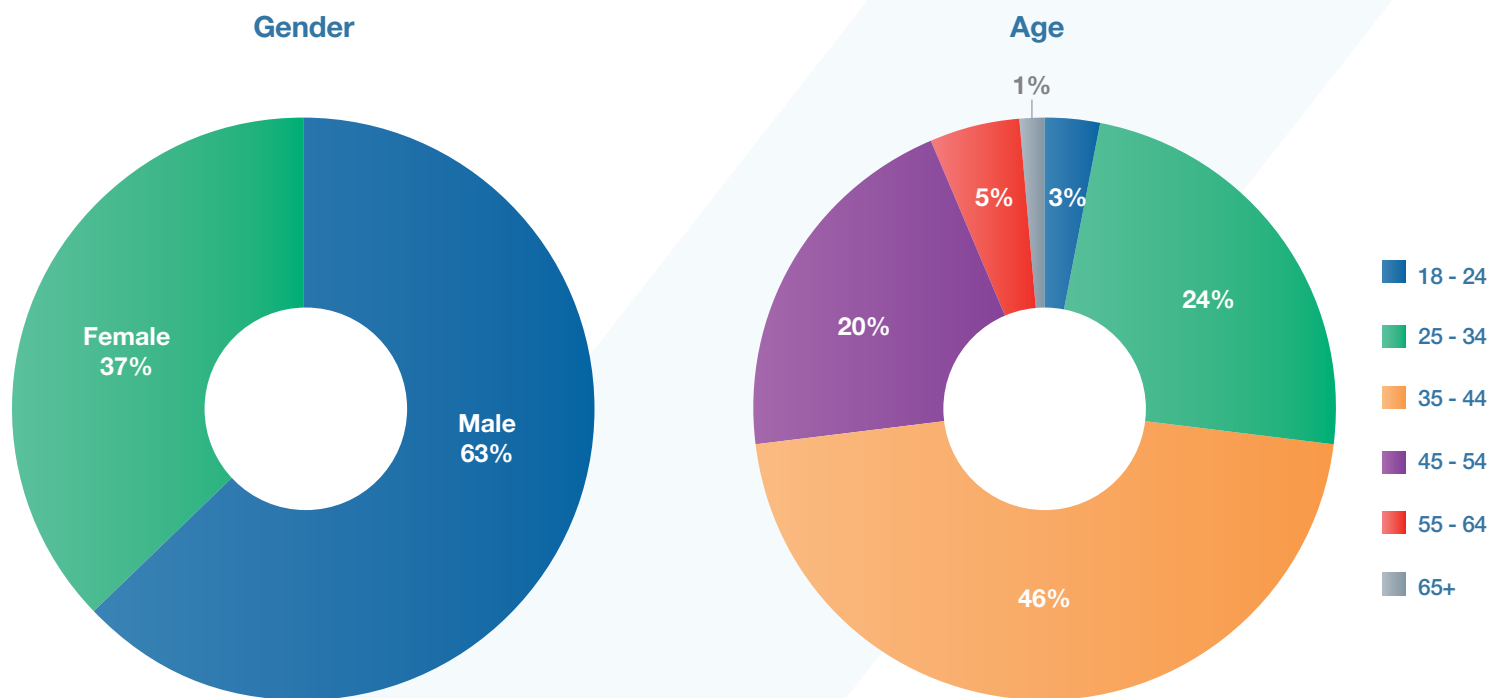
Which Region & Area Best Describes Where You Live?



Source: VAB / Research Now "Advertising Community" Survey, February 2017. Q3: Please select which region/state you live in (select one). Q4: Which area best describes where you live? Respondents = 254.

Our Respondents Skew Male & Younger Than The Population

Advertising Community

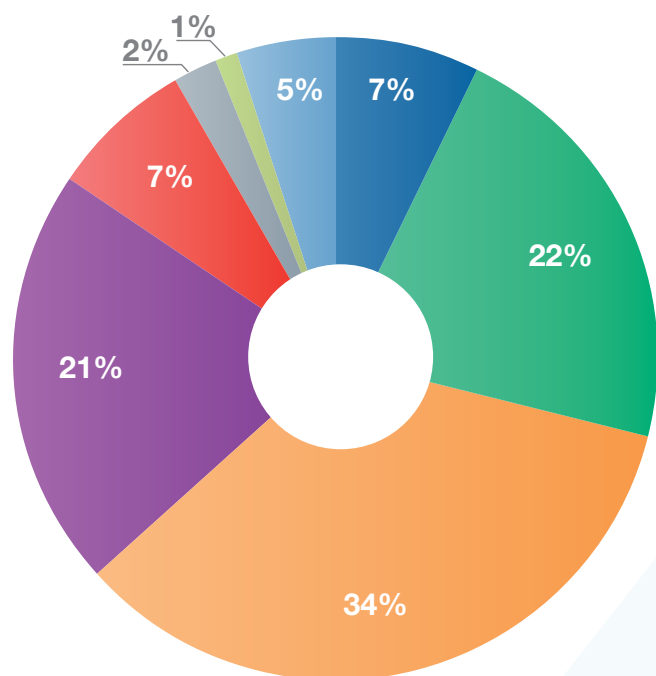


Source: VAB / Research Now "Advertising Community" Survey, February 2017. Q1: What is your gender? Respondents = 254. Comparison made to "average A18+ population" is based on Nielsen 2016-2017 National Universe Estimates.

...And Are More Affluent Than The Average Population

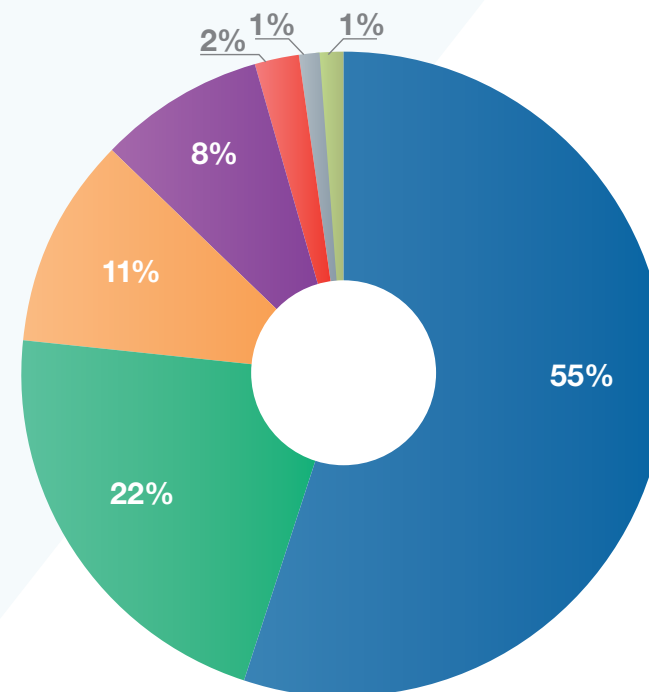
What Is Your Annual Income?

Advertising Community



65% = \$75K+ IEI

Average A18+ Employed Full-Time



23% = \$75K+ IEI

- Less \$49,999
- \$50,000 - \$74,999
- \$75,000 - \$99,000
- \$100,000 - \$149,000
- \$150,000 - \$199,000
- \$200,000 - \$249,000
- \$250,000+
- Prefer not to answer

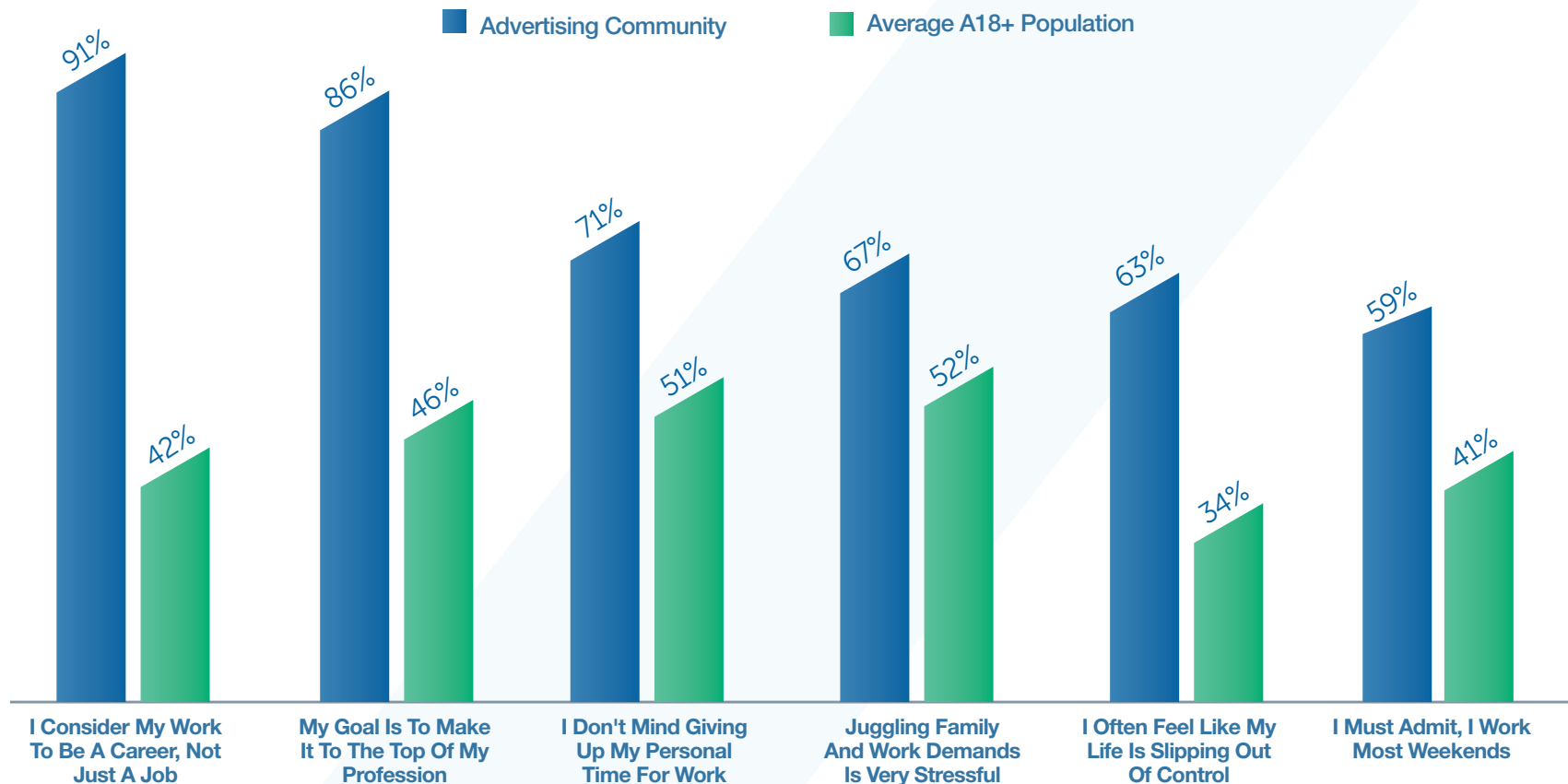
Source: VAB / Research Now "Advertising Community" Survey, February 2017. Q5: What is your annual income? Respondents = 254. "Average A18+ population" data based on VAB analysis of GfK MRI 2016 Doublebase ("Individual Employment Income" - IEI) and reflects only those who are currently employed full-time.



How Does The Lifestyle of Advertising Professionals Compare With The Average American?

We Are Career-Driven Workaholics And, Yes, More Stressed Than The Average Population

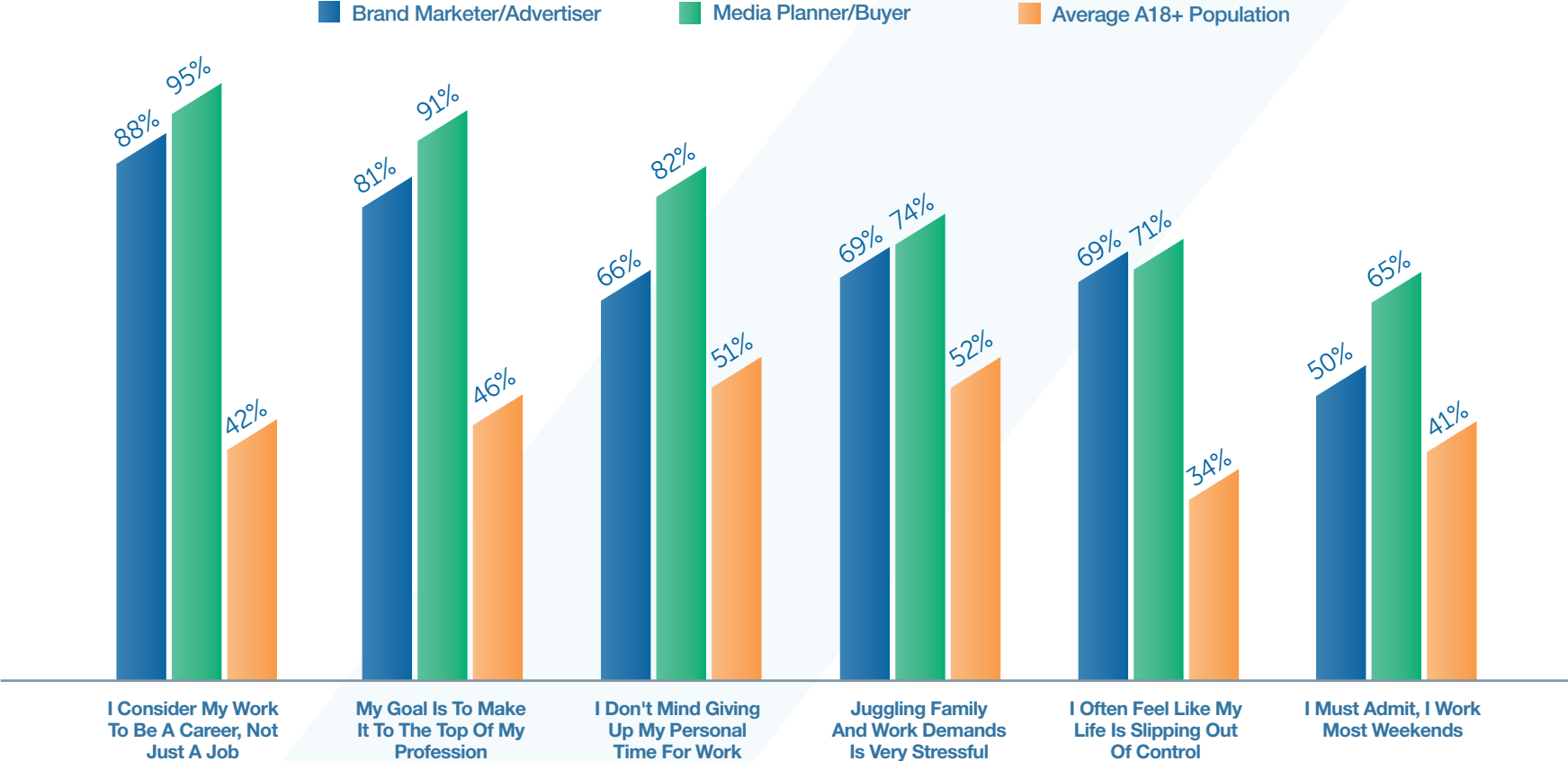
% That Agree With The Following “Work/Life Balance” Statements



Source: VAB / Research Now “Advertising Community” Survey, February 2017. Q12: Please indicate below how much you agree or disagree with the following statements (Top 2 Box agree); Respondents = 254. “Average A18+ population” data based on GfK MRI 2016 Doublebase.

Media Planners / Buyers Tend To Be More Stressed (And Work More Weekends) Than Brand Marketers

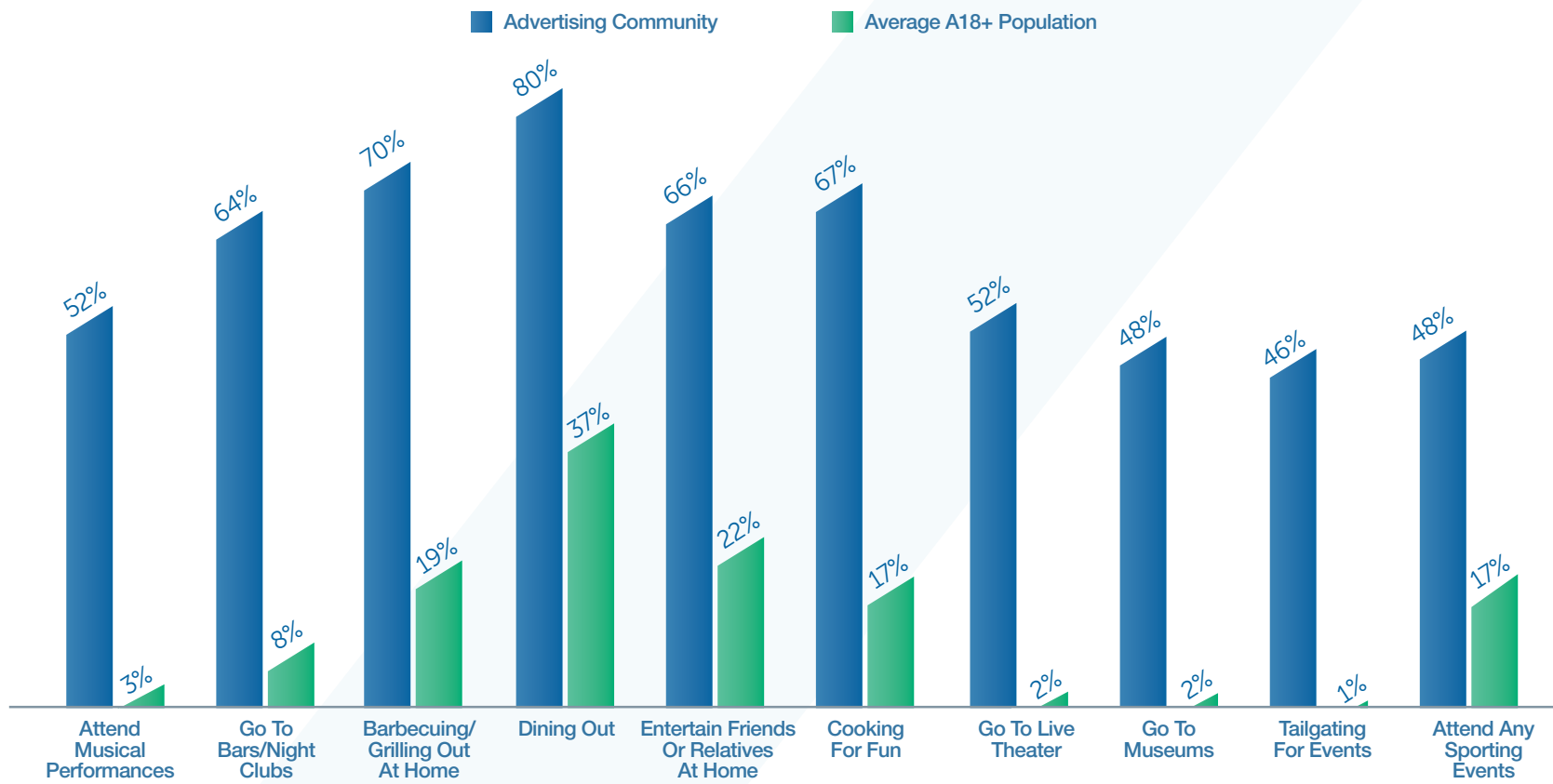
% That Agree With The Following "Work/Life Balance" Statements



Source: VAB / Research Now "Advertising Community" Survey, February 2017. Q12: Please indicate below how much you agree or disagree with the following statements (Top 2 Box agree). Brand Marketer / Advertiser = 74; Media Planner/Buyer Respondents=188. "Average A18+ population" data based on GfK MRI 2016 Doublebase.

Amidst All This Work, We Find A Way To Have Fun... We Are More Active & "On The Go" Than Most Americans

Which Activities Do You Participate In At Least Once A Month?

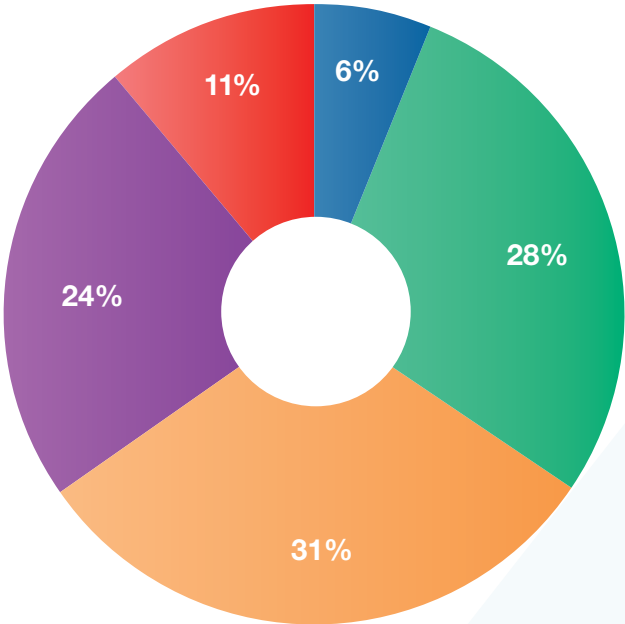


Source: VAB / Research Now "Advertising Community" Custom Survey, February 2017. Q32: Please indicate how often you engage in the following activities? Respondents = 254.
 "Average A18+ Population" based on GfK MRI 2016 Doublebase ("any sports" is based on last 12 months for MRI).

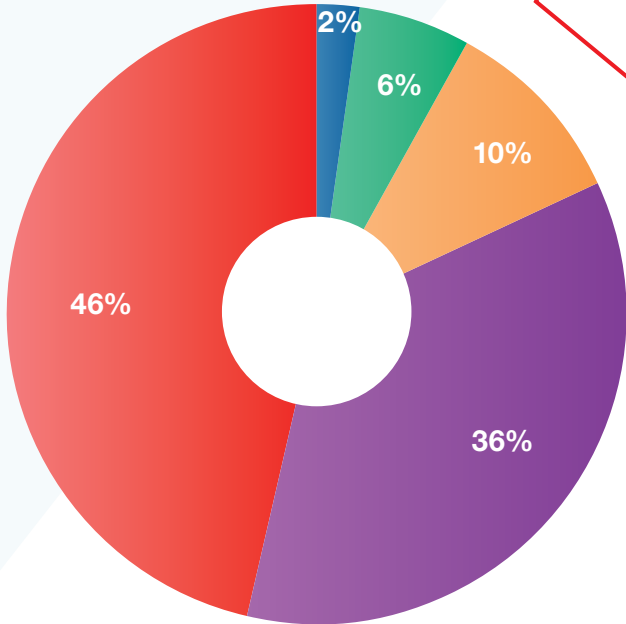
We Also See More Movies In The Theater Than Most Americans

How Often Have You Been To A Movie Theater? (Last 90 Days)

Advertising Community



Average A18+ Population



65% go to the movies at least once a month

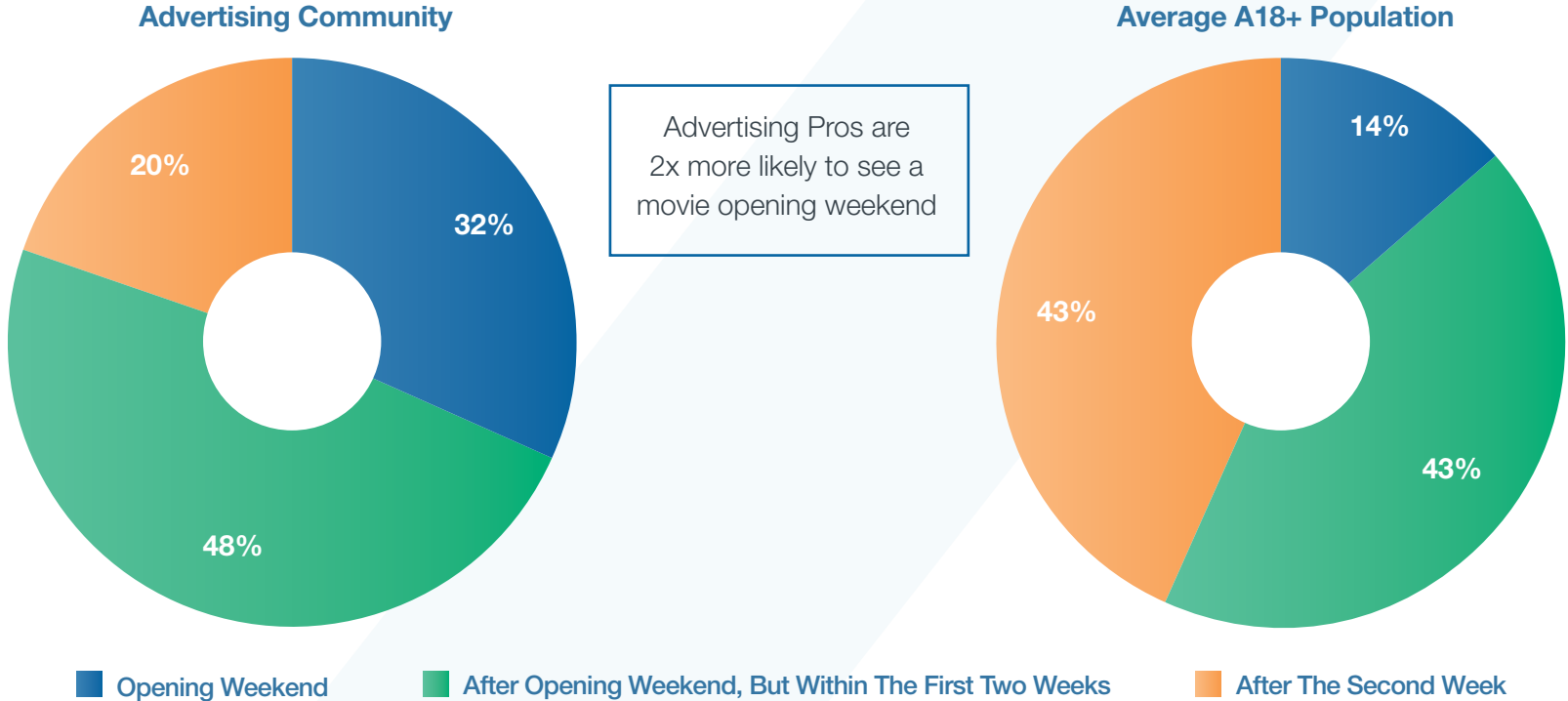
18% go to the movies at least once a month

■ Once A Week Or More
 ■ 2-3 Times A Month
 ■ Once A Month
 ■ Less Than Once A Month
 ■ I Haven't Been

Source: VAB / Research Now "Advertising Community" Custom Survey, February 2017. Q28: How often have you been to a movie theater in the last 90 days? Respondents = 254. "Average A18+ Population" data based on GfK MRI 2016 Doublebase.

Of Course, In The Interest Of Staying On Top Of Pop Culture, We Need To Be The First To See A Movie

When Do You Prefer To See A New Movie In The Theater?



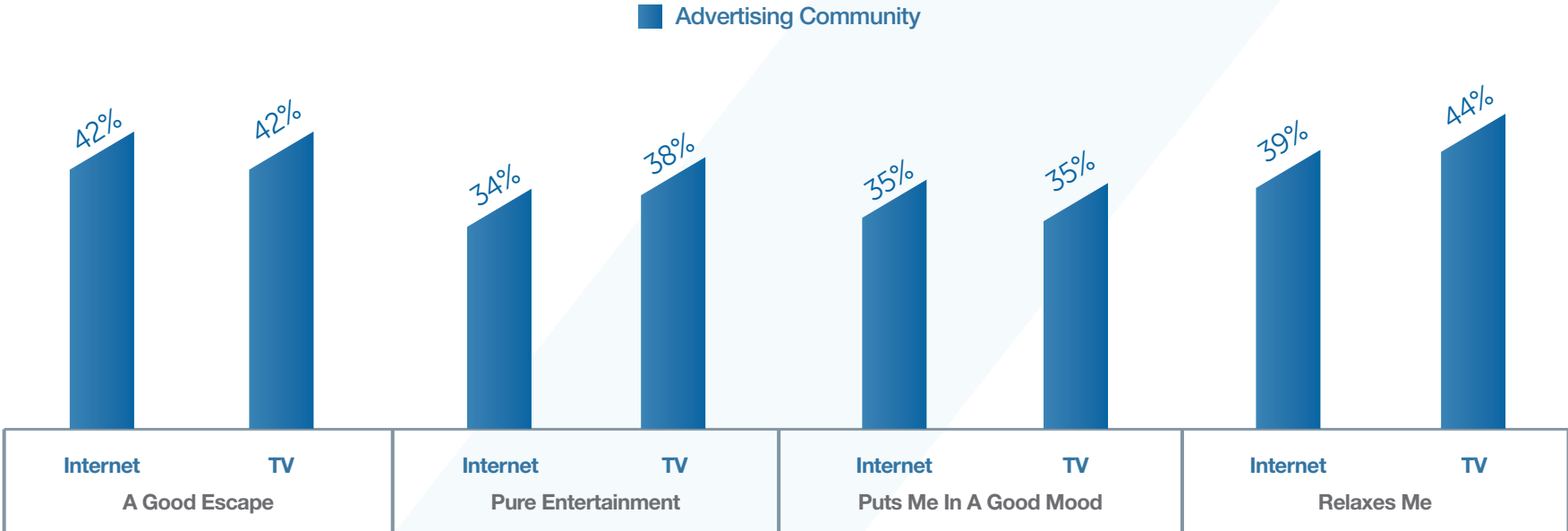
Source: VAB / Research Now "Advertising Community" Custom Survey, February 2017. Q29: When do you prefer to see a new movie in the theater? Respondents = 254. "Average A18+ Population" data based on the universe of people who have seen a movie in GfK MRI 2016 Doublebase.

A man in a light-colored striped shirt and a patterned tie is sitting on a white couch. He is smiling and looking to his right, holding a black remote control in his right hand. The image has a blue and green gradient overlay, with a diagonal line separating the blue and green areas. The text is overlaid on the blue area.

Advertising Pros Have A Different
Lifestyle Than Average Americans -
Does This Affect Media Usage?

We Rely On TV & The Internet, Fairly & Equally, For Entertainment & Escape

For The Following Statements, Which Media Do You Think It Describes?



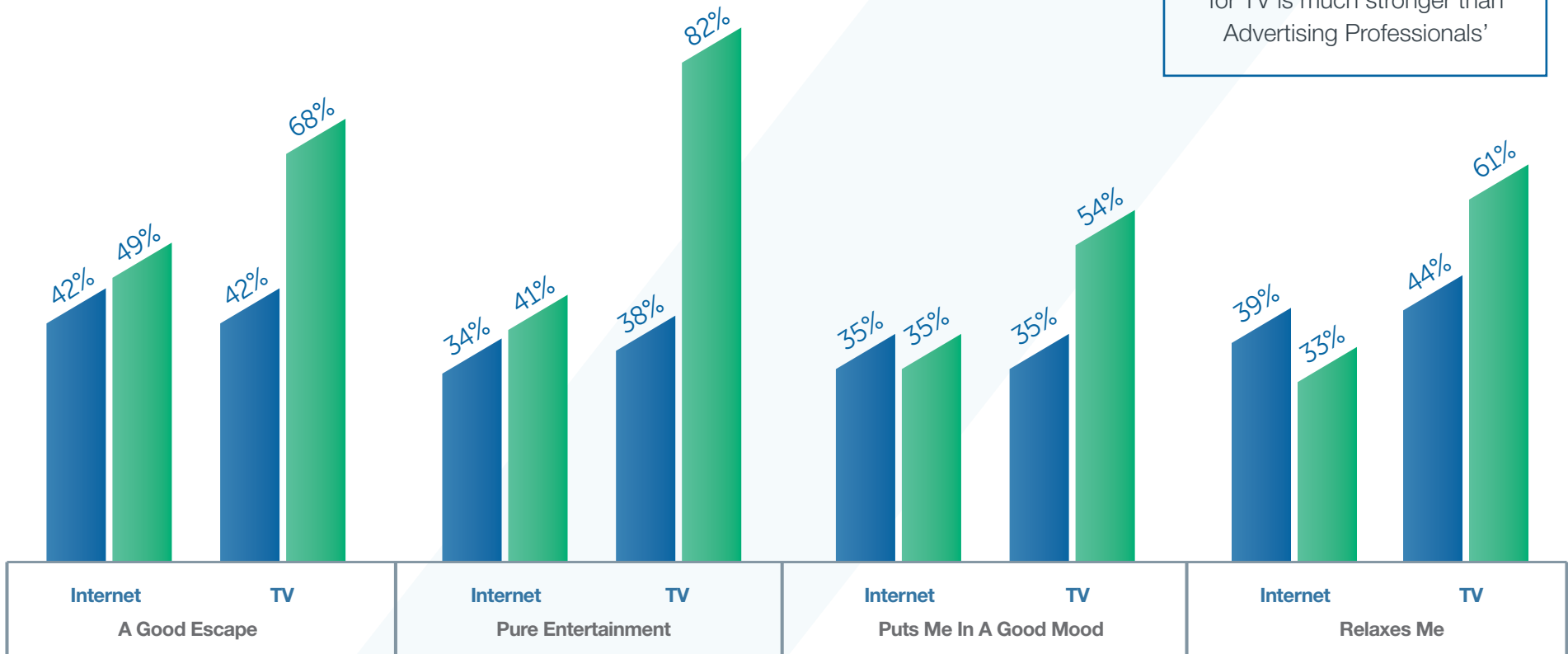
Source: VAB / Research Now "Advertising Community" Survey, February 2017. Q25: For each of the following statements, please check off which media you think it describes; Respondents = 254.

In Contrast, The Average Adult Overwhelmingly Relies On TV

For The Following Statements, Which Media Do You Think It Describes?

■ Advertising Community ■ Average A18+ Population

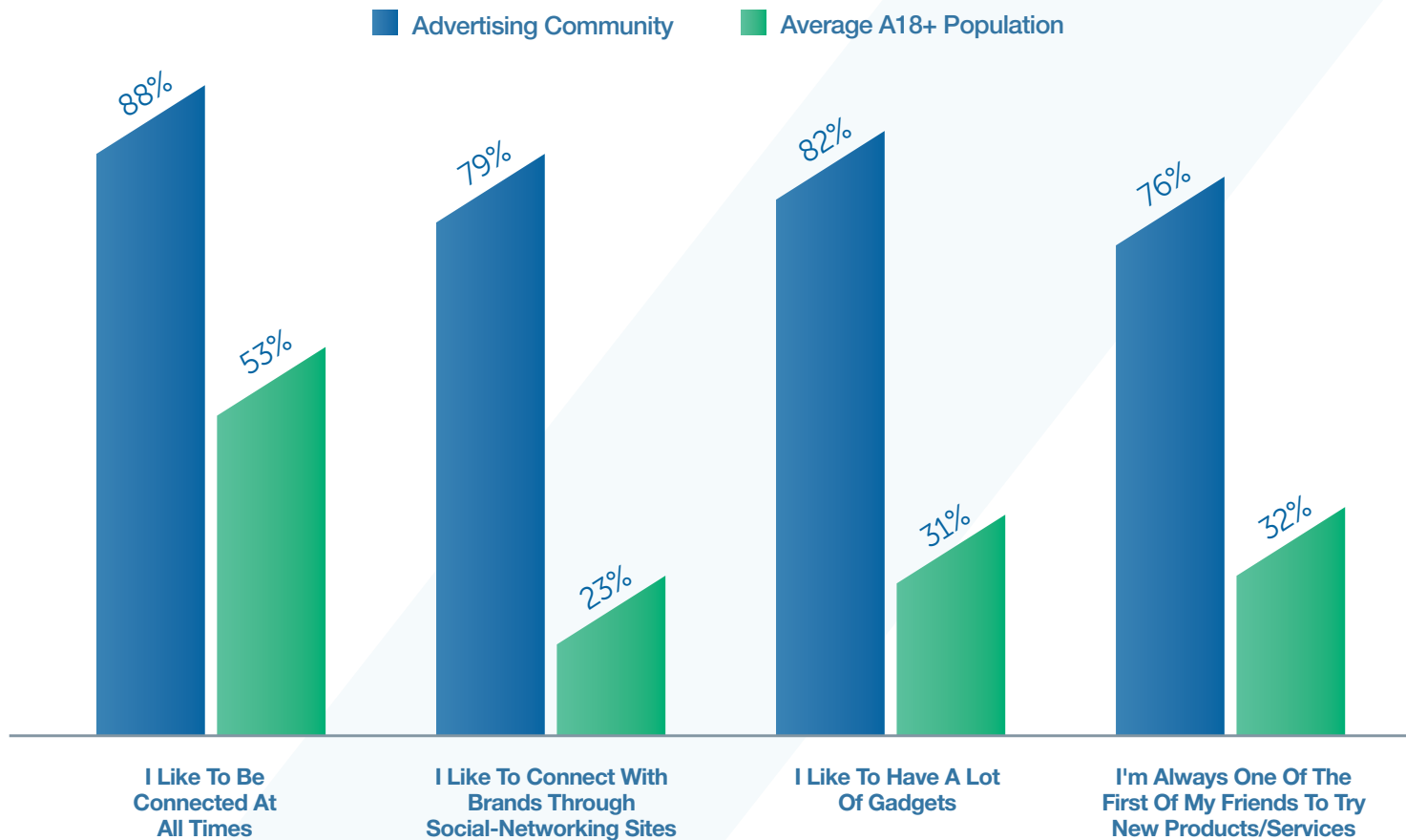
America's sentiment and passion for TV is much stronger than Advertising Professionals'



Source: VAB / Research Now "Advertising Community" Survey, February 2017. Q25: For each of the following statements, please check off which media you think it describes; Respondents = 254. "Average A18+ population" data based on GfK MRI 2016 Doublebase.

We Are Always Connected and Are More Likely To Be Early Adopter Gadget Gurus

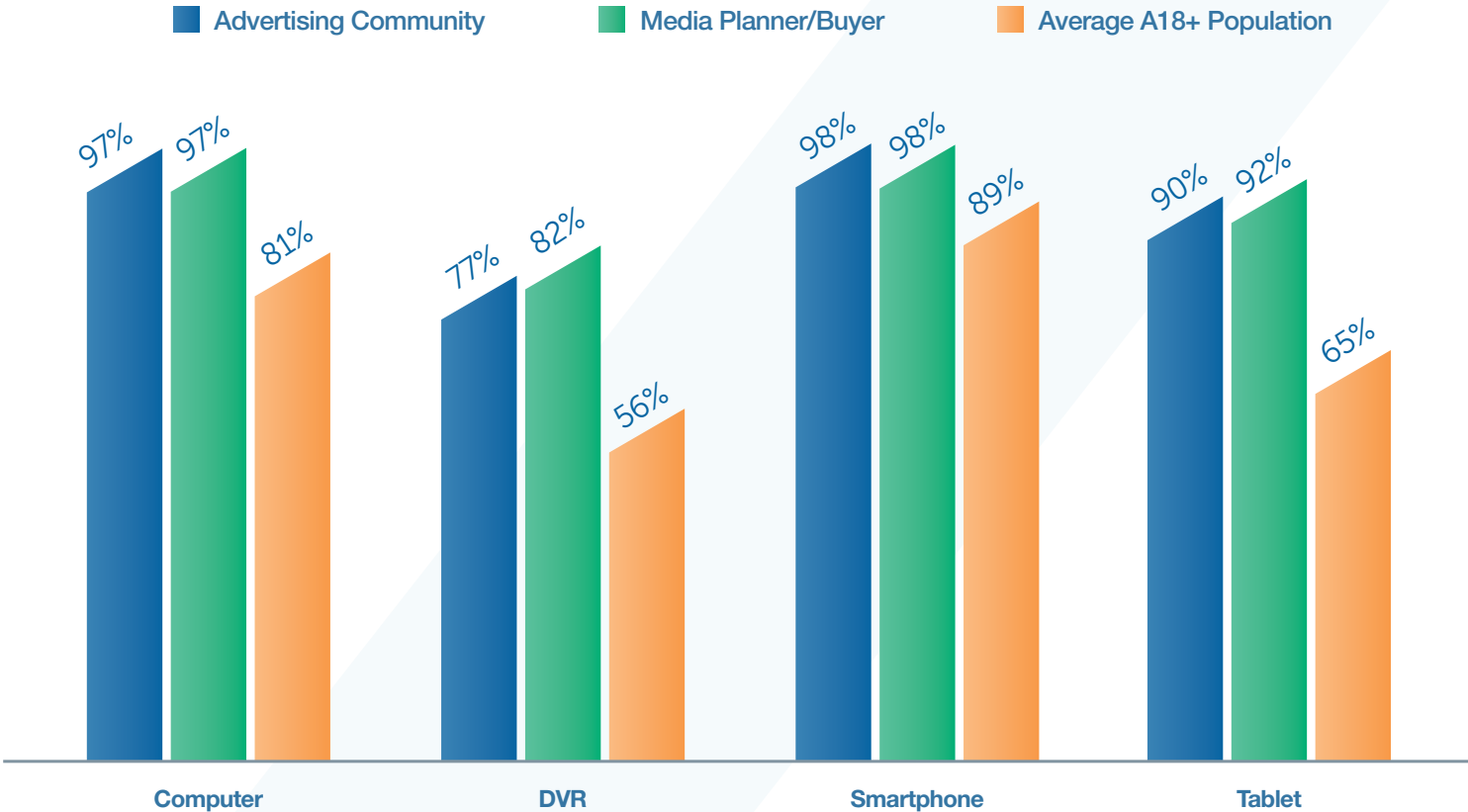
% That Agree With The Following “Early Adopter / Technology” Statements



Source: VAB / Research Now “Advertising Community” Survey, February 2017. Q18: Please indicate below how much you agree or disagree with the following statements (Top 2 Box agree); Respondents = 254. “Average A18+ population” data based on GfK MRI 2016 Doublebase.

Therefore, We Are More Likely To Own Almost Every Major Device

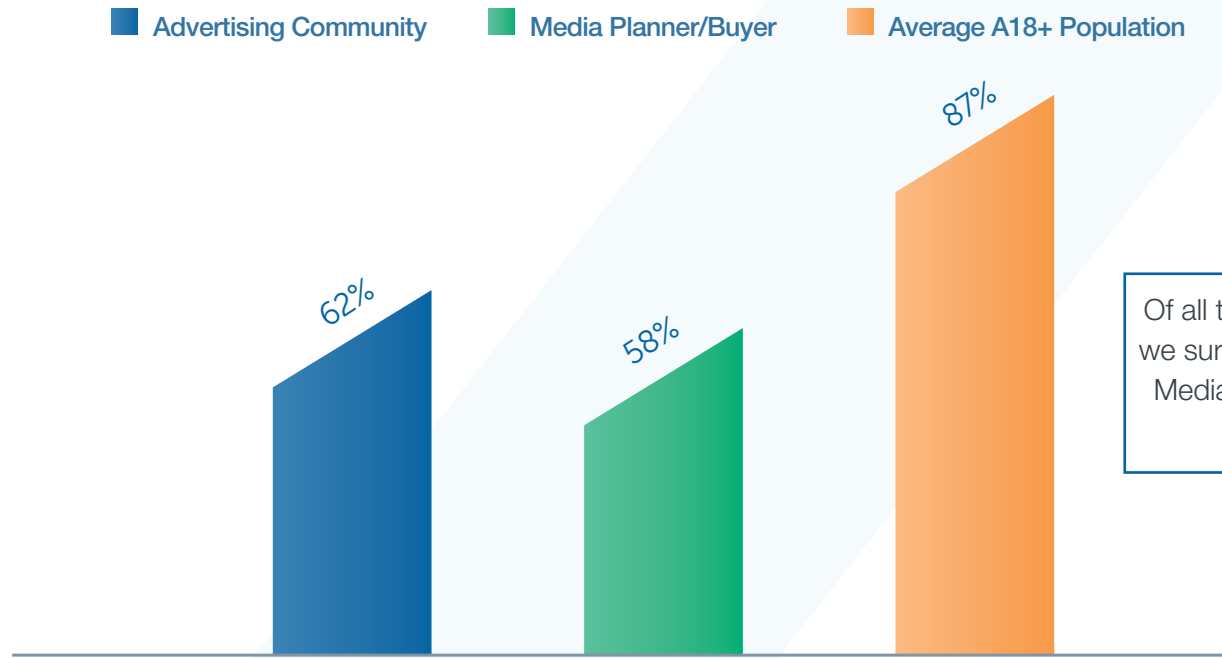
% That Have At Least One Device In Their Household



Source: VAB / Research Now "Advertising Community" Survey, February 2017. Q13: How many of each of the following devices are there in your household? Total Respondents = 254, Media Planner / Buyer Respondents = 188.

Except TV's...We Are Much Less Likely To Have Multiple TV's In Our Household

% That Have 2 or More TVs In Their Households



Of all the Advertising functions we surveyed, urban, Integrated Media Professionals own the fewest TV's

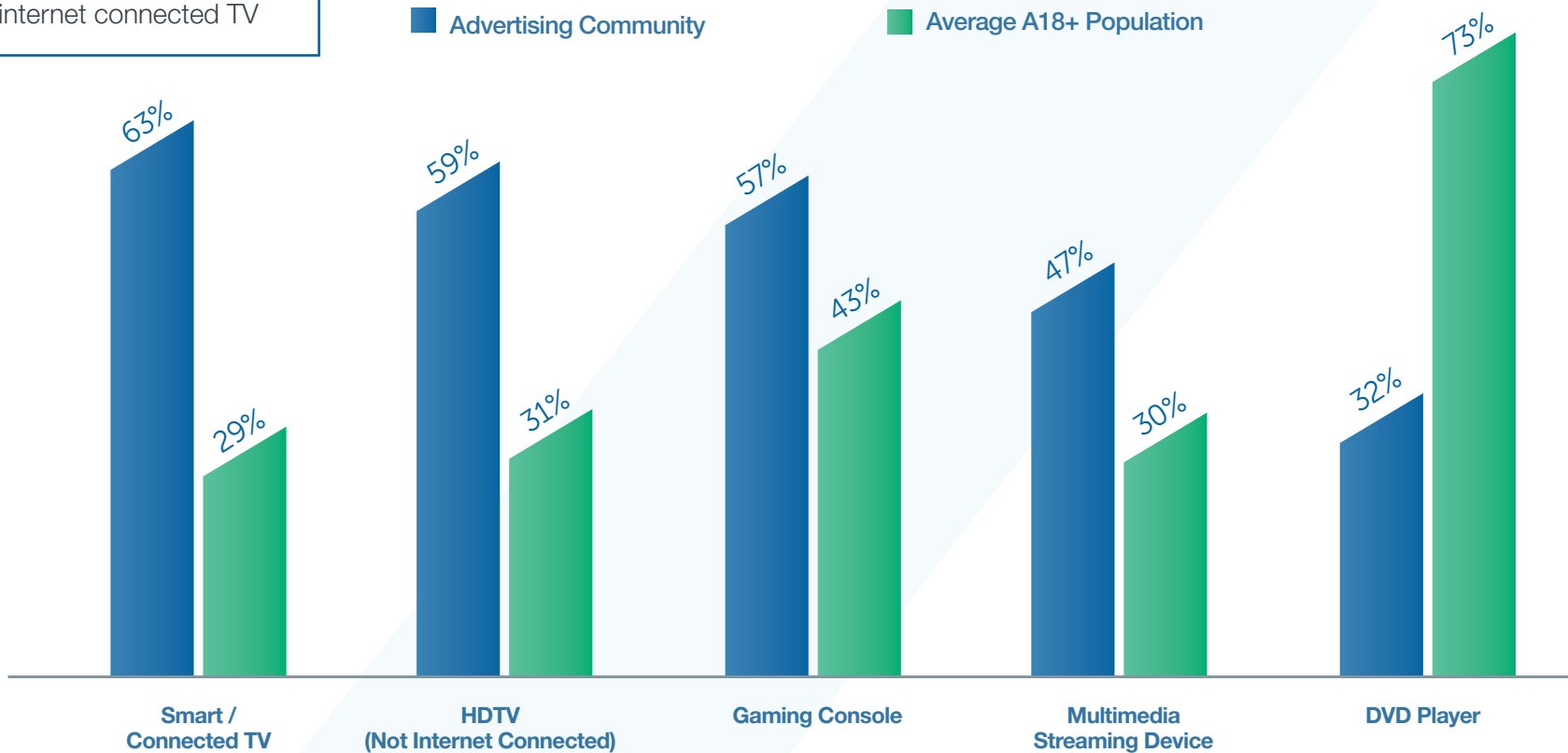
	Advertising Community	Media Planner/Buyer	Average A18+ Population
3+ =	21%	15%	63%
4+ =	8%	4%	38%

Source: VAB / Research Now "Advertising Community" Survey, February 2017. Q13: How many of each of the following devices are there in your household? Total Respondents = 254, Media Planner / Buyer Respondents = 188

However, We Invest In Smart TV's And OTT Devices That Allow Easy Access to Streaming Content

Device Ownership in Household

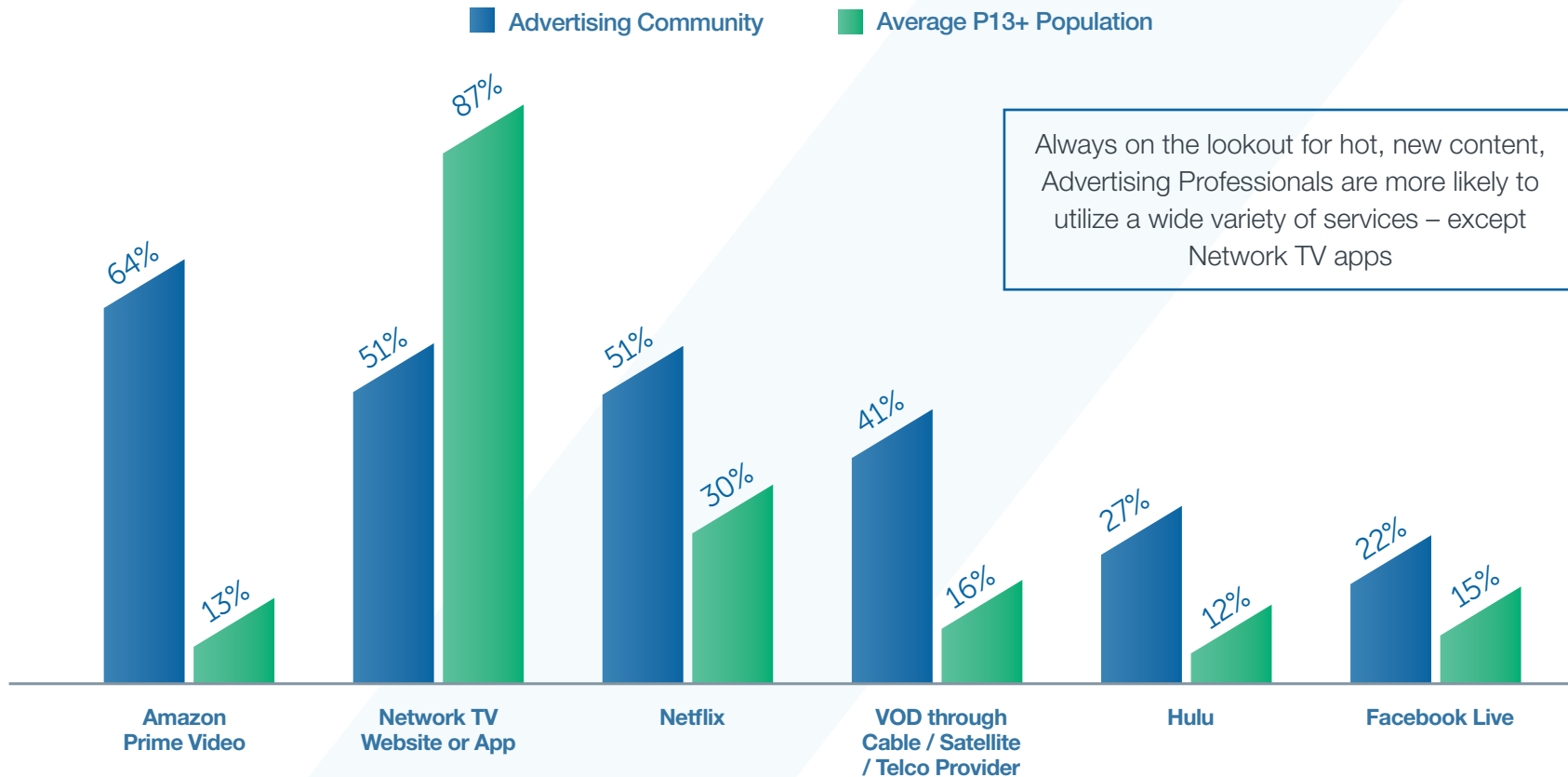
Advertising Professionals are more than 2x as likely to own an internet connected TV



Source: VAB / Research Now "Advertising Community" Survey, February 2017. Q14: Which of the following devices do you or anyone else in your household own? Respondents = 254. "Average A18+ population" data based on Nielsen NPower, January 2017 household data; HDTV (not Internet connected) based on GfK 2016 Doublebase.

We Are Content Thirsty & Platform Agnostic – SVOD Services, TV Everywhere Apps, VOD

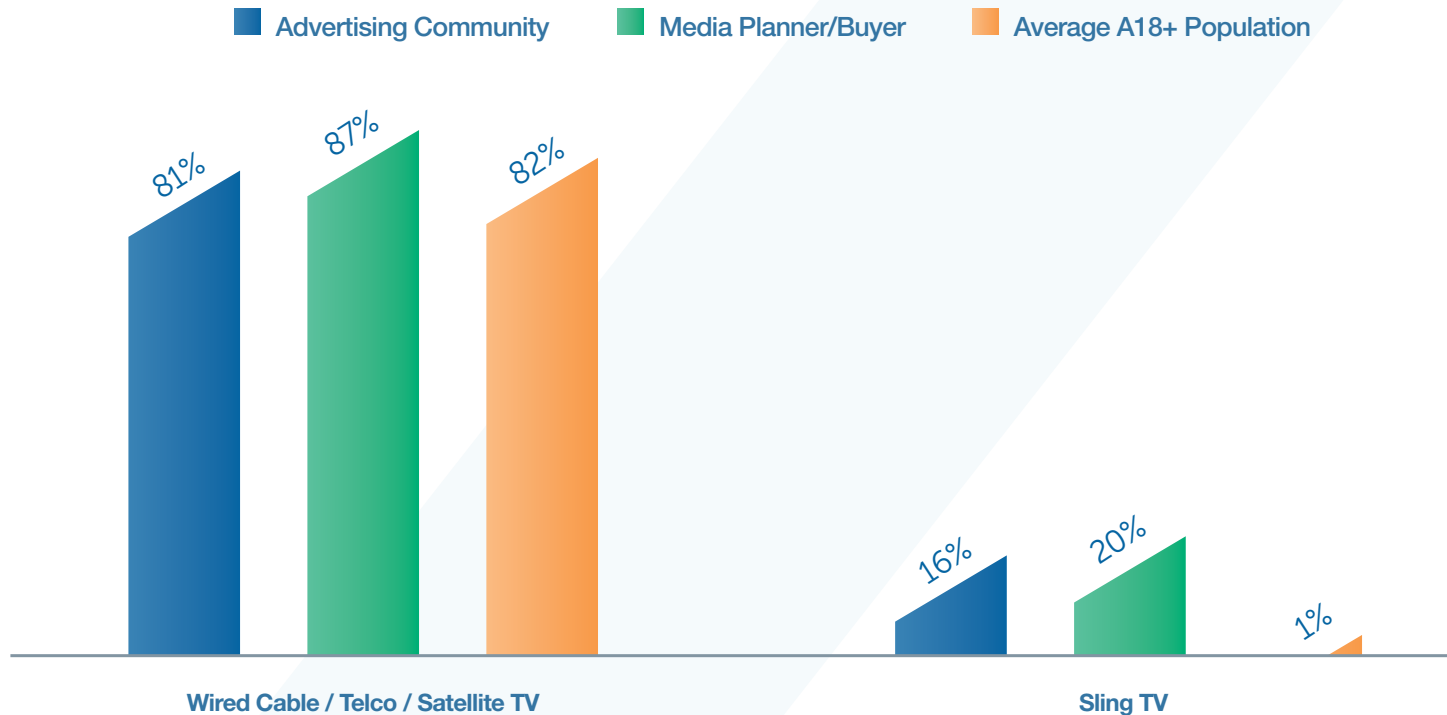
Which Service Have You Used In The Past Month?




Source: VAB / Research Now “Advertising Community” Survey, February 2017. Q17: Which of the following services have you used in the past month? Respondents = 254. “Average P13+ population” data based on GfK Comparing Streaming Services 2016 study, U.S., P13-64; “network TV website or app” based on comScore MediaMetrix Multiplatform data, January 2017. Facebook Live is based on VAB analysis of eMarketer November 2016 data and projected to the U.S. population.

Even Though We Have Access To Multiple Platforms, We Are No More “Cord Cutters” Than The Average Adult

Which Service Does Your Household Subscribe To?



Source: VAB / Research Now “Advertising Community” Survey, February 2017. Q15: Which of the following do you or someone in your household subscribe to? Total Respondents=254; Media Planner/Buyer Respondents=188. “Average A18+ population” data based on Nielsen NPower, February 2017 household data; Sling TV is estimated based on mid-September 2016 Nielsen subscriber estimates.

A top-down view of a person's hands interacting with a laptop, a tablet, and a smartphone on a wooden desk. A white coffee cup sits on the desk. The image is overlaid with a blue and green gradient. The text is centered in white.

Do Our Unique Media Preferences
Skew Our Perceptions of General
Media Usage?

Perception vs. Reality

In our Advertising Community survey, we asked respondents to provide two separate responses to our media consumption questions:



Self-reported

“What do you do...”



Estimated

“What do you *think* an average American does...”

Then we compared the advertiser responses to the general population’s “real” media consumption based on third-party syndicated research

32% Of The Advertising Community's Video Consumption Is Done On TV

Total Video Consumption (P18+): % By Device



(Live or Recorded on a TV set)



(Via a TV connected device)



(On a PC/Desktop/Laptop Computer)



(On a Tablet)



(On a Smartphone)

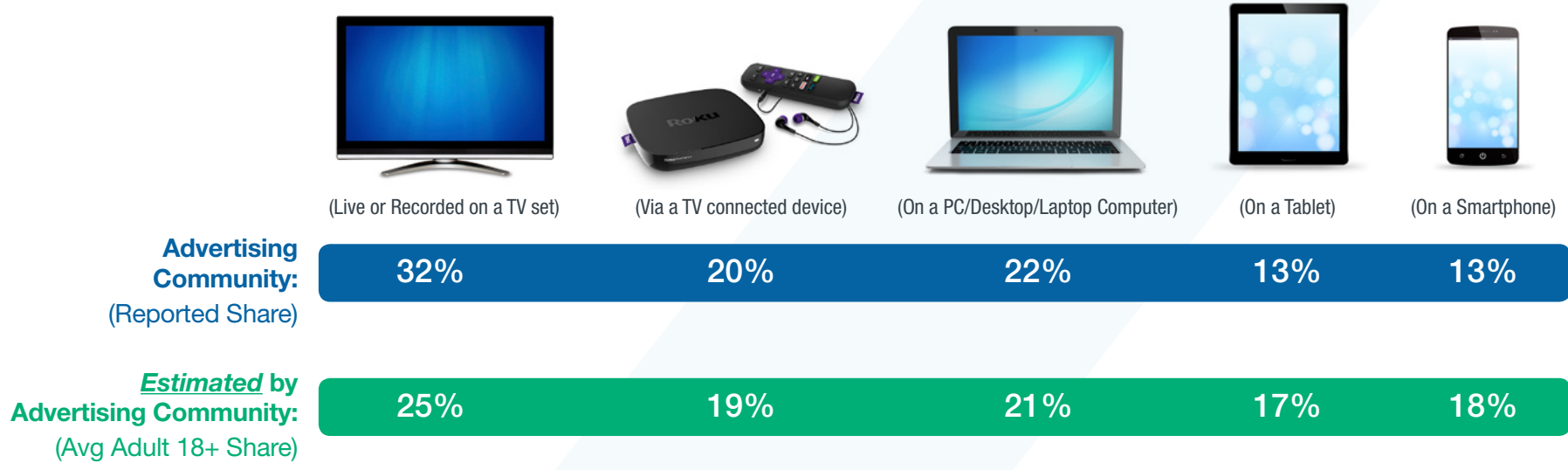
Advertising Community:
(Reported Share)



Source: VAB / Research Now "Advertising Community" Survey, February 2017. Q23: Of all the video that you watch, what % of time do you watch video (UGC, broadcast, streaming, cable TV programs, online video, etc.) on the following devices? (mean average summary which factors in 0% responses); Respondents = 254.

We Believe The Average Adult's Share Of Video Viewing On TV Is Even Lower

Total Video Consumption (P18+): % By Device

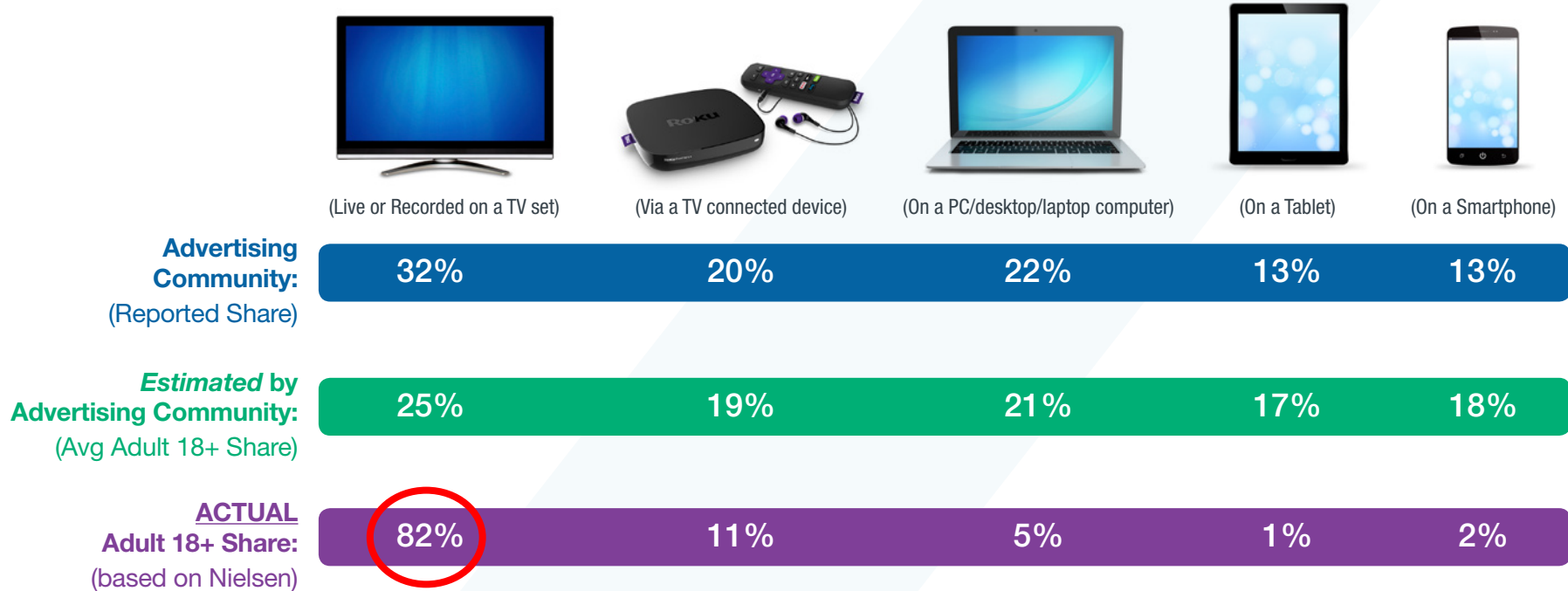


Advertising Pros believe average Americans consume more video on mobile devices than themselves

Source: VAB / Research Now "Advertising Community" Survey, February 2017. Q23: Of all the video that you watch, what % of time do you watch video (UGC, broadcast, streaming, cable TV programs, online video, etc.) on the following devices? (mean average summary which factors in 0% responses); Q24: Of all the video that an average American (P18+) watches, what % of the time do you believe they watch video (UGC, broadcast, streaming, cable TV programs, online video, etc.) on the following devices? (mean average summary which factors in 0% responses). Respondents = 254.

In Reality, 82% Of Adult 18+ Video Viewing Is On TV

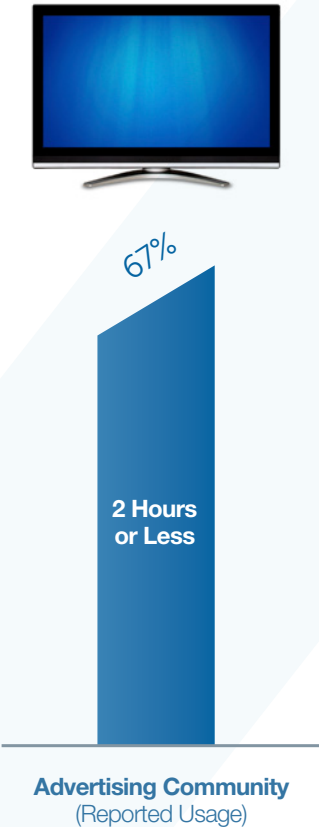
Total Video Consumption (P18+): % By Device



Source: VAB / Research Now "Advertising Community" Survey, February 2017. Q23: Of all the video that you watch, what % of time do you watch video (UGC, broadcast, streaming, cable TV programs, online video, etc.) on the following devices? (mean average summary which factors in 0% responses); Q24: Of all the video that an average American (P18+) watches, what % of the time do you believe they watch video (UGC, broadcast, streaming, cable TV programs, online video, etc.) on the following devices? (mean average summary which factors in 0% responses). Respondents = 254. "Average P18+ population" data based on Nielsen's Comparable Metrics Report, Q3'16, P18+, and reflects an average week between June 27th, 2016 – September 25, 2016.

Time Spent: 67% Of Us Say That We Watch Two Or Less Hours Of TV Per Day

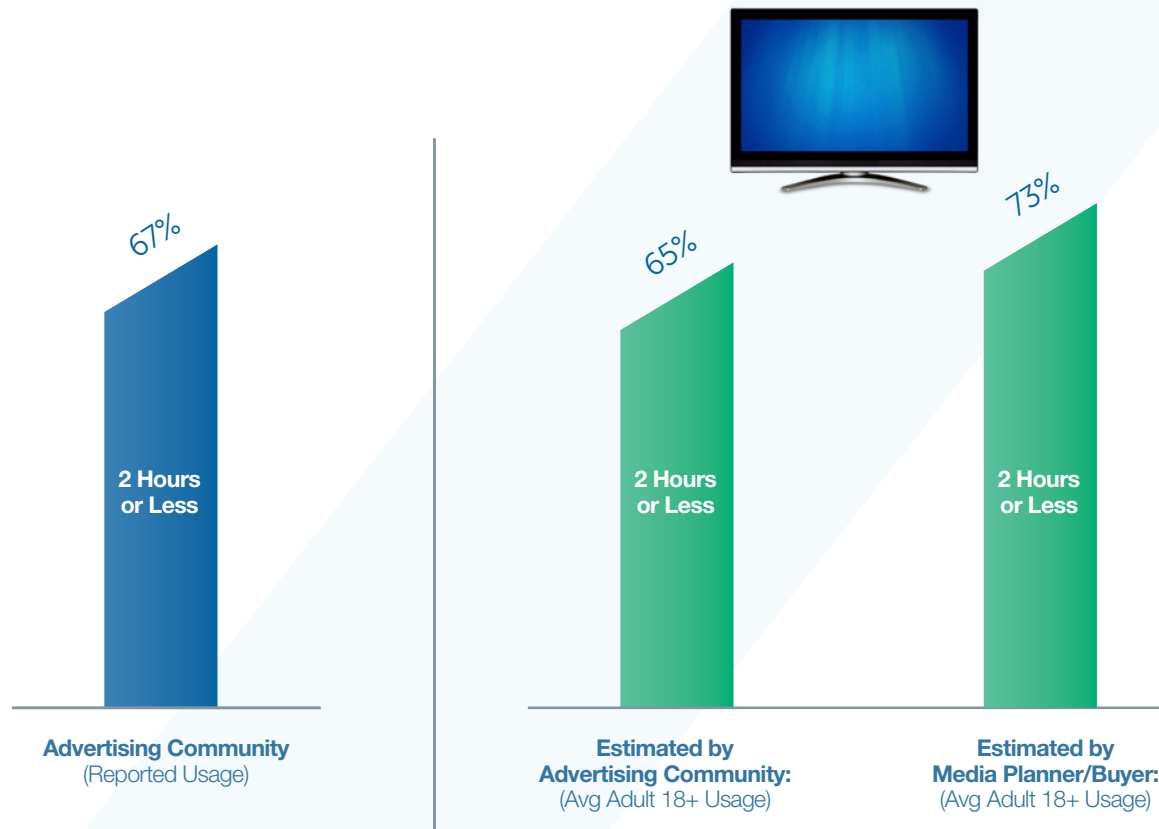
In an average day, approximately how much time do you spend watching TV on a TV set?



Source: VAB / Research Now "Advertising Community" Custom Survey, February 2017. Q19: In an average day, approximately how much time do you spend watching TV on a TV set (live, recorded / from a DVR or VOD)? Total Respondents = 254. Data doesn't include those respondents who answered "don't know."

We Believe The Average Adult's TV Viewing Habits Align With Our Own

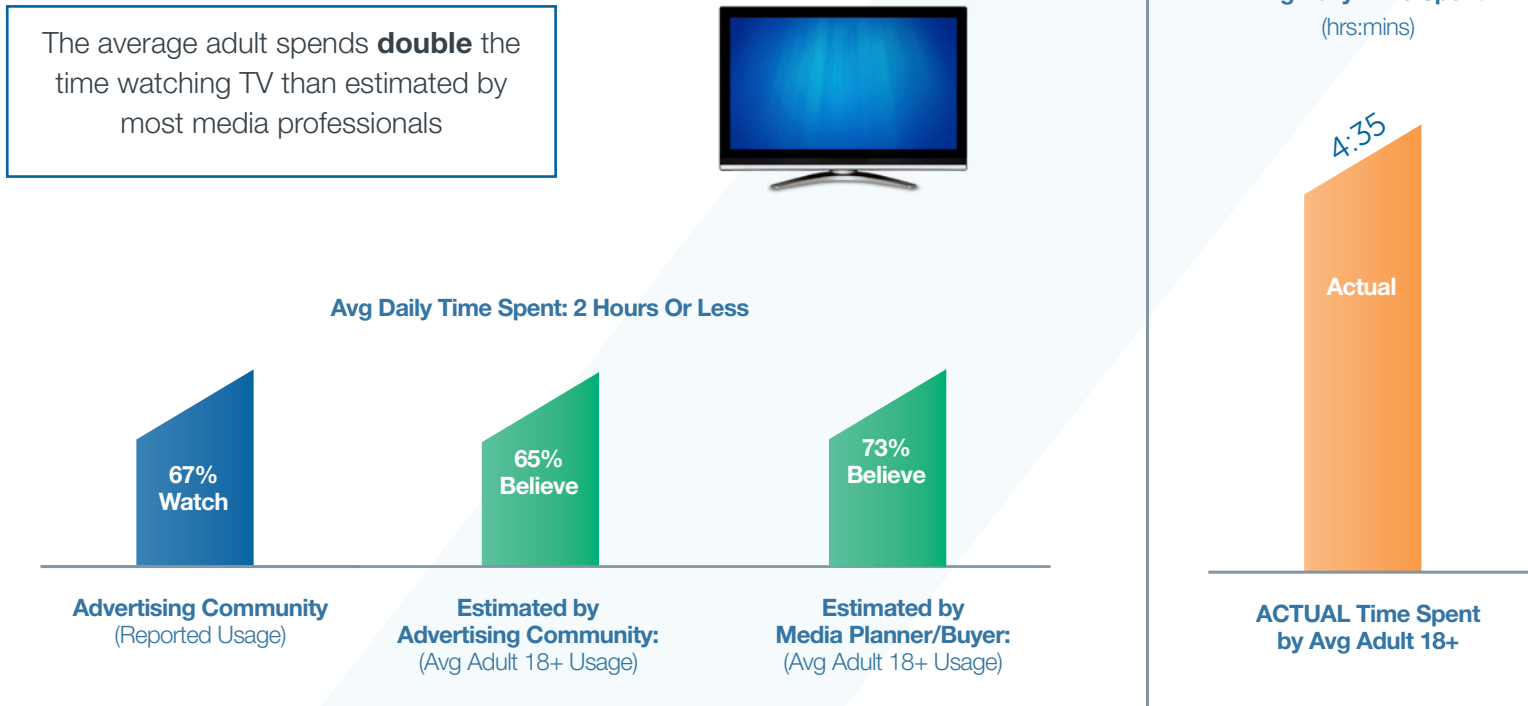
In an average day, how much time do you *think* the average adult spends watching TV on a TV set?



Source: VAB / Research Now "Advertising Community" Custom Survey, February 2017. Q19: In an average day, approximately how much time do you spend watching TV on a TV set (live, recorded / from a DVR or VOD)? & Q20: In an average day, how much time do you think the American public (P18+) spends watching TV on a TV set. Total Respondents = 254; Media Planner/Buyer Respondents = 188. Data doesn't include those respondents who answered "don't know."

However, We Vastly Underestimate How Much Time Is **Actually** Spent By The Average Adult Watching TV

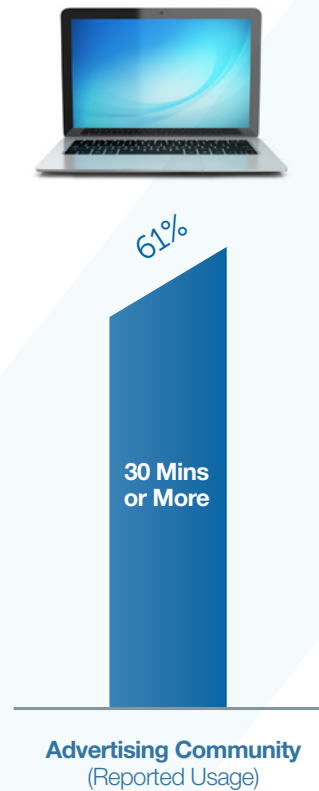
In an average day, approximately how much time do you spend, and how much time do you think the average adult spends, watching TV on a TV set?



Source: VAB / Research Now "Advertising Community" Custom Survey, February 2017. Q19: In an average day, approximately how much time do you spend watching TV on a TV set (live, recorded / from a DVR or VOD)? & Q20: In an average day, how much time do you think the American public (P18+) spends watching TV on a TV set. Total Respondents = 254; Media Planner/Buyer Respondents = 188. Data doesn't include those respondents who answered "don't know." "Average A18+ Population" data based on VAB analysis of on Nielsen Comparable Metrics Report, Q3'16, and reflects an average week between June 27th, 2016 - September 25, 2016 for total population.

Over 60% Of Us Say We Spend Over 30 Minutes Per Day Watching Video On Our Computer

In an average day, approximately how much time do you spend watching video on a computer?



Source: VAB / Research Now "Advertising Community" Custom Survey, February 2017. Q19: In an average day, approximately how much time do you spend watching video on a computer (desktop/laptop/PC)? Total Respondents = 254. Data doesn't include those respondents who answered "don't know."

We Believe That The Average Adult Spends Even More Time Than Us Watching Video On A Computer

In an average day, approximately how much time do you think the average adult spends watching video on a computer?



Source: VAB / Research Now "Advertising Community" Custom Survey, February 2017. Q19: In an average day, approximately how much time do you spend watching video on a computer (desktop/laptop/PC)? & Q20: In an average day, how much time do you think the American public (P18+) spends watching video on a computer (desktop/laptop/PC)? Total Respondents = 254; Media Planner/Buyer Respondents = 188. Data doesn't include those respondents who answered "don't know."

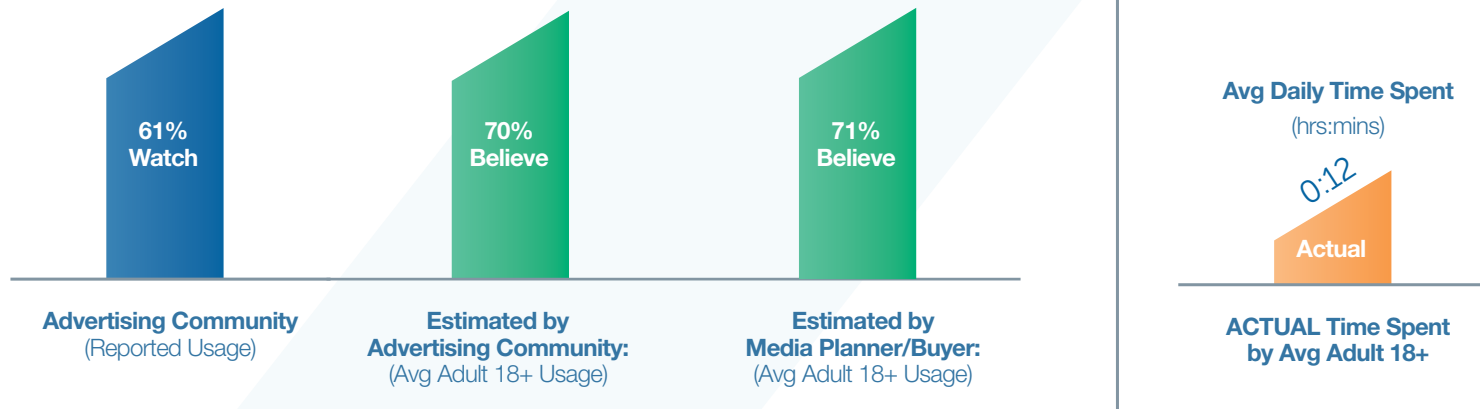
Unlike TV Though, We Vastly Overestimate How Much Time Is **Actually** Spent Watching Video On A Computer

In an average day, approximately how much time do you spend, and how much time do you *think* the average adult spends, watching video on a computer?

The average adult spends *less than half the time* estimated by most media pros watching video on a computer



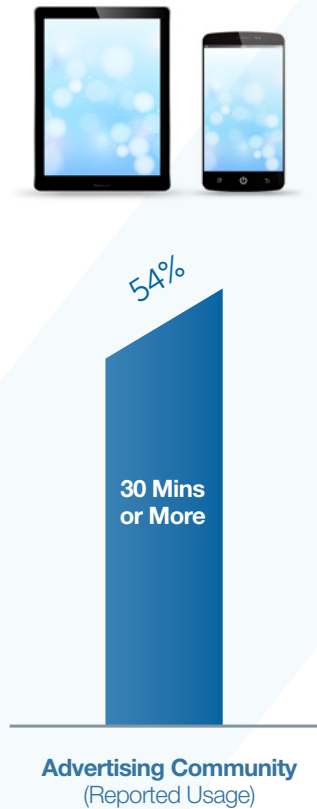
Avg Daily Time Spent: 30 Minutes or More



Source: VAB / Research Now "Advertising Community" Custom Survey, February 2017. Q19: In an average day, approximately how much time do you spend watching video on a computer (desktop/laptop/PC)? & Q20: In an average day, how much time do you think the American public (P18+) spends watching video on a computer (desktop/laptop/PC)? Total Respondents = 254; Media Planner/Buyer Respondents = 188. Data doesn't include those respondents who answered "don't know." "Average A18+ Population" data based on VAB analysis of on Nielsen Comparable Metrics Report, Q3'16, and reflects an average week between June 27th, 2016 – September 25, 2016 for total population.

54% Of Us Say We Spend Over 30 Minutes Per Day Watching Video On Our Mobile Devices

In an average day, approximately how much time do you spend watching video on a mobile device?



Source: VAB / Research Now "Advertising Community" Custom Survey, February 2017. Q19: In an average day, approximately how much time do you spend watching video on a mobile device (smartphone or tablet)? Total Respondents = 254. Data doesn't include those respondents who answered "don't know."

We Believe That The Average Adult Spends Even More Time Than Us Watching Video On Mobile Devices

In an average day, approximately how much time do you *think* the average adult spends watching video on a mobile device?



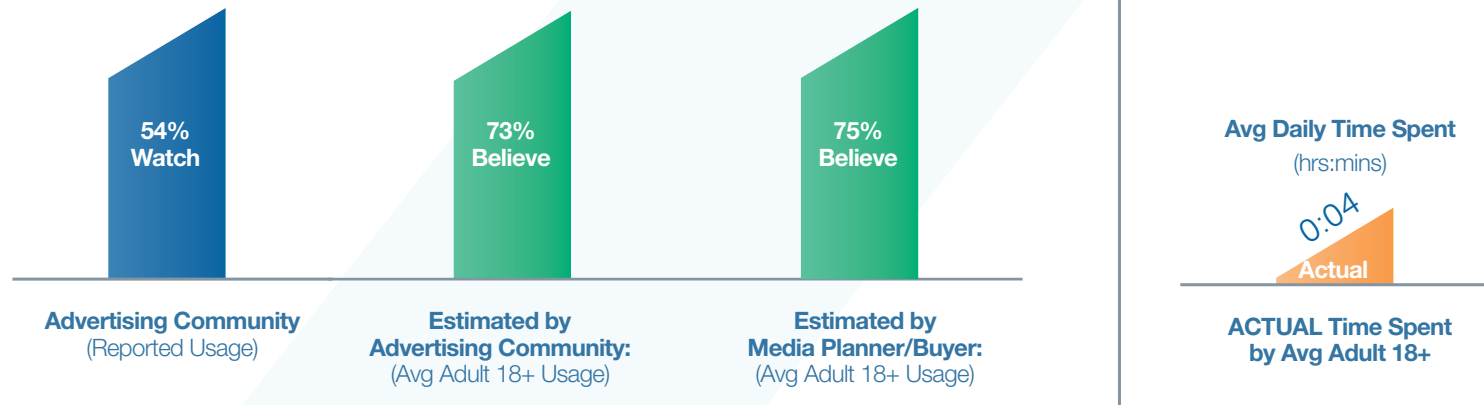
Source: VAB / Research Now "Advertising Community" Custom Survey, February 2017. Q19: In an average day, approximately how much time do you spend watching video on a mobile device (smartphone or tablet)? & Q20: In an average day, how much time do you think the American public (P18+) spends watching video on a mobile device (smartphone or tablet)? Total Respondents = 254; Media Planner/Buyer Respondents = 188. Data doesn't include those respondents who answered "don't know."

However, We Vastly Overestimate How Much Time Is **Actually** Spent By The Average Adult Watching Video On Mobile Devices

In an average day, approximately how much time do you spend, and how much time do you *think* the average adult spends, watching video on a mobile device?



Avg Daily Time Spent: 30 Minutes or More



Source: VAB / Research Now "Advertising Community" Custom Survey, February 2017. Q19: In an average day, approximately how much time do you spend watching video on a mobile device (smartphone or tablet)? & Q20: In an average day, how much time do you think the American public (P18+) spends watching video on a mobile device (smartphone or tablet)? Total Respondents = 254; Media Planner/Buyer Respondents = 188. Data doesn't include those respondents who answered "don't know." "Average A18+ Population" data based on VAB analysis of Nielsen Comparable Metrics Report, Q3'16, and reflects an average week between June 27th, 2016 – September 25, 2016 for total population.

We Also Vastly Overestimate The **Actual** Time The Average Population Spends Per Day Watching Videos On YouTube

In an average day, approximately how much time do you spend, and how much time do you *think* the average person spends, watching videos on YouTube?



Source: VAB / Research Now "Advertising Community" Custom Survey, February 2017. Q19: In an average day, approximately how much time do you spend doing the following activities? (activities done at the same time are counted separately), Q20: In an average day, approximately how much time does an average American (age 18+) spend doing the following activities? (activities done at the same time are counted separately), Total Respondents = 254, Media Planner / Buyer Respondents = 188. Data doesn't include those respondents who answered "don't know." "Average P18+ Population" data based on comScore media metrix multi-platform, January 2017, P18+.

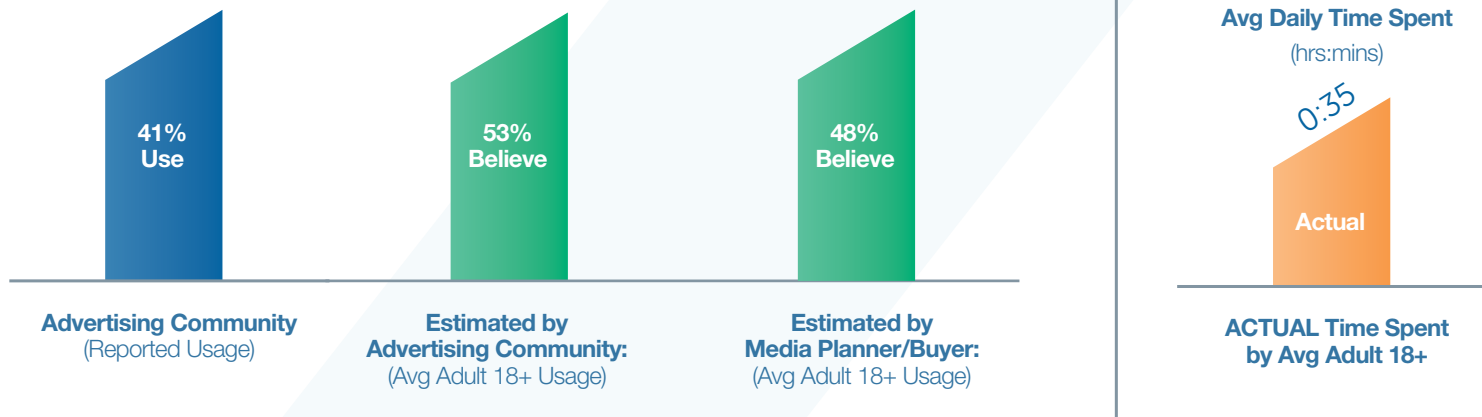
The Same Trend Holds For Facebook & Instagram

In an average day, approximately how much time do you spend, and how much time do you *think* the average person spends, on Facebook or Instagram?



(Facebook and Instagram)

Avg Daily Time Spent: 1 Hour or More



Source: VAB / Research Now "Advertising Community" Custom Survey, February 2017. Q19: In an average day, approximately how much time do you spend doing the following activities? (activities done at the same time are counted separately), Q20: In an average day, approximately how much time does an average American (age 18+) spend doing the following activities? (activities done at the same time are counted separately), Total Respondents = 254, Media Planner / Buyer Respondents = 188. Data doesn't include those respondents who answered "don't know." "Average P18+ Population" data based on comScore media metrix multi-platform, January 2017, P18+.

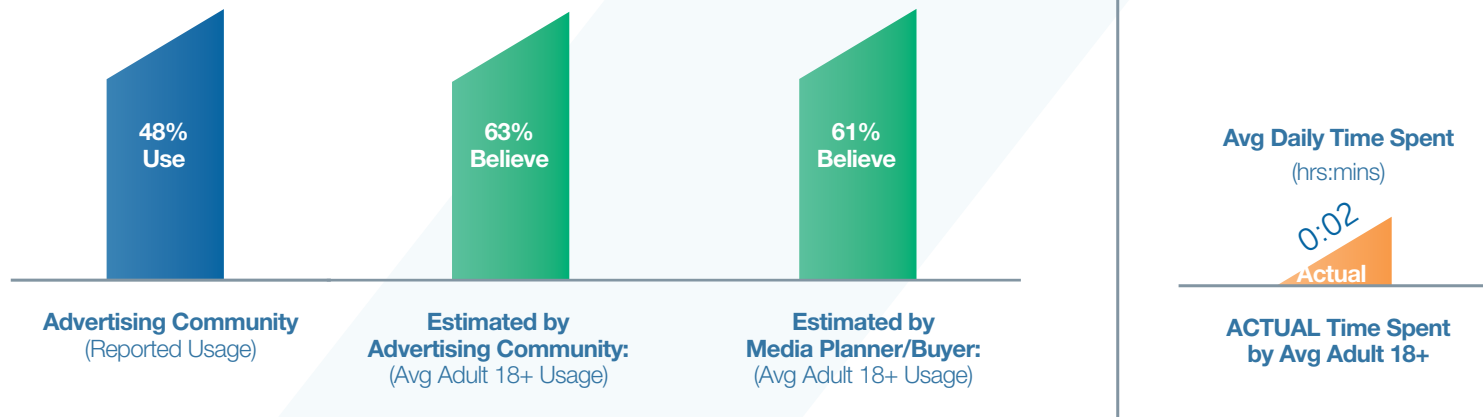
...And Twitter And Virtually Every Digital Platform We Asked About

In an average day, approximately how much time do you spend, and how much time do you *think* the average person spends, on Twitter?



(Twitter)

Avg Daily Time Spent: 30 Minutes or More



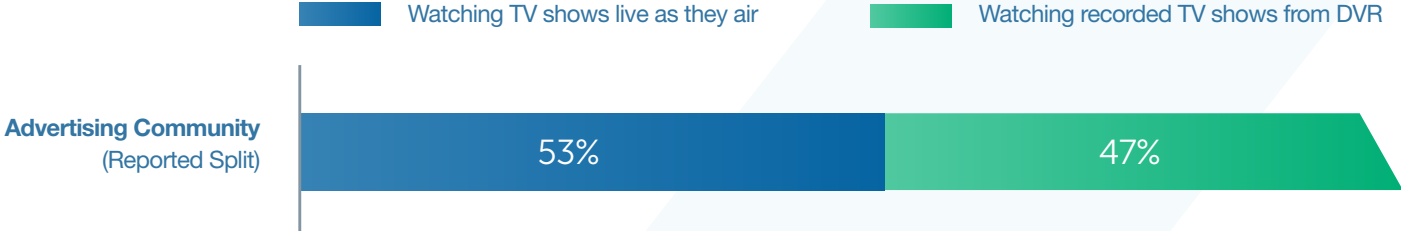
Source: VAB / Research Now "Advertising Community" Custom Survey, February 2017. Q19: In an average day, approximately how much time do you spend doing the following activities? (activities done at the same time are counted separately), Q20: In an average day, approximately how much time does an average American (age 18+) spend doing the following activities? (activities done at the same time are counted separately), Total Respondents = 254, Media Planner / Buyer Respondents = 188. Data doesn't include those respondents who answered "don't know." "Average P18+ Population" data based on comScore media metrix multi-platform, January 2017, P18+.



How Do We
Consume TV?

We Say That We Time-Shift Almost Half Of Our Total TV Viewing

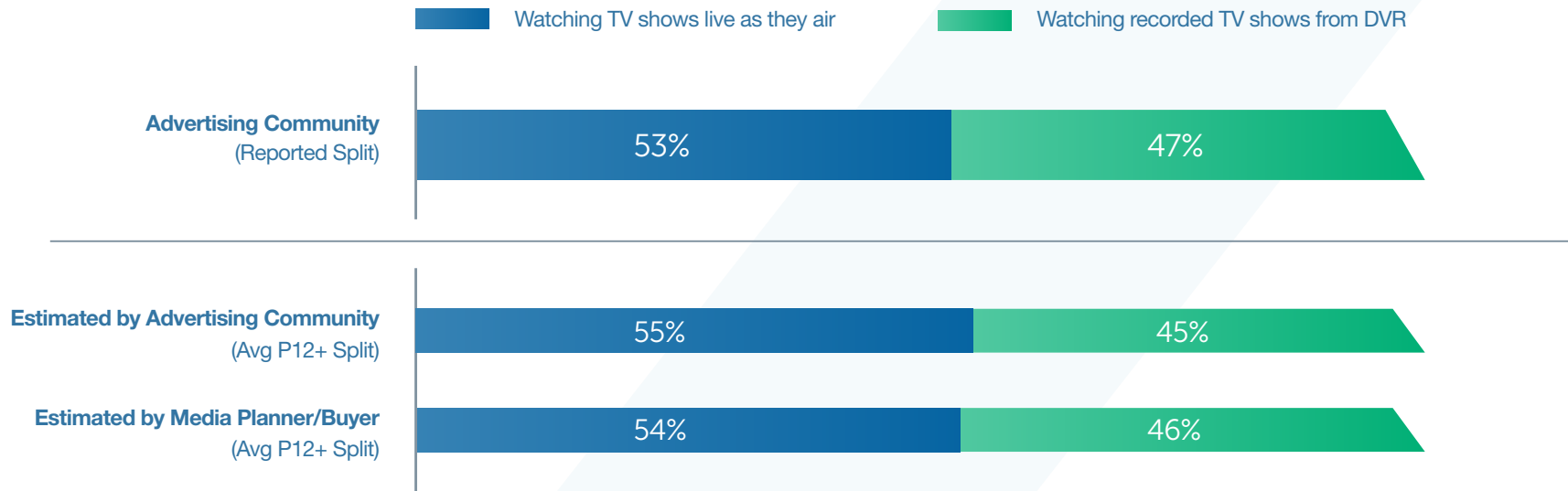
How Do You Consume TV Programming On Your TV Set?
% of Total TV Viewing Time



Source: VAB / Research Now "Advertising Community" Survey, February 2017. Q21: In a typical week, what % of your total TV viewing is spent on the following? (mean average summary which factors in 0% responses) Respondents = 254.

We Believe That People Time Shift Their TV Viewing As Much As We Do

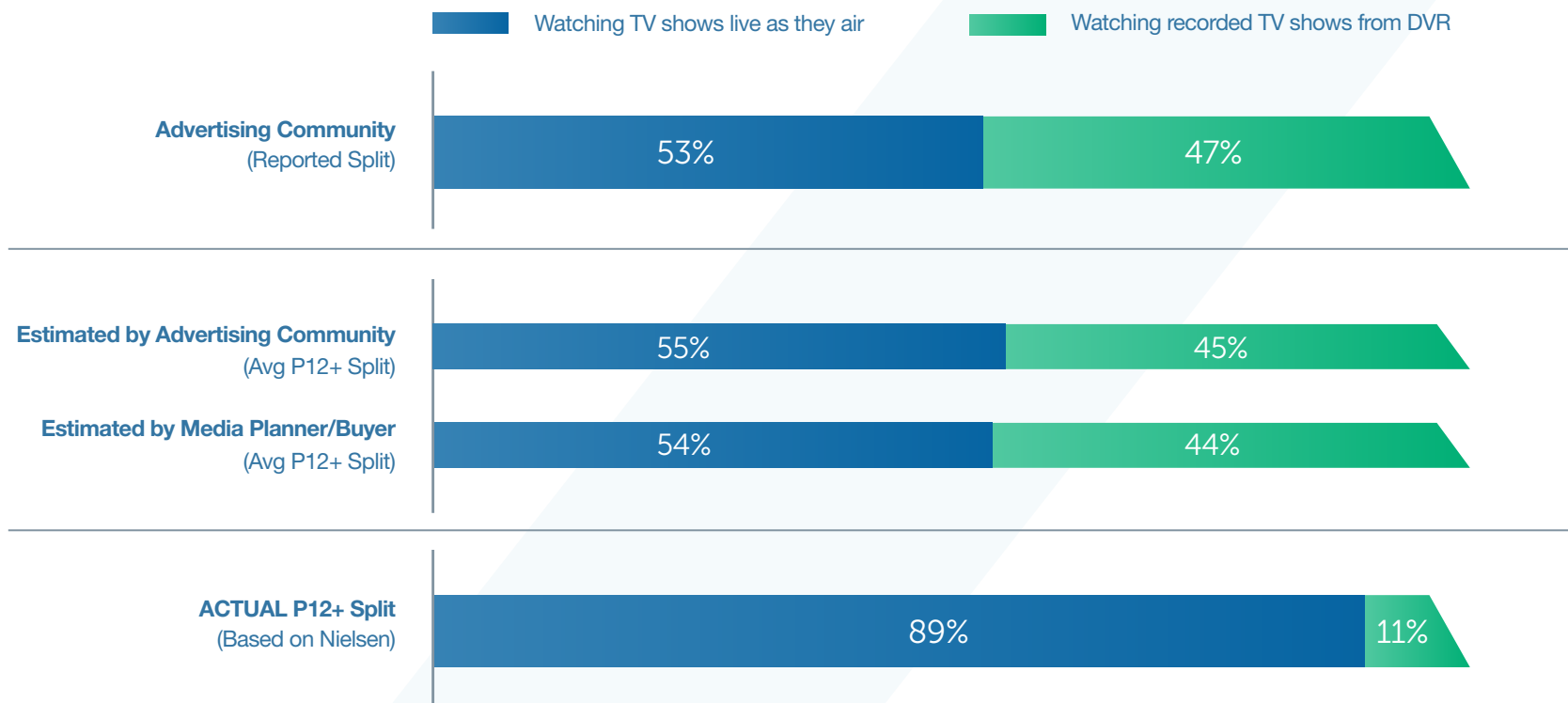
How Do You *Think* The Average Person 12+ Consumes TV On Their TV Set?
 % of Total TV Viewing Time



Source: VAB / Research Now "Advertising Community" Survey, February 2017. Q21: In a typical week, what % of your total TV viewing is spent on the following? (mean average summary which factors in 0% responses), Q22: In a typical week, what % of an average American's (P12+) total TV viewing do you think is spent on the following? (mean average summary which factors in 0% responses); Respondents = 254, Media Planner/Buyer Respondents = 188.

We Vastly Overestimate Time-Shifting Because, In Reality, 89% Of Viewing Is Live

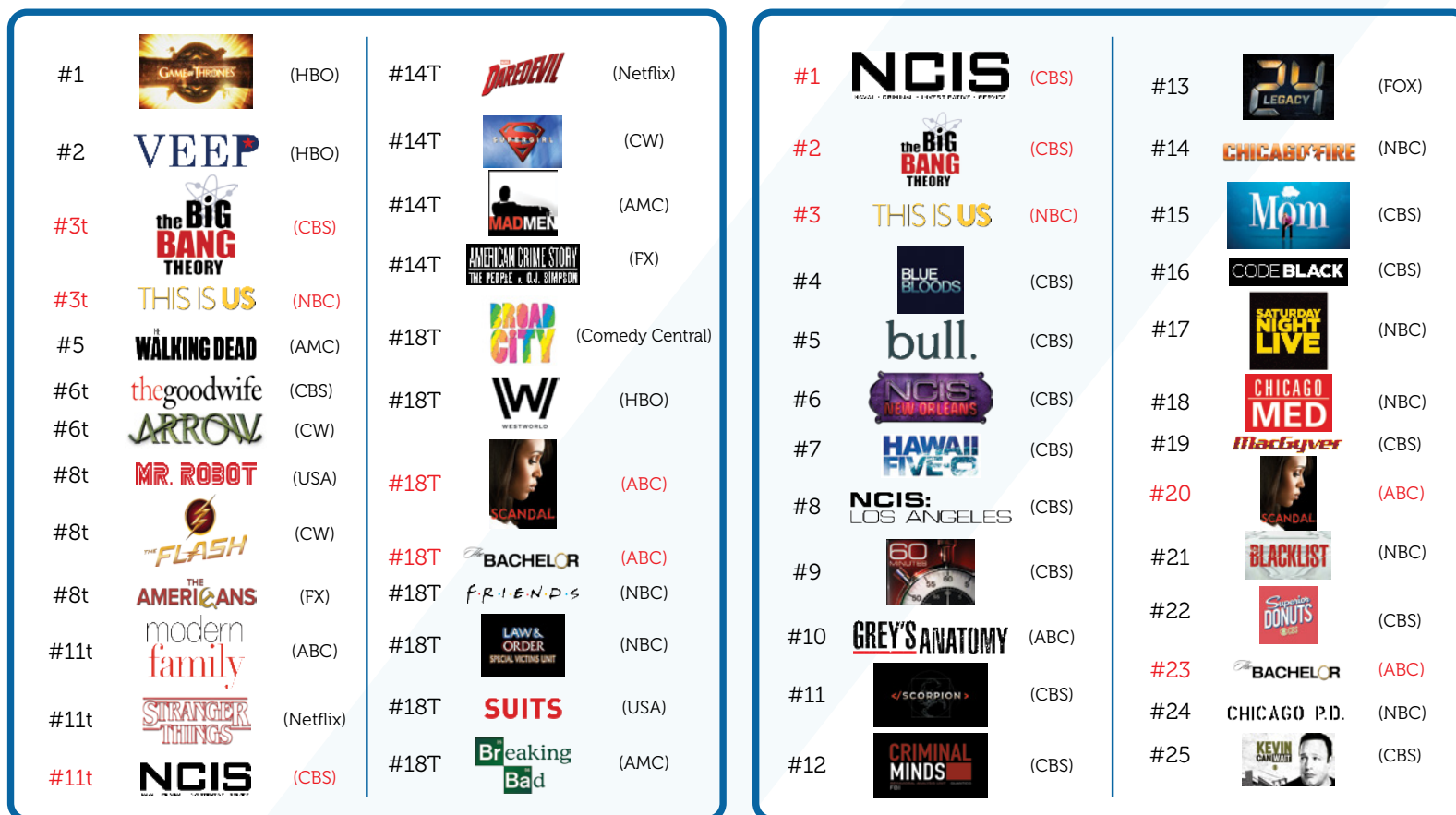
Live Vs. Time-Shifted Television Consumption (P12+)
% of Total TV Viewing Time



Source: VAB / Research Now “Advertising Community” Survey, February 2017. Q21: In a typical week, what % of your total TV viewing is spent on the following? (mean average summary which factors in 0% responses), Q22: In a typical week, what % of an average American’s (P12+) total TV viewing do you think is spent on the following? (mean average summary which factors in 0% responses); Respondents = 254, Media Planner/Buyer Respondents = 188. “Average P12+” population” data based on VAB analysis of Nielsen Total Audience Report, 3Q’16, Total Day.

We Watch Different Programs, On Different Platforms, Than The Average Adult

We Skew Towards Edgy Programming On Pay-TV & SVOD Services; Only 5 Programs Overlapped In The Top 25 Advertising Community's "Favorite Programs" vs. Adult 18+ "Program Ratings" Ranker Comparison



Source: VAB / Research Now "Advertising Community" Custom Survey, February 2017. Q27: What is your favorite program on TV at the moment (could include broadcast, cable, pay-TV or subscription streaming)? Respondents = 189 (the balance of the 254 total respondents did not provide a specific answer). "Average 18+ population" data based on Nielsen NPower, February 2017, P18+, Live+7 for cable + broadcast, excludes specials and sports.

CONTACT US

For More Information Visit Us Online
TheVAB.com



Follow us: @VideoAdBureau



Like us: [facebook.com/VideoAdvertisingBureau](https://www.facebook.com/VideoAdvertisingBureau)

Sean Cunningham
President & CEO
212-508-1223
seanc@TheVAB.com

Danielle DeLauro
SVP Strategic Sales Insights
212-508-1239
danielled@TheVAB.com

Jason Wiese
VP Strategic Insights
212-508-1219
jasonw@TheVAB.com

Evelyn Skurkovich
VP Strategic Research & Insights
212-508-1220
evelyns@TheVAB.com

