Simplify

2021 – 4th Quarter

The VAB Top 10

Our 10 must-read Insights charts of the quarter

VAB Insights. Inspiration. Impact.

About VAB

VAB is an insights-driven organization that inspires marketers to reimagine their media strategies resulting in fully informed decisions.

Drawing on our marketing expertise, we **simplify** the complexities in our industry and **discover** new insights that **transform** the way marketers look at their media strategy.

Simplify

We save you time by bringing you the latest data & actionable takeaways you can use to inform your marketing plans.

Discover

We keep you one step ahead with the latest thinking so you can create innovative, forward-looking strategies.

Transform

We help you build your brand by focusing on core marketing principles that will help drive tangible business outcomes.

We are committed to your business growth and proud to offer VAB members, brand marketers and agencies ***complimentary access*** to our continuously-growing Insights library. **Get immediate access** at **theVAB.com**.

1H '21 New TV Advertisers: 52 more brands entered the national TV marketplace during the first half of 2021 compared to the same time period last year

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New National TV Advertisers
1H '20 vs. 1H '21 Comparison

Year	# of Brands	# of Categories	New TV $$$ (MM)
1H '20	110	59	$459.3
1H '21	162	52	$465.4
# YoY Diff	+52	-7	+$6.1
% YoY Diff	+47%	-12%	+1%

Sampling **of 1H '21 New Nat'l TV Advertisers**

simplehuman, Mrs. Meyer's Clean Day, Cerebral, Slice, Working for Women, afterpay, Paramount+, Tattooed Chef, milk, phexxi, Stuffed Puffs, The Original Oatly!, Josh, SKIMS, allblk, Cointreau, Kesimpta (ofatumumab), Tracksmith New England, hiveonline, Impossible

For a full list of the 162 brands with spend **click here**

Source: VAB analysis of Nielsen Ad Intel data, 1/1/20-6/30/20 vs. 1/1/21-6/30/21. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over $100K. MM = millions.

‘Non-Covid’ vs. ‘Covid-Segment’ new TV advertisers: ‘Covid-segment’ brands nearly doubled their share of spend as they sought to capitalize on changing consumer behaviors

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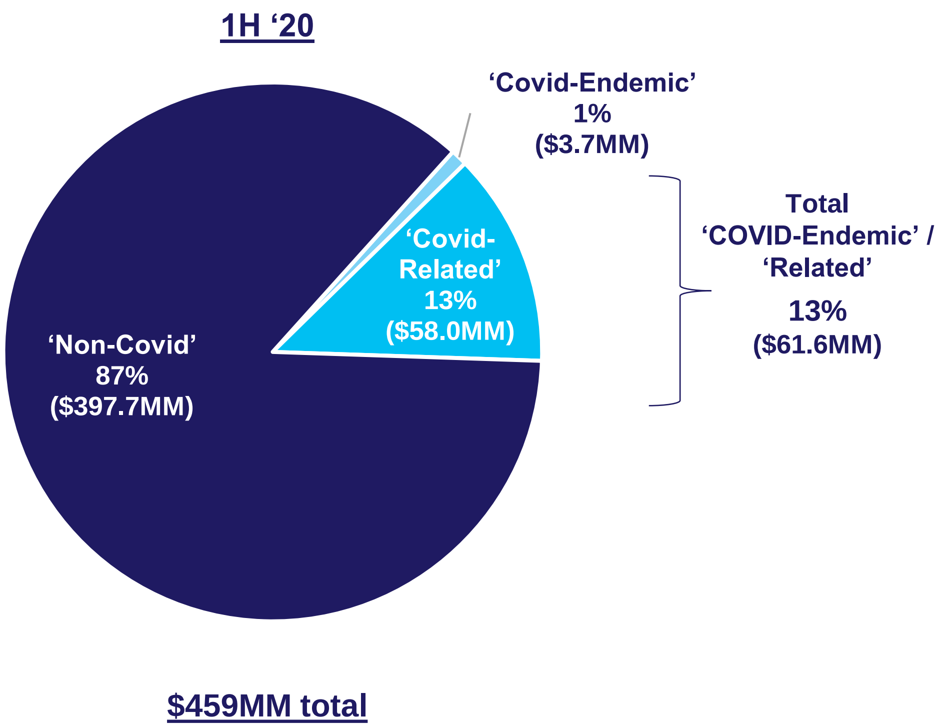
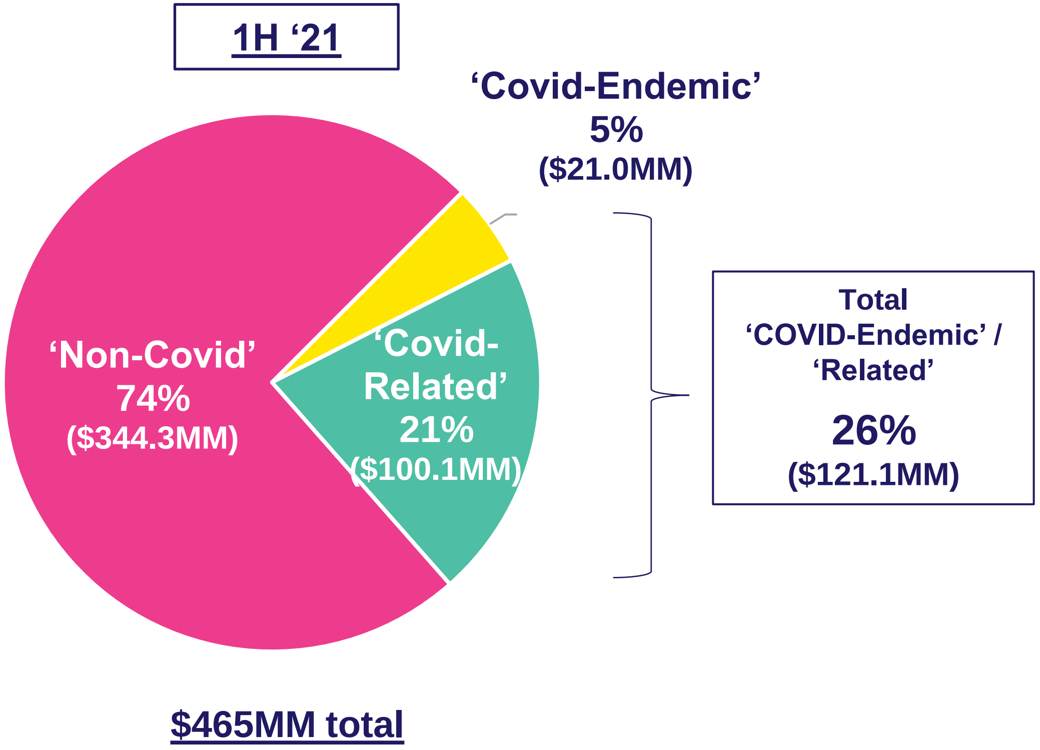
YOY New National TV Advertisers: ‘COVID-Endemic’ / ‘Related’ vs. ‘Non-COVID’ Brands

Total $$$ of ‘COVID Endemic’ / ‘Related’ vs. ‘Non-COVID’ Brands





Source: VAB analysis of Nielsen Ad Intel data, 1/1/20-6/30/20 vs. 1/1/21-6/30/21. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over $100K. Percentages may not add up to 100% due to rounding.

VAB

Streaming growth across cord status: The overwhelming majority of adults have streamed in the last year, underscoring the platform's reach potential

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Staying ahead of evolving dynamics in the marketplace and our culture

% that have 'streamed in the past 12 months'
based on respondent 'cord' status

	'Corded'		'Cordless'	
	Cord Loyalists	**Cord Shavers**	**Cord Cutters**	**Cord Nevers**
July '21	**69%** (+7% pp vs. 2018)	**85%** (+12% pp vs. 2018)	**92%** (+13% pp vs. 2018)	**86%** (+15% pp vs. 2018)
July '18	61%	73%	79%	71%

Source: VAB analysis of MRI-Simmons Cord Evolution Study, July 2018, July 2019, July 2020 & July 2021, P18+. 'Cord Loyalists': have pay-TV; no changes, 'Cord Shavers': have pay-TV; reduced services or channels, 'Cord Cutters': no pay-TV; cancelled it, 'Cord Nevers': no pay-TV; never had it. PP = percentage points.

TV is TV to most ‘cordless’ people: They are now just watching this premium content across platforms, connections and devices

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How do you personally define TV?

% of video streamers based on respondent ‘cord’ status

■ Cord Cutters ■ Cord Nevers

“**Anything** I can watch on **my TV set** whether it's via streaming or cable, satellite, fiber optic provider”	46% / 46%	vs. adults 18+: **48%**
“**Anything** I can watch on **any device**”	32% / 27%	vs. adults 18+: **24%**
“**Any shows** available via **cable**, **satellite**, **fiber optic** provider”	7% / 11%	vs. adults 18+: **13%**
“**Any shows** created by a **TV network**”	15% / 16%	vs. adults 18+: **15%**

Source: VAB analysis of MRI-Simmons Cord Evolution Study, July 2021, P18+. ‘Cord Cutters’: no pay-TV; cancelled it, ‘Cord Nevers’: no pay-TV; never had it. ‘How do you personally define TV?’. Base = ‘Streamed in the past 12 months’.

One of 23 case studies on video streaming outcomes: A luxury auto advertiser's streaming campaign on Tubi delivered on cross-channel incremental reach

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Category: **Automotive** (Luxury)

Challenge

- A luxury auto advertiser wanted to extend the reach of their video campaign beyond linear TV

Solution

- Tubi partnered with TVSquared who combined ACR and digital measurement to understand the incremental reach that Tubi offered beyond the advertiser's linear investments

Target Segment

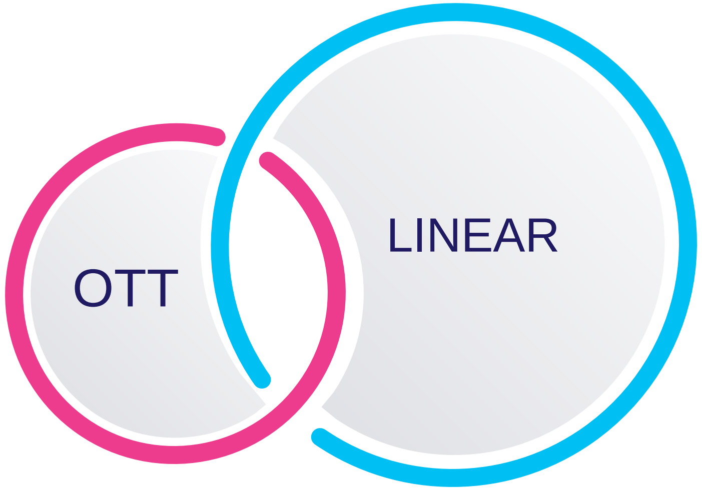
- Household Income $75K+

Results

- **89%** of Tubi's audience was incremental to the linear buy, and only **3%** of media volume overlapped between Tubi and linear campaigns

Company / Platform / Media Type

- Tubi **/** Streaming + Linear TV **/** OTT + Linear TV



89% of Tubi's Audience was incremental to linear investments

	Share of Impressions	Reach of Proportion	Avg. Frequency
OTT	14%	12%	3.4
LINEAR	83%	86%	2.8
OVERLAP	3%	1%	6.3

Source: Tubi, Case study: *Tubi drives incremental reach*. Campaign time period: 6/16/21-6/30/21. ACR and digital measurement via TVSquared.

Diversity & inclusion strengthens brand engagement: Streamers are more likely to take action or share data with brands that align with their lifestyle and values

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'It is important for companies to create advertising that is culturally diverse in order to stay relevant'

% of respondents who strongly/somewhat agree

White	Black
63%	79%

Hispanic	Asian
71%	73%

Importance of brand values to CTV viewers

62%

Say it is important to buy brands that are in **line with their lifestyle and opinions**

49%

are willing to share information in order to receive ads from brands that **match their interests and values**

Source: MRI Cord Evolution – July '21, Base=Streamed P12 months. Magnite, Connected TV is for Everyone 2021/22 Report, October 2021.

The importance of in-language content: Over half (57%) of Hispanic streamers wish there was more Spanish-language content which can create additional opportunities to further engage with this audience

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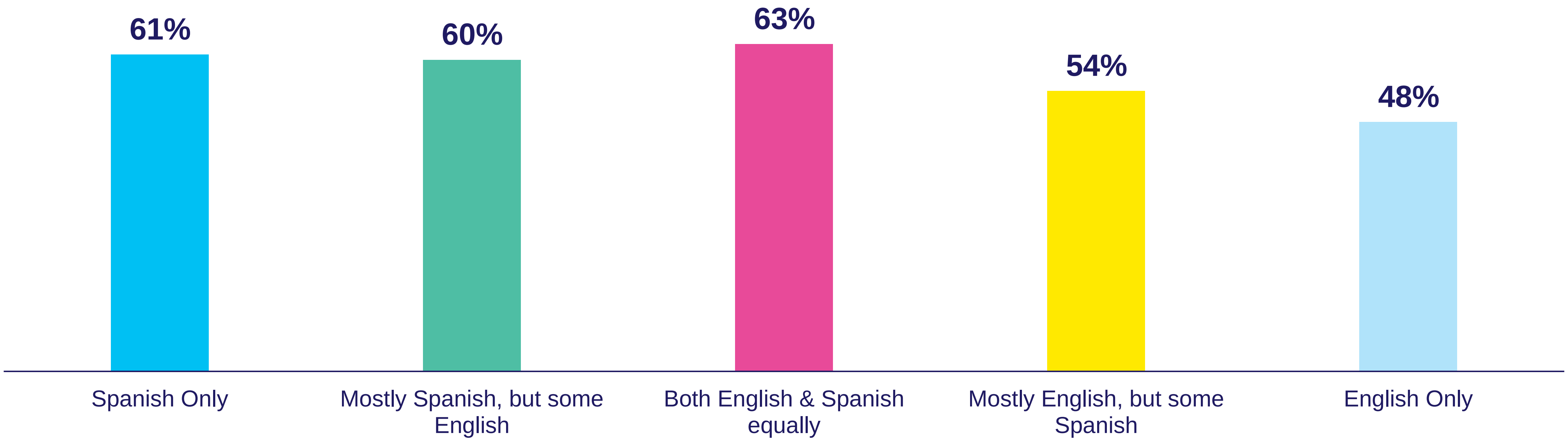
'I wish there was more Spanish-language content to stream'

% of Hispanic streamers who agree, based on their preferred language to speak at home



Source: VAB analysis of MRI-Simmons Cord Evolution Study, July 2021; P18+. Base = 'Streamed in the past 12 months'; respondents who agree (top 2 box – strongly agree or somewhat agree).

The growing influence and value of Asian American consumers:
Tastemakers with an appetite for new trends and products

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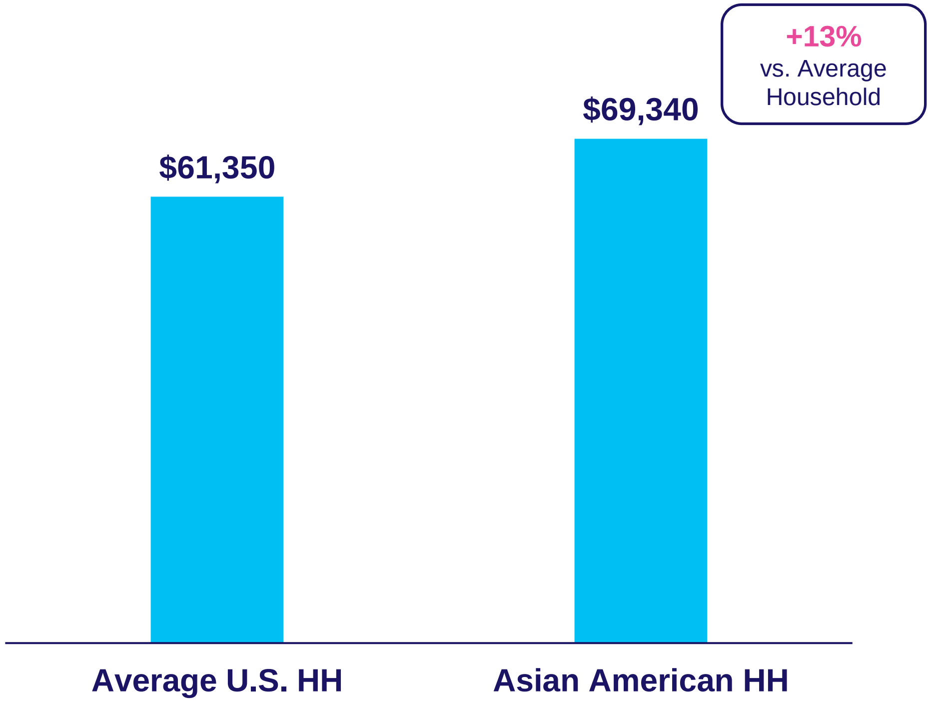
Average Annual Expenditures
2020

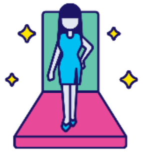


‘I’m usually / always the first among my friends / colleagues to try…..’
% of Asian A18+ who agree

New **Food** products — **37%** (120 index)

New **Technology** products — **34%** (133 index)

New **Products** or **services** — **34%** (122 index)



New **Clothing** styles — **21%** (140 index)

(xxx) = index vs. Non-Asian A18+ Population

Source: VAB analysis of Consumer Expenditure Survey data, U.S. Bureau of Labor Statistics, 2020. VAB analysis of MRI-Simmons Spring 2021 Doublebase. Based on respondents who agree (top 2 box – strongly agree or somewhat agree).

VOD complements linear TV viewership: Audiences tend to catch up on their favorite shows or watch new content on-demand during the weekends, typically when live linear TV viewing is lighter

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VOD Ad Impressions by Day of Week
in millions

Daily Average: **699 MM**

Source: Canoe, U.S. Market: VOD & Linear Addressable Advertising, Q3 '21 Insights Report. MM = millions.

Mobile gaming extends beyond young males: Marketers can incrementally reach audiences well beyond Gen Z and millennial males that regularly play mobile video games

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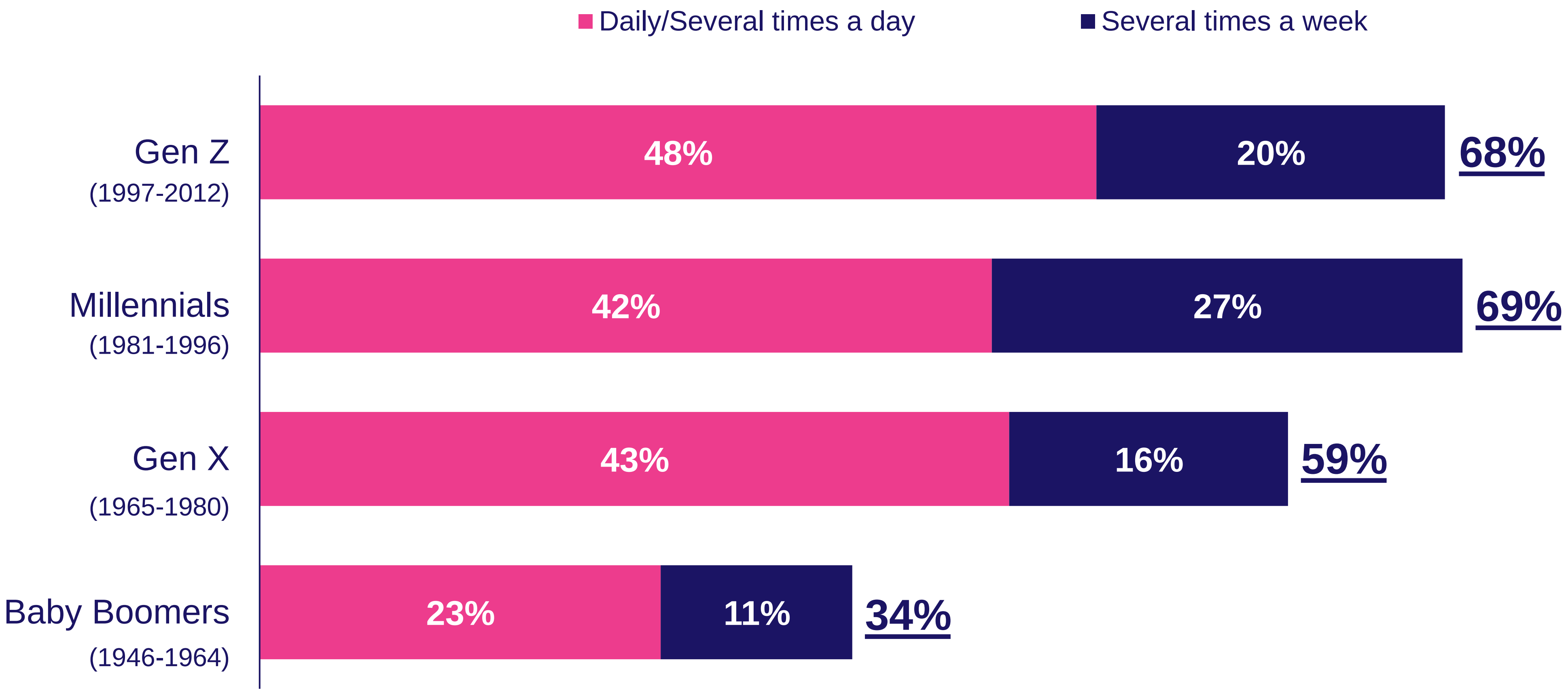
Mobile Video Game Usage by Platform



Mobile-only gamers are **75% women** and 66% are between the ages of 35-65.

Source: Morning Consult, Video Game Landscape 2021. 'How often, if ever, do you play video games on the following?' Total respondents = 2,200 adults; Gen Z (n=201), Millennials (n=665), Gen X (n=514), Baby Boomers (n=730); poll conducted between October 4-6, 2021. Years represent birth year range for each generation. Comscore, State of Gaming 2021, used for mobile-only gamer statistics.

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