



2024 – 1<sup>st</sup> Quarter

# The VAB Top 10

Our 10 must-read Insights charts of the quarter



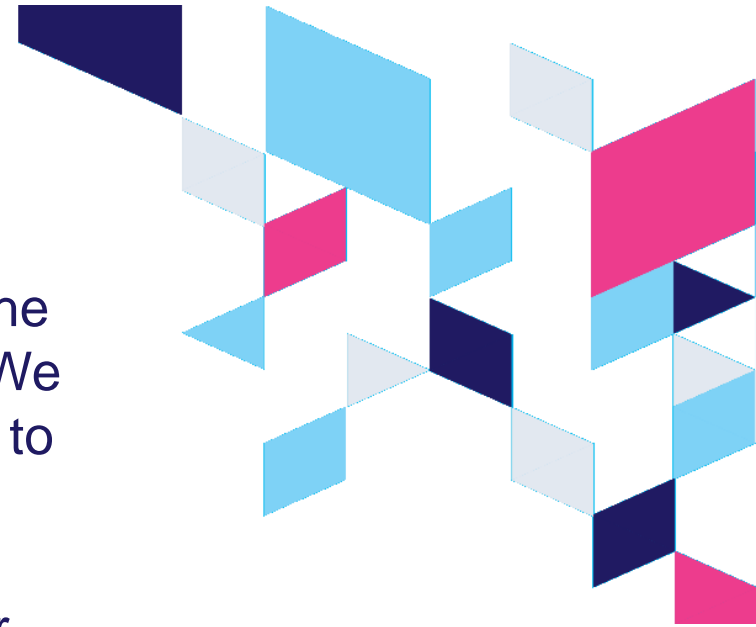
# About VAB

VAB plays a dual role in the video advertising industry. We are leading the change to bring about a more innovative and transparent marketplace. We also provide the insights and thought leadership that enables marketers to develop business-driving marketing strategies.

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.



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](https://theVAB.com).





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# Prioritize quality: Marketers have a standard for what constitutes premium media partners within their video campaigns

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**How important are the following factors when buying premium video inventory?**  
% of buyers who responded important / very important



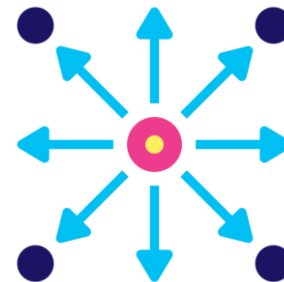
**91%**

**Brand Safety**



**89%**

**High Production Quality**



**85%**

**Publisher of Content**



**81%**

**Demand for Content**

Source: Comcast Advertising, *What is Premium Video: Redefining what it Means to be Premium in Advertising*, November 2023.

# A 'premium' halo effect: High-quality video content shapes a more positive perception of advertisers vs. digital platforms



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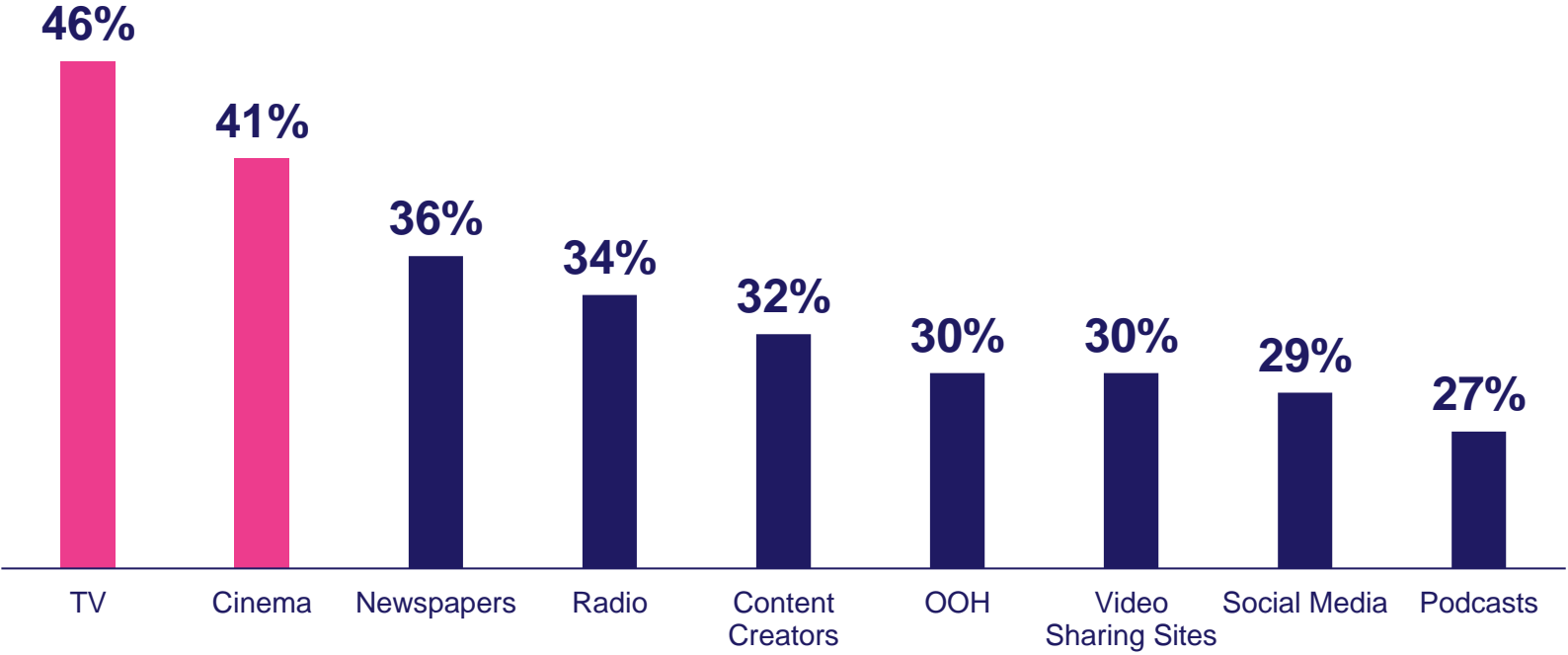


## Media signaling:

The perceived cost and scale of an advertising channel that can **enhance brand attributes** in the eyes of the consumer.

Signaling determines a platform's ability to strengthen brand perception in terms of its **financial footing, popularity and degree to which it could be trusted.**

### 'Signaling strength' by channel



**How to read:** 46% of respondents believe TV advertising enhances a brand's attributes

Source: WARC, *Why media quality will take centre stage in 2024*, 1/22/24.

# Demand transparency: Ad placements appearing alongside misinformation can have a drastic negative impact on brands



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73%

of consumers agree that they would **feel unfavorably towards brands** that have been associated with misinformation\*



65%

of consumers say that they are **likely to stop buying** from a brand that advertises next to misinformation\*\*

Source: Integral Ad Science, *Advertising in the Age of Misinformation*, 2022. Based on survey of 1,189 U.S. adults in July 2022. \*Reflects respondents who answered 'agree' or 'strongly agree'. \*\*Reflects respondents who answered 'likely' or 'very likely'. Download VAB's report ['The Credibility Crisis'](#) to learn more.

# Consumer outlook on brand safety: Many people will stop buying a brand if they see its ads next to objectionable content

What Is...  
Clarifying marketing topics and terms

VAB  
Virtually Assisted  
Business

Brand Safety  
A Look Into Critical Issues  
Impacting Marketers Today  
February 2024

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 Simplify  
What Is...  
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nearly  
**90%**

of consumers feel that **brands bear responsibility** for ensuring their ads run beside content that is safe

**82%**

of consumers say it is important that a brand's ads appear on **content that is safe, accurate and trustworthy**

**67%**

of consumers would be likely to **stop using the brand** if they viewed the brand's digital advertising beside false, objectionable or inflammatory content

Source: DoubleVerify & Harris Poll, Consumers Reject Brands That Advertise on 'Fake News' and Objectionable Content Online, June 2019

# Understanding the scale of fraud: If global digital ad fraud was a human, it would be the ninth richest person in the world



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## Net Worth of the Wealthiest People in the World vs. Global Cost of Digital Ad Fraud in billions



Source: Forbes, *The 25 Richest People In The World 2023*, 4/4/2023. \*Juniper Research, *Quantifying the Cost of Ad Fraud: 2023-2028*, 9/26/2023. \*Includes Elon Musk (X/Twitter), Jeff Bezos (Amazon), Bill Gates & Steve Ballmer (Microsoft), Larry Page & Sergey Brin (Alphabet/Google), Mark Zuckerberg (Meta/Facebook)

# Sizing up fraud: The North American cost of digital ad fraud is equivalent to the total national & local cable TV ad spend



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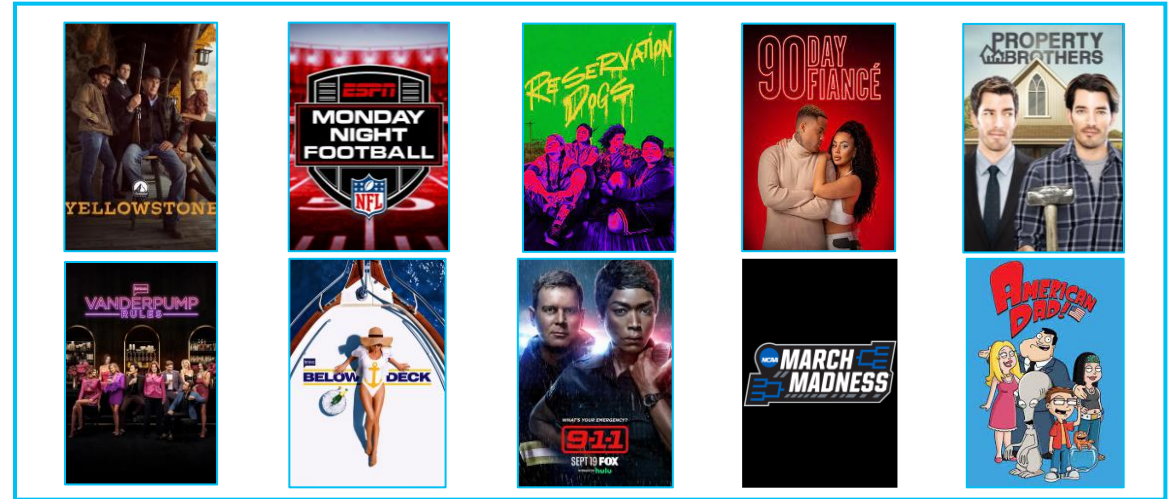
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## North America Cost of Digital Ad Fraud



**\$35B**

## U.S. National & Local Cable TV Ad Spend



**\$34B**

Source: Juniper Research, *Quantifying the Cost of Ad Fraud: 2023-2028*, 9/26/2023. eMarketer Insider Intelligence, 2022 estimated based on MoffettNathanson analysis of company reports. Based on estimated TV ad spending; national cable (\$28.5B total) and local cable (\$5.3B total).

# Embrace innovation: Marketers seek customizable targeting, creative partnerships & innovative ad formats to drive KPIs



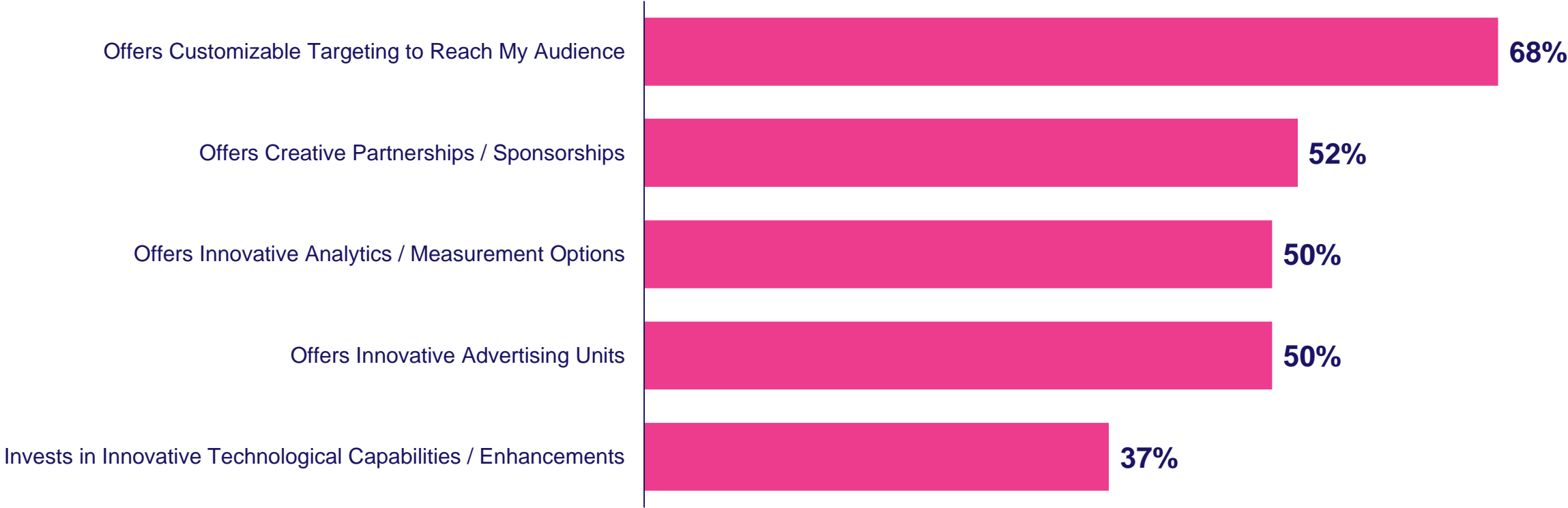
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## The Top Five Factors of Innovation & Creativity in Advertising-Supported Media



Source: The Myers Report / MediaVillage Education Foundation / American Association of Advertising Agencies (4A's), based on survey of 3,400 agency professionals in July / August 2023.

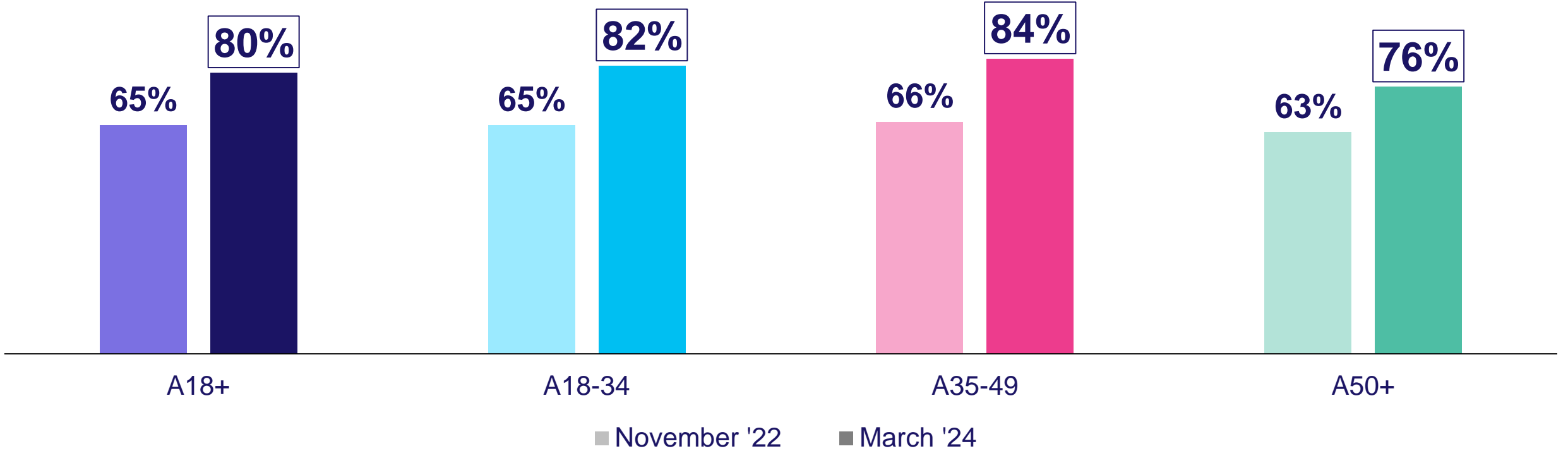
# Opportunities in streaming: Ad-supported services now reach eight of ten streamers as platforms and audiences grow



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**% of streamers who use at least one ad-supported streaming service**



Source: VAB analysis of MRI-Simmons November 2022 & March 2024 Cord Evolution Study, A18+. Base = 'streamed in the past 12 months'. November '22: reflects % of streamers who have used any of the following streaming services in the past 12 months: Crackle, Crunchyroll (limited commercial subscription), Discovery + (limited commercial subscription), Hulu (limited commercial subscription), PARAMOUNT + (LIMITED COMMERCIAL SUBSCRIPTION), Peacock (limited commercial subscription), IMDb TV, Local Now OR PARAMOUNT + (LIMITED COMMERCIAL SUBSCRIPTION), Peacock (limited commercial subscription), Pluto TV, redbox, Roku Channel, Samsung TV Plus, Tubi TV, Vudu, Xumo. March '24: reflects % of streamers who have used any of the following streaming services in the past 12 months: Crackle, Crunchyroll (free), Tubi, Discovery+ (with ads/commercials), Disney+ (with ads/commercials), Freevee (formerly IMDb TV), Max (with ads/commercials), Hulu (with ads/commercials) NET, LG Channels, Local Now App, Paramount+ (with ads/commercials), Peacock (with ads/commercials), Pluto TV, redbox, Roku Channel, Samsung TV Plus, Vudu

# Adopt alternatives: Choosing currencies that best meet their evolving business goals can set up brands for future success



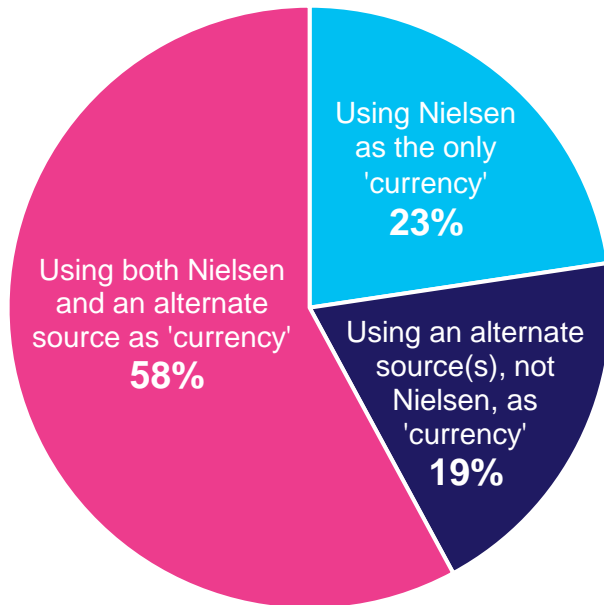
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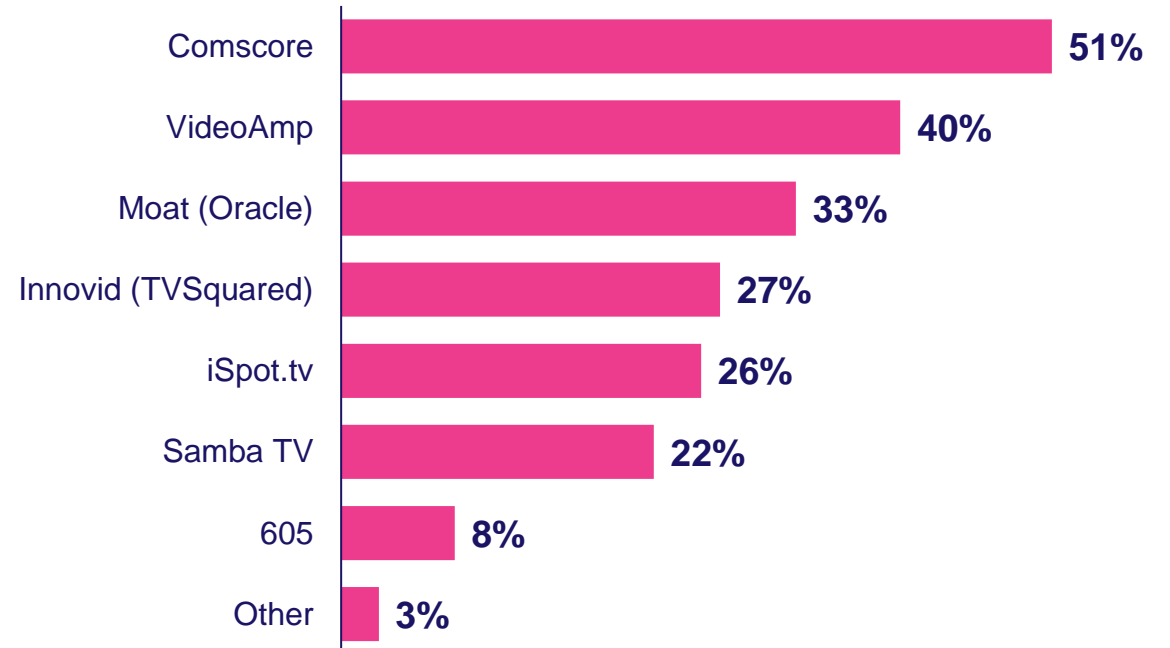
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**'Currency' Used for Audience-Based TV Buys**  
% of respondents using ABB



**Alternate 'Currency' Used for Audience-Based TV Campaigns\***  
% of respondents using alternate 'currency' sources



Source: VAB / Spectrum Reach / Advertiser Perceptions 'Audience-Based Buying Survey,' February 2023, fielded January 11 – 27, 2023 (n=210). Survey base: Advertising decision-makers who are involved in buying or planning digital video, cable / broadcast TV, or advanced TV. Q240. Which of the following best describes how you're transacting on your audience-based TV buys? Base = Audience-Based Buying is a Key Part/Small Part/Testing Phase (n=190). \*Q240b. Which of the following alternate 'currency' sources is your [company/main client] using for audience-based TV campaigns? Base = 'Using Alternate or Nielsen currency for audience-based TV campaigns' (n=147). Download VAB's marketer's guide ['Unlocking Brand Growth with Audience-Based Buying'](#) to learn more.

# Impact of 'big data' inclusion: A modern measurement solution shows viewership lifts over panel-only data for NFL games



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## Impact of Nielsen's Modern Measurement Solutions vs. 'Panel Only' Data 2023 season (based on comparable game analysis)



**+9%**

Lift in TNF viewership with the **inclusion of Amazon's first-party data** over panel only data, on average



**+3%**

Lift in SNF viewership with **Nielsen's Big Data** measurement over panel only data, on average



**+2%**

Lift in MNF viewership with **Nielsen's Big Data** measurement over panel only data, on average

TNF on Amazon in Spanish /  
SNF on Universo & Telemundo /  
MNF on ESPN Deportes

**+58%**

Lift in Spanish-language broadcast viewership with **Nielsen's Big Data** measurement over panel only data, on average

Source: VAB analysis of Nielsen Ratings Analysis Program Report, Sunday Night Football (NBC, Universo, Telemundo), Monday Night Football (ESPN, ESPN2, ESPN Deportes, ABC) and Thursday Night Football (Amazon (incl. local broadcast for in-game markets only)), excludes pre- & post-game shows, [Live+SD\\_P18-34\\_P18-49 & P25-54\\_Panel data & Big data: TNF \(Panel+ Amazon First-Party Data\) & SNF/MNF \(Panel+ STB/ACR\)](#). **NBC, Universo, Telemundo, ESPN, ESPN2, ESPN Deportes and ABC reflects linear TV audience only and does not include audiences gained from their digital / app streaming.** The 13 comparable games reflect all weeks that have standalone NFL night game broadcasts across NFL weeks: 2-11 & 13-15 (excludes Thanksgiving weekend). NBC Sunday Night Football includes Universo and Telemundo simulcast viewership. ESPN Monday Night Football includes ESPN2 and ESPN Deportes simulcast viewership. Note: ESPN MNF data also includes ABC simulcast data and reflects only ABC for week 14 (12/11/23) due to a staggered doubleheader that night when each game partially overlapped each other. MNF weeks 2, 3 and 14 include two matchups. See [appendix](#) for schedule and single game details.

# Download [What Is A Video Impression](#) to uncover the five values of buying & measuring based on impressions and more



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## The 5 Values of Buying and Measuring Based on Impressions



### Increased Granularity

Evolving from traditional GRP-driven buying to impression-based buying gives marketers a more thorough and accurate view of audiences. Shifting from ratings to impressions can lead to increased supply enabling more cost-effective planning, buying and measuring of video campaigns.



### Audience-Based Buying

Audience-Based Buying enables advertisers to effectively target their best customers through data-driven segments (based on behavioral, attitudinal, lifestyle or transactional data), adjust creative messaging, and engage with multiple target audiences across video platforms.



### Cross-Platform Currency

As the video ad ecosystem continues to evolve and shift, the future of currency must account for multi-screen viewership and campaign strategies. The convergence for cross-platform transactions is impression-based buying which links linear and digital for holistic measurement.



### Flexible In-Flight Optimizations

Campaigns focused on impressions allow for budgets and inventory allocation to be shifted seamlessly across inventory (platforms, channels, programs, etc.) to effectively reach the target audience throughout the campaign flight.



### Tied to Outcomes

Measuring full funnel outcomes such as brand awareness, online search, in-store visitation, and sales enables marketers to effectively evaluate their advertising ROI and quantify the full impact on their marketing efforts. Proving the performance can inform future campaign strategies and potentially justify increased budgets.

**Download the report to access the other 3 values...and much more!**

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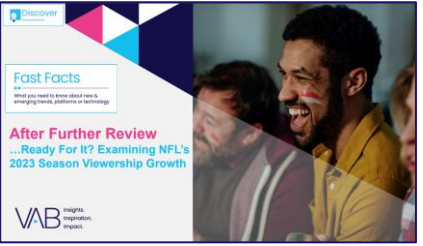
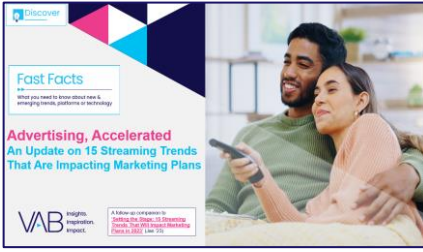
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