



2023 – 2nd Quarter

The VAB Top 10

Our 10 must-read Insights charts of the quarter



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.



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.**

Curious to learn more about VAB? Check out this [quick video](#) to see what we do and how we can help you develop business-driving marketing strategies.

TV's economic resilience: Despite uncertainty, more dollars were invested by new advertisers in 2022 than prior years



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New National TV Advertisers 2019 - 2022



Year	# of New Advertisers	# of Categories	New TV \$\$\$ (MM)
2019	114	61	\$843.4
2020	283	95	\$1,279.1
2021	315	74	\$1,320.2
2022	303	71	\$1,331.6

For a full list of the 303 brands with spend, download the report [here](#)



Source: VAB analysis of Nielsen Ad Intel data as of 2/16/23, 1/1/22-12/31/22. Prior years based on VAB analysis of Nielsen Ad Intel Data from the following periods: 1/1/2019-12/31/2019, 1/1/2020-12/31/2020, 1/1/2021-12/31/2021. 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.

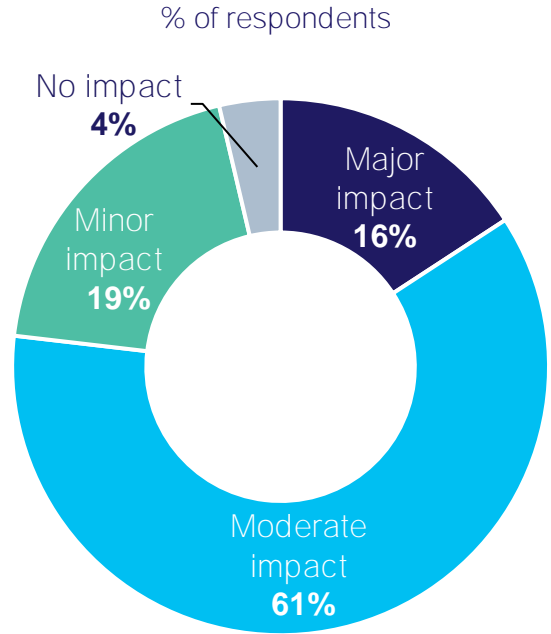
TV buying strategies in a challenging economy: Most marketers are increasing their audience-based buying investment to achieve their main campaign priorities throughout the funnel



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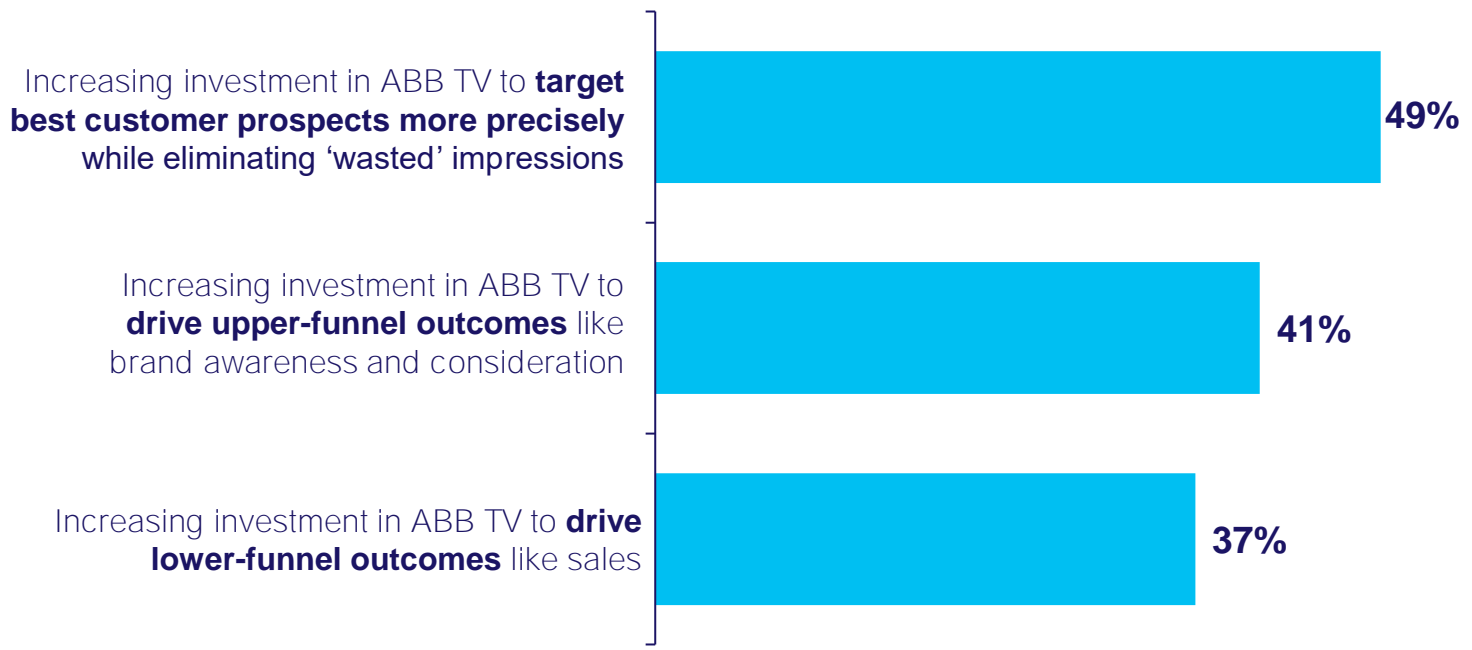
Transform **Marketer's Guide**
 Innovative thinking to make a lasting impact on your business growth.

Impact of uncertain economic conditions on ABB vs. traditional demographic-based buying



How uncertain economic conditions have impacted audience-based buying strategies*

% of respondents impacted by current economic conditions



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. Q59. To what extent have current economic conditions (rising inflation, recession concerns) impacted [your/your main client's] TV campaign investment allocation between audience-based buying and traditional demographic-based buying? Base = 'Audience-Based Buying is a Key Part/Small Part/Testing Phase' (n=190). *Q59b. You mentioned that the current economic conditions have had at least some impact on [your/your main client's] TV campaign investment towards audience-based buying. How have these conditions changed [your/your main client's] audience-based buying strategies? Base = 'Economic Conditions have had an Impact' (n=183).

Reach & time spent by media: The TV set is the leading device for engagement among all adults



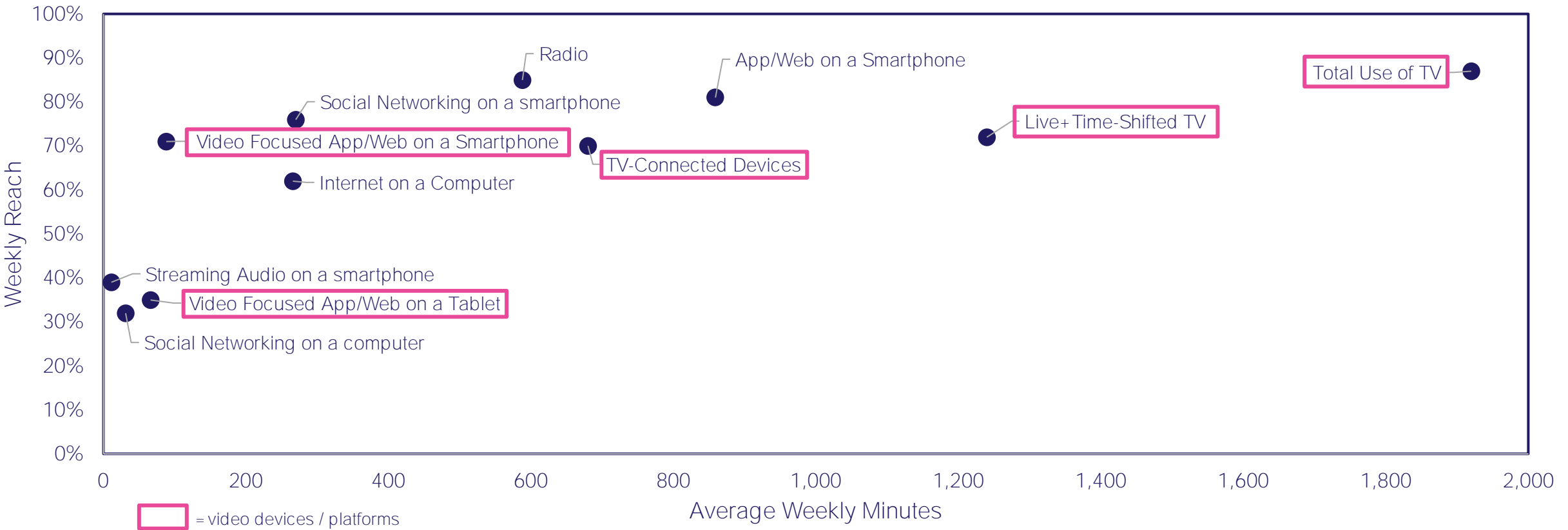
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Weekly Reach & 'Time Spent'

Q3 '22, P18+ (based on Total U.S. Pop)

P18-34, P18-49 & P25-54 demos available in the full report



Source: VAB analysis of data from the Nielsen Audience Insights Data Tables, Q3 2022, time spent and percentage of users among U.S. population, P18+. TV-Connected Device = devices connected to the TV that are used to stream content such as Apple TV, Roku, Google Chromecast, Amazon Fire TV, Smartphone, Computer/Laptops, etc. (inclusive of smart TV app usage). Internet on a computer is inclusive of 'social networking on a computer'. App/Web on a smartphone is inclusive on 'streaming audio' and 'social networking' on a smartphone. App/Web on a tablet is inclusive of 'streaming audio' and 'social networking' on a tablet. Video on a computer is excluded due to unavailable reach percentage data.

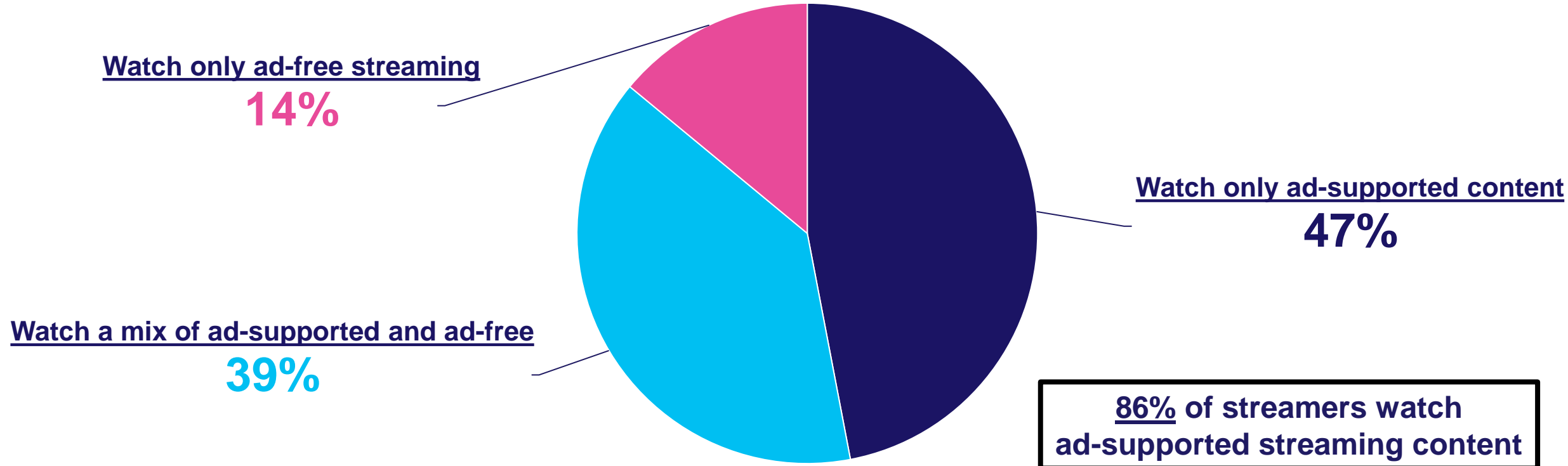
Streaming ad opportunity: Nine out of ten streamers watch content with ads, with half watching only ad-supported services



[Click here for the full report](#)

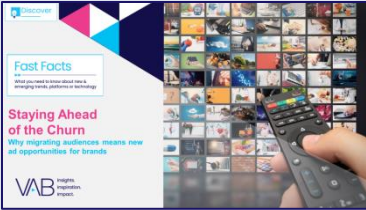


What Are Streamers Watching?



Source: Magnite Research, *Streaming Continues To Surge- An In-Depth Look at How Ads Are Powering Streaming Growth*, 2023.

Audience migration in streaming: Wider viewer adoption of FAST has fostered a shift from subscription services among highly desirable audiences for brands

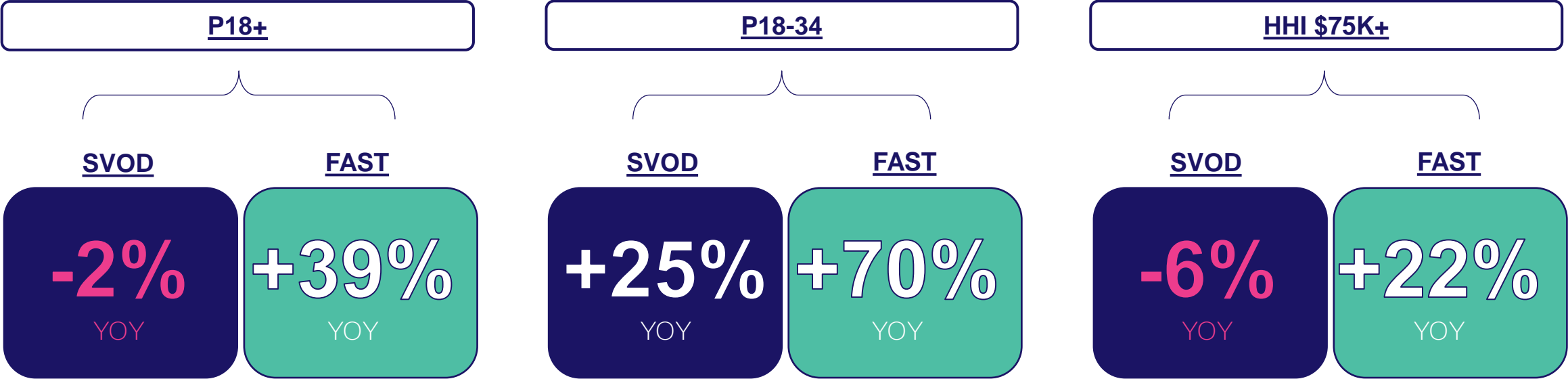


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SVOD & FAST Services: Total Aggregated Minutes (YoY Difference)

February 2023 vs. February 2022



Source: VAB analysis of Comscore mediametrix multiplatform, Mediatrend data, P18+, P18-34 and households with \$75K+ income. February 2023 vs. February 2022. Based on total cume minutes across five measured platforms for both SVOD and FAST. SVOD includes Amazon Prime Video, Apple+, DAZN, Netflix and STARZ. FAST includes Tubi, Freevee, Vudu, Xumo and Crackle.

Streaming advertising in linear TV: Services have tripled their TV investment but have also shifted more towards promoting specific programs to aid viewers' content discovery



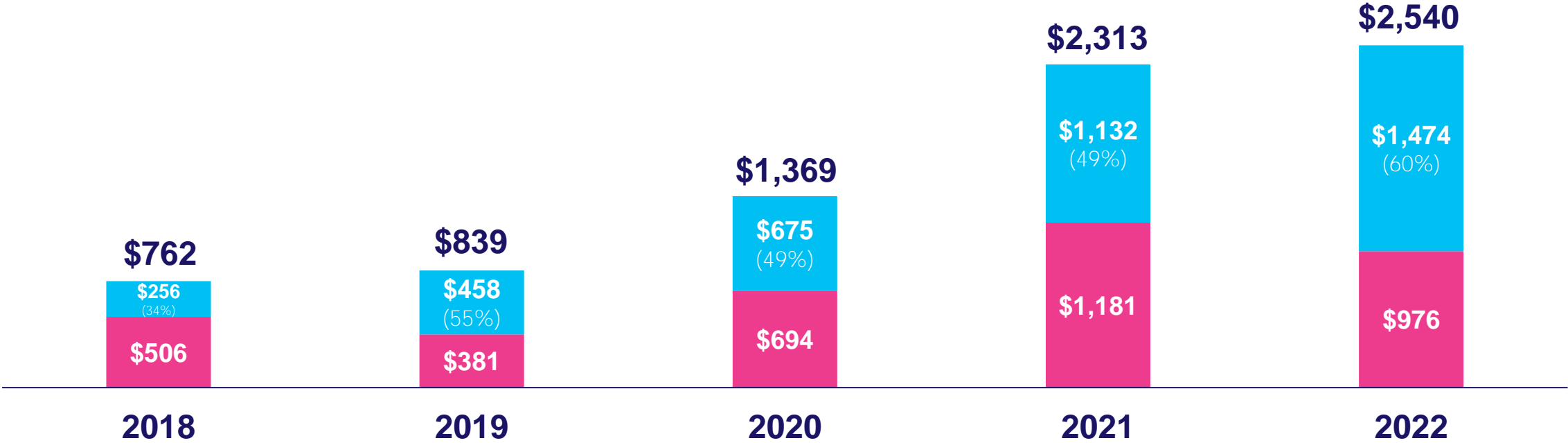
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Streaming Categories: Annual TV Ad Spend

\$ in MM

■ Service-Focused ■ Program-Focused



Source: VAB analysis of Nielsen AdIntel, CY 2018-2022, TV spend includes cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV, spot TV, and syndicated TV. U.S. TV spend only, excludes promos. Streaming Categories include: Streaming Channel, Streaming Player, Streaming Program and Streaming Services-Video.

Platforms most at risk of ad fraud: Like consumers, marketers trust the premium environment of CTV and view it as less vulnerable to fraud than many other digital platforms

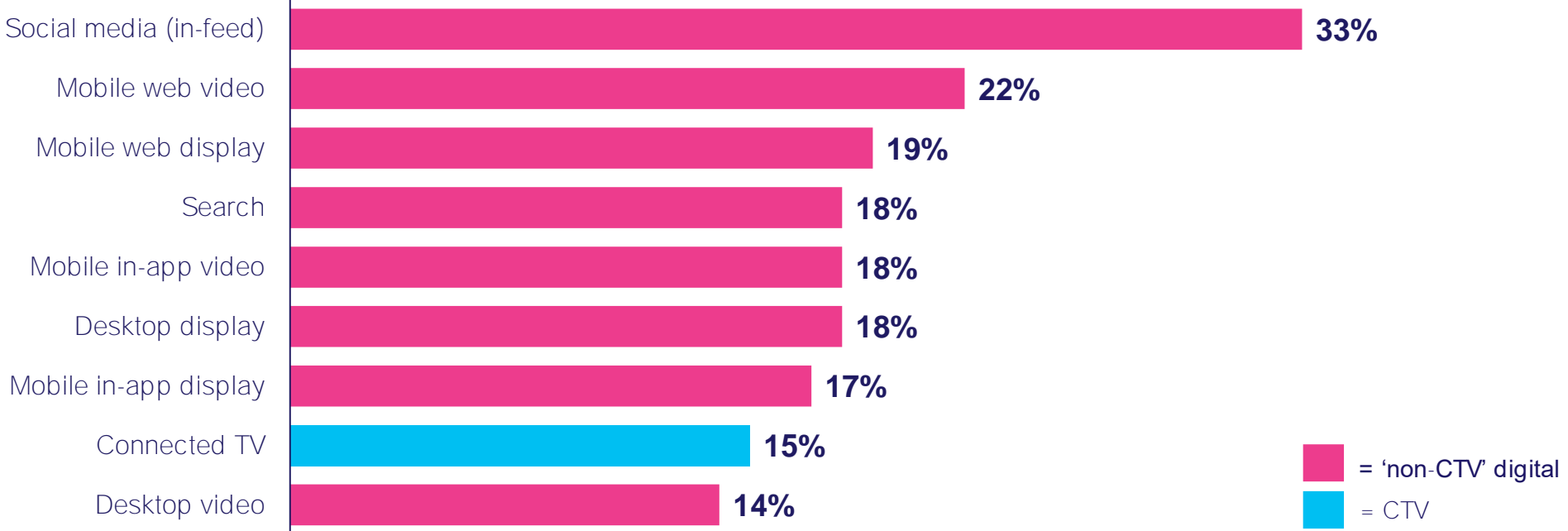


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Which media types will be most vulnerable to ad fraud in the next 12 months?

% of respondents



Source: Integral Ad Science (IAS), *The 2023 Industry Pulse Report*, December 2022. Based on October 2022 IAS / YouGov survey of U.S. digital media experts who use programmatic advertising (n=356). Q. Which of the following media types will be most vulnerable to ad fraud in the next 12 months? (select up to three).

Ad creative strategies that drive results: Video ads featuring lighthearted moments and visual branding tend to achieve the highest viewer attention and awareness



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Lighthearted, funny and relatable moments

servicenow

'Experience Without Barriers'

(TV Spot first aired: 3/30/20)



159
Ad Attention Index

Expensify

Super Bowl 2019 TV Spot, 'Expensify This'

Featuring 2 Chainz, Adam Scott

(TV Spot first aired: 2/3/19)



152
Ad Attention Index

KAJABI

'Get Out Of Your Own Way With Kim: What People Want'

(TV Spot first aired: 9/29/20)



155
Ad Attention Index

smartsheet

'Make it Easier'

(TV Spot first aired: 10/26/19)



132
Ad Attention Index

Visual branding with a focus on products services

KAJABI

'Every Business Needs a Website'

(TV Spot first aired: 9/20/20)



160
Ad Attention Index

smartsheet

'96 of 100'

(TV Spot first aired: 10/9/18)

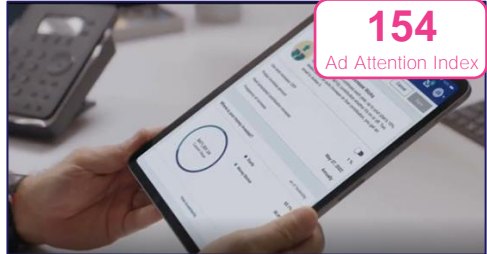


141
Ad Attention Index

PAYCHEX

'Making 401(k) Simple'

(TV Spot first aired: 7/30/21)



154
Ad Attention Index

LEVITON

'Protect Your Home' Featuring Danny Lipford

(TV Spot first aired: 10/11/20)



132
Ad Attention Index

How to read: 'Experience Without Barriers' (159 index) had 59% less interruptions than other ads in the context of the media placement with a 100 score being average.

Source: Creative from iSpot.tv, time period of airing 4/1/18 – 4/30/22, note: each creative execution had to launch before 4/30/22 so some may still be actively airing on TV. Ad Attention Index within iSpot.tv's Attention Analytics. Index scale is 0-200 with a 100 index seeing ad performance as expected. [Click above images to watch TV spots.](#) Note: Ad interruptions = when viewers are changing channels, fast forwarding, turning off the TV or otherwise interrupting an ad.

Building website traffic for SMBs: TV advertising delivers thousands of new customers monthly for small and medium-sized brands



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Unmeasured B2B Brands: Monthly Website Unique Visitors (000) Comparison

Based Over a Four-Year Time Period: Apr '18 – Apr '22

Brand	B2B Category	Three-Month Average: Prior to TV Launch	Monthly Average: 'When On TV'
	Commercial Real Estate	N/A	25
	Banking/Finance	N/A	35
	Manufacturing	N/A	75
	Software	N/A	166

Source: VAB analysis of Comscore mediametrix multiplatform media trend data, P18+. April 2018 – April 2022 (calendar months), figures are based on monthly averages for the 25 brands analyzed.




Affordable entertainment at the cinema: The cost of a movie ticket is much more affordable than other popular local activities



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Entertainment Costs Across Different Market Sizes

Activity	New York City (County 'A')	Cleveland, OH (County 'B')	Des Moines, IA (County 'C')	Bakersfield, CA (County 'D')
 <p>Movie Tickets From Fandango 1 Adult Ticket</p>	<p>\$19.65 Regal E-Walk</p>	<p>\$10.25 Capitol Theatre</p>	<p>\$11.24 Flix Brewhouse</p>	<p>\$13.75 Maya Bakersfield 16 & MPX</p>
 <p>Bowling 1 lane for 2 hours (Group of 6) Price Per Person</p>	<p>\$41.43 Bowlero</p>	<p>\$20.16 The Corner Alley</p>	<p>\$13.50 Air Lanes</p>	<p>\$26.00 Bowlero</p>
 <p>Mini Golf 2 rounds of mini golf (estimated 50 – 90 mins) Price Per Person</p>	<p>\$43.98 Shipwrecked</p>	<p>\$25.98 Swing n Things</p>	<p>\$30.00 Slideway Center</p>	<p>\$20.00 Golf N' Stuff</p>
 <p>Archery Price Per Person</p>	<p>\$40.00 Gotham Archery</p>	<p>\$60.00 Crooked River Archers</p>	<p>\$20.00 Archery Field & Sports</p>	<p>\$30.00 Brainy Actz</p>
 <p>Axe Throwing Price Per Person for 2 hours</p>	<p>\$42.00 Bury the Hatchet</p>	<p>\$28.99 Class Axe</p>	<p>\$40.00 Ironside Axe Club</p>	<p>\$30.00 Brainy Actz</p>
 <p>Laser Tag Price Per Person for 2 hours</p>	<p>\$39.99 Area 53 NYC</p>	<p>\$22.50 Area 51 Laser Tag</p>	<p>\$32.00 Spare Time Entertainment</p>	<p>\$20.00 The BLVD!</p>

Source: VAB analysis of pricing available on the specific venues' websites for the cost of activities based on the appropriate location as of 3/24 *Location in Boise, ID. Markets were selected from ABCD counties as categorized by Nielsen based on U.S. Census Bureau population data and metro areas.

What's the Deal with...: This series provides marketers with clear, concise and straightforward answers to the most asked questions about measurement



Click here for more Measurement Education Resources



What's the Deal with Identity?

In this piece, you'll learn common types of identifiers, how privacy should be factored into identity solutions, data clean rooms and the roles they play in measurement, questions to ask your advertising partners when it comes to identity and more.

Bonus Slide!

What's the Deal with Engagement?

This quick read will tell you what ad engagement is, which factors increase it, how it is measured and what new innovative metrics are now available to marketers to help quantify engagement.

Measurement Identity: What are the common types of identifiers?

Identifiers enable marketers to achieve a **comprehensive, consistent, and privacy compliant** view of audiences throughout the customer journey

Identifiers can range from, but are not limited to:

Personal Identifiers	Digital Identifiers
▶ Name	▶ IP address
▶ Address	▶ Device ID
▶ Email Address	▶ 1st Party Cookies
▶ Phone Number	▶ Mobile IDs (MAIDs)
▶ Date of Birth	▶ Customer / Loyalty IDs
▶ Demographics	▶ Social Identities / Handles
▶ Voter Registration	▶ App login
▶ Motor Vehicle Records	

Exposure
Who was exposed to your ad

Device
Where audiences were exposed to your ad across platforms

Outcomes
What audiences did after being exposed to your ad

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Advertising engagement: The quality, content it's placed near, time spent and the screen itself all contribute to ad engagement

Six Factors that Contribute to Advertising Engagement

<p>Content</p> <p>Premium professionally produced content emotionally resonates with audiences and raises brand memorability</p>	<p>Quality</p> <p>Brand safe ad environments that host premium professionally produced content offer a more attentive and engaged audience</p>	<p>Context</p> <p>An ad that is relevant to the content it is airing alongside can amplify the effects of the ad</p>
<p>Dwell Time</p> <p>The longer someone looks at, or "watches," an ad, the longer the brand will stay in memory (can vary by platform)</p>	<p>Screen Coverage</p> <p>The extent to which an ad fills a screen is correlated to greater attention and ad recall</p>	<p>Screen Size</p> <p>Ads shown on larger screens tends to inspire greater engagement than smaller screens</p>

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marketers are making important decisions
about their video investment strategy.

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