Simplify

2021 – 2nd 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**.

Evolving Buying Strategies During COVID-19: The economic effects of the pandemic led to greater ROI accountability and openness to new solutions, spurring the growth of audience-based TV buying

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% of respondents that agree with the following statements

87%

"With the economic downturn and increased scrutiny on ROI and budgets since COVID, there has **been more pressure to prove the effectiveness** of our video campaigns"

86%

"Since COVID, my company / client has been more **open to new ways to plan, buy and measure** the efficiency and effectiveness of our TV campaigns"

56%

"**COVID-19 has had a moderate to major impact** on my TV campaign investment allocation between audience-based buying and traditional demographic-based buying"

Source VAB / Advertiser Perceptions 'Audience-Based Buying Survey,' March 23 – 31, 2021. Survey base: Advertising decision-makers who are involved in buying or planning digital video, cable / broadcast TV, or advanced TV (n=211). Q20. With the economic downturn and increased scrutiny on ROI (return on investment) / budgets since COVID, there has been more pressure to prove the effectiveness of our video campaign (strongly/somewhat agree). Q21. Since COVID, [my company / main client] has been more open to new ways to plan, buy and measure the efficient\cy and effectiveness of our TV campaigns (strongly/somewhat agree). Q59. To what extent did COVID-19 impact your TV campaign investment allocation between audience-based buying and traditional demographic/content-based buying? Base: Total Respondents.

Driving Campaign Success: Audience-based TV buying makes a marketer’s job easier by increasing the ability of their media to deliver on brand objectives

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% of respondents that agree with the following statements

89%

“Implementation of audience-based buying has increased the ability to meet campaign objectives”

86%

“Overall, I am satisfied with campaign results from our audience-based buying initiatives”

79%

“Implementing audience-based buying has made my job easier”

Source: VAB / Advertiser Perceptions ‘Audience-Based Buying Survey,’ fielded March 23 – 31, 2021. Survey base: Advertising decision-makers who are involved in buying or planning digital video, cable / broadcast TV, or advanced TV (n=211). Q135. How much do you agree or disagree with the following statements around your experiences with TV audience-based buying? (strongly/somewhat agree). Base = Respondents who say audience-based buying is a ‘key part’ / ‘small part’ of their TV strategy (n=151).

Upending The Way Media Is Bought: With their openness to innovate, brands and agencies are welcoming the industry-wide shift towards audience-based TV buying

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% of respondents that agree with the following statements

"**I am comfortable** with moving from traditional, GRP-driven TV buying to an audience-based TV buying approach"

83% / 91% / 83% / 71%

"Over the next three years, I believe the industry will **significantly shift** from traditional TV buying (GRPs) to an audience-based TV buying approach"

90% / 94% / 85% / 89%

'Large' Brand Marketers | 'Small' Brand Marketers | 'Large Business' Agency Pros | 'Small Business' Agency Pros

Source: VAB / Advertiser Perceptions 'Audience-Based Buying Survey,' March 23 – 31, 2021. 'Large' Brand Marketers = business with annual total ad spend of $5MM+, 'Small' Brand Marketers = business with annual total ad spend of $10K - $5MM, 'Large Business' Agency Pros = client with annual total ad spend of $5MM+, 'Small Business' Agency Pros = client with annual total ad spend of $10K - $5MM. Pros = Professionals. Q170. How much do you agree or disagree with the following statements? (strongly/somewhat agree).

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Positive Momentum for Data-Driven TV: Many brands and agencies are shifting from traditional demo-based TV buying to audience-based buying to some degree

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Which of the following best describes your (company's/main client's) current approach to audience-based buying for TV advertising?

	'Any Degree'	'ABB is a key part of our TV Strategy'	'ABB is a small part of our TV strategy'	'Testing ABB and determining it's role in our TV strategies'	'Not currently using ABB for TV'
'Large' Brand Marketers	94%	37%	41%	16%	6%
'Small' Brand Marketers	100%	37%	37%	26%	0%
'Large Business' Agency Pros	87%	30%	39%	18%	13%
'Small Business' Agency Pros	89%	26%	34%	29%	11%

Source: VAB / Advertiser Perceptions 'Audience-Based Buying Survey,' March 23 – 31, 2021. 'Large' Brand Marketers = business with annual total ad spend of $5MM+, 'Small' Brand Marketers = business with annual total ad spend of $10K - $5MM, 'Large Business' Agency Pros = client with annual total ad spend of $5MM+, 'Small Business' Agency Pros = client with annual total ad spend of $10K - $5MM. Q70. Which of the following best describes your (company's/main client's) current approach to audience-based buying for TV advertising?

One of 23 Case Studies on Audience-Based TV Buying: A QSR brand saw lifts in foot traffic among all exposure groups, especially target households, through a data-driven linear TV campaign

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Challenge

- A QSR brand wanted to drive foot traffic to restaurant locations during a limited-time promotion

Solution

- Using NBCU's AdSmart audience targeting solution, the brand ran a national TV campaign across the NBCU portfolio to reach their custom target. Data Plus Math was utilized to measure the incremental impact of the campaign on driving foot traffic to the brand's locations.

Target Segment

- Custom LiveRamp look-alike target modeled from the brand's 1st-party database of mobile app users

Results

- By implementing a targeted data-driven TV campaign, overall restaurant visitations increased +4.5% with a +5% increase among in-target HHs

Company / Platform

- NBCU's AdSmart solution / Data-driven linear

% Lift in Restaurant Visitation

+4.5%
Overall
(Total HHs Exposed to AdSmart Campaign vs. Total HHs Exposed to Non-AdSmart Campaign)

+5%
In-Target

+4.5%
Non-Target

(Target HHs Exposed to AdSmart Campaign vs. Target HHs exposed to non-AdSmart campaign, the non-target lift indicates a strong halo effect)

AdSmart Exposure Among Target HHs Drove Higher Restaurant Visitation, Validating The Targeting

+18%
Higher In-Target Restaurant Visitation vs. *Overall*

+22%
Higher In-Target Restaurant Visitation vs. *Non-Target*

Source: NBCU, AdSmart + QSR Case Study.

NBCUniversal

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Delayed Adulthood: Only half as many adults 25-34 achieved all four common ‘life milestones’ in 2016 as they did in 1975

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Four Common Milestones

Employed

Live Independently

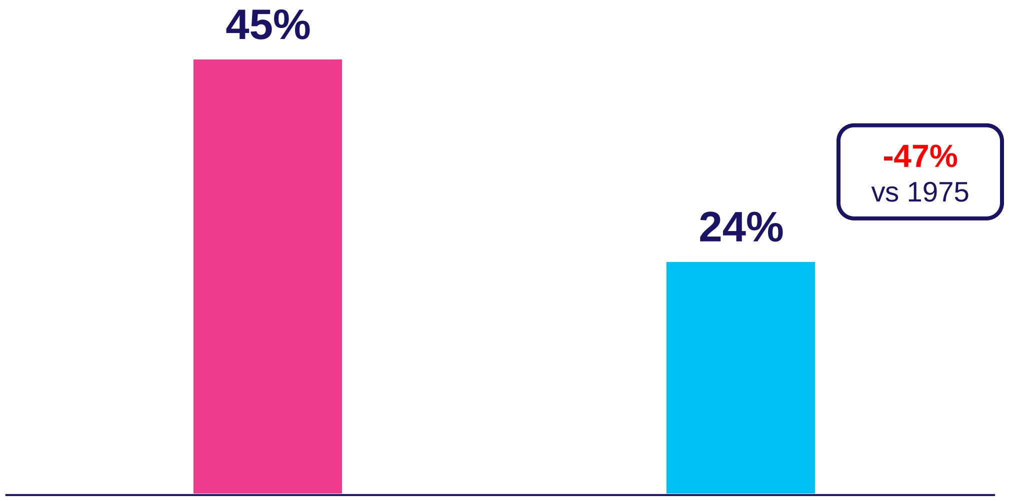
Married

Has Children

Four Common Milestones of Adulthood Achieved

% of A25-34

= 1975 = 2016



Live Independently + Employed + Married + Has Children

Source: U.S. Census Bureau, *The Changing Economics and Demographics of Young Adulthood: 1975 – 2016*, April 2017. Data based on 1975 and 2016 Current Population Survey Annual Social and Economic Supplement. Figure 5. Four Common Milestones of Adulthood – Getting Married, Having Children, Working, and Living Independently. Q: What are the most common combinations that young adults have completed?

2020 New TV Advertisers: In a pandemic, $400MM more in ‘new advertiser’ spending flowed into the national TV marketplace from more brands, and across more categories, compared to the prior year

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New National TV Advertisers
2019 vs. 2020 Comparison

Year	# of Brands	# of Categories	New TV $$$ (MM)
2019	114	61	$843.4
2020	283	95	$1,279.1
# YoY Diff	+169	+34	+$435.7
% YoY Diff	+148%	+56%	+52%

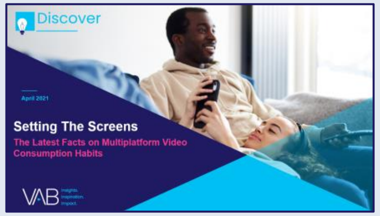
For a full list of the 283 brands with spend **click here**

Sampling **of 2020 New Nat’l TV Advertisers**

DRIZLY, SimpleHealth, peacock, obé, cbdMD, vuori, FIGS, The Athletic, Teladoc HEALTH, VIZZY HARD SELTZER, bear naked GRANOLA, HBO max, thrive causemetics, AOS ART OF SPORT

Source: VAB analysis of Nielsen Ad Intel data, 1/1/20-12/3120. 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. DTC brands are included within the total brand count.

Ad Opportunity In Streaming: Ad-supported services collectively account for over one-third of all video streaming time, providing brands greater opportunities for incremental cross-platform reach



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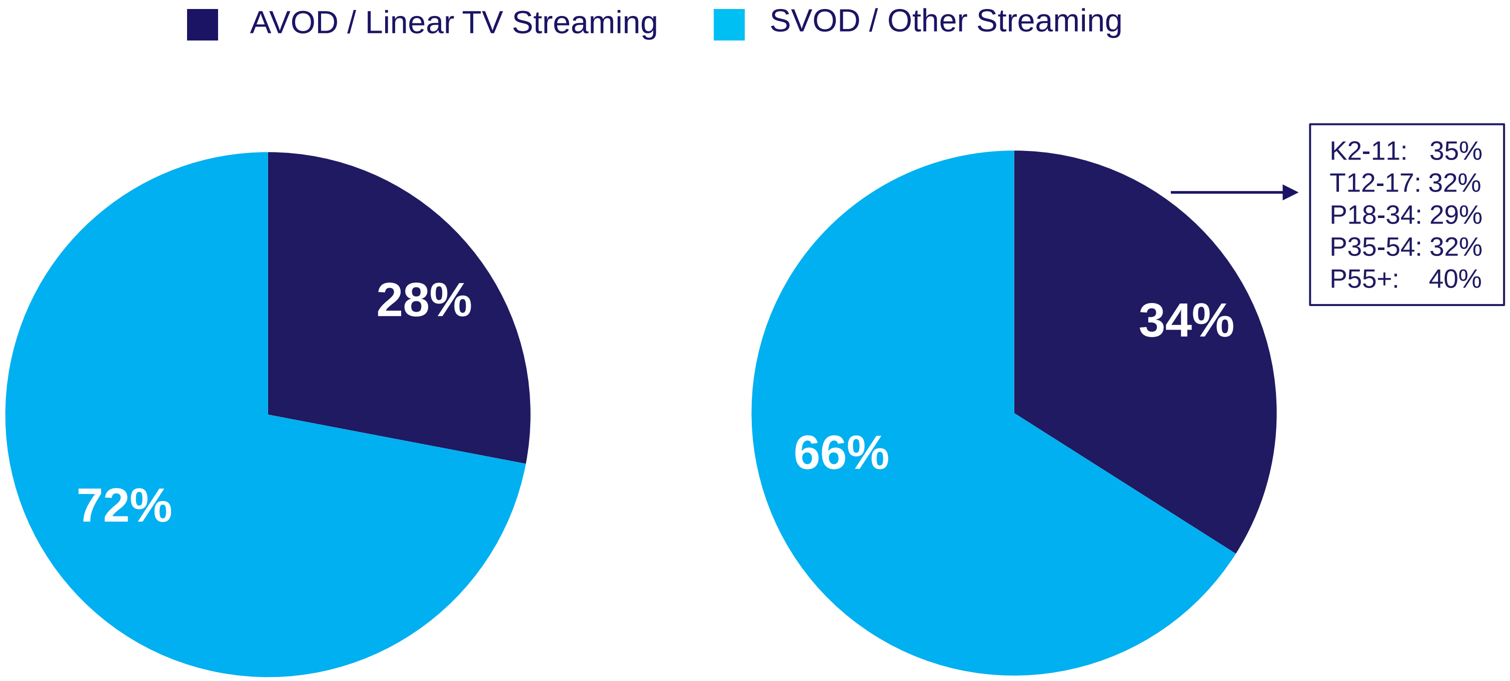
Five *Fast* Facts On

What you need to know about new & emerging trends, platforms or technology

Share of Streaming by Platform Type

Among Streaming Capable Homes



Jan '20 **Jan '21**

*As of December 2020, streaming accounted for 23% of total TV usage among streaming capable homes (vs. 21% in Dec '19)

Source: Nielsen Streaming Meter Homes, January 2020 & January 2021, P2+, Total Day. Linear TV streaming reflects TVE / network / cable provider apps. 'Other Streaming' primarily reflects SVOD platforms and includes social, gaming and other uncategorized platforms.

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Engaging Streamers At The Cinema: Frequent video streamers are more likely than the average adult, and even occasional streamers, to be habitual movie goers

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Pre-Pandemic Movie Attendance: Video Streamers vs. Adults 18+

'Frequent' / 'Occasional' Video Streamers

	Once a Week or More	2+ Times a Month	At Least Once a Month	
'Frequent' Video Streamers: vs. A18+	+17% More likely	+23% More likely	+23% More likely	19% of frequent video streamers went to the movies at least once a month pre-pandemic
'Occasional' Video Streamers: vs. A18+	-11% less likely	-5% less likely	+7% more likely	16% of occasional video streamers went to the movies at least once a month pre-pandemic

***How to read**: 'Frequent' video streamers are 17% more likely than the average adult to go to the movies at least once a week.*

Source: MRI-Simmons, GfK MRI Spring 2020, fielded March 2019 - May 2020, Base: P18+, 'frequent' video streamer (14% of streamers) – video streaming 10+ hours weekly,' occasional' video streamer (28% of streamers) – video streaming 5-9 hours weekly. Streaming services include: AppleTV+, Amazon Prime Video, Disney+, Hulu or Netflix. Frequency = # of times attended a movie in the last 90 days. Roku, 'The Future of Movies: How Theaters & Studios Can Thrive in the Streaming Era,' 2020

Nielsen Sample Update: When Nielsen returned to in-home panel maintenance, ‘Total Use of Television’ began to immediately recover - achieving its highest level in 10 months after just five weeks

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Nielsen announced that they would return to in-home service w/o March 22nd with 9,400 homes within the existing sample identified as priorities requiring maintenance (projected completion date: end of May).

The recent TUT growth reflected in the chart occurred within the context of work being completed on only half of the 9,400 homes requiring in-person maintenance.

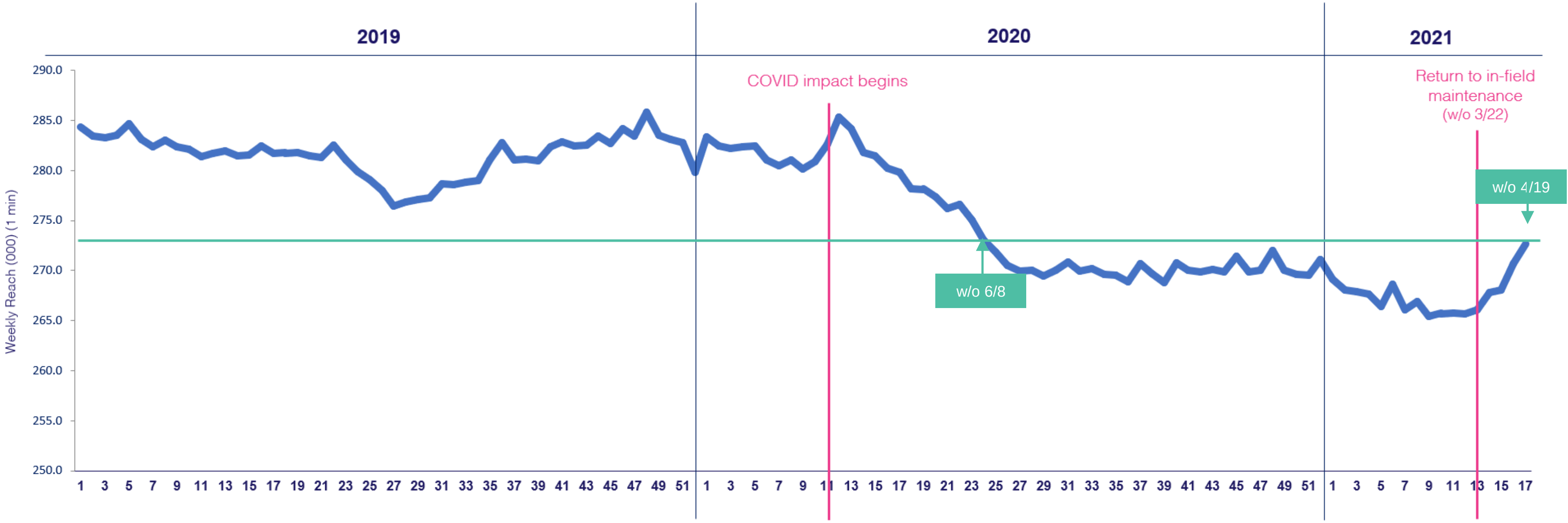
As of w/o 4/22

4,681 HHs completed work (50%)

- 3,625: maintenance performed
- 582: temporarily removed
- 474: removed from sample

Weekly Reach (000), Total Use of Television (TUT), P2+

CY 2019 – YTD 2021



Source: Nielsen R&F Time Period Report, Live+7, Total Day, P2+. Viewing Source: Total Use of Television. Time period: w/o 12/31/18 – w/o 4/19/21. The numbers on the horizontal axis represent the week # of the appropriate calendar year.

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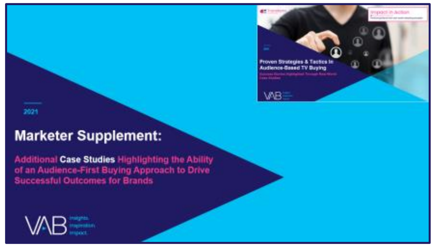

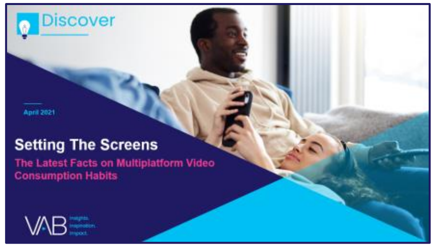

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