



2021 – 3rd 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.

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.

Solutions to the crumbling cookie: The anticipated phase-out is driving marketers to reallocate budgets to channels without third-party cookies like streaming platforms and connected TV



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Because of major browsers phasing out third-party cookies...



36%

My company/main client will **reallocate spend to other channels** without third-party cookies



33%

My company/client will build an **effective identity solution**



32%

My company/main client will develop a **more sophisticated tech stack**

Click below to untangle the terminology within data, privacy & identity

Untangling  Simplify

Clarifying marketing topics and terms

Untangling Terminology Within Data, Identity & Privacy

Source: Xandr, 2020 Ad Relevance Report

A total audience buying approach engages best prospects: TV exposure to adult 50+ viewers resulted in the influx of new consumers through the 'digital storefronts' of 30 DTC brands



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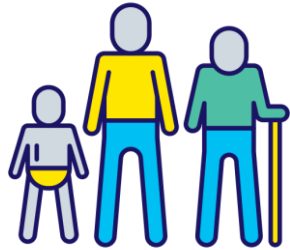


Transform

Marketer's Guide

Innovative thinking to make a lasting impact on your business growth.

Unique Website Visitors: 30 Brand Average



Median Age

30 Brand Avg

Total U.S. Internet Avg

1Q '17*
(Monthly Avg)

43.2

44.3

1Q '21
(Monthly Avg)

49.9

45.2

1Q '21 vs. 1Q '17
(Monthly Avg)

+6.7
years

+0.9
years



P50+ Comp %

30 Brand Avg

Total U.S. Internet Avg

37.6%

39.7%

51.7%

42.2%

+14.1%
percentage points

+2.5
percentage points

Source: VAB analysis of Comscore mediаметrix multiplatform media trend data, P18+. 1Q '17: January – March '17, 1Q '21: January – March '21 (calendar months), monthly average within each quarter, P50+ comp% is based on monthly unique visitors; figures are based on monthly averages for each 3-month time period across the 30 brands analyzed. *1Q '17 (Jan-Mar '17) is reflective of the first 3-month measurement period available and is inclusive of a few brands that were first measured after this time period, based on their first 3-month measurement period. Note: Comscore did not begin measuring 'median age' as a reported metric until February '17, therefore the first time period reflects Feb-Apr '17.

Driving business outcomes through total audience-based buying: The TV investment strategies of 30 DTC brands analyzed led to exponential growth in consumer action and digital engagement



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Key Website Metrics: 30 Brand Average Jan-Mar '21 vs. Jan-Mar '17: Three-Month Avg Comparison



Unique Visitors (000)



Total Visits (000)



Total Minutes (MM)

Difference

+3,156

+22,184

+95

% Difference

+63%

+135%

+89%

*Total U.S. Internet Avg
% Difference*

+10%

+26%

+34%

Source: VAB analysis of Comscore mediametrix multiplatform media trend data, P18+. January – March '17, January – March '21 (calendar months), figures are based on averages across the 30 brands analyzed. *Jan-Mar '17 is reflective of the first 3-month measurement period and is inclusive of brands that were not Comscore measured until later into 2017.

What would encourage brand marketers to increase their investment in audience-based TV buying? Development of enhanced performance metrics, as well as more education and training



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Marketer's Guide

Innovative thinking to make a lasting impact on your business growth.

Which of the following would encourage you to increase your investment in audience-based TV buying?

% of brand marketer respondents that ranked the following statement 1-3

48%

Development of better performance metrics solutions

43%

Having a better understanding of benefits and how it works

41%

Unified measurement across media platforms

39%

Incentives provided by media companies

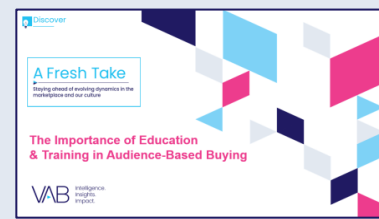
33%

Introduction of a new advanced solution or offering in the market

vs. 26% among 'agency pros'

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). Brand Marketers = respondents who work for a company selling products or services to consumers (B2C) or businesses (B2B), 'Small Business' Brand Marketers = business with annual total ad spend of \$10K - \$5MM. Q130. Which of the following would encourage you to increase your investment in audience-based TV buying?

Greater education on audience-based buying leads to higher satisfaction: Marketers that are formally trained are more likely to see successes from their ABB TV campaigns



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% of respondents who are satisfied with the following aspects of the audience-based TV buying process

■ Formal Company Training
 ■ Informal In-house Training
 ■ No Training



Ability to Deliver Outcomes

72% / 55% / 40%



Media Measurement

72% / 55% / 23%

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). Q103. How satisfied are you with the following aspects of the audience-based buying process in TV advertising? (very satisfied / satisfied). Base = Respondents who say audience-based buying is a 'key part' / 'small part' of their TV strategy or are currently testing audience-based buying and determining its role. 'Formal Company Training' = formal internal training program offered by your company; 'Informal In-house Training' = informal internal training provided by a colleague.

Embracing innovative buying strategies through ‘test and learns’: Marketers are learning that ABB TV campaigns can deliver greater ROI and quantifiable business outcomes against their objective



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Top Benefits of Audience-Based Buying in TV Advertising

% of marketers ‘currently testing ABB TV’ that ranked each between #1-3 in priority



Better Return on Investment (ROI)

44%

122 index



Execute Against Objectives With A Smaller Initial Investment

30%

149 index



Ability to Deliver Outcomes

28%

107 index



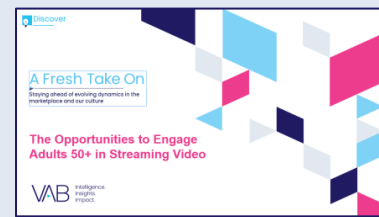
Increased Ad Relevance for Consumers

28%

How to read the indices: example - marketers ‘currently testing ABB TV’ are 22% more likely than all other respondents to rank ‘Better Return on Investment (ROI)’ in their top 3 benefits of audience-based buying in TV.

Source: VAB / Advertiser Perceptions ‘Audience-Based Buying Survey,’ March 23 – 31, 2021. Base: Marketers who are “currently testing audience-based buying and determining its role in our TV strategies.” Q110. Rank up to 3 factors that you believe are the top benefits of audience-based buying in TV advertising (rank 1-3). Top 4 on percentage are reflected. Index calculated against survey respondents who are not currently testing audience-based TV buying (n=168).

Ad opportunity in streaming for older consumers: On average, adults 50+ spend nine hours with video streaming per week, over five of which are through services with at least a limited ad load



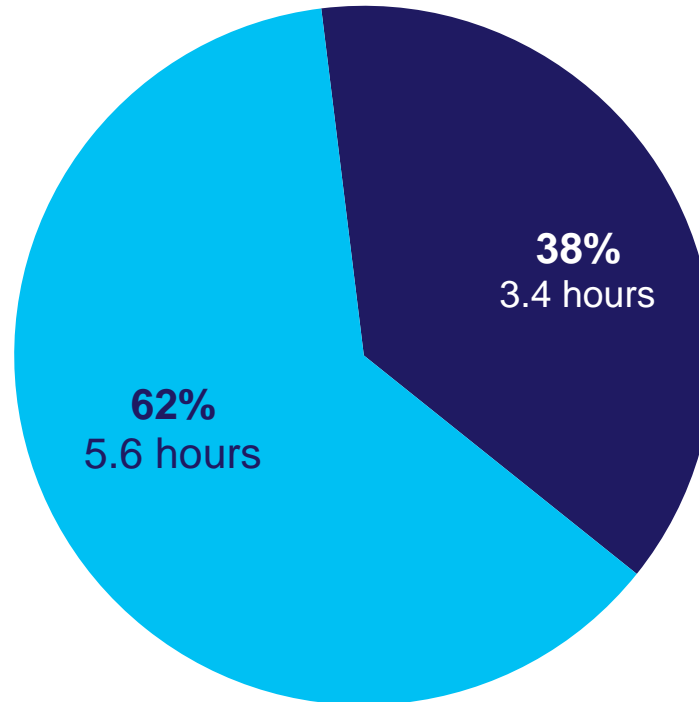
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Average % of time spent with streaming in a typical week by platform

A50+

- Paid Subscription Streaming Services w/out Ads
- Streaming Services w/ Ads (Paid / Free)



On average, adults 50+ spend **62%** of their time streaming on services **with ads** in a typical week

On average, adults 50+ spend nearly **38%** of their time streaming on subscription services **without ads** in a typical week

Source: VAB analysis of MRI-Simmons Cord Evolution Study, April 2021. Percentage breakout represents average time spent in a typical week with various sources used to watch content. Average hours represents 'hours of time-shifted streaming in typical week' and 'hours of live streaming in typical week'. 'Paid Subscription Streaming w/out Ads' includes pure paid subscription services (e.g., Netflix, Prime Video, HBO Max, Commercial-free Hulu, etc.). 'Streaming Services w/ Ads (Paid/Free)' includes Paid Subscription Streaming w/ Ads (e.g., versions of Hulu, Discovery+, Peacock, etc. with ads/commercials), Free Streaming services (e.g., Pluto TV, YouTube, Tubi, etc.), Streaming Cable TV network apps (e.g., A&E app, Bravo app, E! app, etc.) and Streaming Broadcast TV network apps (e.g., ABC app, NBC app, CBS app, FOX app, etc.).

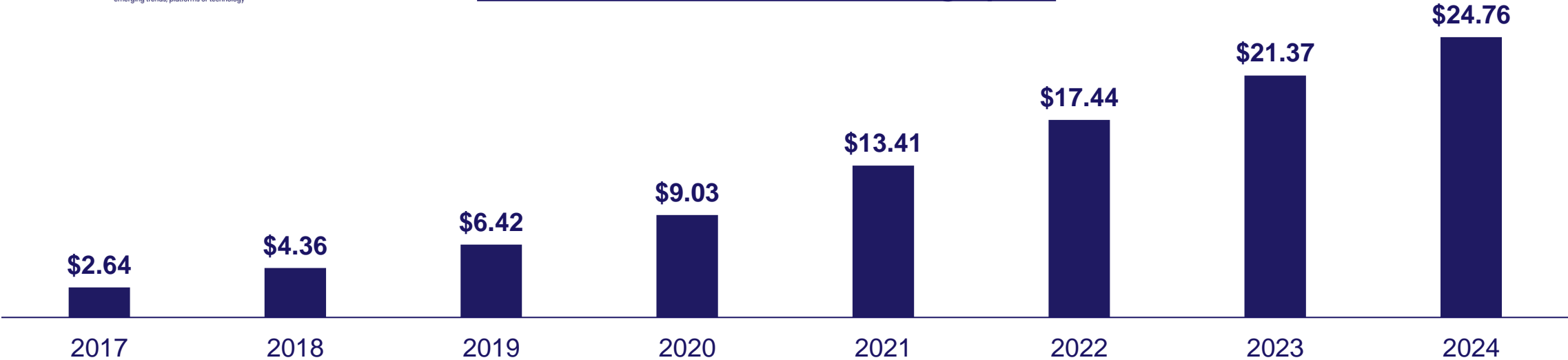
The growth of CTV advertising: Marketers are flocking to the platform as two-thirds began shifting some of their media investment into connected TV within the last three years



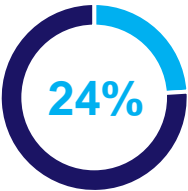
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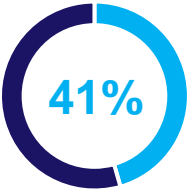
Connected TV: Annual Advertising Spend



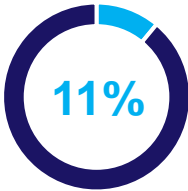
Two-thirds of marketers began shifting their media investment to connected TV within the last three years



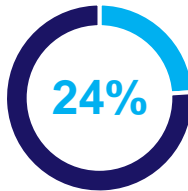
> One year ago



1-3 years ago



< 3 years ago



Have not started shifting strategy

Source: eMarketer's Connected TV Ad Spending in the U.S., June 2020 & March 2021. Innovid: The State of CTV Advertising, May 2021.

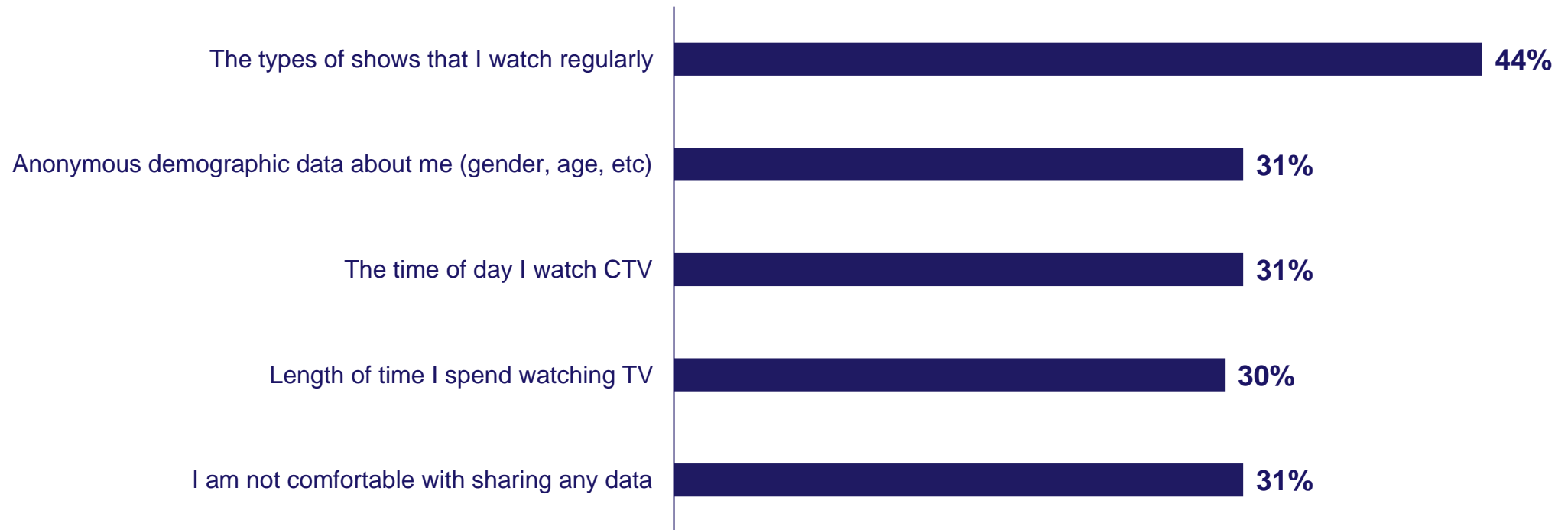
Bartering data for a better experience: Marketers searching for consumer data should consider CTV as over two-thirds of viewers are willing to share their information for improved personalization



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What type of data are you comfortable sharing with brands to improve your CTV ad experience?



Source: Integral Ad Science, Press Play: CTV & Ads, October 2020; Valassis, Connected TV Isn't Just Cool, It Really Works, March 2021

Audio podcasts complement video viewing: While TV drives outcomes throughout the entire funnel, adding podcasts to the media mix can build consideration and purchase intent

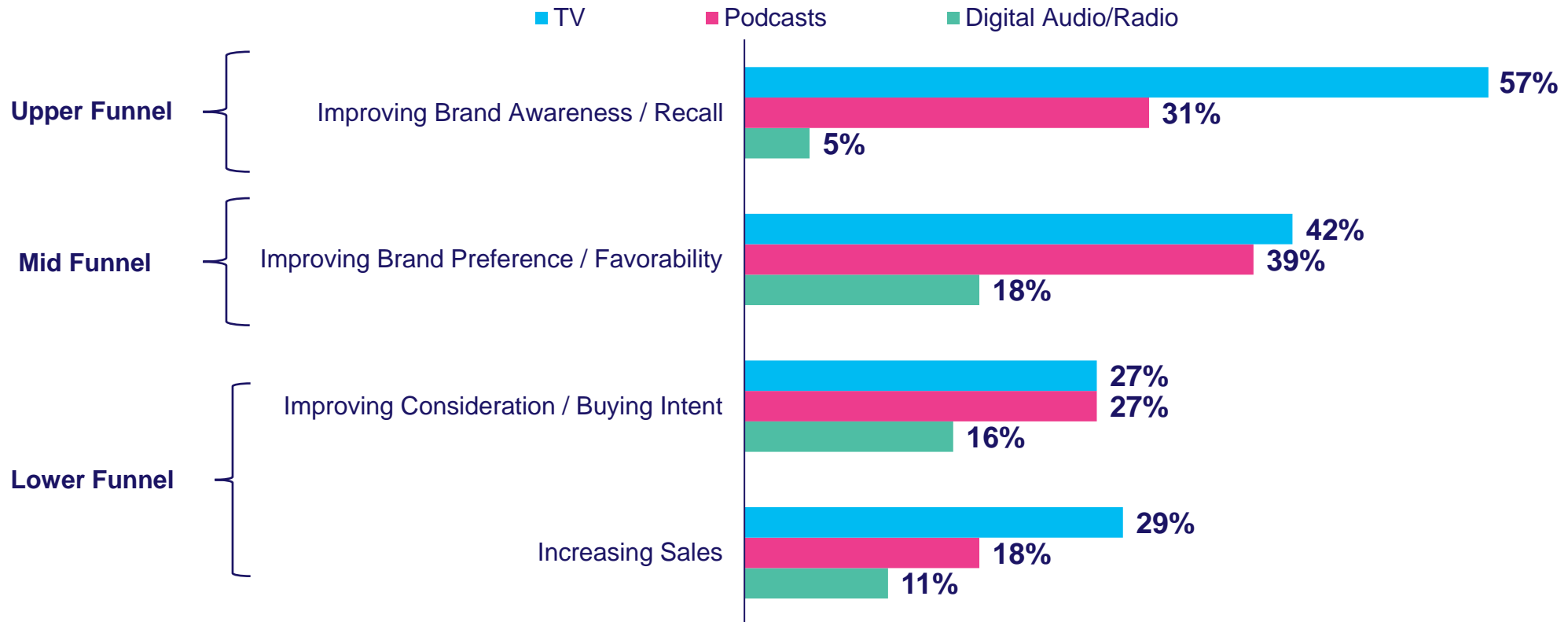


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Media Types Best at Delivering Campaign Objectives

% of advertisers



Source: VAB analysis of Advertiser Perceptions' Podcast Advertising Market Report, 2020.

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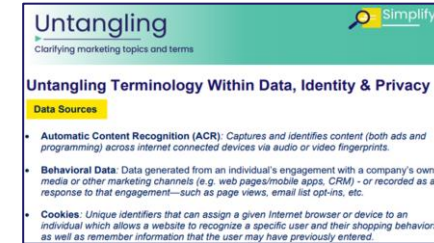
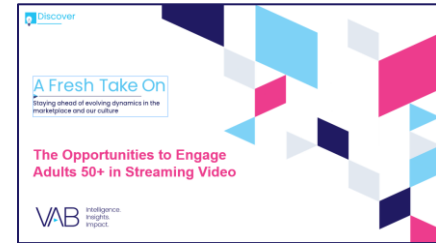
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- Data Sources**
- **Automatic Content Recognition (ACR):** Captures and identifies content (both ads and programming) across internet connected devices via audio or video fingerprints.
 - **Behavioral Data:** Data generated from an individual's engagement with a company's owned media or other marketing channels (e.g. web pages/mobile apps, CRM) - or recorded as a response to that engagement—such as page views, email list opt-ins, etc.
 - **Cookies:** Unique identifiers that can assign a given internet browser or device to an individual which allows a website to recognize a specific user and their shopping behaviors as well as remember information that the user may have previously entered.

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