



2023 – 3rd 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.



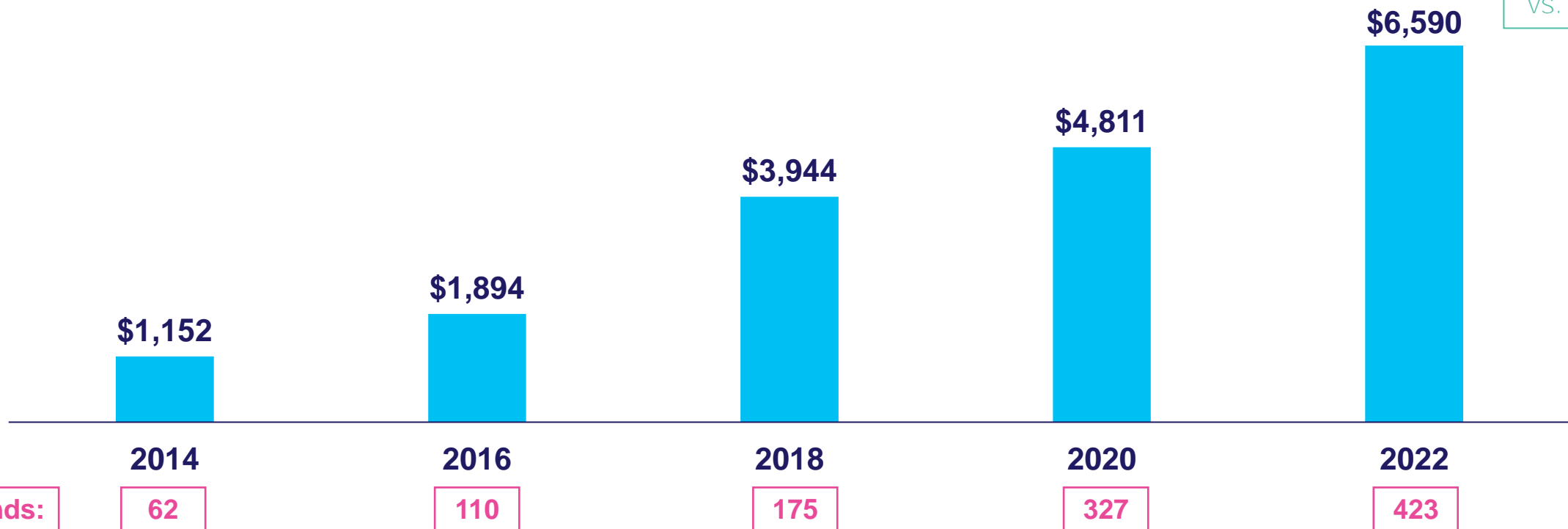
Direct-to-Consumer national TV advertisers: More data-driven, digital-native brands continue to launch new TV campaigns

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Discover **Fast Facts**
What you need to know about new & emerging trends, platforms or technology

Direct-to-Consumer (DTC) Brands U.S. Total TV Spend in millions

+37%
vs. 2020



Member's Only exclusive, [download the report](#) to get the full list of advertisers

Source: VAB analysis of Nielsen Ad Intel, 2013-2022 Calendar Years, 6 TV Sources (National broadcast TV, national cable TV, Spanish-Language broadcast TV, Spanish-Language cable TV, Spot TV & Syndication TV). Direct to Consumer – a company that sells their product or service online directly to end customers without involving third-party retailers, wholesalers or other parts of the traditional consumer supply chain.*Number of DTC brands active on U.S. TV each year.

VAB investigates: Did YouTube allow for targeted campaigns to be served on “Made for Kids” channels?



Click here for the full report



The VAB created a YouTube channel with neutral, brand safe content and executed a campaign to conduct our experiment



One of the channels included is “Peekaboo Kidz”, which describes itself as “Specially designed for kids as they explore the World of Kids Educational Videos”

- [Link](#)
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Placement	Type	Ad group
<input type="checkbox"/> Miraculous Ladybug	YouTube channel	VAB Test Campaign #1
<input type="checkbox"/> Peekaboo Kidz	YouTube channel	VAB Test Campaign #1
<input type="checkbox"/> LUCCAS NETO - LUCCAS TOON	YouTube channel	VAB Test Campaign #1
<input type="checkbox"/> SWIRL	YouTube channel	VAB Test Campaign #1
<input type="checkbox"/> Hudson's Playground	YouTube channel	VAB Test Campaign #1

5 examples of placements on “Made for Kid’s” channels being served behaviorally targeted ads

Placement	Type	Ad group	↓ Views	Avg. CPV	Impr.	View rate
<input type="checkbox"/> Miraculous Ladybug	YouTube channel	VAB Test Campaign #1	3	\$0.008	3	100.00%
<input type="checkbox"/> Peekaboo Kidz	YouTube channel	VAB Test Campaign #1	1	\$0.014	1	100.00%
<input type="checkbox"/> LUCCAS NETO - LUCCAS TOON	YouTube channel	VAB Test Campaign #1	1	\$0.008	1	100.00%
<input type="checkbox"/> SWIRL	YouTube channel	VAB Test Campaign #1	1	\$0.005	1	100.00%
<input type="checkbox"/> Hudson's Playground	YouTube channel	VAB Test Campaign #1	1	\$0.009	1	100.00%

*763 total campaign placements

No budget is too small for TV: Brands across all investment levels see significant lifts in website traffic after their TV launch



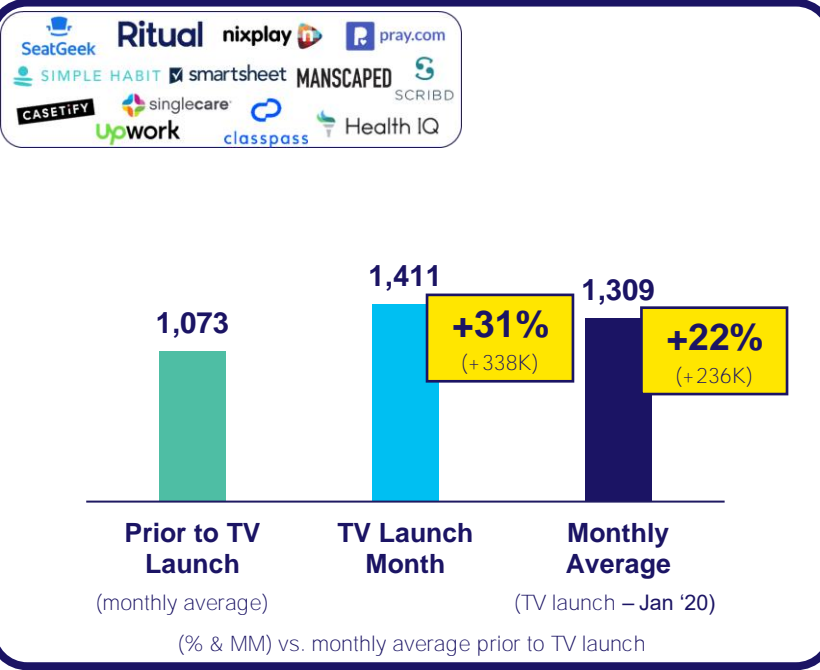
Click here for the full report

Transform Marketer FAQs

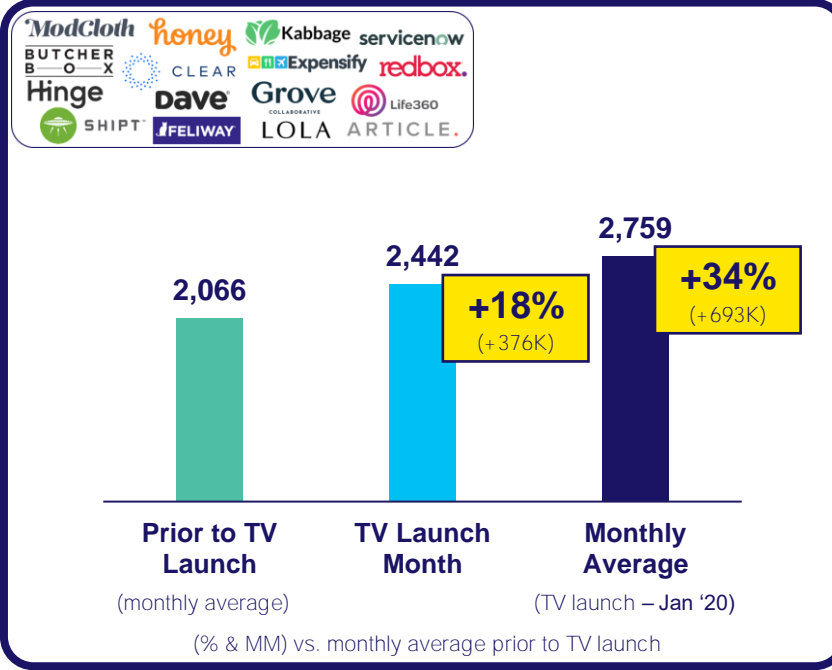
36 'Emerging' Direct-to-Consumer (DTC) Brands*

Average Monthly Website Unique Visitors (000)
Based Over a Four-Year Time Period: Jan '16 – Jan '20

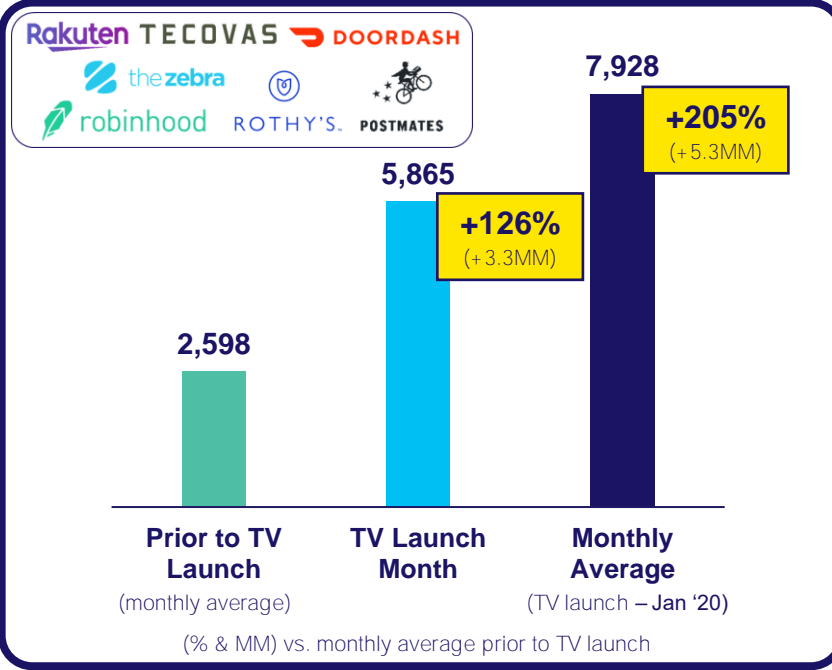
\$500K - \$2MM TV Spend: 12 Brands Analysis



\$2MM - \$10MM TV Spend: 16 Brands Analysis



\$10MM+ TV Spend: 8 Brands Analysis



Source: VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), Feb '18 – Jan '20 (calendar months). VAB analysis of Comscore mediametrix multiplatform media trend data, total audience (Desktop P2+, Mobile 18+), Jan '16 – Jan '20 (calendar months). 'Prior to TV Launch' reflects the average monthly unique visitors based on when each brand's website began being measured by Comscore, or starting from January 2016 if measurement began before that month. *Reflects the 36 brands that are measured in Comscore and had reported monthly unique visitors in at least one month prior to their campaign launch.

Shoppable TV drives recall among young adults: Younger audiences are more likely to remember seeing interactive ads



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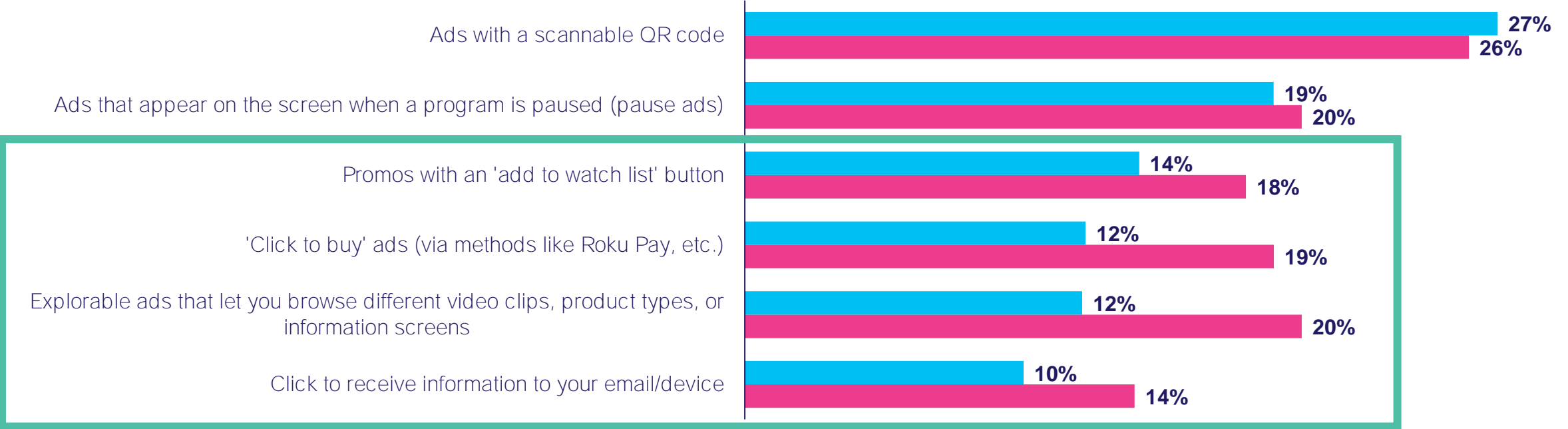


Marketer's Guide
 Innovative thinking to make a lasting impact on your business growth.

% of A16+ who recall seeing different types of interactive ad formats when watching TV

% of total respondents

■ P16+ ■ P16-34



Source: VAB custom research fielded by Hub Entertainment Research as part of the 2023 *Monetization of Video* report. Data sourced from Hub's survey of 1,602 TV consumers, ages 16-74 who meet the following criteria: watch at least one hour of TV / week, have broadband access. Data collected June 2023. Q2: Which of the following types of ad formats do you recall seeing when watching TV (including: TV and streaming)?

TV motivates young adults to act: Campaigns for younger-skewing brands drive engagement and online conversion



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Sampling of Younger-Skewing Disruptor Brands

Monthly Website Unique Visitors (000) Comparison

Based Over a Four-Year Time Period: Jan '16 – Jan '20

Brand	Monthly Average: Prior to TV Launch	Monthly Average: TV Launch – Jan '20	# Diff	% Diff
DOORDASH	5,467	22,020	+16,553	+303%
SeatGeek	2,920	3,923	+1,003	+34%
MANSCAPED	765	1,662	+897	+117%
TECOVAS	549	1,081	+532	+97%
classpass	286	474	+188	+66%

Based Over a Four-Year Time Period: Mar '16 – Feb '19

Brand	Monthly Average: Prior to TV Launch	Monthly Average: TV Launch – Feb '19	# Diff	% Diff
lyft	2,471	10,549	+8,078	+327%
POSHMARK	5,978	13,812	+7,833	+131%
purple	1,309	1,630	+321	+25%
zelle	1,584	3,008	+1,424	+90%
ZOLA	254	1,324	+1,070	+422%

Source: **Direct Effect** - VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), Feb '18 – Jan '20 (calendar months). VAB analysis of Comscore mediamatrix multiplatform media trend data, total audience (Desktop P2+, Mobile 18+), Jan '16 – Jan '20 (calendar months). 'Prior to TV Launch' reflects the average monthly unique visitors based on when each brand's website began being measured by Comscore, or starting from January 2016 if measurement began before that month. **Direct Outcomes** - Source: VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), March '15 – February '19 (calendar months). VAB analysis of Comscore mediamatrix multiplatform media trend data, total audience (Desktop P2+, Mobile 18+), March '15 – February '19 (calendar months). 'Prior to TV Launch' reflects the average monthly unique visitors based on when each brand's website began being measured by Comscore, or starting from March 2015 if measurement began before that month.

Audience-based TV buying drives KPIs: Brands are using ABB to increase target audience reach and engage new customers



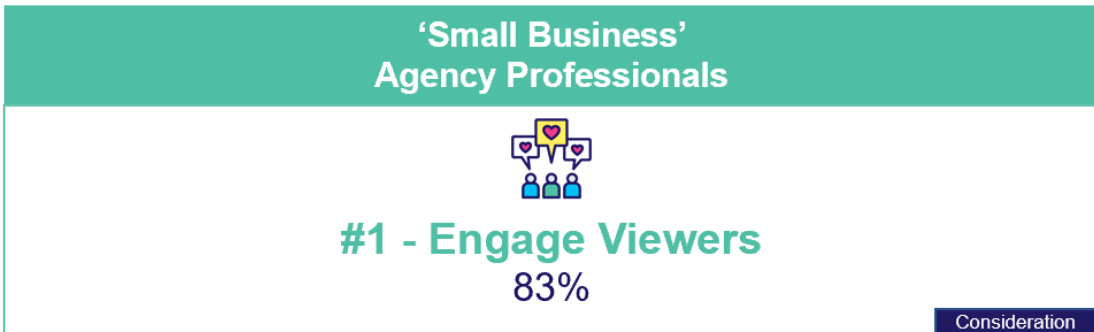
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% of respondents who believe audience-based TV buying can impact each of the following KPIs

% of respondents who ranked each #1



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. '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. Q150. To what extent do you believe audience-based buying of TV advertising can impact each of the following KPIs? (extremely impactful / very impactful). Base = Total Respondents.



Another silver lining for FAST: Adults 65+ are turning to FAST services to expand the amount of content they have access to



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Which of the following are reasons for why you have watched / signed up for a free ad-supported streaming TV service?

% of total respondents (rank 1-3)



Source: VAB custom research fielded by Hub Entertainment Research as part of the 2023 *Evolution of Video Branding* report. Data sourced from Hub's survey of 2,400 TV consumers, ages 16-74 who meet the following criteria: watch at least one hour of TV / week, have broadband access. Data collected early February 2023. Q2: Which of the following are reasons for why you have watched / signed up for a free ad-supported streaming TV service?

Adults 65+ discretionary spending advantage: HH net worth growth for older adults is outpacing younger demographics



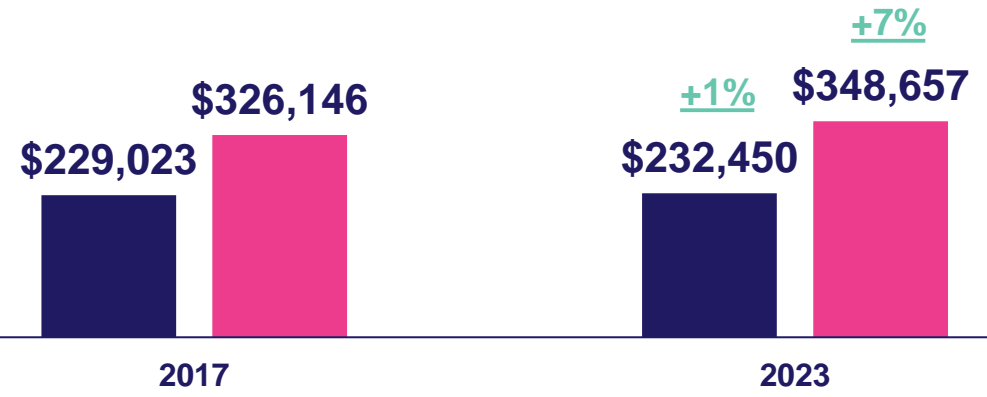
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Household Net Worth by Demo 2017 vs. 2023

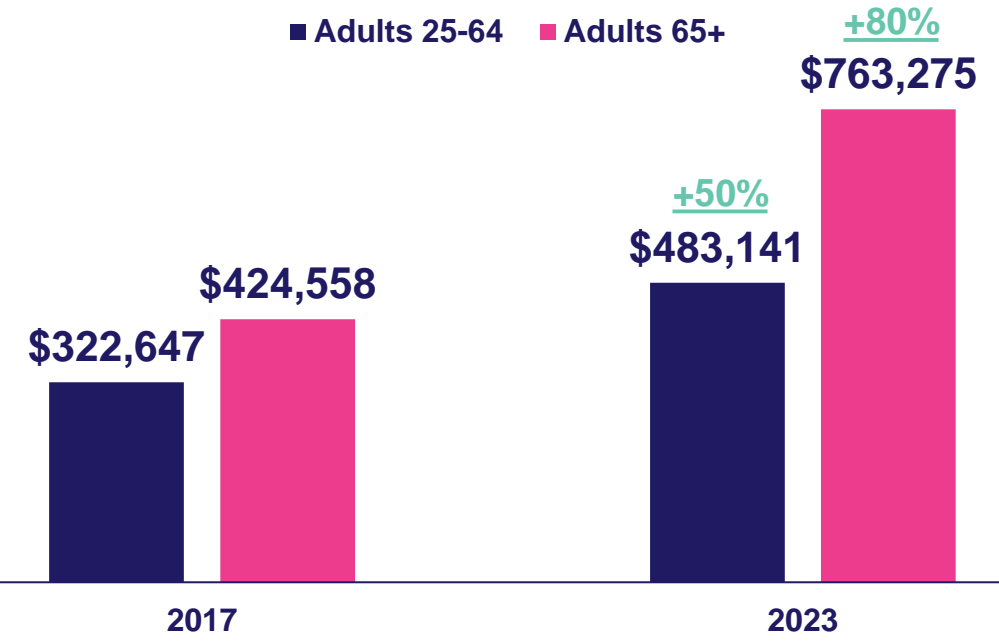
Median HH Net Worth

■ Adults 25-64 ■ Adults 65+



Average HH Net Worth

■ Adults 25-64 ■ Adults 65+



Source: VAB analysis of MRI-Simmons USA Study, Spring 2017 & Spring 2023. According to the U.S. Census Bureau, 'net worth' is the value of assets owned (cash in bank accounts, investments, retirement accounts, etc. as well as the value of any owned property) minus any liabilities owed (debt, including student loans, credit cards, mortgage, etc.).

Social video ad growth: Spend has more than tripled since 2019 and will soon represent a \$40 billion marketplace

What Is...
Clarifying marketing topics and terms

Simplify
VAB
Video Advertising Bureau

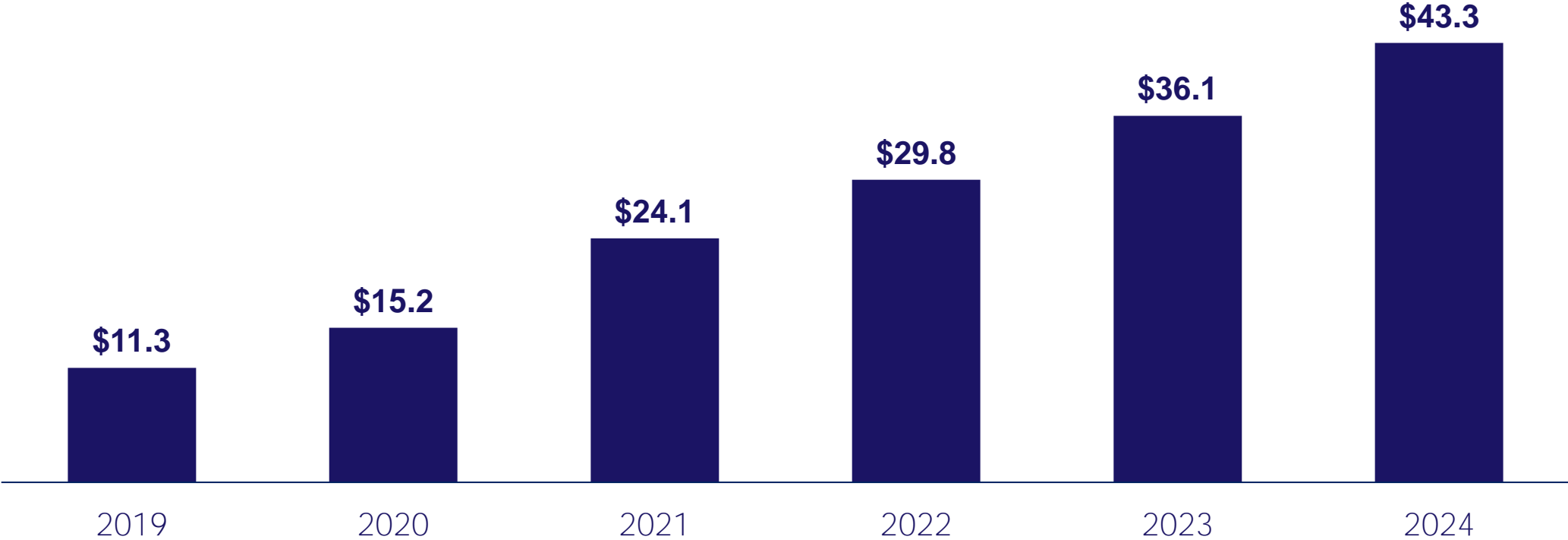
The Social Video Ecosystem

A Look Into The Evolving Landscape

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Simplify
What Is...
Clarifying marketing topics and terms

U.S. Social Video Ad Spending \$ in Billions



Source: eMarketer, 'Social Video Ad Spending Forecast 2023,' 1/24/23. Note: excludes spending by marketers that goes toward developing or maintaining organic social video content; excludes YouTube; includes paid video advertising appearing within social networks, social network games and social network apps. Ad Spend Forecast based of October 2022 data. Note: YouTube advertising revenues, from eMarketer: 2019 - \$3.4B, 2020 - \$4.5B, 2021 - \$6.5B, 2022 - \$6.9B, 2023 - \$7.4B, 2024 - \$8.5B

Measuring outcomes: Three key components lead to insights and optimization opportunities for cross-platform measurement



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1 Ad Data

Impression Data Cross Platform Ad Exposure

Leverage impression-based ad exposure data that reflects when and where your ads ran across the video ecosystem

2 Outcomes Data

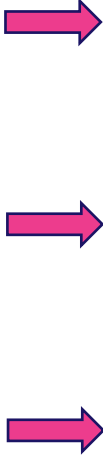
Surveys Aggregated Online Behavior Web Tags Sales

Collect full funnel outcomes data during your ad campaign to capture a full picture look at the customer journey

3 Identity Resolution

Individual Level Household Level Privacy Compliant

Match ad data & outcomes data in a privacy compliant manner via an identity resolution at a HH or individual level



Insights & Optimization Opportunities

Outcomes Over Time Target Audience Insights Cross Platform Outcomes

Outcome solutions rooted in identity enable true cross platform measurement of outcomes and supports the ability to layer in valuable audience information

What's next in measurement? The future of TV measurement will likely be dependent on both big data and panels, with panels acting as a complement to modern measurement



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Making Sense of Measurement
What you need to know about innovations and advancements in measurement



Measurement Panel

Overview

Viewing habits, behaviors and demographic info are collected from a small group of people to represent a larger group

Benefits

When stable, panels can be used to provide a common view of the TV landscape

Challenges

Can lack in representation of certain television household types such as OTA



Calibration Panel

Overview

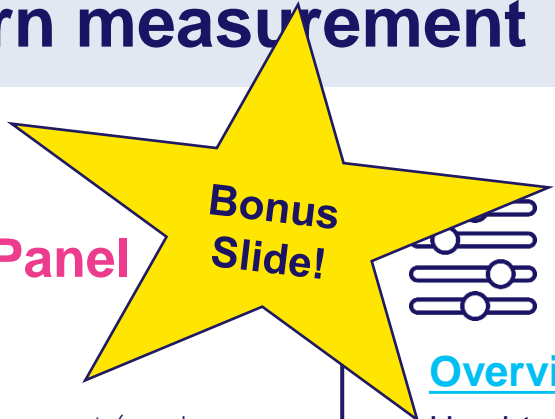
Used along with another data asset (such as big data) and is used to understand where the gaps or biases are within that dataset

Benefits

Can provide a path to demographic, geographic and television household type representation in TV measurement

Challenges

If there are issues with the panel, those biases can be passed into the dataset they are meant to benefit



Validation Panel

Overview

Used to show mathematically that you're solving for the gaps in the measurement (such as representation or bias)

Benefits

Can be used to prove that relevant changes/adjustments have been made to solve bias issues

Challenges

Requires a well-trained Machine Learning Model

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