Simplify

2022 – 4th Quarter

The VAB Top 10

Our 10 must-read Insights charts of the quarter

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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.

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.

Consumers will spend over $1K on average this holiday season:

Despite inflation being a major concern, consumers plan to make purchases across a range of holiday-related categories

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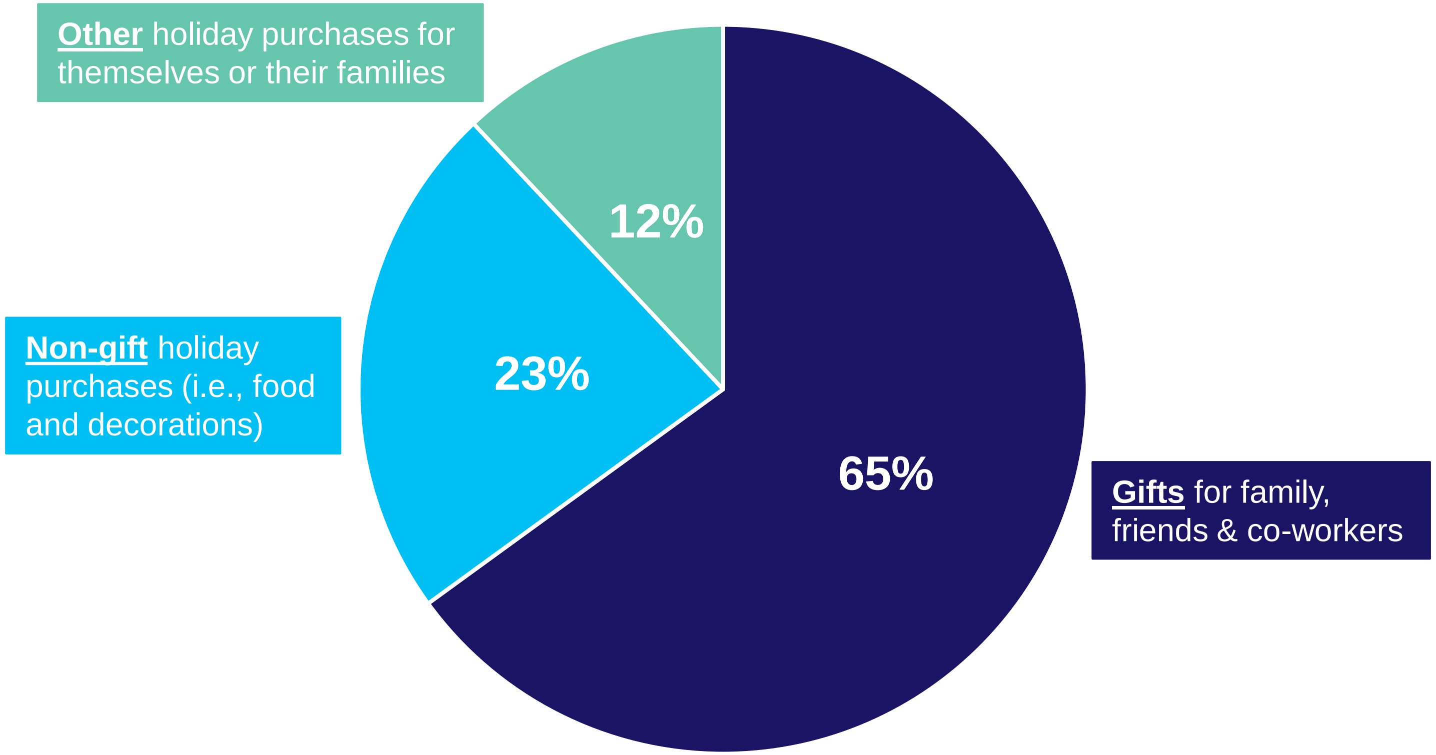
$1,041

Spend on the holiday season
by the average adult

Average Consumer Holiday % Share of Spend*
By Product Segment



Source: Samba TV, 2022 Holiday Report. Based on HarrisX online survey of 2,505 U.S. adults, fielded 8/29/22 – 9/1/22. *VAB analysis of National Retail Federation, Holiday 2021 by the Numbers, December 2021.

Hispanics driving holiday spending: Due to their fervent holiday spirit, Hispanic consumers are planning to spend one-third more than the average adult on holiday shopping this year

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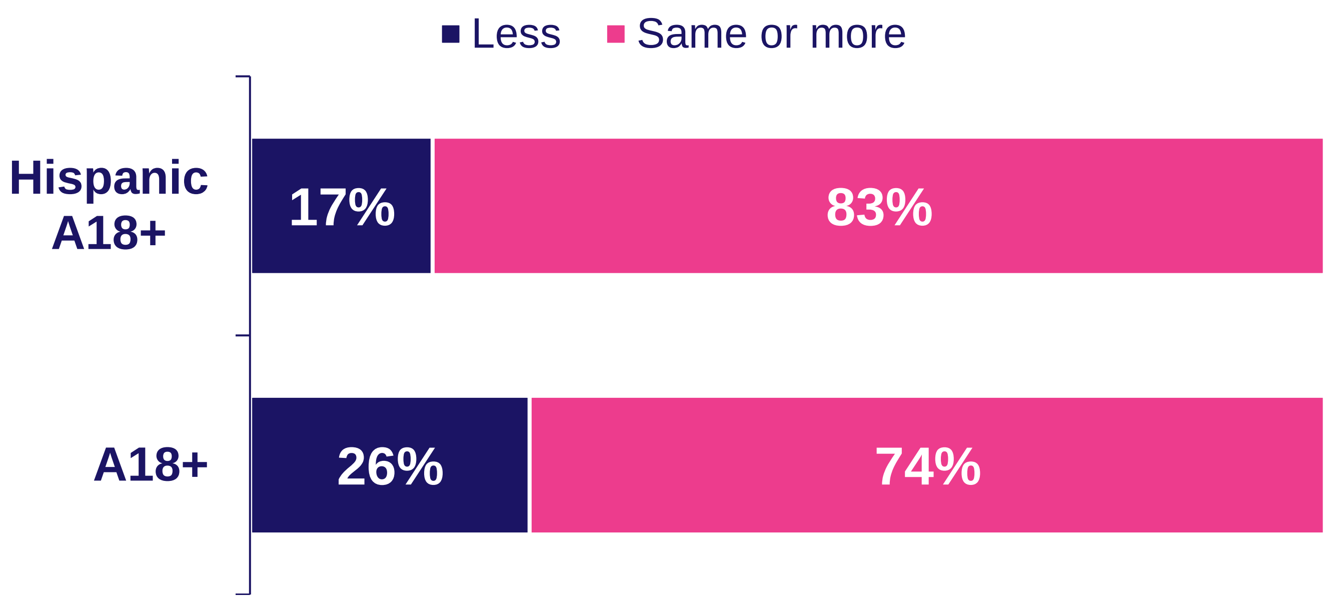
Click here to learn about the 6 reasons why Hispanics will be driving brand growth during the holidays

+34%

Spend on the holiday season
by Hispanic adults vs.
the average adult

$1,392 *vs. $1,041*
(+$351)

Holiday Shopping Spend in 2022 vs. 2021
% of U.S. Adults



Source: Samba TV, *2022 Holiday Report*. Based on HarrisX online survey of 2,505 U.S. adults, fielded 8/29/22 – 9/1/22.

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Measuring attention across platforms: The average :30 TV ad generates the same amount of attention as 1.5 YouTube Ads, 4.5 Facebook in-feed ads or 40 desktop display ads

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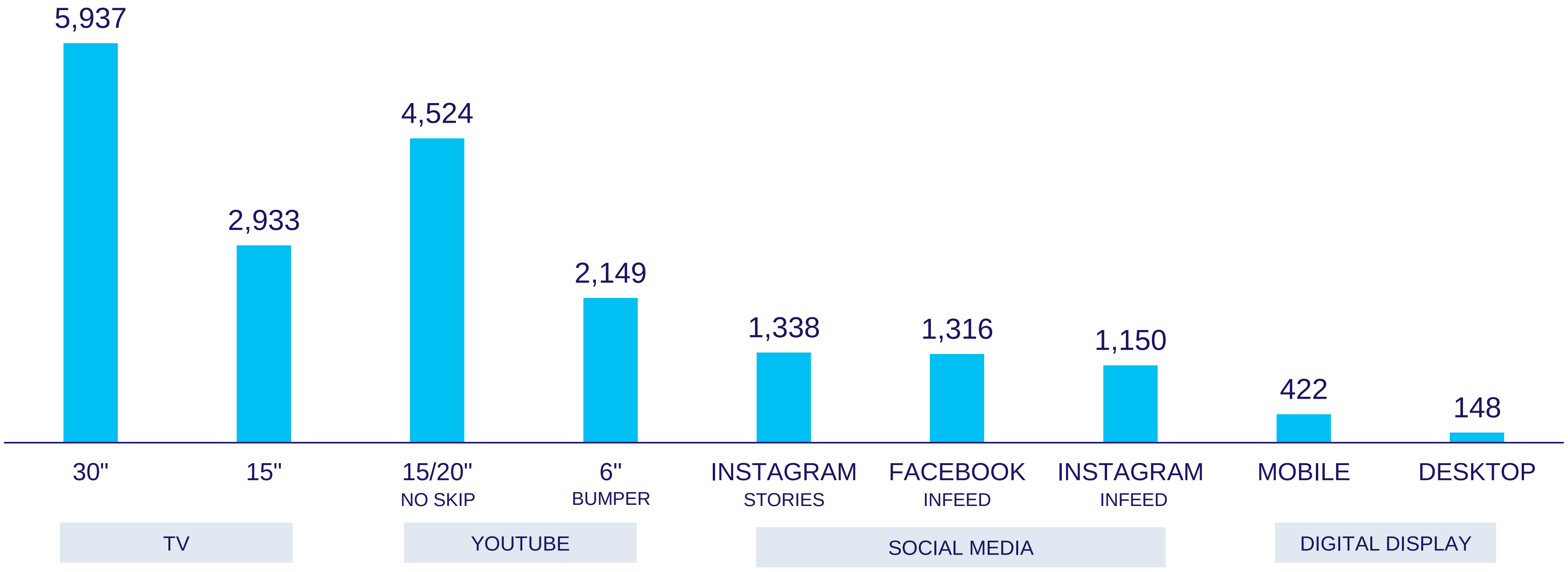
Attentive seconds per 1,000 impressions



Source: Ebiquity, with Lumen, TVision and Dan White – The Challenge of Attention, June 2021.

Multiscreen TV generates the greatest sales impact: TV across all devices outperforms even the best ROI seen with other online video platforms

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Sales impact across media platforms

Bonus Slide!

	TV	Desktop	Mobile
Television	144	153	161
Facebook	---	118	121
YouTube	---	116	137

How to read above chart: An exposure to an ad on Television drove **44%** more sales than not seeing the ad at all

Source: Karen Nelson-Field – Amplified Intelligence – "Not All Reach is Equal: An Investigation into Cross Platform Advertising Effectiveness," ThinkTV Australia, 2019. **Short-Term Advertising Strength (STAS)** is calculated by determining the proportion of category buyers who bought a specific brand having not been exposed to that brand's advertising and comparing this to the proportion of category buyers who were exposed to advertising and went on to buy the brand. STAS is built to capture short term effects, capturing impact up to a month after exposure. A STAS score of 100 indicates no advertising impact in that those who were exposed to the advertising were just as likely to purchase as those who were not. A score above 100 indicates that the advertising had an impact on sales. Indices based on % who were exposed to an ad that purchased a product divided by % who were not exposed to an ad that purchased a product.

1H ’22 new TV advertisers: Categories that serve ‘everyday’ needs like pharma, insurance and financial services have taken on a renewed importance among consumers

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1H ‘22 New National TV Advertisers: Top 15 Categories Ranked by Total Spend

Rank	Category	# of Brands	% of total brands	Category $$$ (000)	% of total spend
1	Pharmaceutical	13	10%	$182,272.1	44%
2	Insurance	7	5%	$38,940.4	9%
3	Communications	2	2%	$26,963.7	7%
4	Professional Services	5	4%	$24,559.0	6%
5	Financial Services	10	8%	$21,518.5	5%
6	Insecticides	1	1%	$15,638.5	4%
7	Apparel	6	5%	$12,908.2	3%
8	Alcohol Beverages	4	3%	$12,301.9	3%
9	Beverages	1	1%	$11,900.3	3%
10	Streaming Services	1	1%	$9,221.7	2%
11	Automotive	2	2%	$7,638.0	2%
12	Pet Care	4	3%	$7,027.5	2%
13	Medical Devices	3	2%	$4,467.2	1%
14	Vitamins & Supplements	3	2%	$4,430.3	1%
15	Entertainment	2	2%	$3,586.3	1%
16	Other Categories (32)	69	52%	$30,740.6	7%
	Grand Total	**133**		**$414,114.2**	

=categories highlighted align within at least one of the ‘functional’ categories (healthcare / pharma, insurance, financial services, professional services, apparel & accessories, fitness & wellness and ‘lifestyle’ brands that incorporate alcohol beverages, food and travel)

Source: VAB analysis of Nielsen Ad Intel data, 1/1/22-6/30/22. 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.

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The FAST experience: With many on-demand and paid video services available, FAST presents a ‘frictionless’ viewing experience at no cost with no sign up needed

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Free Ad-supported Streaming TV

	SVOD	AVOD	FAST	vMVPD	Linear TV	MVPD VOD	TV Everywhere
Viewing Experience On-Demand vs. Live Scheduled Programming	Stream content on-demand on viewer’s schedule	Stream content on-demand on viewer’s schedule	Option to stream either live linear channels or on-demand content	Option to stream either live feeds of linear channels or on-demand content	Watch live or time-shifted content through an MVPD or antenna	Watch content on-demand on viewer’s schedule through an MVPD	Option to stream either live feeds of linear channels or on-demand content
Ad Experience Ad-Free vs. Ad-supported	Ad-free	Ad-supported (‘limited ad’ options also available)	Ad-supported	Ad-supported	Ad-supported	Ad-supported	Ad-supported
Business Model Paid vs. Free	Paid monthly or annual subscription	Some services are free & ad-supported, while others are offered as part of a SVOD / AVOD hybrid service at a lower cost with limited ads	Free to watch in exchange for viewing ads (Log-ins are available but not necessary)	Paid monthly or annual subscription	Paid MVPD subscription or free channels through Over-the-Air (OTA) access	Paid MVPD subscription	Paid MVPD subscription

MVPD (Multichannel Video Programming Distributor) reflects a cable, telco, or satellite provider.

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The growth of FAST: With the largest year-over-year growth of all streaming platforms, 4 out of 10 adult streamers are now watching FAST services

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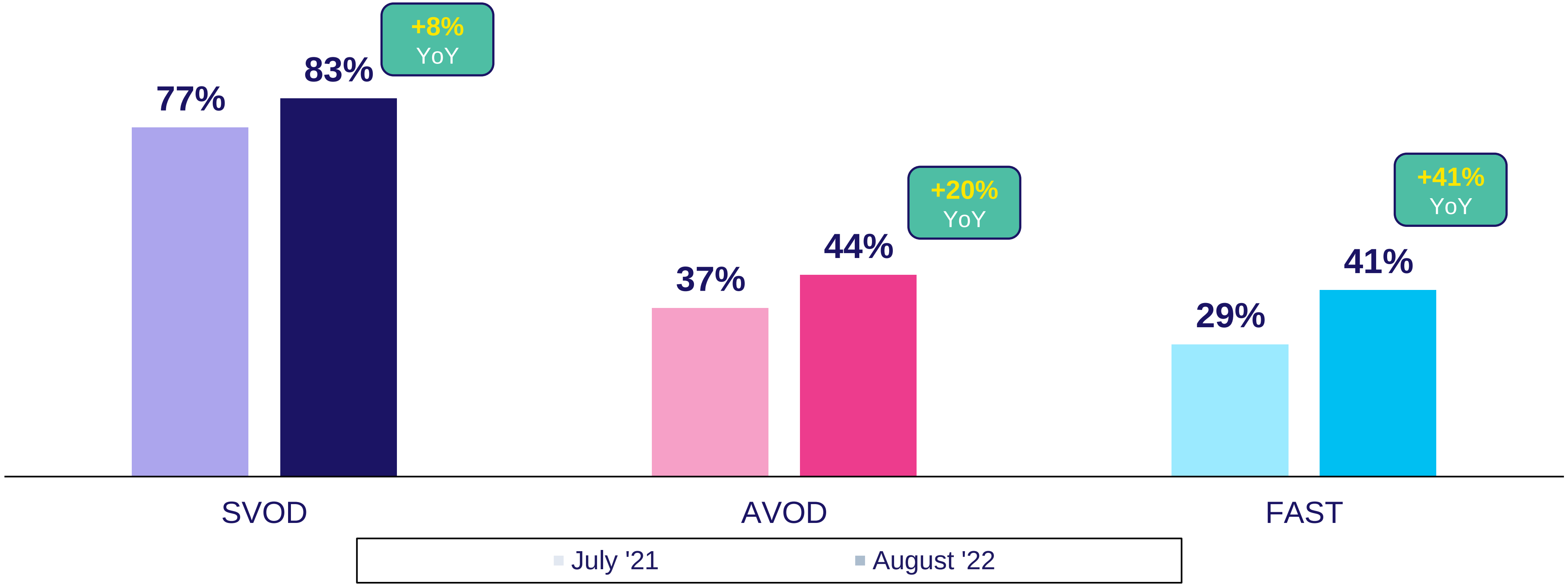
% of U.S. adult 18+ streamers that watch the following types of streaming services



Source: VAB analysis of MRI-Simmons August 2022 Cord Evolution Study, A18+. Base = streamed in the past 12 months. SVOD Viewers (72% of A18+ population / 83% of A18+ streaming population) = used any of the following streaming services in the past 30 days: Apple TV+, Discovery+, Disney+, HBO Max (commercial free), Hulu (commercial free), Netflix, Paramount+ (commercial free), Amazon Prime Video. AVOD Viewers (38% of A18+ population / 44% of A18+ streaming population) = used any of the following streaming services in the past 30 days: Hulu (limited commercial), Paramount+ (limited commercial), Peacock (limited commercial), HBO Max (limited commercial), Crackle, Vudu, Discovery+ (limited commercial). FAST (36% of A18+ population / 41% of A18+ streaming population) = used any of the following streaming services in the past 30 days: Peacock (free service w/ limited commercials), Roku Channel, Tubi TV, Freevee (formerly IMDb TV), Pluto, Samsung TV Plus, Xumo, Local Now.

One of six entertainment 'need states' that FAST meets: The way FAST viewers make decisions is often based on efficiency, so they seek out brands that make their lives run smoother

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Click here to learn about how FASTs meet the 6 entertainment 'need states' for consumers

Keep It Simple

(desire for convenience)

% of FAST viewers who agree with the following statements

Automotive

- **82%** say when buying a vehicle, **how well it meets their needs matters more** than whether it's foreign or domestic

Travel

- **82%** would rather **book a trip over the Internet** than meet with a travel agent

Food

- **76%** are always on the lookout for **quick and 'easy to prepare'** meal options

Mobile Apps

- **69%** say apps have made their life **so much more convenient**

Online Shopping

- **63%** are more likely to **purchase a product online** than in a store

Consumer Tech

- **33%** say **'smart' home devices / appliances** have become an important part of their life

Source: VAB analysis of MRI-Simmons August 2022 Cord Evolution Study, A18+. Base = streamed in the past 12 months. FAST Viewers (41% of A18+ streaming population) = used any of the following streaming services in the past 30 days: Peacock (free service w/ limited commercials), Roku Channel, Tubi TV, Freevee (formerly IMDb TV), Pluto, Samsung TV Plus, Xumo, Local Now. Reflects respondents who answered 'somewhat agree' or 'strongly agree'.

FAST expansion: More channels means more opportunities for marketers as services continue to grow and additional content agreements are formed

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Total number of FAST channels in the U.S.*

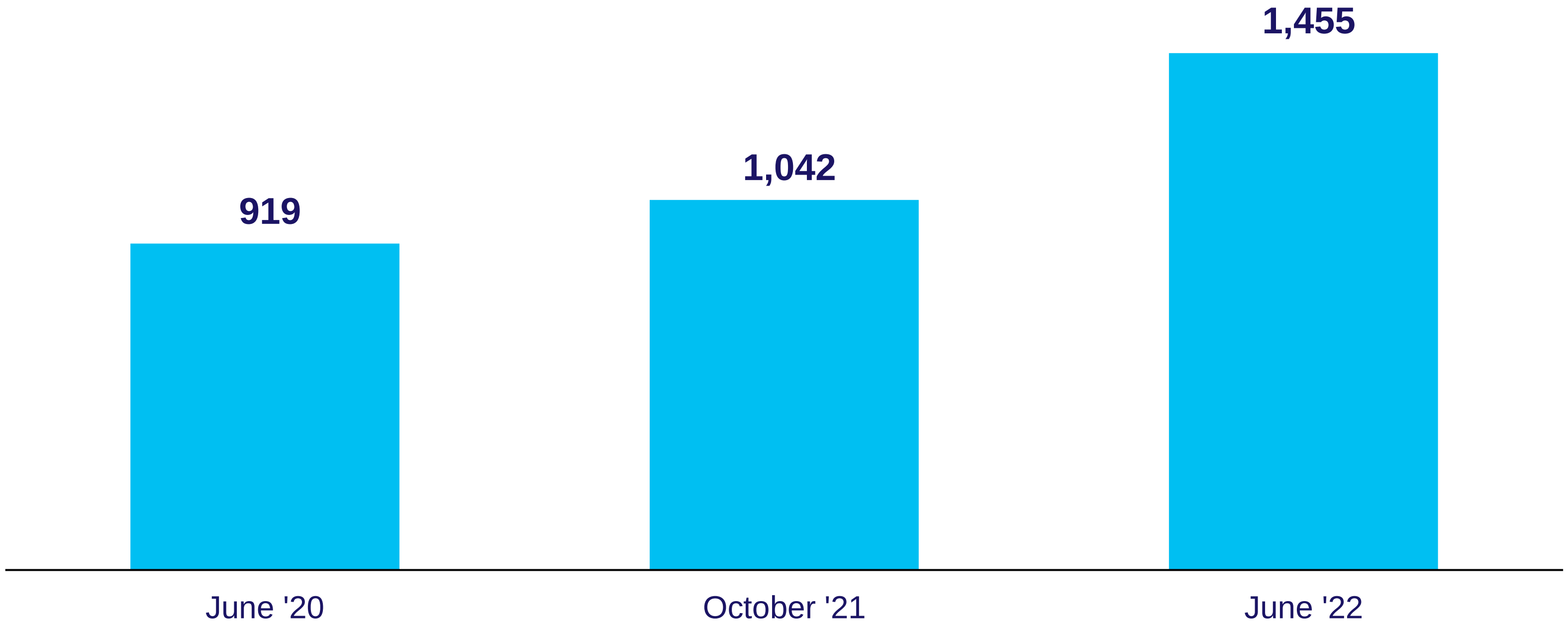
(Exclusive to & Shared Across Services)

+58%
vs. June '20

YoY FAST audience increased

+73%

From July 2020 to August 2022



Source: VAB analysis of MRI-Simmons Cord Evolution Study, July 2020 vs. August 2022, A18+. Base = streamed in the past 12 months. FAST Viewers (41% of A18+ streaming population) = used any of the following streaming services in the past 30 days: Peacock (free service w/ limited commercials), Roku Channel, Tubi TV, Freevee (formerly IMDb TV), Pluto, Samsung TV Plus, Xumo, Local Now. *VIP+ Variety Intelligence Platform, Life in the FAST Lane, July 2022. VIP+ analysis includes DistroTV, Freevee, Haystack News, LG Channels+, Local Now, News by Fire TV, Peacock, Plex, Pluto, Prime Video Channels, Redbox, Roku Channel, Samsung TV Plus, Sling Free, Sports.TV, STIRR, Tubi, Very Lcoal, ViX, Vizio WatchFree+, Xumo.

Build presence among diverse audiences on video platforms: Multicultural segments are more likely to watch professionally-produced, long-form TV programming across devices

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% of weekly time spent watching TV Shows

Share of Time	Live / DVR / VOD on TV	Live TV Streaming / Streaming on TV	TV Total	VOD / Downloaded on Other Devices	Live TV Streaming / Streaming on Other Devices	Other Devices Total
Black / African American	39%	28%	67%	12%	21%	33%
Hispanic	32%	35%	67%	10%	21%	31%
American Indian / Alaska Native	38%	34%	72%	11%	19%	30%
Asian	32%	33%	65%	9%	23%	32%
Other	30%	35%	65%	16%	20%	36%
Non-Hispanic White	44%	31%	75%	11%	16%	27%

Source: VAB analysis of MRI-Simmons August 2022 Cord Evolution Study, A18+. Q40b: Ways Watching TV Shows - Time Spent In Typical Week: Volume (% of Time Spent). Live on TV: Live, when it is broadcast, on a TV set; DVR on TV: DVR, on a TV set; VOD on TV: TV provider's Video On-Demand service on a TV; Live TV Streaming on TV: Streaming live, at the same time it airs on TV, on a TV; Streaming on TV: Streaming, on my schedule, on a TV set; VOD on other devices: TV provider's Video On-Demand service on any other device; Streaming on other devices: Streaming, on my schedule, on any other device; Live TV Streaming on other devices: Streaming live, at the same time it airs on TV, on any other device; Streaming on other devices: Streaming, on my schedule, on any other device; Downloaded content on any device: Watching downloaded content on any device. Note: %s may not add to 100% due to rounding.

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Inclusivity resonates with all audiences: Expand messaging beyond individual segments to create deeper connections across audiences by engaging ‘allies’ and ‘advocates’ as well

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5.3%

% of the U.S. A18+ population that identifies as LGBTQ+

% of that are supportive of the LGBTQ community*

68%	(A18+)
80%	(A18-24)
72%	(A25-44)
64%	(A45-64)
59%	(A65+)

% of A18+ who agree with the following statements*

61%
‘I believe brands should **support the LGBTQ community all year**, not just during gay pride month’

60%
‘Today, I think **most companies / brands should support** the LGBTQ community’

46%
‘I am **more likely to purchase a product / service** from a company / brand that supports the LGBTQ community’

Source: VAB analysis of MRI-Simmons Winter 2022 Study. LGBTQ represents A18+ that identify as LGBTQ. *MRI-Simmons, LGBTQ and Gender Identity Study, October 2021. Based on respondents who ‘strongly agree’ or ‘somewhat agree.’

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