



2023 – 4th 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.

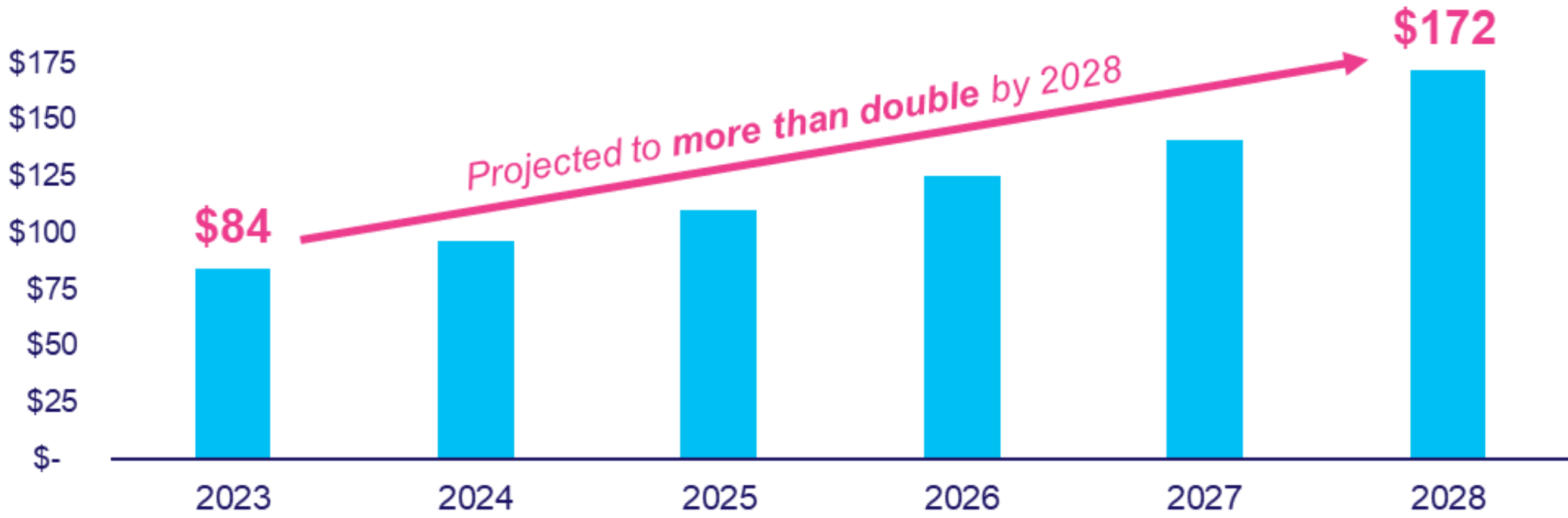


We are committed to your business growth and proud to offer VAB members, brand marketers and agencies ***complimentary access*** to our continuously-growing Insights library. **Get immediate access** at theVAB.com.

Cost of digital ad fraud: The estimated global cost is projected to more than double by 2028 to \$172 Billion

Simplify
What Is...
Clarifying marketing topics and terms

Estimated Global Cost of Digital Ad Fraud
\$ in Billions

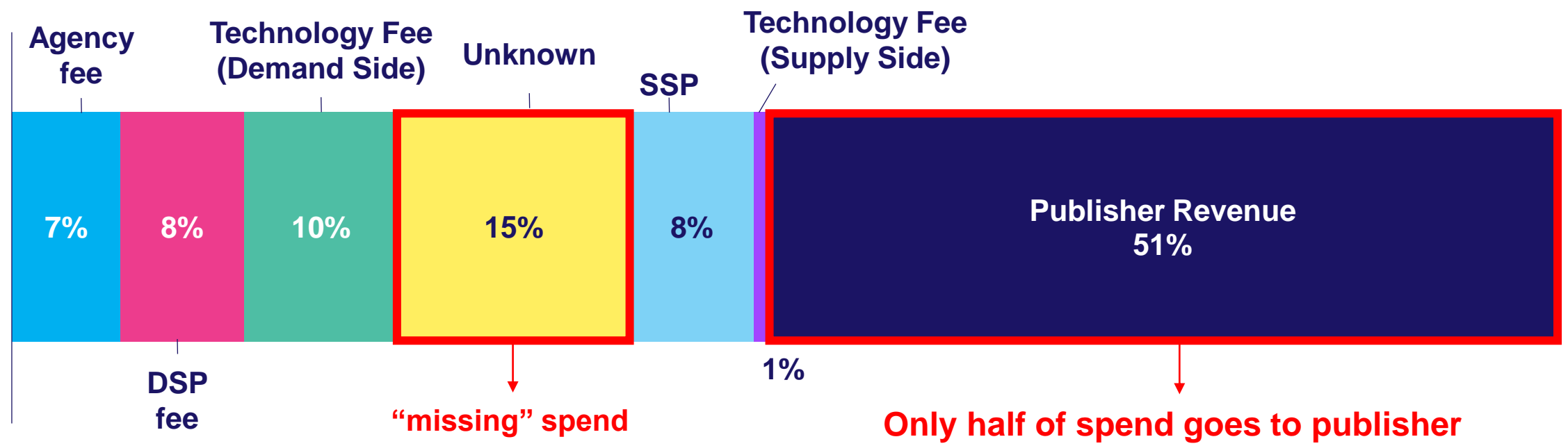


Source: Juniper Research, Quantifying the Cost of Ad Fraud: 2023-2028, 9/26/2023.

Opacity of the digital supply chain: Only about half of an advertiser's investment via programmatic goes towards ads



Digital Supply Chain Advertising Investment Allocation



Source: ISBA, May 2020 via Augustine Fou in Forbes, *In Digital, 'Wanamaker's 50%' Is Known. It's Also Worse Than That*, 12/19/20.

Consumers are concerned about misinformation: Many people report seeing false or misleading information online regularly



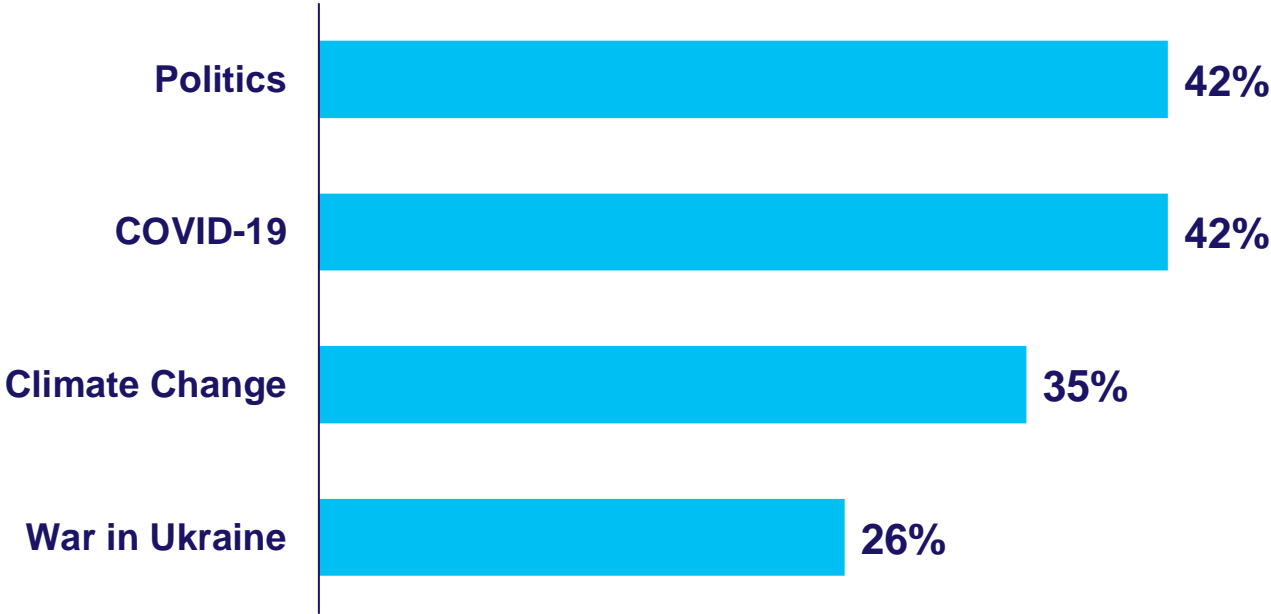
[Click here for the full report](#)



65%

of respondents are concerned about what is real and what is fake on the internet when it comes to news

% of U.S. respondents who have seen false or misleading information on the following topics online in the last week



Source: Reuters Institute, *Digital News Report 2023*. Based on global research conducted by YouGov, end of January – beginning of February 2023. Reflects respondents from North America.

The value of local TV news: A platform viewed as trustworthy that provides useful information and creates a positive impact



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83%

Find local news coverage on TV to be **most trustworthy**



77%

Feel local news provides people with **important info about their community & critical national news**



72%

Agree local news helps **enact positive change** in their local community

Source: Spectrum News / Morning Consult study via Charter Communications press release, *Spectrum News/Morning Consult Poll Finds 83% of Americans Trust Local News*, 8/25/2022.

Women's sports is a growth engine for TV: Live viewership has grown significantly, with females outpacing male demographics



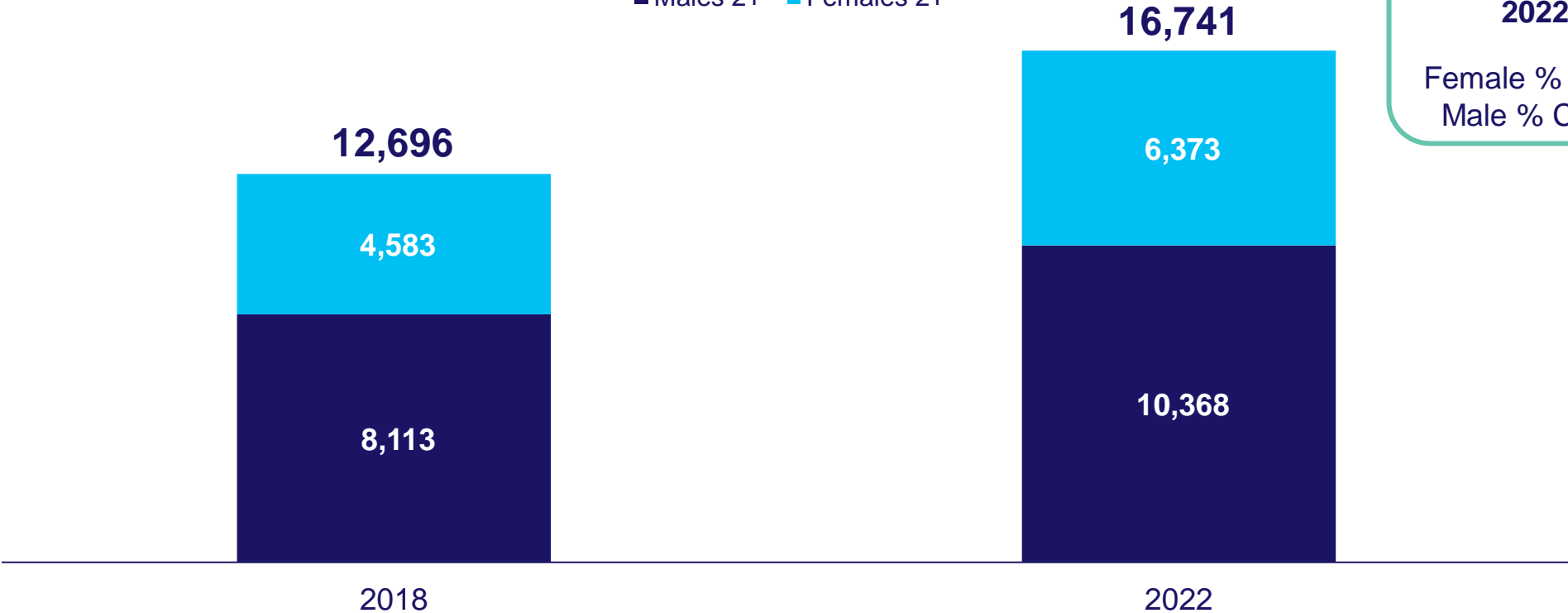
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Total time spent viewing women's live sporting events

in millions of minutes

■ Males 2+ ■ Females 2+



+32%
2022 vs. 2018

Female % Change: +39%
Male % Change: +28%

Source: VAB analysis of Nielsen NPower R&F Program Report, 2018 & 2022, Total Day, Live+SD, males 2+, females 2+, persons 2+. Ad-supported national cable TV & broadcast TV, includes Spanish language networks; excludes regional sports networks, local broadcast airings and digital airings of sports through MVPD / network TV apps. Reflects live sporting events only.

Female athletes are highly marketable: Increased exposure has turned many into mainstream stars and personalities



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Top 10 marketable female athletes



Source: SportsProMedia, *The Most Marketable Athletes of 2022, 2023*. Marketability is scaled on their **brand strength, audience and reach**, and **economics**. *Top marketable athletes ranking is based on SportsPro and Northstar's 'Marketability Score', which is made up of 3 components that are added together to generate an overall score: brand strength, audience & reach, economics. Athletes considered were active during the evaluation period (12/1/21-7/31/22) in one of the 24 sports analyzed.

1H '23 new TV advertisers: Despite continued uncertainty, more dollars were invested by new advertisers than in prior years



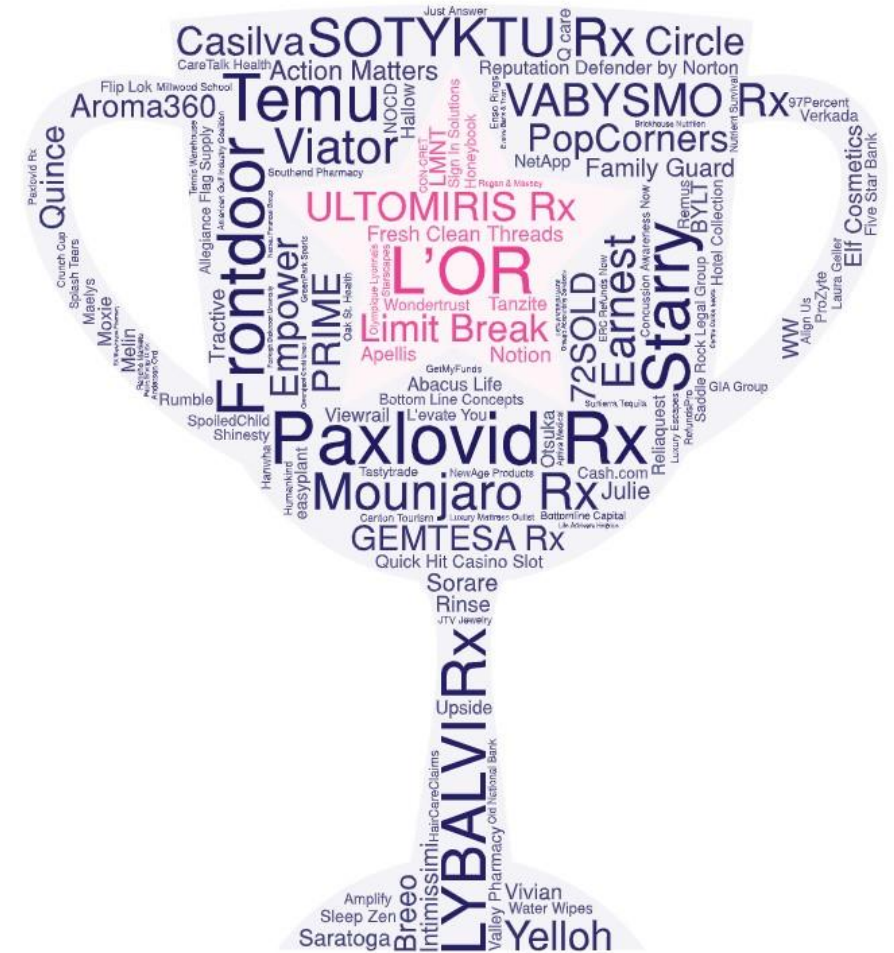
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New National TV Advertisers 1H 2019 – 1H 2023



Year	# of New Advertisers	# of Categories	New TV \$\$\$ (MM)
1H '19	49	23	\$283.9
1H '20	110	59	\$459.3
1H '21	162	52	\$465.4
1H '22	136	47	\$416.2
1H '23	127	46	\$475.4



Source: VAB analysis of Nielsen Ad Intel data as of 8/16/23, 1/1/23-6/30/23. Prior years based on VAB analysis of Nielsen Ad Intel Data from the following periods: 1/1/2019-6/30/2019, 1/1/2020-6/30/2020, 1/1/2021-6/30/2021, 1/1/2022-6/30/2022. 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.

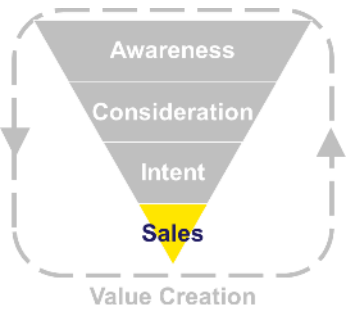
TV strengthens 'share of market': Microsoft Teams utilized TV to increase their SOV and take share from a major competitor



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10-Month COVID Time Period vs. Previous 10-Months

Microsoft Teams	<u>May '19 - Feb '20</u>	<u>Mar '20 - Dec '20</u>	<u>% Change</u>
Total U.S. TV Spend	\$20.0 MM	\$152.4 MM	+661%
Avg. Monthly Unique Visitors	11.8 MM	32.3 MM	+173%
Time Period Cume Total Hours Spent	68.5 MM	379.1 MM	+453%



slack	<u>May '19 - Feb '20</u>	<u>Mar '20 - Dec '20</u>	<u>% Change</u>
Total U.S. TV Spend	N/A	\$0.5 MM	---
Avg. Monthly Unique Visitors	5.1 MM	4.9 MM	-6%
Time Period Cume Total Hours Spent	101.1 MM	49.3 MM	-51%

Source: VAB analysis of Nielsen AdIntel, calendar months of May 2019 - December 2020. 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. VAB analysis of Comscore mediametrix multiplatform media trend data, total audience (Desktop P2+, Mobile 18+), May '19 - Dec '20 (calendar months)

The excitement of cinema: 'Barbenheimer' created the most interest for any premium video content during the summer

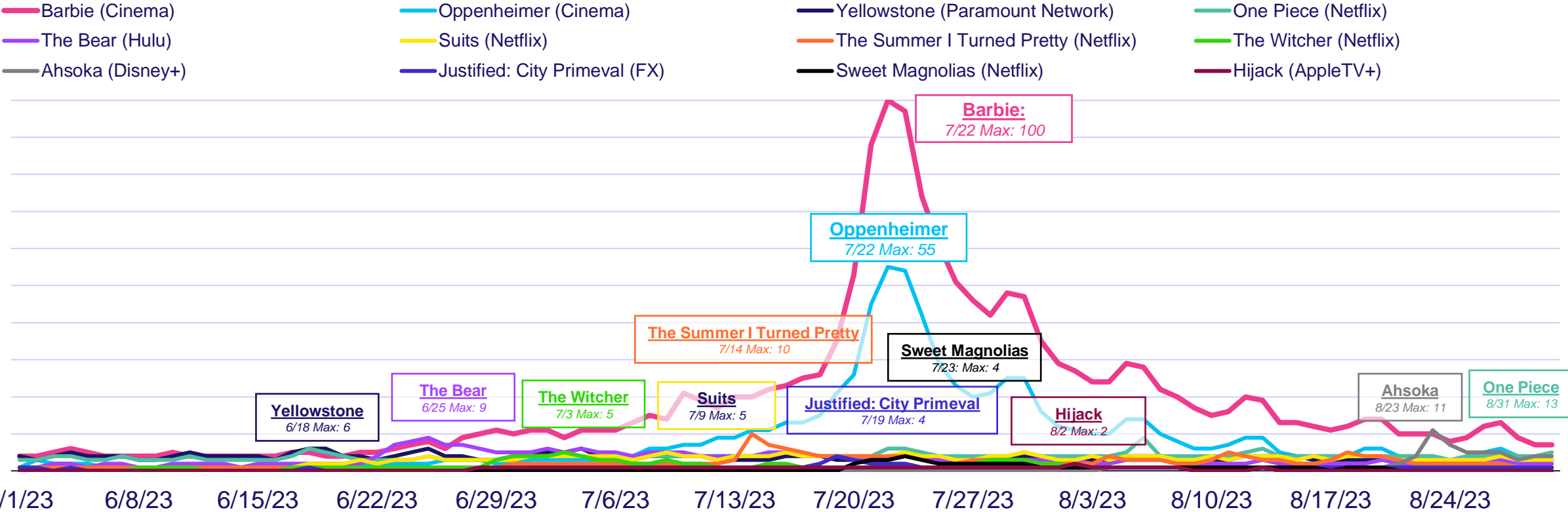


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Cinema, TV & Streaming Content: Google Trends Index*

reflects a selection of top movies, linear TV and streaming programs



Source: VAB analysis of Google Trends, United States only, All Categories, Web Search, 06/01/23-08/30/23. *Google Search Index represents search interest relative to the highest point on the chart for the given region and time period, a value of 100 is the peak popularity for the term, a value of 50 means that the term is half as popular.

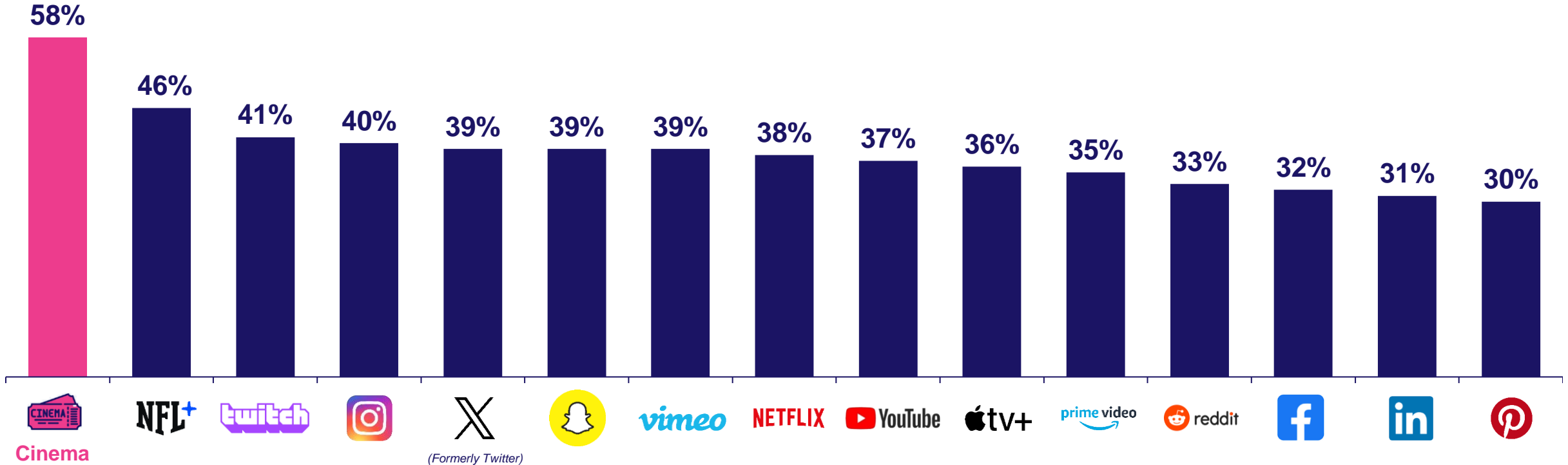
Reaching diverse audiences: Cinema has a higher composition of diverse segments than popular digital video platforms



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Discover Marketier FAQs

Diverse Audience Composition % by Platform



Source: For cinema - VAB analysis of Comscore Post-Trak reported box office demographics for the opening weekend of theatrical releases in August 2023. For digital video platforms - VAB analysis of MRI-Simmons Cord Evolution Study, August 2023; P18+. Audience % based on Monthly Users / Viewers of each platform – ‘Streaming Services used in the last 30 days’ and ‘Social media, photo or video-sharing services visited or used in the last 30 days.’ Composition % represents diverse respondents (excludes non-Hispanic White).

Sizing the ad fraud marketplace: How much ad fraud exists in the digital supply chain annually?



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Digital Ad Fraud: Annual Cost in North America



\$35B

Three Major League Sports: Combined Annual Revenue



\$34.6B

**Bonus
Slide!**

**VAB was a proud
sponsor of AWNY 2023!**

[Click here](#) to watch the insightful, industry-shaping conversations designed to transform the way you think about your marketing strategies.

Source: Juniper Research, *Quantifying the Cost of Ad Fraud: 2023-2028*, 9/26/2023. NFL – Statista, 2022, 9/5/23 (\$18.6B total revenue); NBA - Statista, 2021-2022, 9/7/23 (\$10.02B total revenue); NHL – Statista, 2022, 9/14/23 (\$5.93B total revenue).

Additionally, this quarter we launched the first edition of our **Advanced Measurement Solutions Directory**

Advanced Measurement Solutions Directory
Your guide to modern measurement solutions and their capabilities

Click here for the full report

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

VAB is proud to launch this directory with 14 inaugural measurement solutions partners

The **Advanced Measurement Solutions Directory** serves as a reference guide to simplify and provide clarity in measurement solutions so that you can keep informed.

Developed in partnership with the solutions themselves, the directory is a compilation of the **topline capabilities** and **several applicable case studies**.

We expect this directory to grow and welcome all measurement companies that would like to contribute.

Directory preview

Advanced Measurement Solutions Directory

VAB is proud to launch this directory with these 14 inaugural partners

Click on the company logos to be brought to their capabilities page

- affinitysolutions
- ampersand
- BLOCKGRAPH
- BrightLine
- DISQO
- EDO
- Leap Media Group
- MarketCast
- mediaprobe
- INNOVAD
- ORACLE Advertising
- PREMION
- Upwave
- vidyoamp

We invite measurement solutions to submit their capabilities for inclusion. If interested, please contact us at info@thevab.com

Digital Format Coming Soon!

Example of measurement solution & their capabilities

Upwave

Product Category: Pharmaceutical / Healthcare

Upwave in Action: Optimize for Outcomes Among a Brand-Specific Target Audience

2.5X More likely to reach the Hospital Leadership team	3X More likely to reach the Government sector	5X More likely to reach the Media sector	1.5X More likely to reach the TV audience via Linear TV
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11.8MM People (Audience)

521MM Total Digital Impressions

4.2B Total TV Impressions

Challenge: A leading pharmaceutical & health care company needed an 8-month Digital (Display, Mobile and Desktop) and TV campaign, measuring and optimizing their brand spend, increasing Brand lift, specifically brand awareness and brand reputation, with an average of 10% increase in awareness.

Measurement Solution: Utilize our brand lift model coupled with reach allow brands to measure reach among a brand, national audience, but also niche demographics, beyond age and gender.

Target Segment: Brand National Audience

Reach: 100%+ High-Level Job Title/Industry in Healthcare, Finance, Government.

Learnings:

- Engaging on TV was key to gain momentum, and the brand should utilize programs to hyper-target better performing audiences on TV.
- Reduce the messaging throughout the campaign, utilizing creative based on performance indicators among the target audience-leading to spikes in key KPIs in the first month of the campaign.
- In general, the campaign drove higher lift (awareness) in Brand lift across all brand customer KPIs over time, based on the utilization of Brand Optimization and Brand Reach tools.

Viewing Source / Media Type:

- Linear TV: Streaming (Cable, OTT and Digital Platforms (Display, Mobile and Desktop))

Jason Wiese

SVP, Director of Strategic Insights
jasonw@thevab.com

Benjamin Vandegrift

VP, Measurement Solutions & Innovations
benjaminv@thevab.com

Reed Kiely

Director, Data Insights & Trends
reedk@thevab.com

Leah Montner-Dixon

Director, Audience & Behavioral Insights
leahm@thevab.com

Karolina Guillen

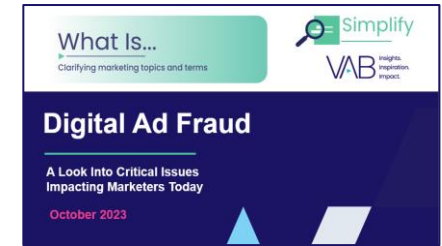
Insights Manager
karolinag@thevab.com

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We are committed to providing marketers with the data and insights they need to develop thoughtful, inclusive campaigns & strategies. To find out more on the unique media consumption behaviors and cultural trends of diverse consumers, visit the VAB's **DEIB Marketing Resources Center**.



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