



2022 – 1st 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.



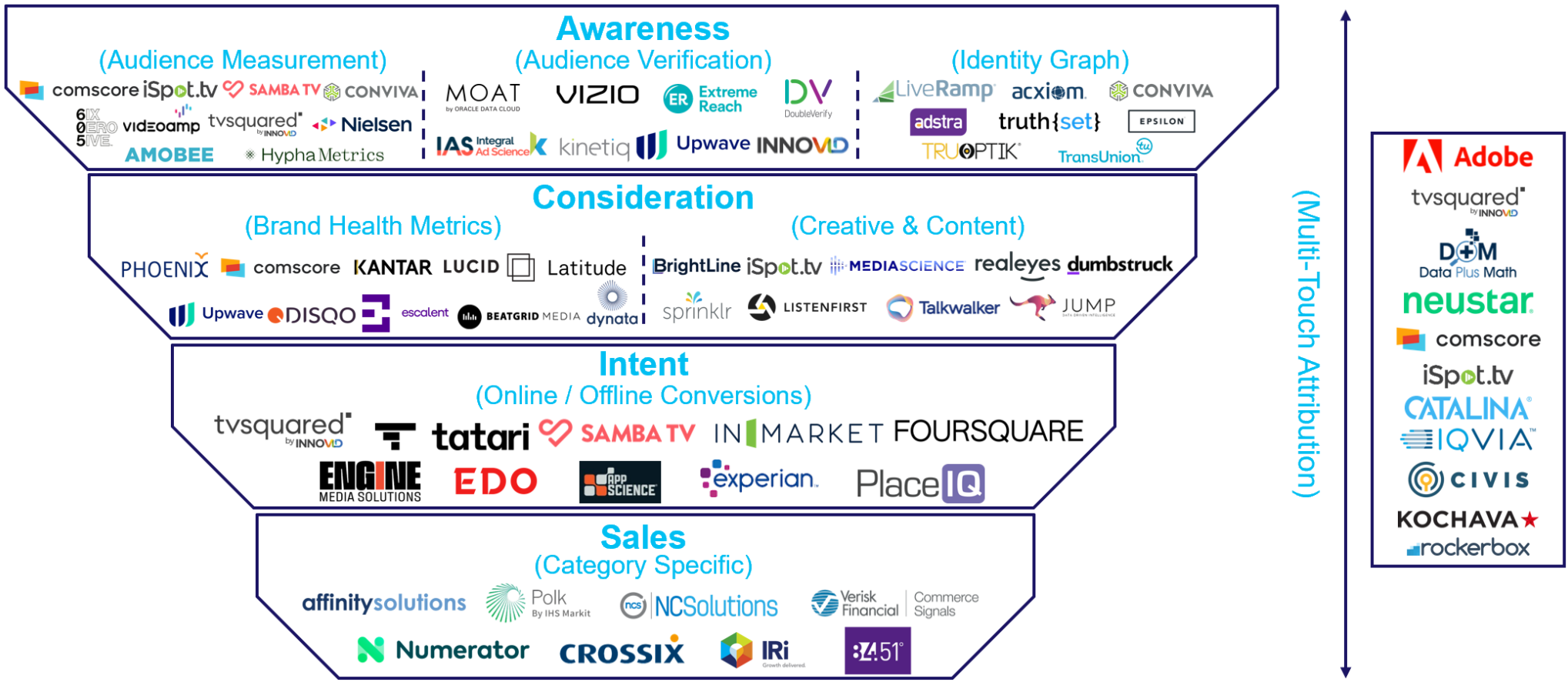
We are committed to your business growth and proud to offer VAB members, brand marketers and agencies **complimentary access** to our continuously-growing Insights library. **Get immediate access at theVAB.com.**

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.

Measurement solutions across the path to purchase: Today, customized solutions are available for marketers to measure the impact of their TV campaign across every stage of the funnel



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Note: logos reflect a sampling of companies that provide measurement solutions within each funnel stage and is not meant to be an exhaustive list of all companies with related solutions; companies' solutions can also cross funnel stages as well.

One of 13 case studies on measurement innovation: A QSR brand partnered with LiveRamp to optimize their converged TV campaign in order to drive incremental reach



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Category: 
QSR

View the **5 companion webinars** – hear directly from these measurement platforms as they explain their solutions and review how they were implemented on TV campaigns.

Challenge

A major QSR brand needed to concretely identify how their key OTT/CTV partners overlapped with their linear TV buy

Audience Measurement Innovation

- ▶ LiveRamp helped the brand create a learning agenda based on their OTT/CTV partnerships (see footnote for more details*)
- ▶ Focused on the brand's most desired partners, the plan centered on YOY comparisons on how well each OTT/CTV partner drove incremental reach relative to complement their linear TV buy

Target Segment

All households

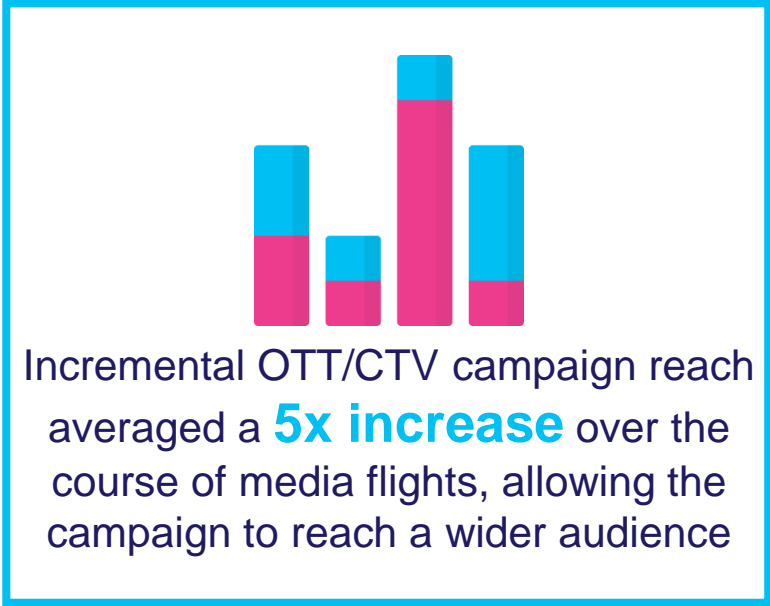
Learnings

The brand gained the ability to better optimize toward incremental reach across OTT/CTV (see charts on the right side)

Company / Viewing Source / Media Type

LiveRamp, Data Plus Math (D+M) / ACR, Pixel Integration / National Linear TV, CTV, OTT

The brand gained the ability to evolve its linear media strategy to maximize its incremental reach across OTT/CTV



Source: LiveRamp, Case study: *How a Major QSR Brand Revised their Linear Media Strategy Toward Driving Incremental Reach With CTV/OTT*. Campaign time period: 9/28/2020-11/8/2020 & 11/9/2020-12/26/2020. Advanced TV Measurement: Data Plus Math. ***Innovation Detail:** Combining ad exposures from ACR data via Inscap partnership and D+M pixel integration with CTV/OTT publishers resolved to **RampID** & **HHID**, x-screen projection scaling methodology, custom report views to support insights agenda.



One of 13 case studies on measurement innovation: A cross-platform strategy with TVSquared allowed an online delivery service advertiser to extend reach and increase share of voice



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Category: 
Online Delivery

View the **5 companion webinars** – hear directly from these measurement platforms as they explain their solutions and review how they were implemented on TV campaigns.

Challenge

- ▶ With a partnership base that will soon exceed 5,000 retailers, an online delivery service needed a strategy that would get their message above the noise of their competitors and make it as far-reaching and effective as possible

Audience Measurement Innovation

- ▶ Always-on, cross-platform insights from **TVSquared by Innovid** enabled the advertiser to track and act on its audience reach across platforms to maintain efficiencies and improve ROI

Target Segment

- ▶ Men 25-54

Learnings

- ▶ While CTV only represented **4%** of total impressions, and **5%** of reach, the audience reached across streaming was **87%** unique to linear, opening the doors to **nearly 30,000** first time customer purchases
- ▶ Insights found that the level of app engagement was **over 60%** higher than web, and the media mix strategy resulted in a remarkably efficient cost per response (CPR). OTT's CPR came in **25%** lower and contributed a **22%** increase in responses

Company / Viewing Source / Media Type

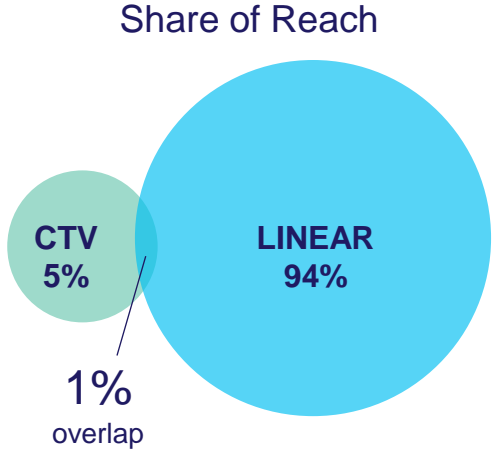
- ▶ TVSquared by Innovid / Smart TV, ACR / Data-Driven Linear TV, CTV, OTT

Service

Cross-platform strategy provided e-commerce advertiser with the reach to stay on top of this competitive category

Total Reach:
500MM+ Impressions
20MM+ HHs
(average per month)

Web & App Visits:
1.7MM+



CTV Unique Reach: 87%

Source: TVSquared by Innovid, Case study: *Converged TV Campaign Extends Reach for Online Delivery Service*. Campaign time period: April – September 2021. SOV = Share of Voice.



Full 16-Month Update: 5 fast stats you should know about the Nielsen TV Out-of-Home ratings undercounting



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A Fresh Take

Staying ahead of evolving dynamics in the marketplace and our culture

Quantifying the 'Error': Total 16-Month 'Undercounting' Time Period

1

Almost **54 billion ad impressions** went uncounted during the 16-month time period

(P2+ Total Day, Sep'20-Dec '21)

2

Over **\$690 million** in TV ads could not be bought or sold between Sep '20 – Dec '21

(NPower monthly audience lifts applied to Ad Intel \$\$\$ across sports, entertainment, news, general genres)

3

Nearly **350K people** were not counted in the Primetime ratings **every night** from Sep '20 – Dec '21

(on average across broadcast & cable, Sep'20-Dec'21)

4

Almost **19.5 billion** 18-34 ad impressions disappeared

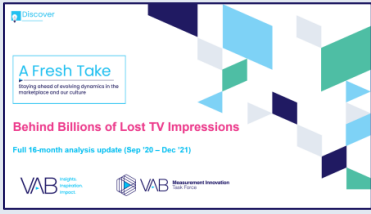
(P18-34, Total Day, Sep'20-Dec '21)

5

12.0 billion Black ad impressions and over **10.5 billion** Hispanic ad impressions disappeared

(Black & Hispanic P2+, Total Day, Sep'20-Dec'21)

Audience undercounting was seen across demos and genres: The greatest 'loss' of impressions occurred among the highly coveted adult 18-34 segment, especially within sports and news



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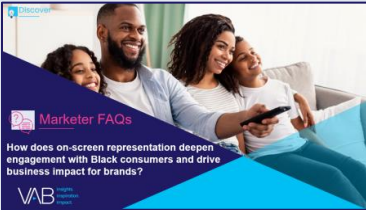


Major Genres: Estimated 'Undercounted' Impressions Based on Reprocessing Lift aggregated across ad-supported broadcast & cable TV Live + Same Day

| 16-Month Time Period: Sep '20 – Dec '21 (8/31/20 – 12/21/21) | | | | | | |
|---|--------------------|-----------------------|--------------------|-----------------------|--------------------|-----------------------|
| | Sports | | News | | Entertainment | |
| Demo | Monthly Avg % Lift | Total IMPEs (MM) Lift | Monthly Avg % Lift | Total IMPEs (MM) Lift | Monthly Avg % Lift | Total IMPEs (MM) Lift |
| P2+ | 1.6% | 12,294.9 | 0.6% | 9,170.9 | 0.5% | 20,739.8 |
| P18-34 | 5.2% | 5,165.3 | 3.5% | 1,992.3 | 2.2% | 8,407.4 |
| P18-49 | 3.4% | 8,600.6 | 2.0% | 4,389.1 | 1.3% | 14,683.2 |
| P25-54 | 2.6% | 7,474.3 | 1.4% | 4,577.1 | 0.9% | 12,993.1 |

Source: % Lift - Nielsen NPower, Ratings Analysis Program Report, Live+SD, P2+, P18-34, P18-49, P25-54. Genres: sports = sports events; news = news & news documentary; entertainment = audience participation, award ceremonies, comedy variety, concert music, conversations, colloquies, daytime drama, evening animation, feature film, general drama, general variety, instruction/advice, musical drama, participation variety, popular music, quiz give away, quiz panel, situation comedy, suspense/mystery. Time periods reflect: Sep '20 – Dec '21 broadcast months (8/31/20 – 12/21/21). *Reprocessing Lift reflects increase in aggregated average audience across ad-supported broadcast & cable TV based on the reported difference between the 'National OOH – Pre-Reprocessing (9/20-12/21)' and revised 'National' Sample (AA Proj (000)); OOH reprocessing data goes through 12/21/21. **IMPEs (MM) Lift** - Nielsen Ad Intel, Live+SD, P2+, P18-34, P18-49, P25-54, equalized impressions, % lift was applied to the reported national TV impressions during the time period by genre to establish an estimate of total monthly impressions undercounted. The subgenres in Ad Intel were aligned with the subgenres in NPower to develop estimates for each genre.

On-screen representation deepens engagement: By building campaigns around inclusive TV content, marketers can further engage diverse audiences, particularly Black viewers



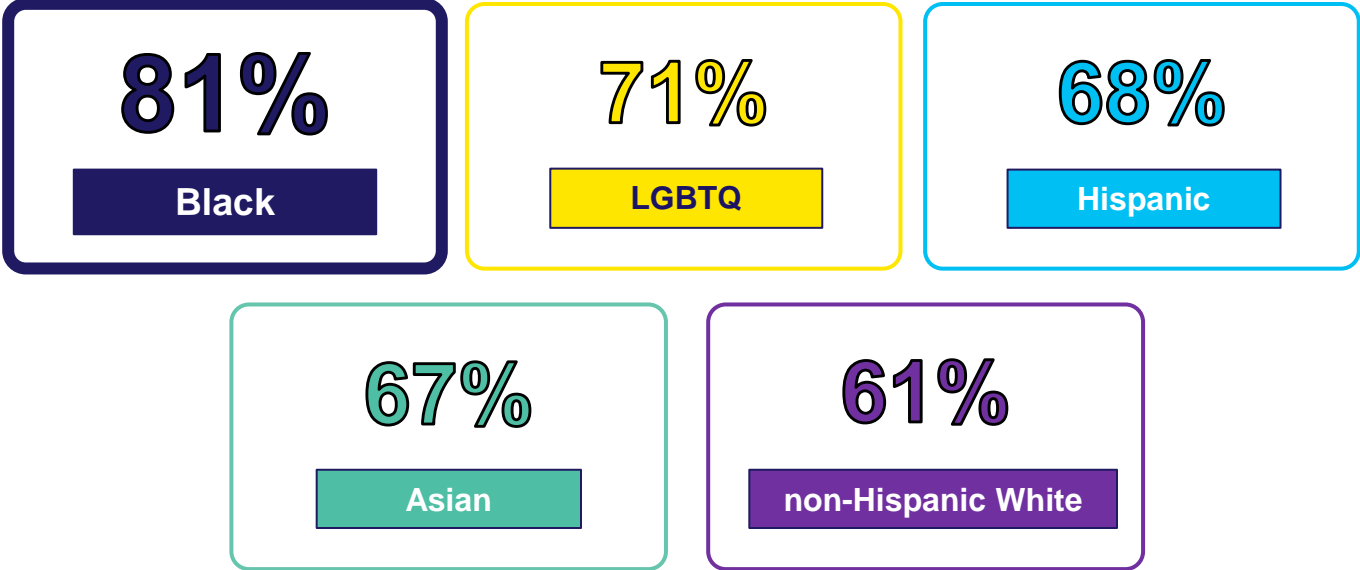
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Almost **80%** of Black audiences believe it is important that television shows and movies **accurately represent their identities**

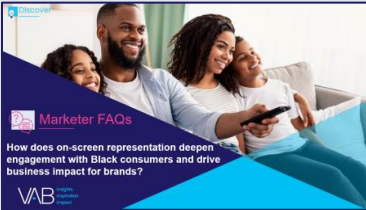
% that are more likely to start watching a television show or movie because characters with similar (racial, ethnic, religious, etc.) identities as you are represented?

% of respondents who answered very/somewhat likely



Source: VAB analysis of Morning Consult, Media Representation, September 2021.

Inclusive advertising drives relevance: Marketers can authentically connect with Black consumers by creating culturally diverse advertising campaigns



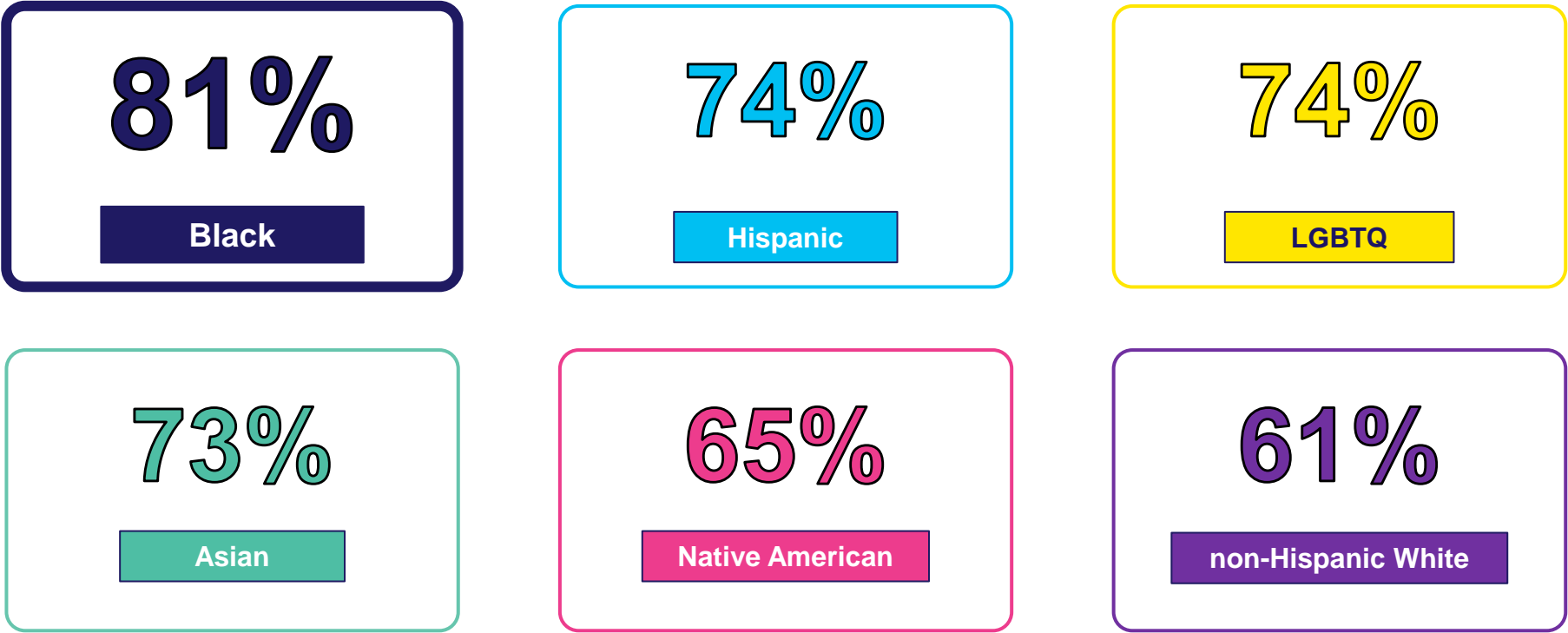
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Marketer FAQs

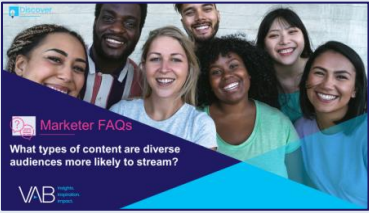
'It is important for companies to create advertising that is culturally diverse in order to stay relevant'

% of respondents who agree



Source: VAB analysis of MRI-Simmons USA Study, Fall 2021; P18+.

Streaming programming that attracts Native American viewers: Family-friendly, sports and other premium content are popular within their communal viewing experience

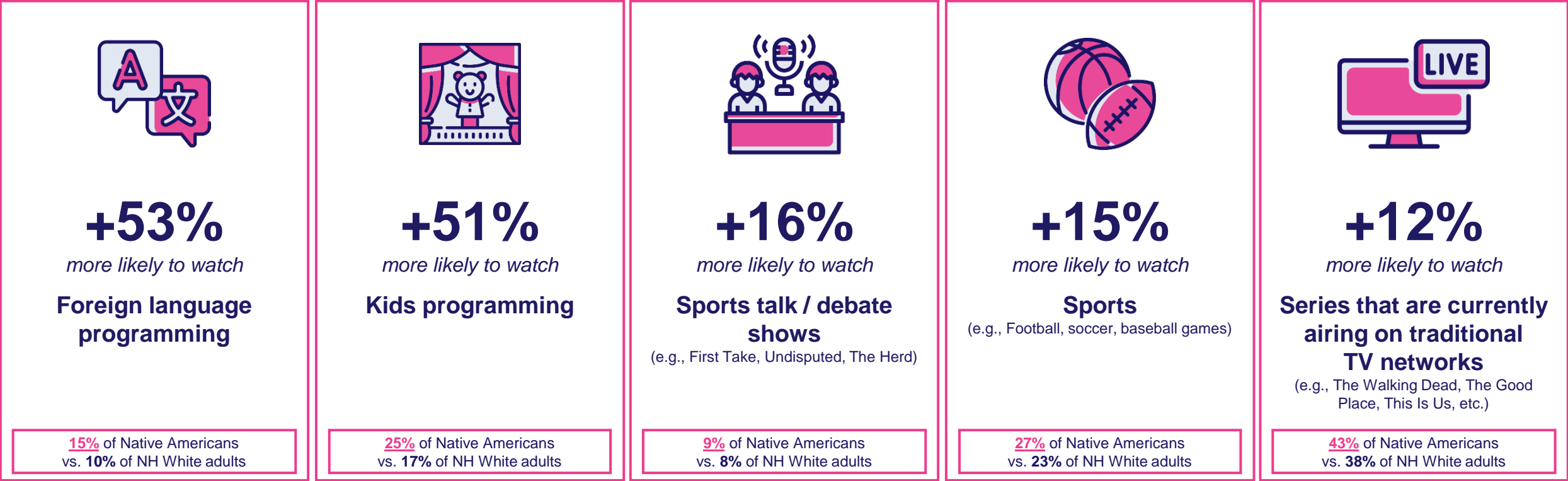


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Download the report to learn more about the types of TV content also streamed by **Black, Hispanic, Asian and LGBTQ** audiences.

Type of TV content streamed American Indian or Alaska Native A18+ Index vs. non-Hispanic White A18+ respondents



Source: VAB analysis of MRI-Simmons Cord Evolution Study, November 2021; P18+. Base = 'Used any streaming services in the past 12 months'.

Latina influence on household consumption: Latinas are more likely to act as decision-makers and live in larger households than non-Hispanic women, presenting an outsized opportunity for marketers



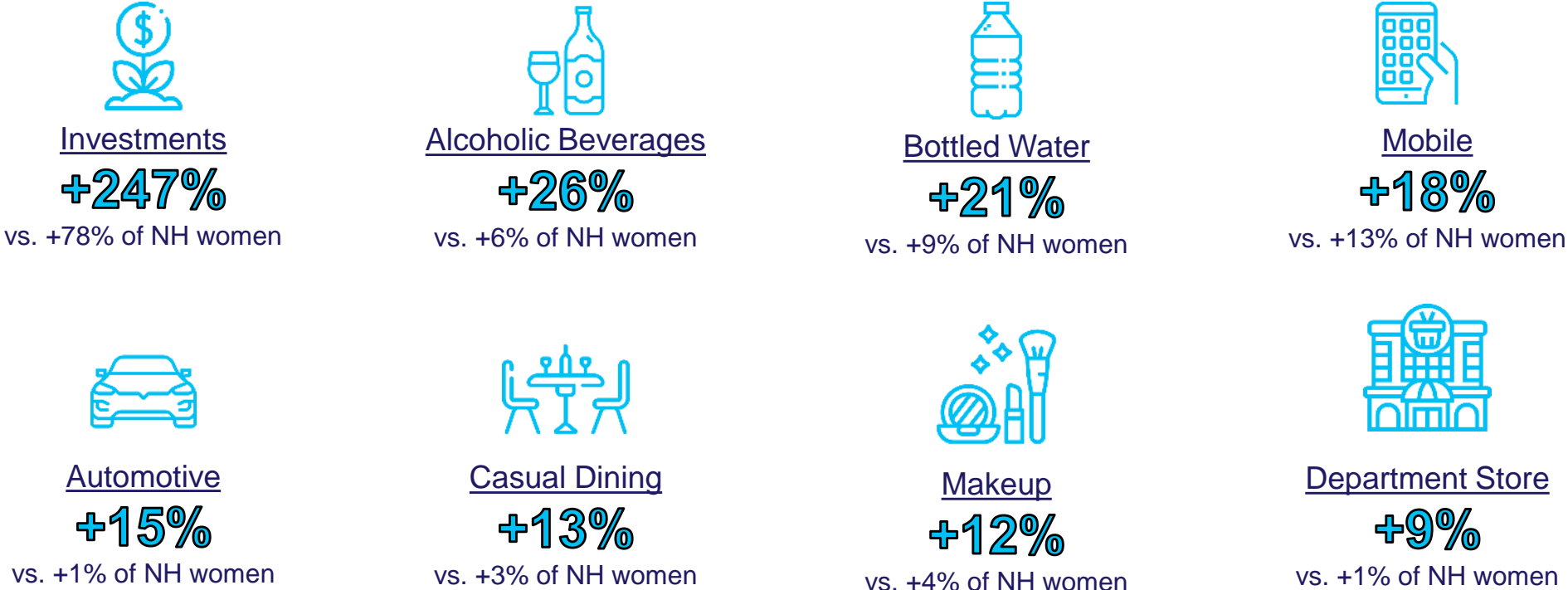
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Latina buyer growth by category

2018 vs. 2014

3.8
Average household size among Hispanic women
(vs. 2.8 among non-Hispanic women)



Source: VAB analysis of MRI-Simmons Fall 2021 Doublebase (average household size). Telemundo, *Latinas Powering Forward*, 2019 (buyer growth by category).

Latinas are voracious video viewers in search of authenticity: They seek content that appeals to their values and traits of family, hard work, language, faith and ‘cultural bothness’



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Hispanic women spend **30+ hours** watching TV and **22 hours** viewing videos, using apps or surfing the internet on smartphones

&

88% of Hispanic women have streamed in the past 12 months

% of Hispanic women who agree with the following statements

65%

‘Having shows that highlight issues / stories that are important to racial diverse communities available on a streaming service makes it more valuable to me’

52%

‘I wish there was more Spanish-language content to stream’

Source: Telemundo, *Latinas Powering Forward*, 2019. VAB analysis of MRI-Simmons November 2021 Cord Evolution Study. Base = Any agree. ‘Cultural bothness’ refers to the equal integration of two cultures and languages into one.

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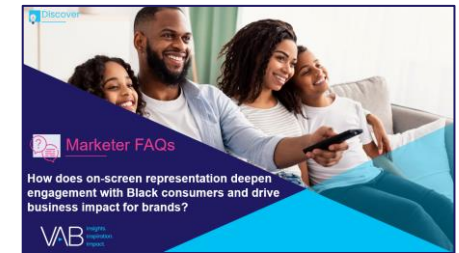
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