



2022 – 2nd 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.

Increased consumer choice within convergent TV: Greater availability of, and accessibility to, linear and streaming platforms has enabled viewers to more than double their number of services



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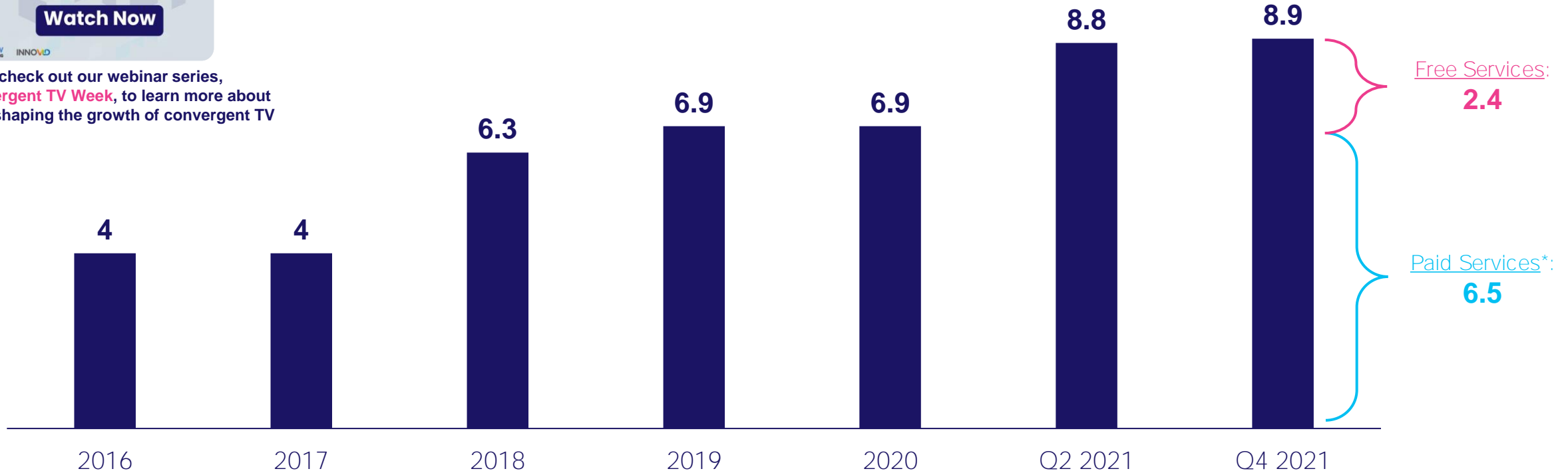
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And check out our webinar series, **VAB Convergent TV Week**, to learn more about the trends shaping the growth of convergent TV

Average Number of Video Services
Adults 18+

73%
of viewers feel that their number of subscriptions are **'just right'**



Source: TiVo, Q4 2021 Video Trends Report. Video services include cable / satellite / telco (MVPD) subscription in addition to TV Everywhere apps, broadcast TV and OTT services. *Paid services include authenticated TVE apps associated with Pay TV. Note: Convergent TV represents linear TV and streaming.

Marketers' growing commitment to convergent TV: Brands are increasingly leveraging targeted advertising solutions across data-enabled multiscreen TV platforms



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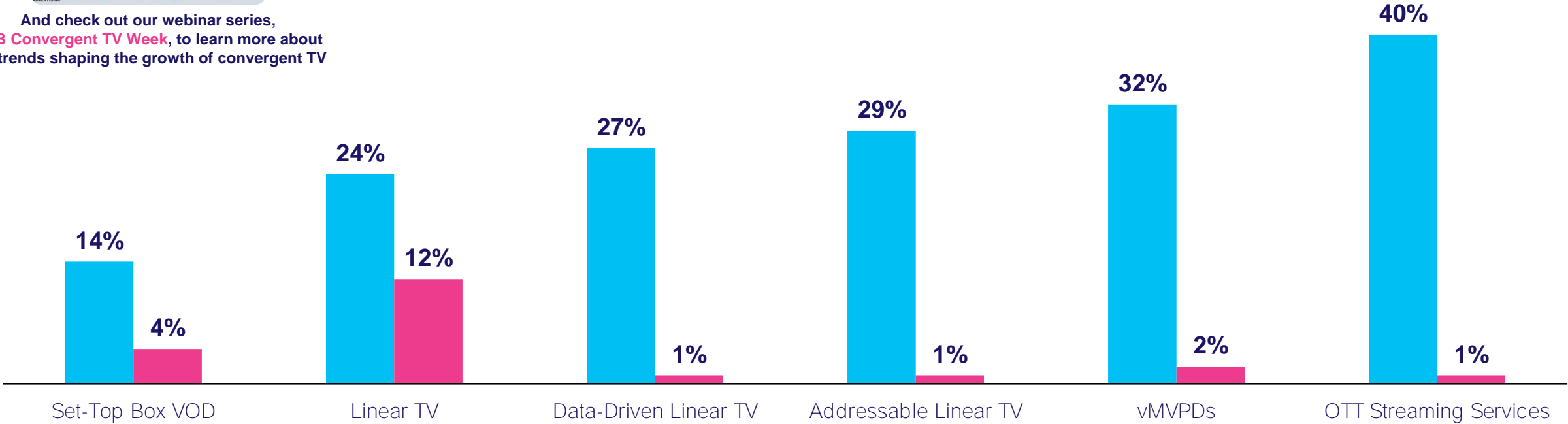
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Change in TV Ad Spend by Type over the Next 12 Months based on % of advertisers who will increase/decrease spend

■ Increase ■ Decrease



Source: Advertiser Perceptions, 2H 2021 Video Advertising Convergence Report. Based on survey of 250 marketer and agency respondents who are involved in video advertising decision-making.

The ad-supported streaming content advantage: AVOD services have larger TV libraries than the top SVOD platforms, providing marketers a variety of environments to engage viewers



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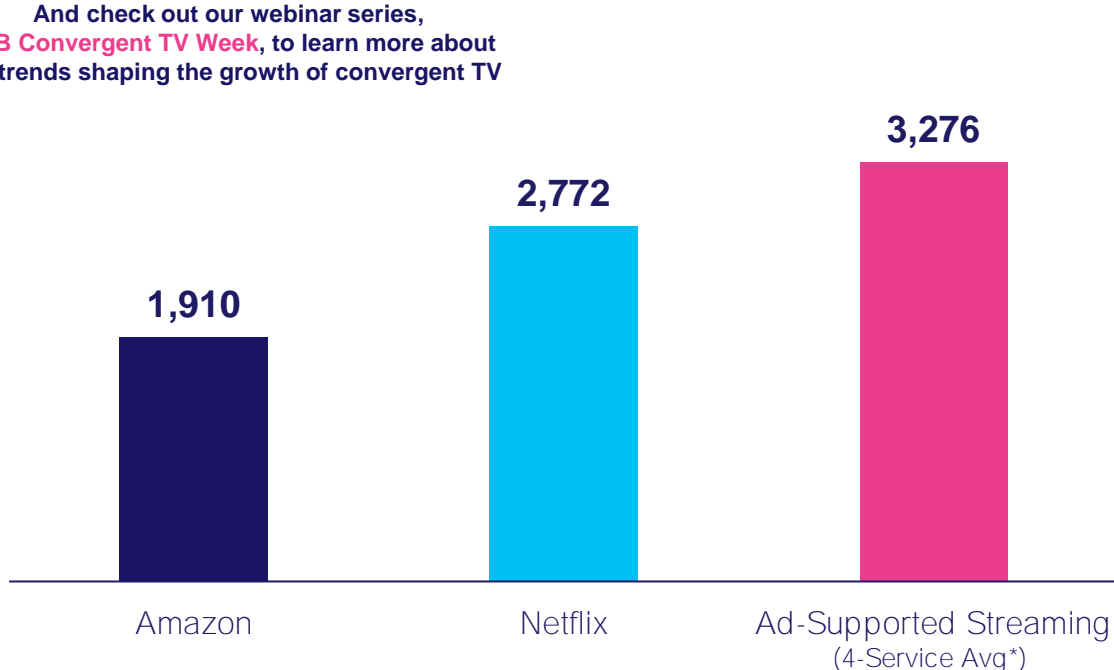
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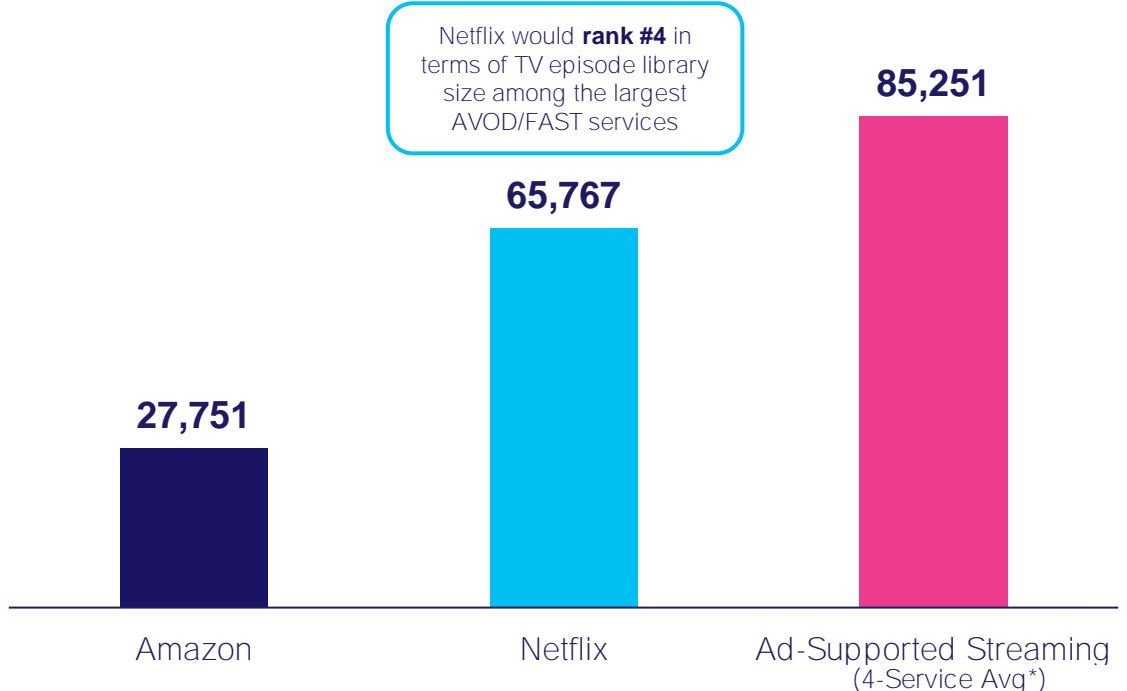
And check out our webinar series, **VAB Convergent TV Week**, to learn more about the trends shaping the growth of convergent TV

TV Library Size By Service Comparison

of TV Series



of Total TV Episodes



73%
of people place a higher value on streaming services that offer content they can't get anywhere else

Source: VAB analysis of S&P Global Market Intelligence, Kagan estimates. TV Show Summaries by service, 2021-2022. *Ad-Supported Streaming Average includes Tubi, Roku Channel, Hulu, PlutoTV. Fandom – State of Streaming 2022.

One of 15 new case studies on measurement innovation: A DTC health tech brand partnered with Tatari to manage their campaign's frequency resulting in increased reach and sign-up cost reduction



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Category:
Health

Frequency Management

Challenge

- ▶ A health tech brand running a local streaming campaign was concerned with over-frequency to the same viewers. It sought to manage its frequency in order to expand its reach of new HHs

Measurement Innovation

- ▶ Tatari analyzed response and conversion rates to understand how frequency impacted each
- ▶ Tatari developed Net Funnel Efficiency (NFE), a calculation that multiplies response rate and conversion rate. NFE enabled Tatari to identify the maximum weekly and daily frequency caps that should be put in place.

Target Segment

- ▶ Streaming audiences that are incremental to linear TV DMA targets

Learnings

- ▶ As a result of the frequency management, they were able to increase the reach of their campaign by 95%, as they were able to more effectively distribute impressions with the same budget
- ▶ From a cost perspective, the brand saw a 65% reduction in Cost Per Website Sign-Up after implementing the above-mentioned caps

Company / Viewing Source / Media Type

- ▶ Tatari / Streaming Platform / CTV

Overview Of Results for the Campaign



+65%

Reduction in Cost Per Website Sign-Up after implementing frequency caps



+95%

Increase in reach with impressions spread further with frequency caps



And check out our webinar series on **Modern Video Measurement Innovations** to hear from our partners: Comscore, DISQO, Vizio & MarketCast!

Source: Tatari, Case study: *DTC Health Tech Case Study*. Campaign dates: Q2 2020 - Q2 2021.



2021 new TV advertisers: There was a surge in brands attributable to entrants in newer categories like crypto and greater competition within traditional categories like home, apparel and personal care



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New National TV Advertisers 2020 vs. 2021 Comparison



Year	# of Brands	# of Categories	New TV \$\$\$ (MM)
2020	283	95	\$1,279.1
2021	315	74	\$1,320.2
# YoY Diff	+32	-21	+\$41.2
% YoY Diff	+11%	-22%	+3%

For a full list of the 315 brands [download the full report here](#)

Source: VAB analysis of Nielsen Ad Intel data, 1/1/20-12/31/20 vs. 1/1/21-12/31/21. 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. MM = millions.

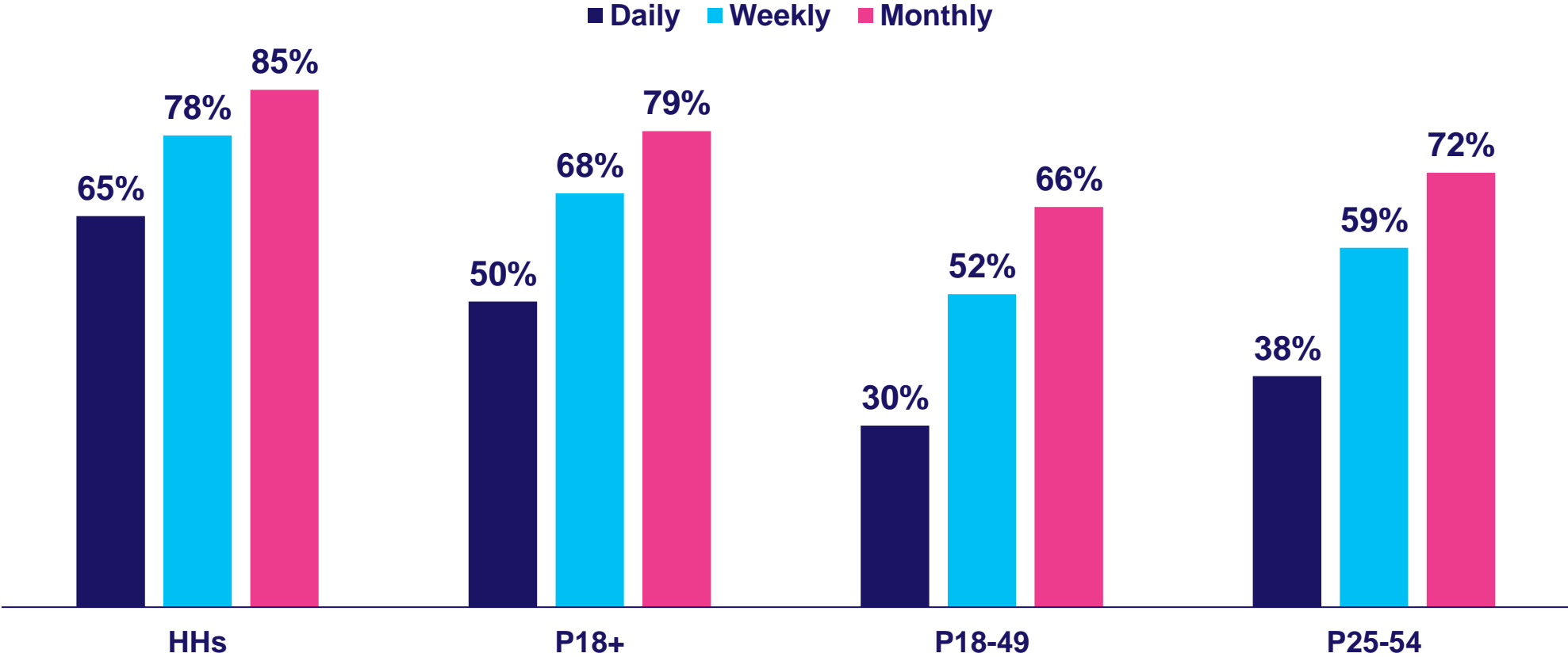
Linear TV reach: Ad-supported TV offers immediate scale, delivering 8 out of 10 homes in an average month



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Ad-Supported TV: Average Reach % By Demo, By Time Period



Source: VAB analysis of Nielsen NPower R&F Time Period, ad-supported TV (broadcast TV & cable TV), total day, Live+SD, April broadcast month (3/28/22 – 4/24/22). Average daily reach is based on the average of daily reach for each day across the broadcast month, average weekly reach is based on the average of weekly reach for each week across the broadcast month.

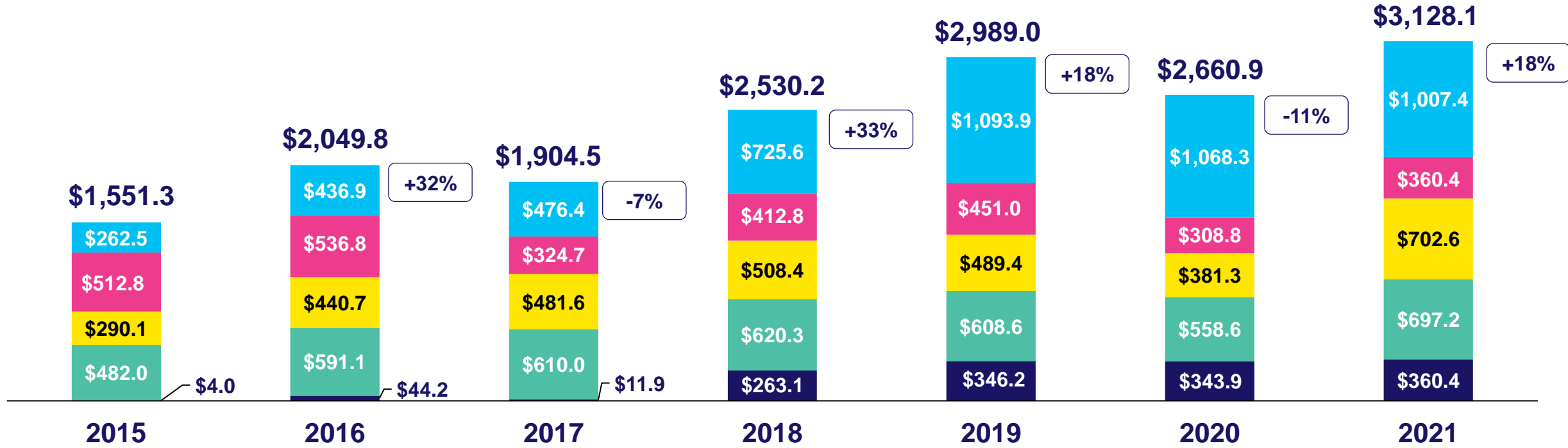
Tech Giants spend billions on TV: In 2021, 'MAAMA' collectively spent over \$3 billion on TV, their highest level ever, as they defended their SOV from competitors and supported new product launches



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MAAMA U.S. TV Spend (\$\$\$ in Millions)



Source: VAB analysis of Nielsen AdIntel, calendar year 2015-2021, as of February 2022. 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.

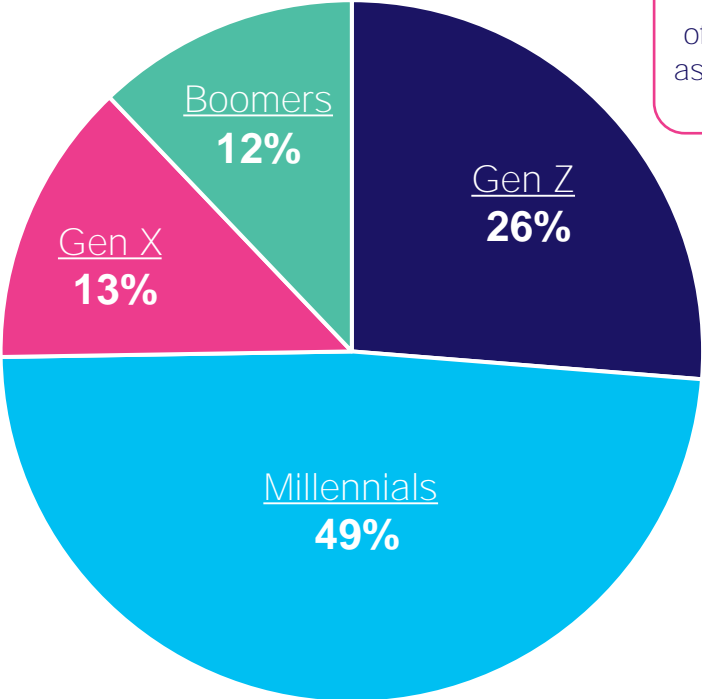
Demographics of the LGBTQ+ community: Brands can foster greater engagement with this young and diverse segment through inclusivity messaging



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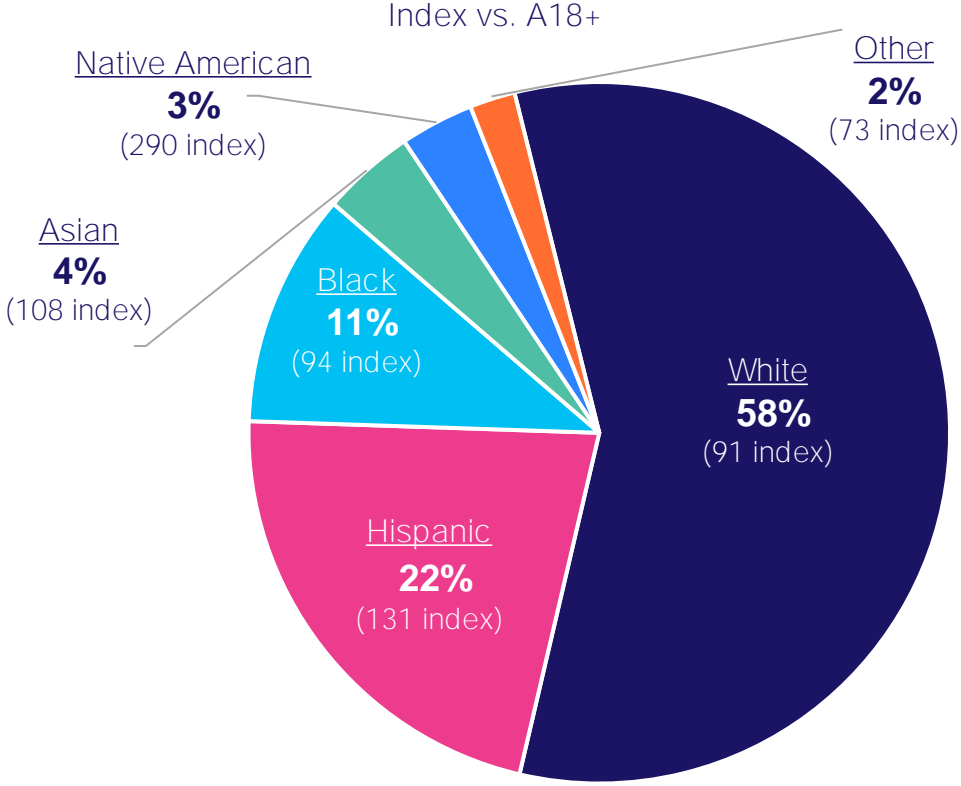
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LGBTQ Community by Generation



79%
of people who identify as LGBTQ are between the ages of 18-49

LGBTQ Community by Ethnicity



Source: VAB analysis of MRI-Simmons Winter 2022 Study, March 2022; LGBTQ represents P18+ that identify as LGBTQ. Birth ranges for generations: Gen Z = 1997-2010, Millennials = 1977-1996, Gen X = 1965-1976, Boomers = 1946-1964. Native American refers to American Indian or Alaska Native. To derive at 100%, ethnicities were broken out by the following: White = Non-Hispanic White Only; Hispanic = Spanish or Hispanic Origin; Black = Non-Hispanic Black / African American Only; Asian = Non-Hispanic Asian; Native American = Non-Hispanic American Indian or Alaska Native.

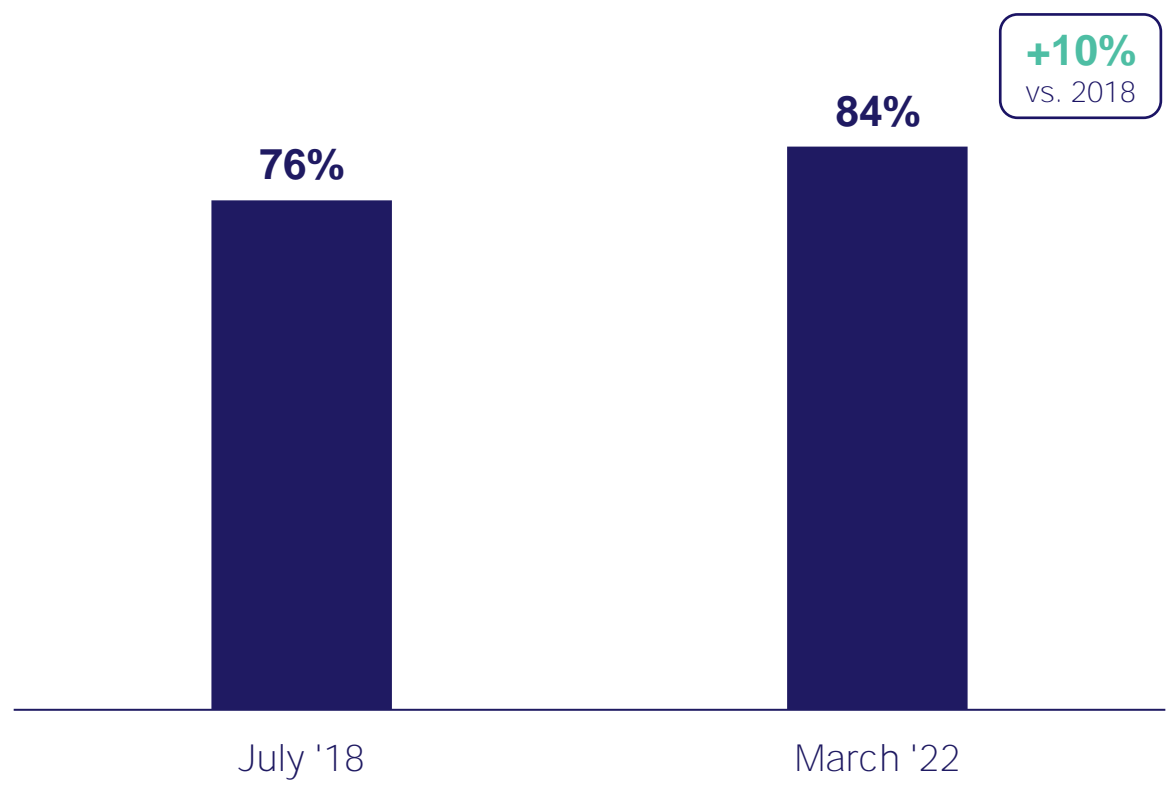
Asian Americans' adoption of ad-supported streaming: Marketers have a growing opportunity to reach and engage these tastemakers through premium video via streaming campaigns



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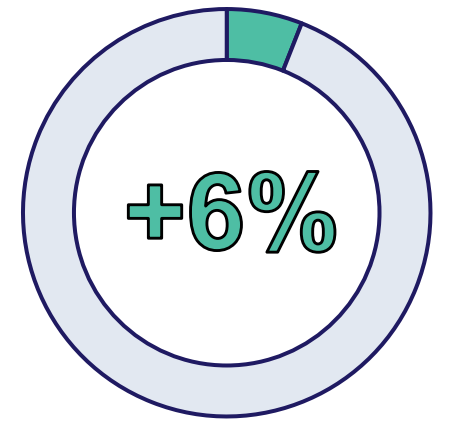
% of Asian adults 18+ that have 'streamed in the past 12 months'



% change in Asian adults 18+ streamers who have access to a... July '18 vs. March '22



Free / Ad-Based
streaming service



Subscription
streaming service

Source: VAB analysis of MRI-Simmons Cord Evolution Study, July 2018 vs. March 2022. Access to free/ad-based vs. subscription streaming service: Base = 'Streamed in the past 12 months.' Free Streaming services (e.g., Pluto TV, YouTube, Tubi, etc.). Subscription services may include ads or limited ad load tiers.

The cinema opportunity for younger adults: Over 3 days, more adults 18-34 went to see The Batman than went to a sporting event across the six major leagues over 12 months



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Sports League Attendance Over Last 12 Months vs. Opening Weekend Cinema Admissions

Adults 18-34



Adults 18-34



Source: VAB analysis of MRI-Simmons 2021 Fall Doublebase, P18-34, 6 Major Sports League attendance reflects unique P18-34 reach for both regular season and playoff games in the last 12 months across: NFL, NBA, MLB, NHL, NCAA Football & NCAA Basketball. VAB analysis of Box Office Mojo and Comscore post-track data based on an estimate of 62% P18-34 audience admissions composition for the opening weekend. Analysis also based on Screendollars, 3/6/22 and supported by data from EntTelligence.

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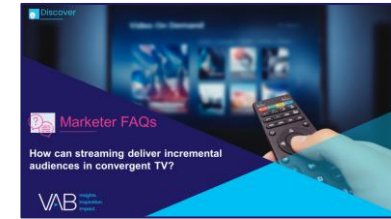
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