



2021 – 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.

Simplify

We save you time by bringing you the latest data & actionable takeaways you can use to inform your marketing plans.

Discover

We keep you one step ahead with the latest thinking so you can create innovative, forward-looking strategies.

Transform

We help you build your brand by focusing on core marketing principles that will help drive tangible business outcomes.

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.

The Effects of 'Ageism' In Media: By ignoring adults 55+, brands are overlooking a group that controls 4 out of 10 dollars spent in the U.S. each year

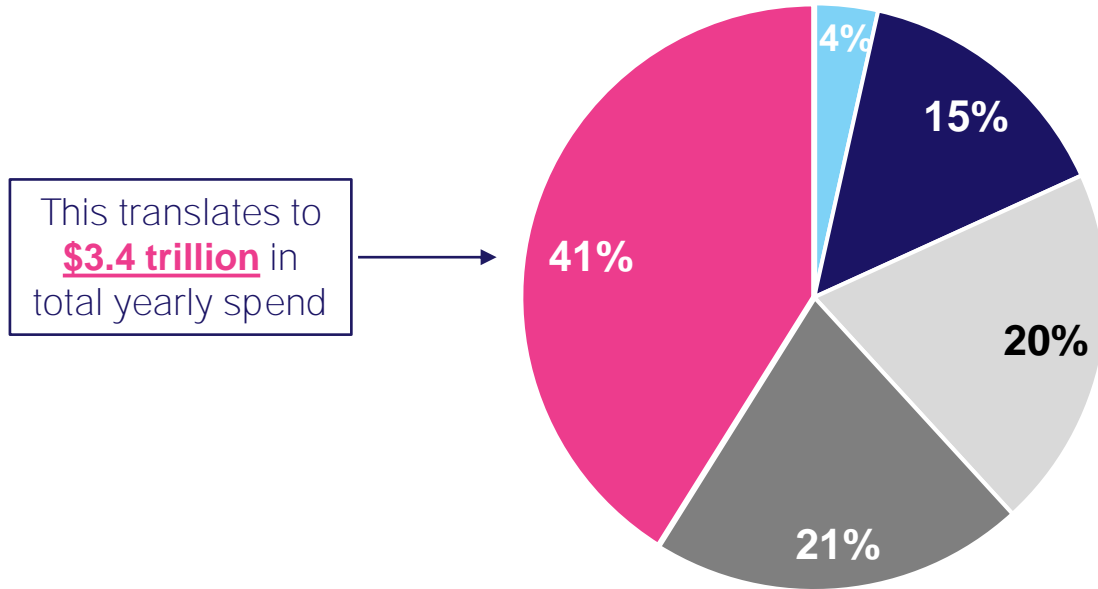


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Marketer's Guide
Innovative thinking to make a lasting impact on your business growth.

% Share of Annual Aggregate Expenditures By Demo



This translates to **\$3.4 trillion** in total yearly spend

- Under 25 Years
- 25-34 Years
- 35-44 Years
- 45-54 Years
- 55+ Years

Source: VAB analysis of *Consumer Expenditure Survey 2019* data, U.S. Bureau of Labor Statistics, reported as of September 2020, Data represents adults 55+ due to data age group breakouts.

Multicultural Population Growth: Over the next decade, multicultural audience segments will account for 78% of the total adult 50+ growth



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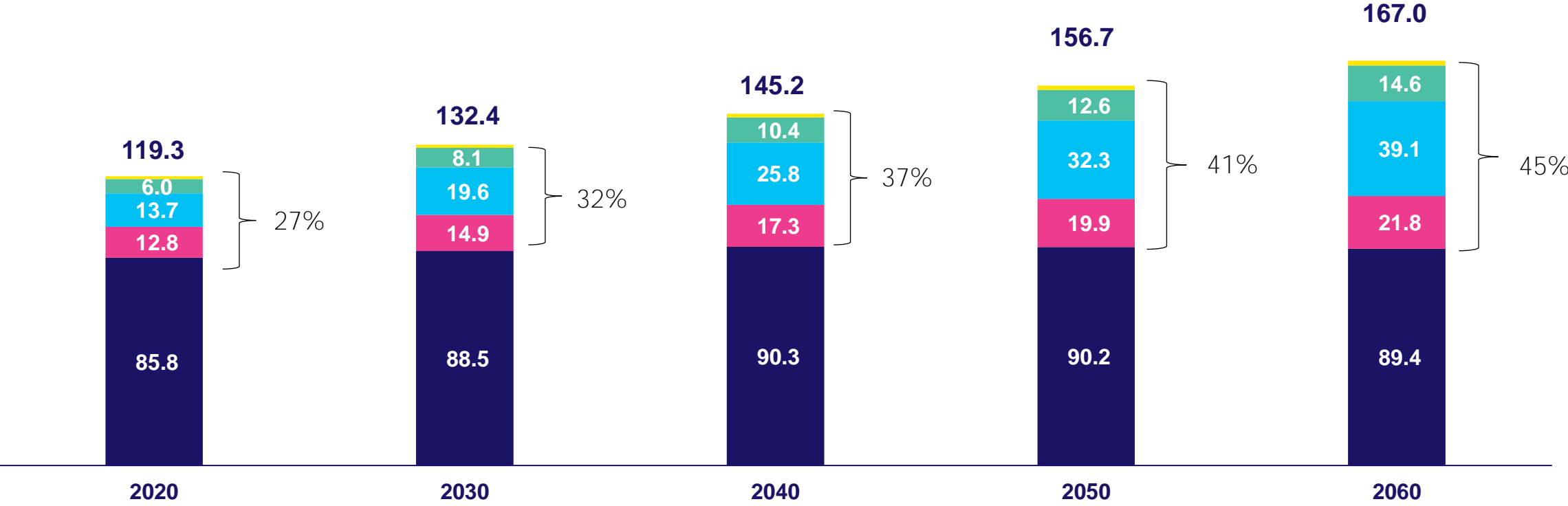


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A50+ Projected U.S. Population (in millions)

■ NH White ■ NH Black ■ Hispanic ■ NH Asian ■ Other



Source: VAB analysis of U.S. Census Bureau data, Population Division: Washington, DC., *Projected Age Groups and Sex Composition of the Population: Main Projections Series for the United States, 2017-2060*. NH = Non-Hispanic. Other – includes Non-Hispanic American Indian, Alaska Native, Native Hawaiian and Other Pacific Islander.

Adult 55+ Purchasing Clout: Older consumers collectively spend more on goods & services than any other demographic segment

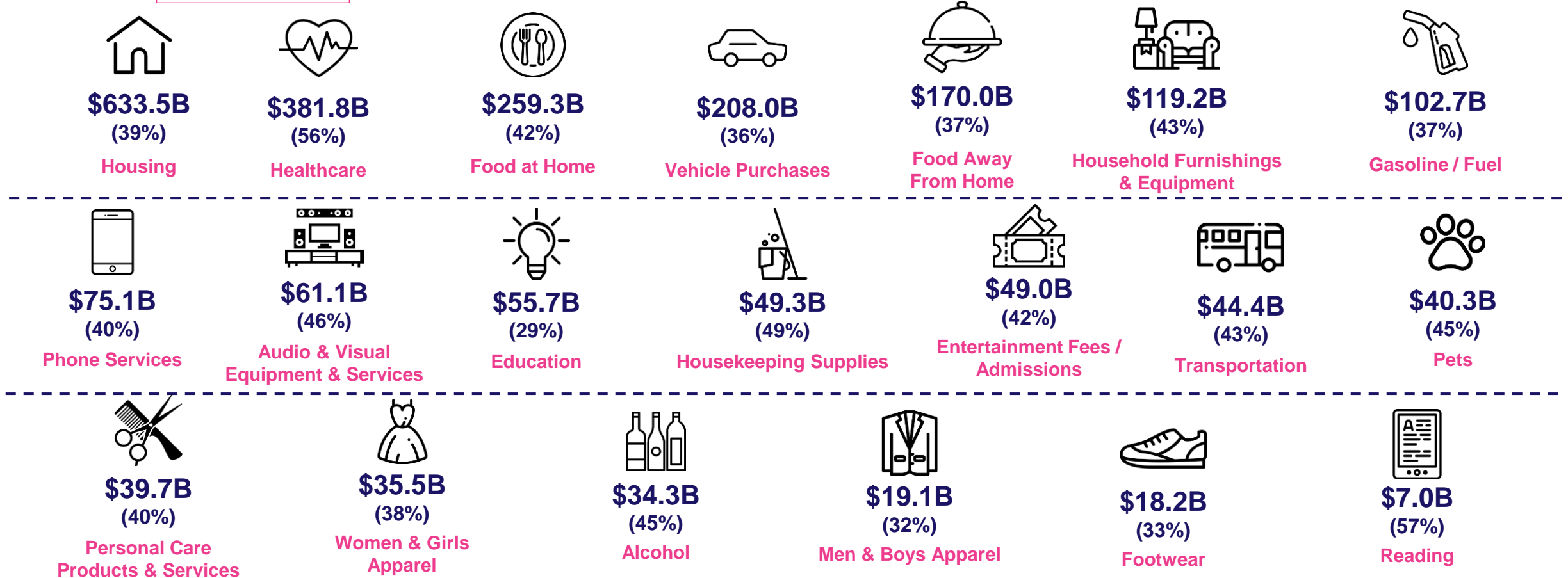


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Transform **Marketer's Guide**
 Innovative thinking to make a lasting impact on your business growth.

A55+ Total Annual Expenditures By Category

(% Share of Total Category Spend)



Source: VAB analysis of *Consumer Expenditure Survey 2019* data, U.S. Bureau of Labor Statistics, reported as of September 2020. Data represents adults 55+ due to data age group breakouts.

Evolving Online Behaviors By Older Consumers: Adults 50+ have been flocking to direct-to-consumer brands' digital platforms during the pandemic; brands that are also significant spenders on TV



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Average monthly unique adult 50+ visitors increase by digital platform

6-month average YoY comparison: Apr-Sep '19 vs. Apr-Sep '20



+35%

(+307K avg monthly UVs)



+26%

(+253K avg monthly UVs)



CARVANA

+89%

(+919K avg monthly UVs)



+18%

(+1.2MM avg monthly UVs)

DOORDASH

+30%

(+1.7MM avg monthly UVs)



+28%

(+198K avg monthly UVs)



+9%

(+118K avg monthly UVs)

WARBY PARKER

+35%

(+235K avg monthly UVs)



+30%

(+5.7MM avg monthly UVs)

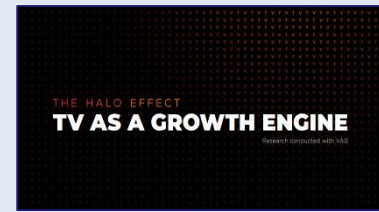


+20%

(+6.7MM avg monthly UVs)

Source: VAB analysis of Comscore MediaMetrix Media Trend multiplatform (desktop + mobile) data, April 2019 – September 2019 vs. April 2020 – September 2020, P50+, total digital population, total monthly unique visitors/viewers. Percentages = average monthly unique visitors increase between the two 6-month time periods.

The Halo Effect of TV: The greatest impact seen from DTC brand's TV investment, especially for younger brands, is the digital conversion lifts that occur when they build a sustained TV presence



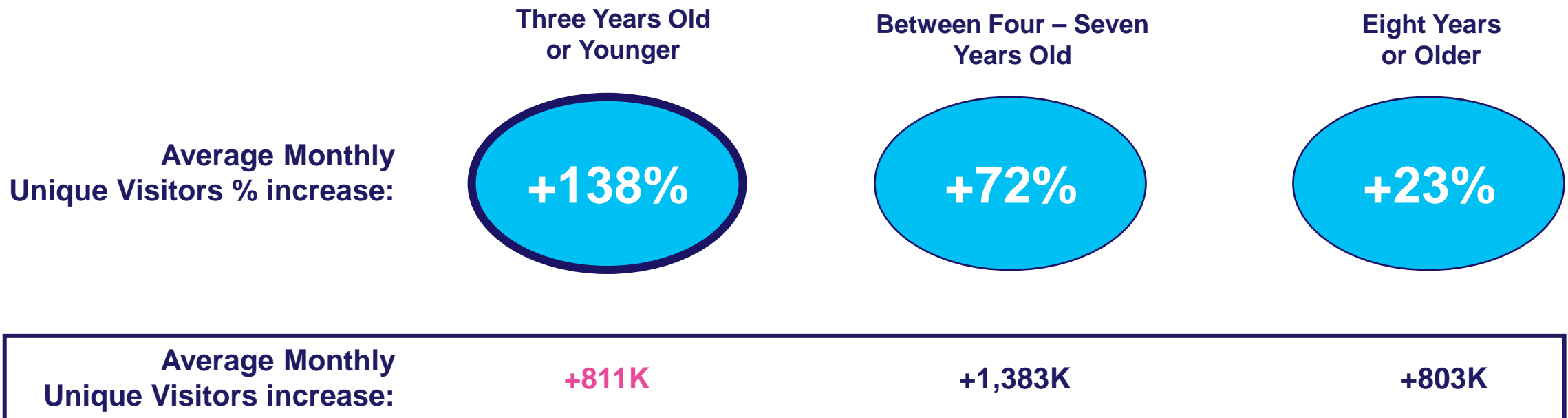
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Marketer FAQs
Answering your questions with our insights

DTC Brands: 'When On TV' Monthly Average vs. Three-Month Average Prior To TV

Average Website Unique Visitors



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, syndicated TV), Jun '16 – Jun '20 (calendar months). VAB analysis of Comscore mediameatix multiplatform (desktop + mobile) media trend data; P18+, Jun '16 – Jun '20 (calendar months). Measurement Time Period: June 2016 – June 2020.

Valuable Video Advertising Tactics For Marketers: Today, more than half of advertisers identify linear TV, collectively in all forms, as their most valuable video tactics

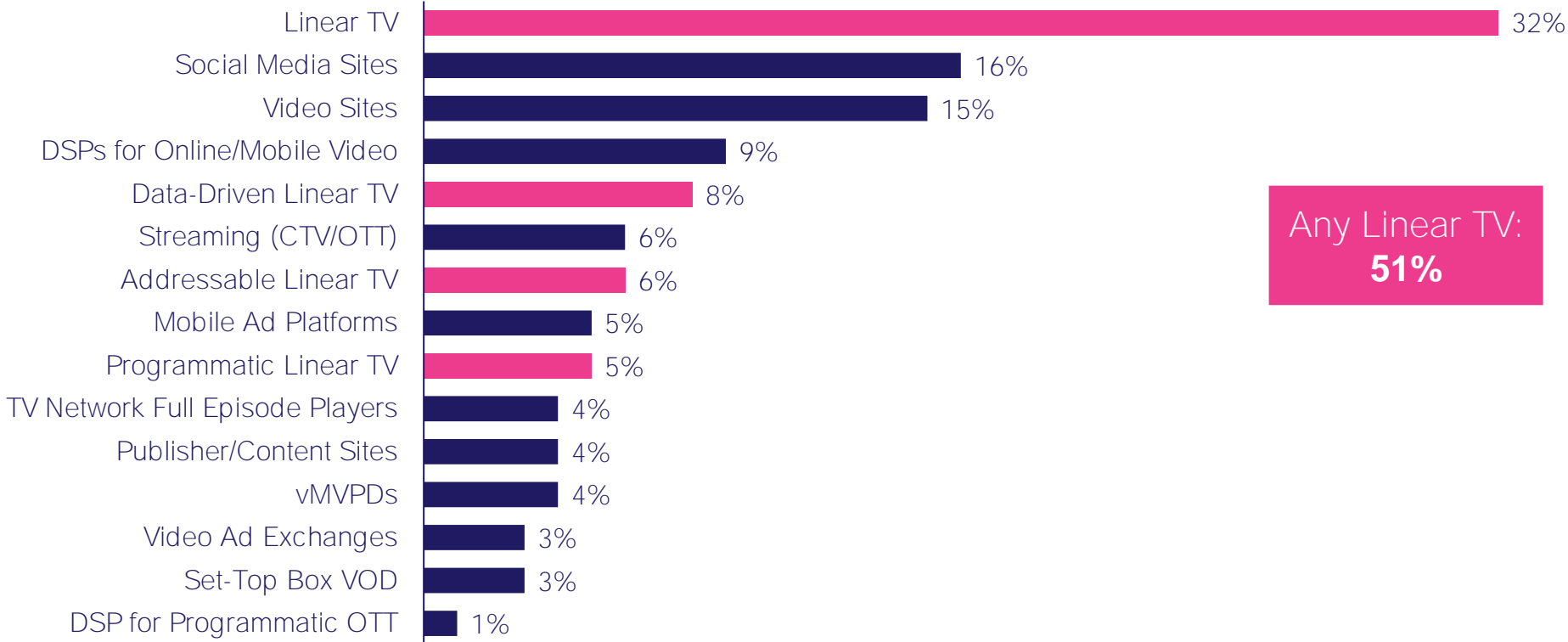


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All Video Advertising Tactics Used

Summary of Top Rank



Any Linear TV:
51%

Source: Advertiser Perceptions, Video Advertising Convergence Report, Wave 9, 2H 2020, released February 2021.

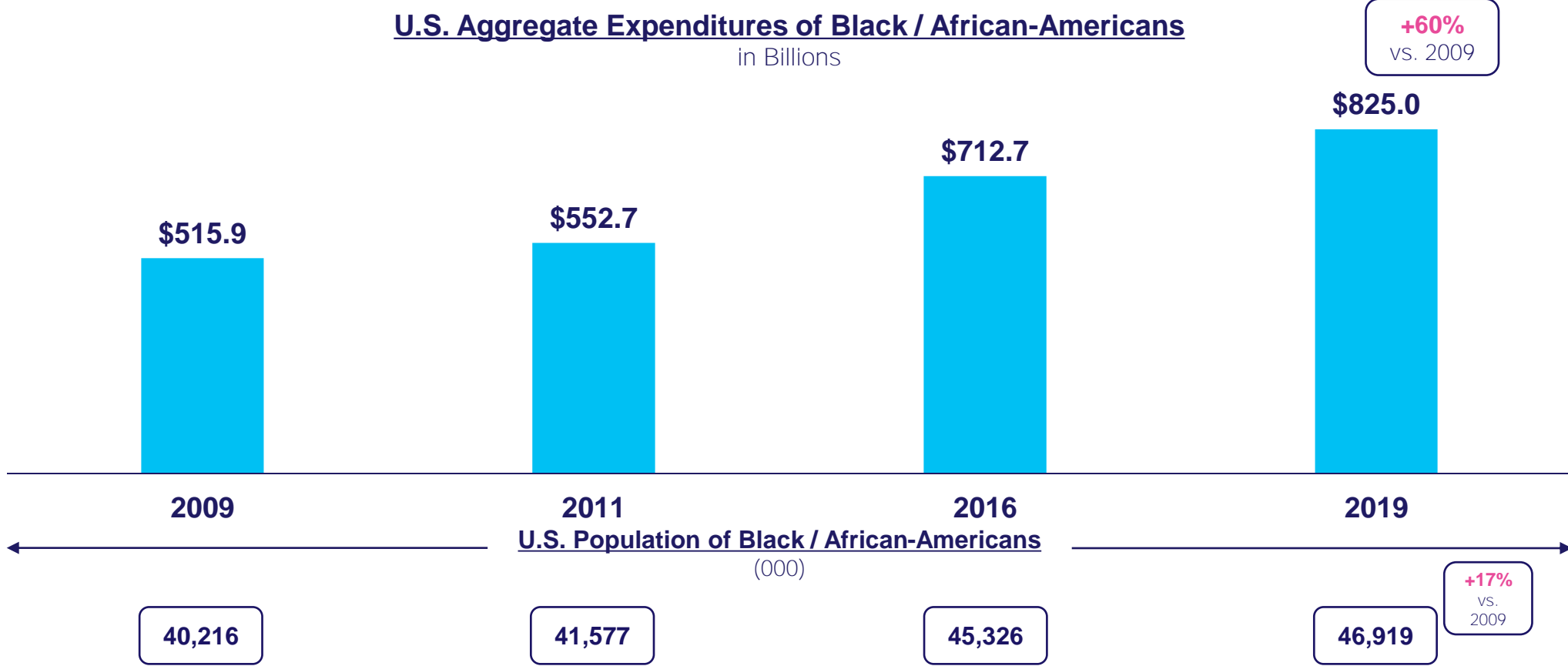
Black Consumer Spending Power: Black consumers have collectively increased their spending power by 60% over the last decade which far outpaces their population growth during the same time period



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U.S. Aggregate Expenditures of Black / African-Americans in Billions



Source: VAB Analysis of Bureau of Labor Statistics data, Race of reference person: Shares of annual aggregate expenditures and sources of income, Consumer Expenditure Survey, 2009, 2011, 2016 & 2019. VAB Analysis of U.S. Census Bureau data The Black Alone or in Combination Population in the United States: Table 1. Population by Sex and Age, for Black Alone or in Combination : 2009; Table 1. Population by Sex and Age, for Black Alone or in Combination: 2011; Table 15. Population by Sex and Age, for Black Alone or in Combination: 2016; Table 15. Population by Sex and Age, for Black Alone or in Combination: 2019.

Streaming Wars Heating Up: Beyond linear, several major TV network groups have recently established their own streaming services that already offer, or will soon offer, an ad-supported option



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Service	Streaming Model	Ad-Free Monthly Pricing	Ad-Supported Monthly Pricing
HBOmax	Hybrid AVOD/SVOD*	\$14.99	N/A*
hulu	Hybrid AVOD/SVOD	\$11.99	\$5.99
Paramount+	Hybrid AVOD/SVOD	\$9.99	\$4.99**
peacock	Hybrid AVOD/SVOD	\$9.99	Free*** or \$4.99
discovery+	Hybrid AVOD/SVOD	\$6.99	\$4.99
NETFLIX	SVOD	\$8.99-17.99	N/A
AMC+	SVOD	\$8.99	N/A
Disney+	SVOD	\$7.99	N/A
Apple tv+	SVOD	\$8.99-17.99	N/A

Click below to untangle the terminology within video streaming

Untangling Terminology Within Streaming
Clarifying marketing topics and terms

Notes: *Ad-supported tier of HBOMax is coming Q2 2021; **'Base Tier' Ad-Supported Paramount+ launches in June 2021; ***Peacock offers a free tier that is ad-supported with limited content library. Chart reflects costs as of 3/1/21. AVOD = Ad-Supported Video-on-Demand; SVOD = Subscription Video-on-Demand

The Election Showcased Successful Strategies For Marketers: The winning formula for President Biden was a sustained presence with an extended heavy-up leading right into voter decision time



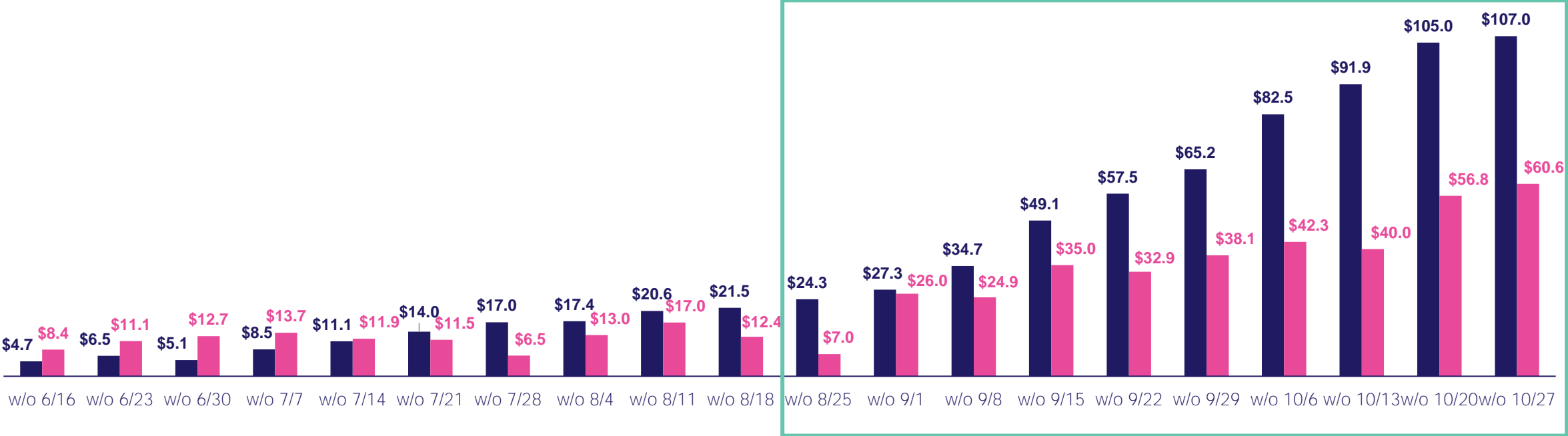
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2020 Presidential General Election: Weekly TV Spend

(Candidate, Party & Issue-Based)
\$ in Millions, 6/16/20 – 11/2/20

■ Democrat ■ Republican



Source: VAB analysis of Kantar CMAG Political Competitive Data Gathering, 2020 Presidential Election data measured from 6/16/20 to 11/2/20 across general election 'heavy-up period' spend. Political weeks begin Tuesdays and end Mondays. TV Platforms: Cable TV, Broadcast TV (including Spanish Language Broadcast TV), Spanish Language Broadcast TV and Satellite TV. Candidate represents spend from only the candidates. Party represents spend from the political party and candidate/party co-op. Issue-Based represents spend from election-affiliated third-party sources (e.g. PACs, The Lincoln Project, NRA Victory Fund, Republican Voters Against Trump). Note: Biden invested over \$15MM in TV during 12 separate weeks vs. 7 for Trump.

Analyzing 'Tech Giants' TV Investment: Rather than relying solely on their own platforms or digital media, GAFAM invested heavily in TV becoming the #1 U.S. advertiser during the pandemic



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Rank	Company	CY 2020 U.S. Total TV Spend
1		\$2.7 B
2		\$2.4 B
3		\$1.4 B
4*		\$1.2 B
5		\$923 MM
6		\$911 MM
7		\$888 MM
8		\$882 MM
9		\$864 MM
10		\$840 MM

Source: VAB analysis of Nielsen AdIntel, calendar year 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. Rankings are based on total TV spend for parent companies based on their subsidiaries and brands as of March 2021. GAFAM includes Google (Alphabet), Apple, Facebook, Amazon and Microsoft. *Amazon, which would've ranked #3, shifted into #1 for the purposes of this chart.

With state restrictions loosening throughout the country and movie theaters now allowed to re-open in all major markets, **cinema will once again become an important platform** for marketers to reach desirable consumers as high-profile movie releases ramp up



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SUPER CINEMA GOERS ARE SUPER SPENDERS, SOCIAL & ACTIVE CONSUMERS.

35% MORE LIKELY TO GO TO BARS/NIGHTCLUBS	57% MORE LIKELY TO FREQUENTLY DINE OUT	48% MORE LIKELY TO SPEND \$1K+ ON VACATIONS ANNUALLY
43% MORE LIKELY TO BE GYM MEMBERS	20% MORE LIKELY TO SOCIALIZE WITH FRIENDS AROUND TOWN	33% MORE LIKELY TO ATTEND SPORTS EVENTS

THE POWER OF SUPER CINEMA GOERS

They are more likely to spend on entertainment, leisure activities, products and services than the average adult.

SUPER CINEMA GOERS ARE THE FIRST TO HEAD BACK TO THE MOVIES.

Source: MRI-Simmons, Spring 2020. Base: P18+. "Super Cinema Goer" - attend a movie at least once a month. Percentages = "Super Cinema Goer" vs. average adult 18+. Frequently dine out = 5+ times in last 30 days. Socialize with friends = 4+ hours weekly.

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