



2019 VIDEO ADVERTISING BUREAU

Video Insights Guide

COMPLIMENTARY VERSION

A go-to industry resource covering the dynamics within the video ecosystem

VAB
VIDEO ADVERTISING BUREAU

INTRODUCTION

We continue to witness rapid change within the video landscape. Consumers have more choices than ever on how to view video programming. Similarly, marketers have increasingly **more opportunities** to reach and engage with their audiences, as well as increased opportunities to **measure the impact** of their efforts. This guide provides data and insights through the lens of marketers and advertisers. It is from this viewpoint that it serves as a helpful reference on the topics most relevant to the video industry today.

Advancements in measurement and attribution mean that marketers are able to quantify the full-funnel impact of their TV marketing spend. Television is starting to get credit for its important role in **driving business outcomes**. The insights we have uncovered or reinforced in 2018 demonstrate not only this business impact of multi-screen TV but *how* it is able to deliver these outcomes.

First, our custom analysis quantifying the **emotional engagement** viewers have with television clearly demonstrates the deep bond between viewer and programming. This engagement benefits advertisers in the form of increased consumer action and purchase intent. Secondly, the **reach** of multi-platform television is unparalleled. This scale provides the awareness required to build brands, but also acts as a halo to strengthen other marketing elements. Thirdly, multi-screen TV offers a **brand-safe, trusted**, and transparent environment. This is essential for advertisers but is also attractive to consumers who show deeper engagement with positive, professionally-produced, brand-safe content.

Finally, the **strengths of Cinema** echo those of Television in its ability to generate business outcomes, offer scale, and inspire consumer engagement within a brand-safe, fully transparent environment.

We invite you to explore these insights to better understand the dynamics of the video landscape and the significant role played by multi-screen video.

2018 Video Insights Pillars



**ATTRIBUTION
AND
OUTCOMES**



**EMOTIONS
AND
ENGAGEMENT**



**SCALE
AND REACH**



**SAFETY
AND TRUST**



**THE
STRENGTH
OF CINEMA**



Attribution and Outcomes

Attribution and Outcomes: Insights Directory

Assigning TV Credit

A Practical Guide To Attribution

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Direct Impact

Direct-to-Consumer Brands

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A Look Under the Hood

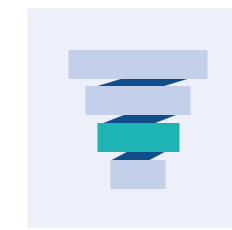
Automotive Category

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Attribution and Outcomes: Key Takeaways

- Attribution has evolved from a basic marketing mix modeling approach to a multi-touch, cross-screen approach, improving granularity, efficiency and accuracy
- Advancements in data and the processing of that data has enabled marketers to measure the full-funnel impact of their TV marketing spend
- It is clear that TV spend has a positive impact on consumer action such as website visits, foot traffic and sales

Luxury Retail Brand Drives Visitation and Connects CTV Viewership Insights with Offline Shoppers



MARKETER: LUXURY RETAIL

FUNNEL STAGE: INTENT

CAMPAIGN: Q2 2018



Connected TV Video Ad Conversion

+37% Store Visitation

Versus any other type of ad exposure

+15% Lift

Opt-in/direct-to-video ads outperformed Auto Play video ads in driving store visitation

Brand Shoppers Are More Likely To:



watch music, sports, comedy and lifestyle TV



watch on Smart TVs during late night/ overnight

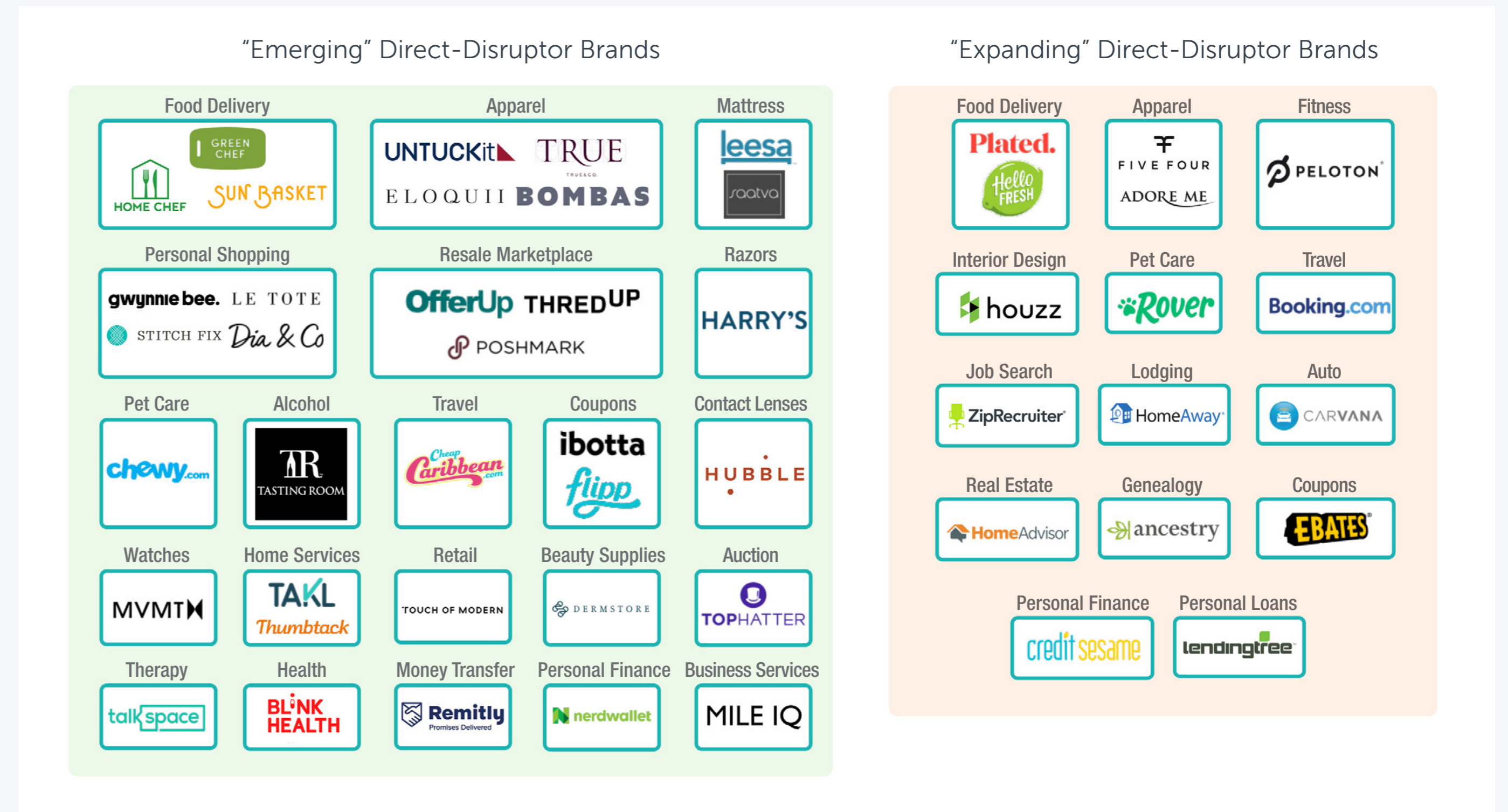


spread normatively across the US

[ASSIGNING TV CREDIT](#)

50 “Direct-Disruptor” Brands Analyzed Across Many Categories

We analyzed the TV spend and individual key metrics (where available) like website traffic, online interactions and revenue of these 50 brands across 30 categories



DIRECT IMPACT

The above list represents a mix of brands across “direct” categories who invested \$500K+ in measured 2017 TV spend (Nielsen AdIntel) and have available data within at least one of the following business metrics: website traffic unique reach via Comscore, online interactions via iSpot.tv, or revenue / valuation estimates through reliable & verified sources such as SEC.gov, Pivotal Research or company press releases / company representative statements.

These 50
Direct-Disruptor
Brands Collectively
Spent Over \$1.3
Billion On TV In 2017;
A 98% Increase YOY

“Direct-disruptor” brands have accelerated spending recently in this very competitive environment, having invested over **\$650MM** more in TV over the last year

TV SPEND COMPARISON (IN MILLIONS)

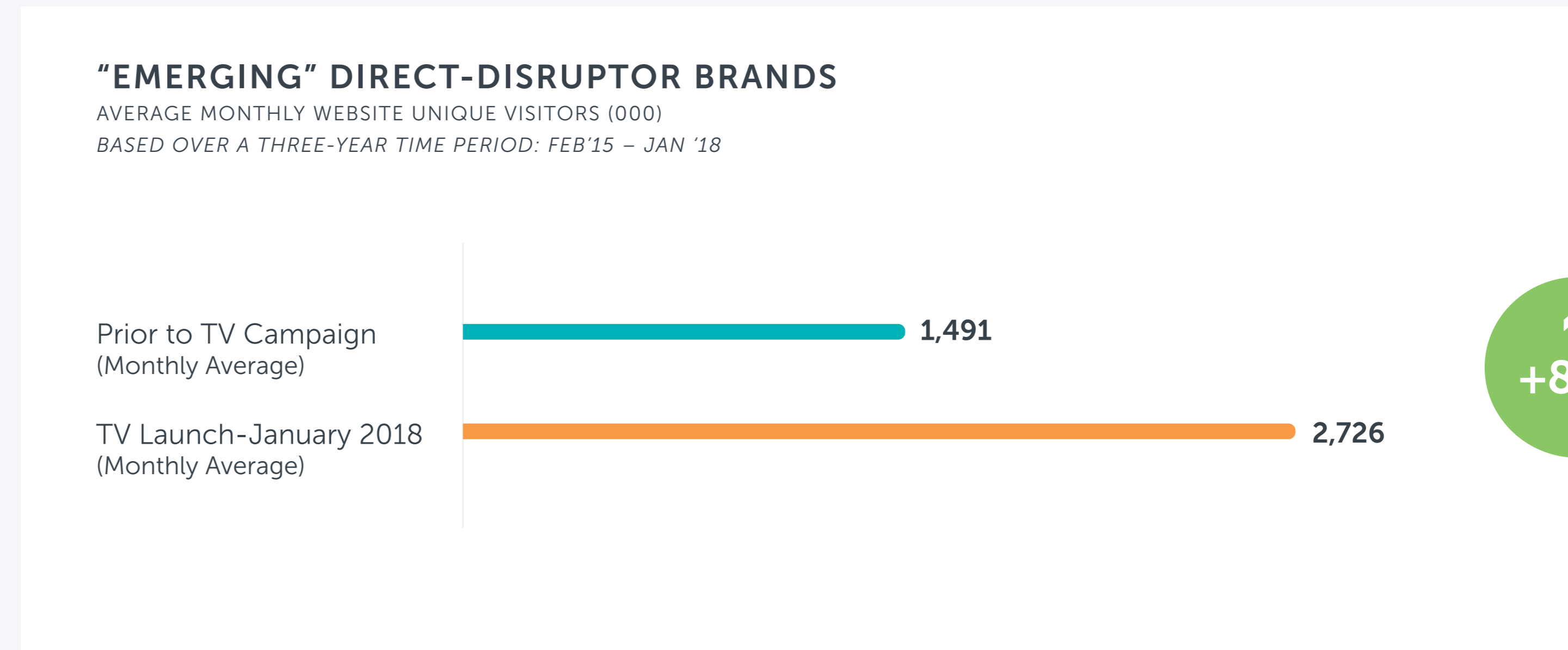


DIRECT IMPACT

Source: VAB analysis of Nielsen Ad Intel data, calendar year 2015-2017. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV, spot TV, syndication TV. Reflects the cume TV spend of the 50 direct brands identified in this report. All 50 companies existed since 2015, except for Hubble, which was founded in 2016.

On Average,
“Emerging” Brands
Saw An **83% Lift**
In Their Unique
Website Traffic
After They
Launched
A TV Campaign

“Emerging” brands saw a continual lift in their website traffic that spans their initial TV launch to present day



Based on the 29 brands within the “emerging” direct-disruptor brands segment that are measured in Comscore

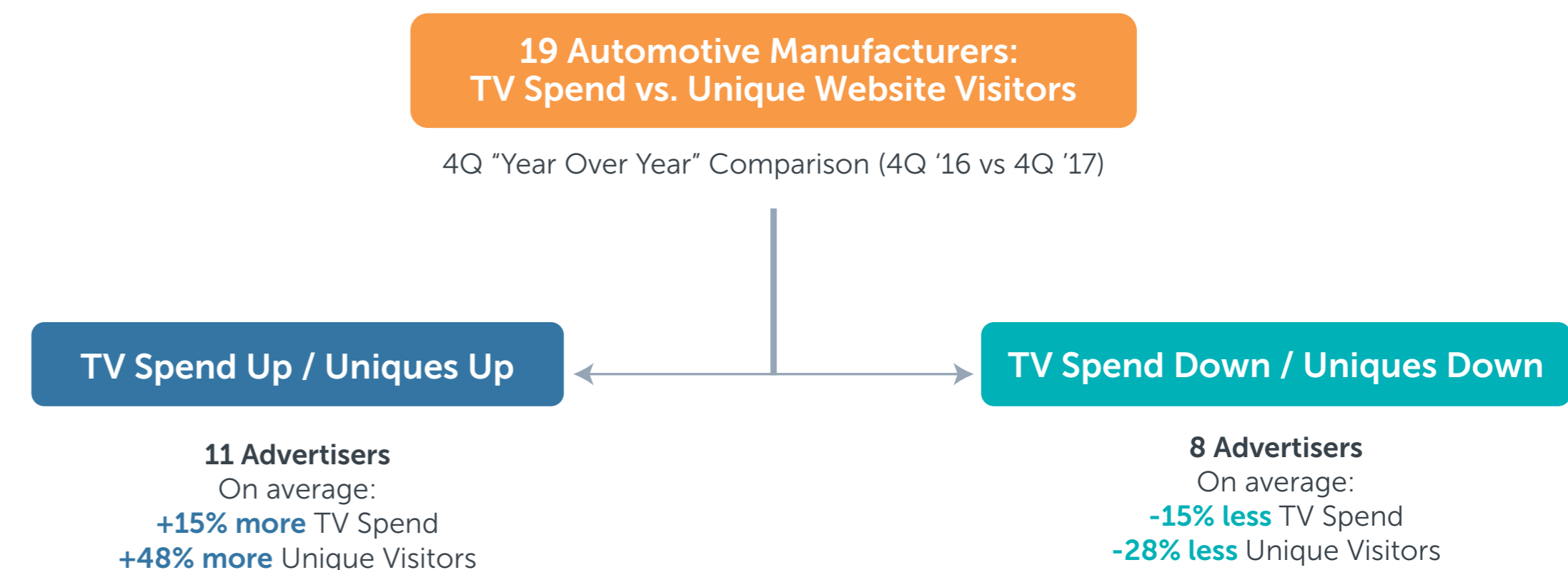
DIRECT IMPACT

Source: VAB analysis of Comscore Media Metrix Multi-Platform media trend data; total audience (Desktop P2+, Mobile 18+), February '15 – January '18 (calendar months). 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, syndication TV), Feb '15 – Jan '18 (calendar months).

“Total Universe” Findings: TV Spend Impact On Automotive Manufacturers With A Definitive Correlation

19 of the 25 Automotive Manufacturers (76%) Analyzed Exhibited a Direct Correlation Between TV Spend & Website Traffic (4Q'16 vs. 4Q'17)

SHIFTS IN AUTOMOTIVE BRANDS' TV SPENDING AID IN ACCELERATING, OR DECELERATING, THEIR WEBSITE TRAFFIC



A LOOK UNDER THE HOOD

Source: VAB analysis of Comscore Media Metrix multiplatform media trend data; total audience (Desktop P2+, Mobile 18+), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). VAB analysis of Nielsen Ad Intel data, TV spend (natl cable TV, natl broadcast TV, Spanish lang broadcast TV, Spanish lang cable TV, spot TV, syndication TV), Oct '16 - Dec '16 vs Oct '17 - Dec '17 (calendar months). Figures are based on a monthly average within each quarter.

Download The Full 2019 VAB Insights Guide [Here](#) For More On Outcomes and Attribution, Including:

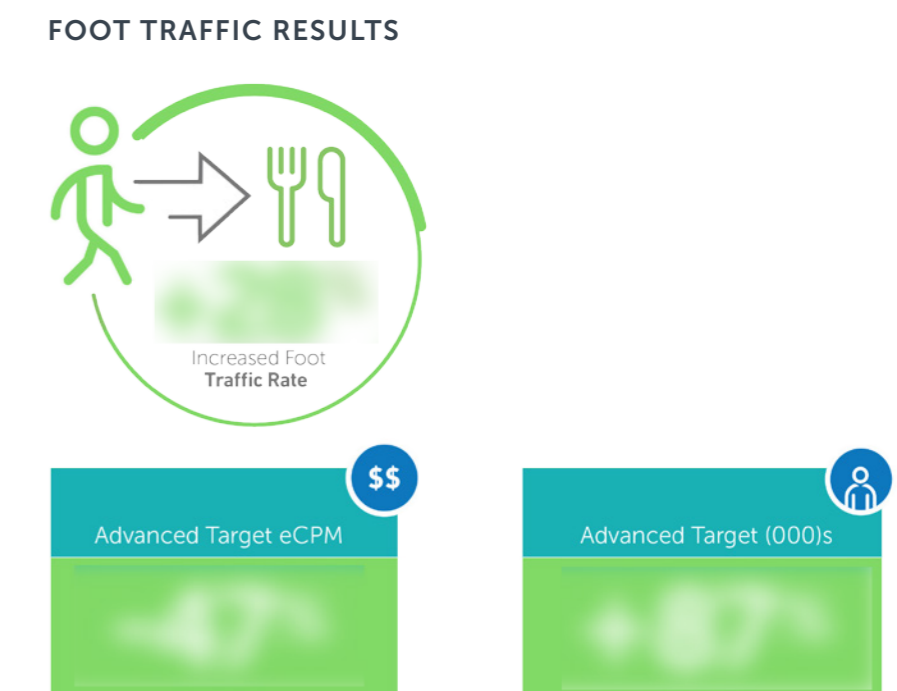
- Brand-level detail on emerging and established direct-to-consumer brands – correlations between TV spend, web-traffic, and revenue
- Detailed spend and web-traffic data within the Automotive and Mattress categories
- A primer on attribution methodology
- Case studies and success stories from campaigns applying attribution models to quantify link between TV spend and business growth
- An additional 25+ charts and insights

DEEP DIVES: EXAMPLES OF BRANDS WHO SAW A SPIKE IN WEB TRAFFIC WITH INCREASED TV SPEND

TV SPEND UP, WEBSITE TRAFFIC UP
4Q "Year Over Year" Comparison (4Q '16 vs 4Q '17)

	BMW	LINCOLN	Ford	BUICK	TOYOTA
AVG MONTHLY TV SPEND (000):					
Oct '16 - Dec '16:	2,200	2,200	2,200	2,200	2,200
Oct '17 - Dec '17:	2,800	2,800	2,800	2,800	2,800
% DIFFERENCE:	+27%	+27%	+27%	+27%	+27%
AVG MONTHLY UNIQUE VISITORS (000):					
Oct '16 - Dec '16:	1,200	1,200	1,200	1,200	1,200
Oct '17 - Dec '17:	1,500	1,500	1,500	1,500	1,500
% DIFFERENCE:	+25%	+25%	+25%	+25%	+25%

QSR BRAND DRIVES FOOT TRAFFIC AND LOWERS THEIR eCPM THROUGH ADVANCED TARGETING



A man with a joyful expression is sitting on a light-colored sofa, eating from a white takeout container with chopsticks. The background is a soft-focus bokeh of blue and green lights, creating a warm and inviting atmosphere. The overall scene conveys a sense of happiness and relaxation.

Emotions and Engagement

Emotions and Engagement: Insights Directory

Committed

Emotional Engagement of Millennials

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Committed

Emotional Engagement of Black &
Hispanic Viewers

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#TVisSocial #FallSeason #Ep4

TV and Social Conversation

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Linear TV and OTT

In Combination, How They Drive Increased
Audience Engagement and Exposure

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Emotions and Engagement: Key Takeaways

- The premium, compelling content offered by multi-screen TV builds a deep emotional connection with consumers
- Content environment is an important consideration for marketers as purchase intent is driven by emotional engagement
- Brands looking to increase their relevance and fame will benefit from a presence within premium multi-screen TV content as these environments inspire conversation, word of mouth, and buzz

The Deep Relationship Millennials Have With TV Programming Inspires And Influences Their Purchasing Decisions



43% | 40%

"I purchased a product that has been shown / featured on a TV show"



43% | 37%

"I have eaten at a restaurant because it, or its chef / owner, was featured on a TV show"



43% | 25%

"Purchase a product I saw while watching a TV program (either a product I saw in an ad or in the actual program)"



40% | 33%

"I have visited a location / vacationed at a place because it was featured on a TV show"

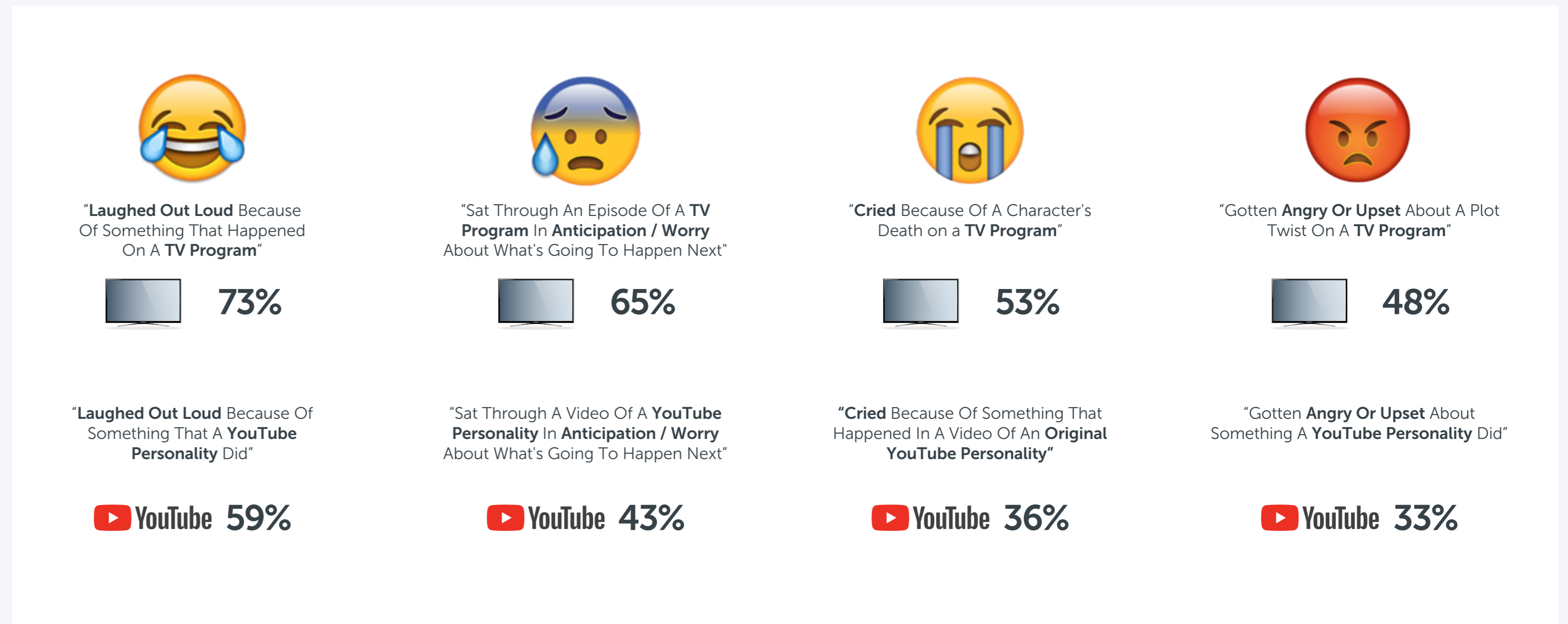
● Millennials ● Adults

COMMITTED: EXPLORING MILLENNIALS' MEANINGFUL RELATIONSHIP WITH TV PROGRAMMING

Source: VAB / Research Now "Program Engagement" Survey, April 2018. Q9: Please indicate how often you do the following? Purchase a product I saw while watching a TV program (either a product I saw in an ad or in the actual program). Respondents Answer = Always/Frequently. Q10: Which of the following statements are true for you? Check any that apply. Adults = A18+, Millennials = A18-34. Total Respondents=1,001.

Millennials Are More Emotionally Invested In TV Programs Than They Are In Original YouTube Content

Millennials' Emotional Response to TV Programs and YouTube Original Content



COMMITTED: EXPLORING MILLENNIALS' MEANINGFUL RELATIONSHIP WITH TV PROGRAMMING

Source: VAB / Research Now "Program Engagement" Survey, April 2018. TV: Q8: Which of the following statements are true for you? YouTube: Q17: Which of the following statements are true for you? Check any that apply. Base = Those who regularly watch original content on YouTube; Millennials = A18-34. Total Respondents=1,001

Decidedly Different: A Summary Of How Multicultural Viewers Differ From Non-Hispanic Whites in Their Commitment To TV And YouTube

Index vs. Non-Hispanic Whites

	Black	Hispanic
PASSIONATELY-ENGAGED VIEWERS		
 "I Have Gotten Upset About A Plot Twist On A Program"	115	110
"Watching My Favorite TV Show Is My 'Me-time'"	109	102
"I Feel Personally Connected To The Characters Of My Favorite TV Programs"	125	119
"I Feel Personally Connected To My Favorite YouTube Personality"	84	77
"I Have Laughed Out Loud Because Of Something That A YouTube Personality Did"	86	82
SOCIAL SHARERS		
 Share, Post Or Tweet Video Clips / Content About A TV Program	164	159
Tweet About Or Read A Tweet About a TV Program	162	157
Discuss TV Programs With Friends, Family And Co-workers	160	146
Watch Video Clips From TV Shows On YouTube	149	123
Reach Or Post Comments About TV Content On YouTube	117	109
KNOWLEDGE-SEEKERS		
 "I Read Online Recaps, Blogs Or Reviews About The Episode"	158	150
"I Look For Spoilers"	152	140
INSPIRED TO PURCHASE		
 Have Purchased A Product I Saw While Watching A TV Program (either a TV ad or in the actual program)	182	150
Have Eaten At A Restaurant Because It, Or Its Chef / Owner, Was Featured On A TV Show	119	100

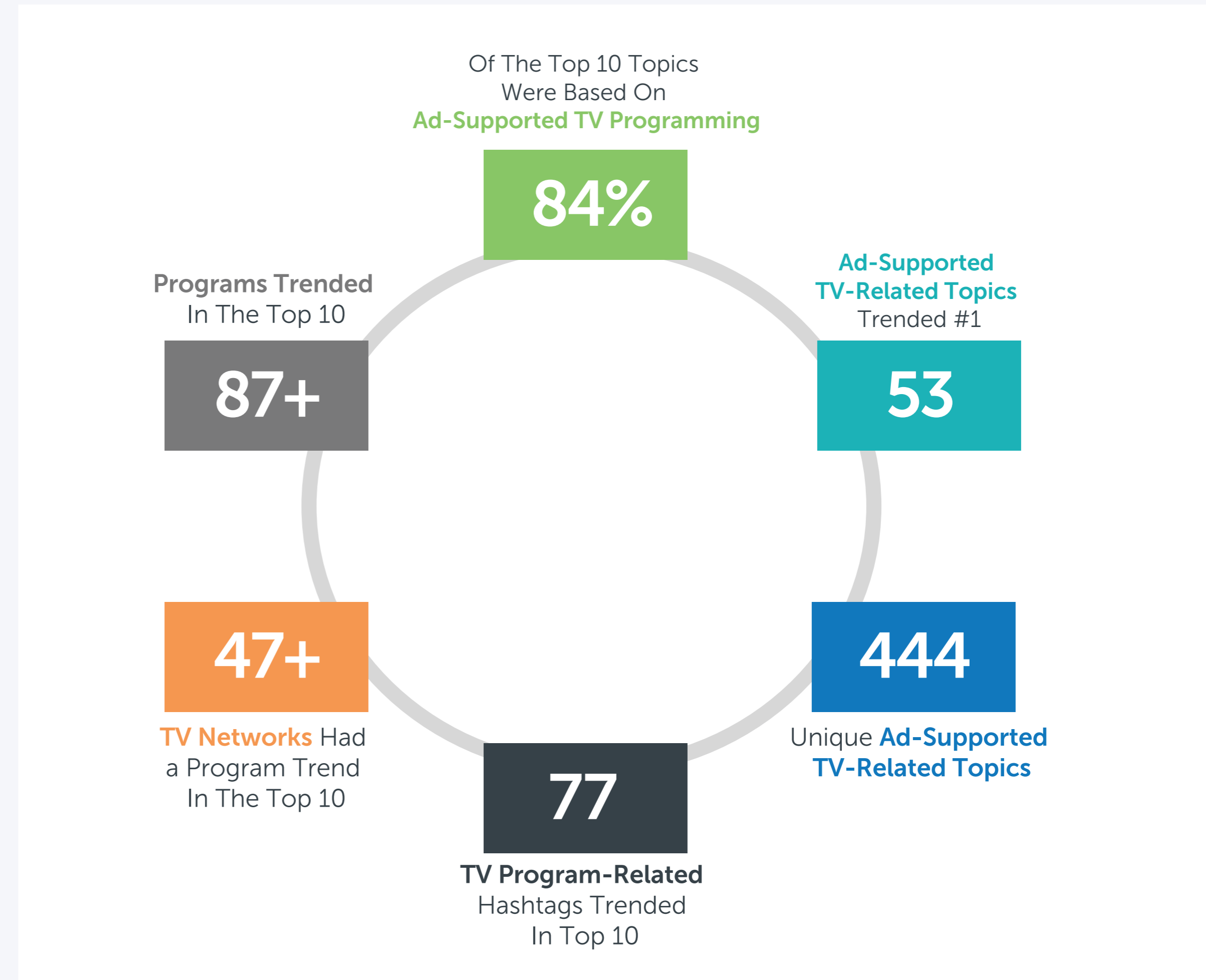
COMMITTED: EXPLORING MULTICULTURAL VIEWERS' PASSIONATE RELATIONSHIP WITH TV PROGRAMMING

Source: VAB / Research Now "Program Engagement" Survey, April 2018. African American/Black/Caribbean American = 160 Respondents, Hispanic = 188 Respondents, Non-Hispanic White = 744 Respondents, Total A18+ Respondents = 1,001.

Four-Week Twitter Topics Analysis: September – October 2018

By The Numbers: Top Trending Stats

Live Ad-Supported TV in Primetime Drives Twitter's Top 10 Trending Topics



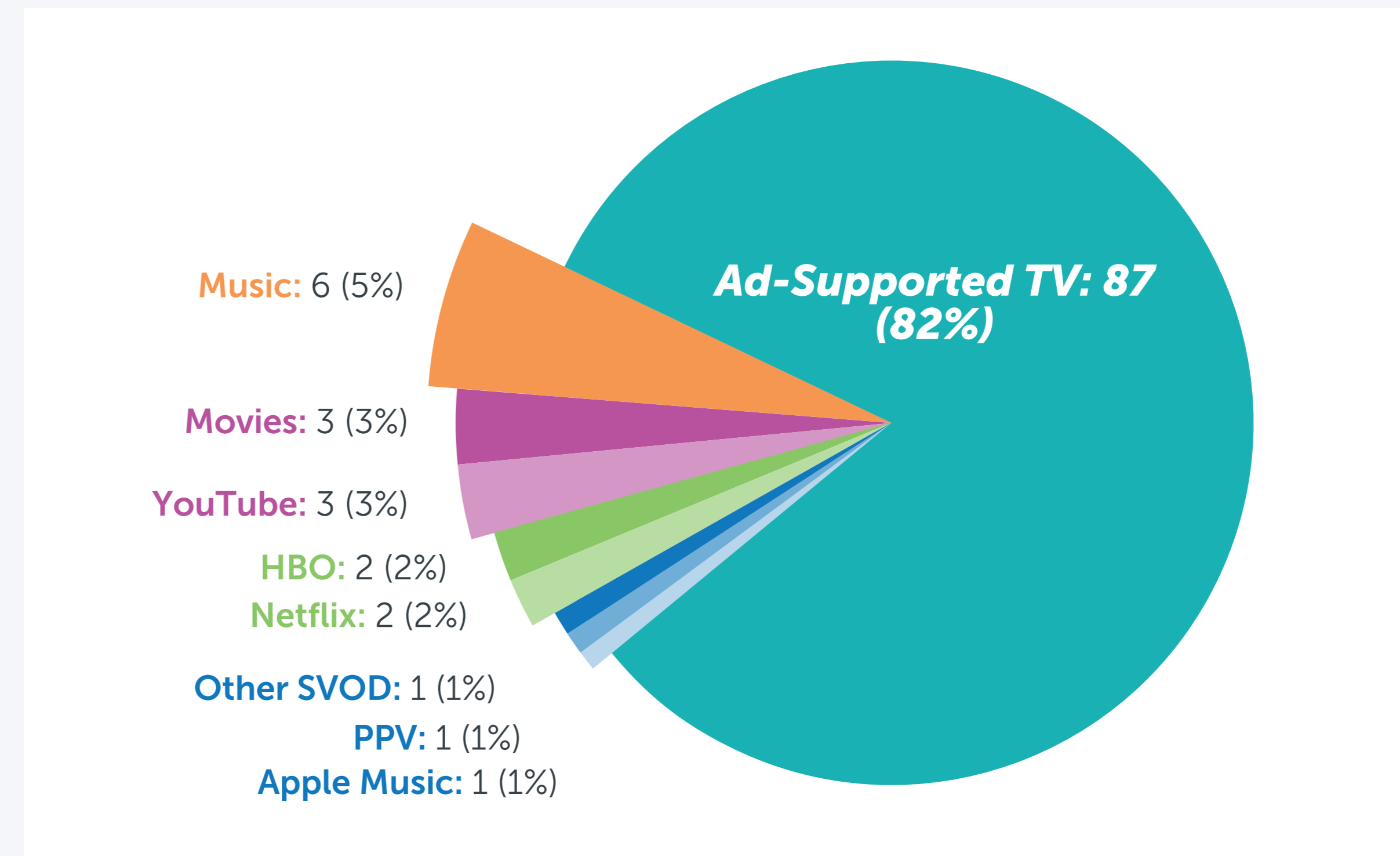
#TVISSOCIAL #FALLSEASON #EP4

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (8:30p, 9:30p, 10:30p, 11:30p) during 4-week time period (9/24/2018 – 10/21/2018).

In Fact, Ad-Supported TV Accounts For **Over 80%** Of The Media Content That Trended In The Top 10

Four-Week Time Period

of Top 10 Trending Programs / Content By Platform



[#TVISSOCIAL](#) [#FALLSEASON](#) [#EP4](#)

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (8:30p, 9:30p, 10:30p, 11:30p) during 4-week time period (9/24/2018 –10/21/2018). Based on unique program counts. For the purposes of this chart, "program / content" is an all-encompassing definition for individual pieces of content on each platform (albums & singles for music, channels on YouTube, etc).

Quantifying The Opportunity For Incremental Reach And Message Reinforcement:

Nielsen Media Impact Analysis

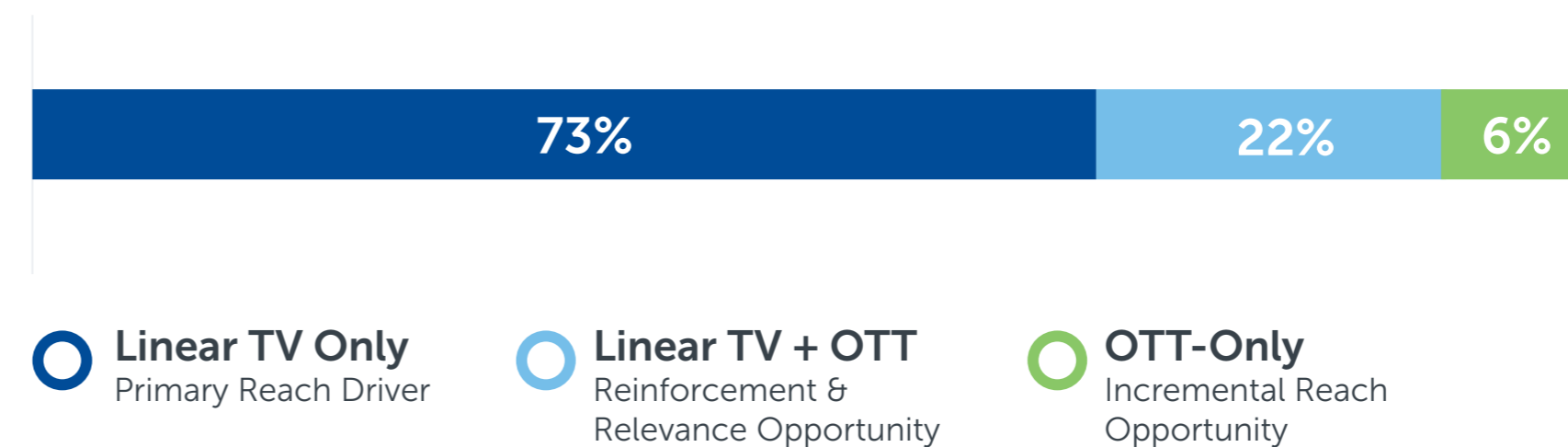


We examined Nielsen's omni-channel planning tool, *Media Impact*, to gauge the potential incremental reach of OTT within a plan.

This analysis includes all ad-supported TV networks and streaming platforms except Amazon and Netflix, the two biggest SVOD platforms. Through this cross-platform analysis, we can determine the percentage of an audience that is exposed to Linear TV only, both Linear TV & OTT, and OTT only.

REACH DUPLICATION, ADULTS 18+

Linear TV, Linear TV + OTT, OTT-only



The data indicates that 73% of reach is derived from linear TV alone, 22% is derived from those reached by a combination of linear TV + OTT, and 6% is derived from those reached by the OTT-alone

[LINEAR TV & OTT](#)

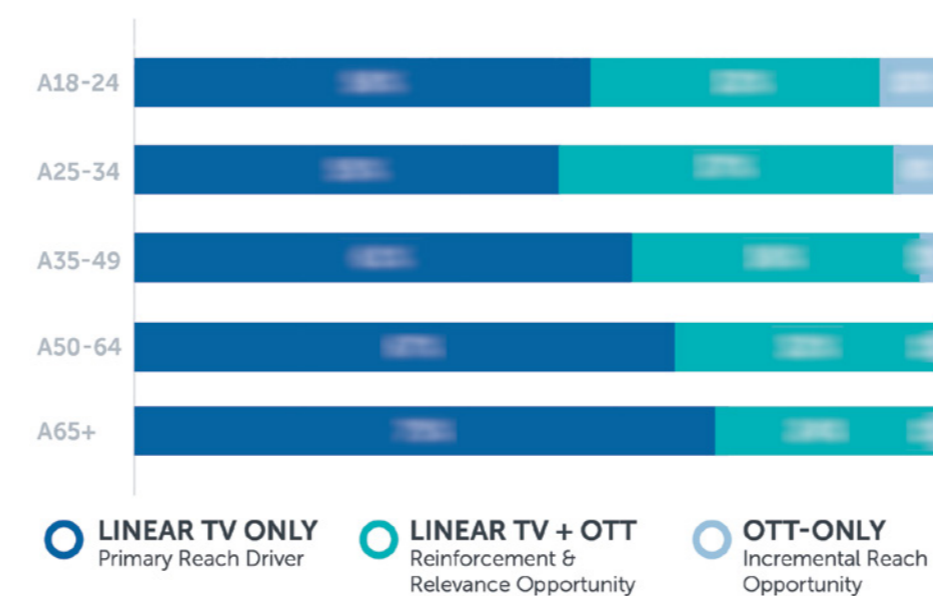
Source: Nielsen Media Impact; A18+. 4/1-4/30/18, Linear TV = Include Cable and Broadcast TV Programs, Live viewing plus 7 days after the broadcast; OTT = Desktop and laptop video streaming, does not include the two major subscription (non-ad supported) video platforms, Netflix and Amazon; TV + OTT = those reached on OTT and Linear TV

Download The Full 2019 VAB Insights Guide [Here](#) For More On Emotions and Engagement, Including:

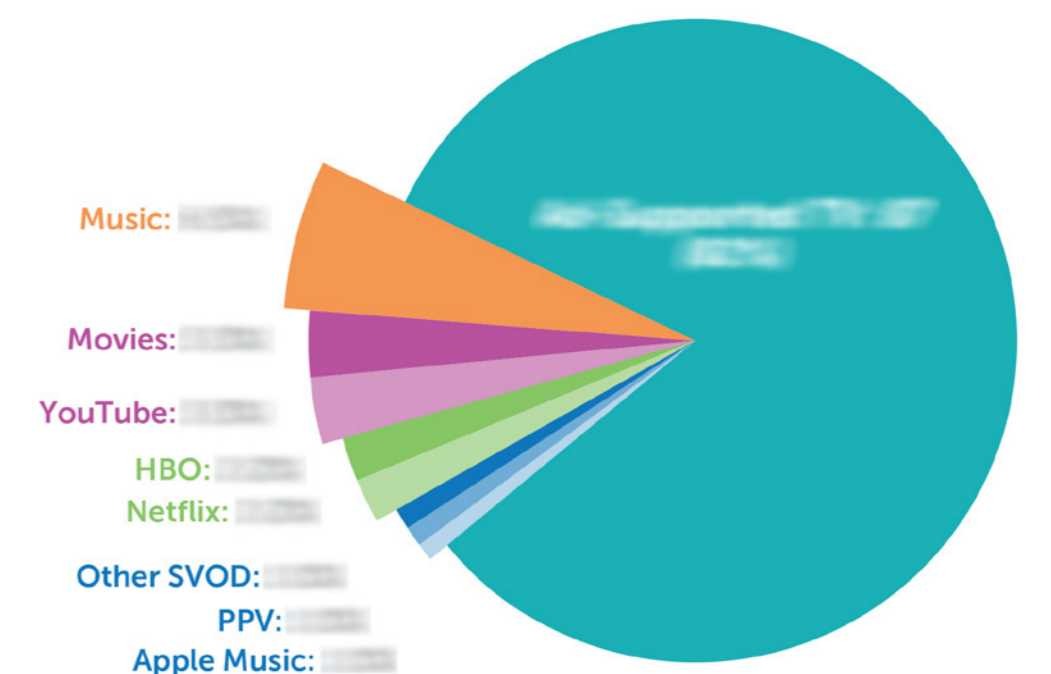
- Demonstrations from our custom analysis how viewers engage with TV programming before, during, and after the airing
- How emotions and behaviors around TV programming contrast with those for original YouTube videos
- Quantifiable metrics that show how the emotions & behaviors of multicultural viewers differ from non-Hispanic whites
- A deep dive into how TV dominates the social conversation and chatter
- Illustrations of how Linear TV and ad-supported OTT drive deeper engagement and message reinforcement, by demo and genre/content
- An additional 20+ charts and insights

REACH DUPLICATION, BY DEMO

LINEAR TV, LINEAR TV + OTT, OTT-ONLY



OF TOP 10 TRENDING PROGRAMS / CONTENT, BY PLATFORM (OVER 4 WEEK PERIOD)





Scale and Reach

Scale and Reach: Insights Directory

Left To Your Own Devices

Device Usage & Consumption

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You Down with OTT?

An Overview of the Video Ecosystem

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Tailor-Made Television

DVR Insights

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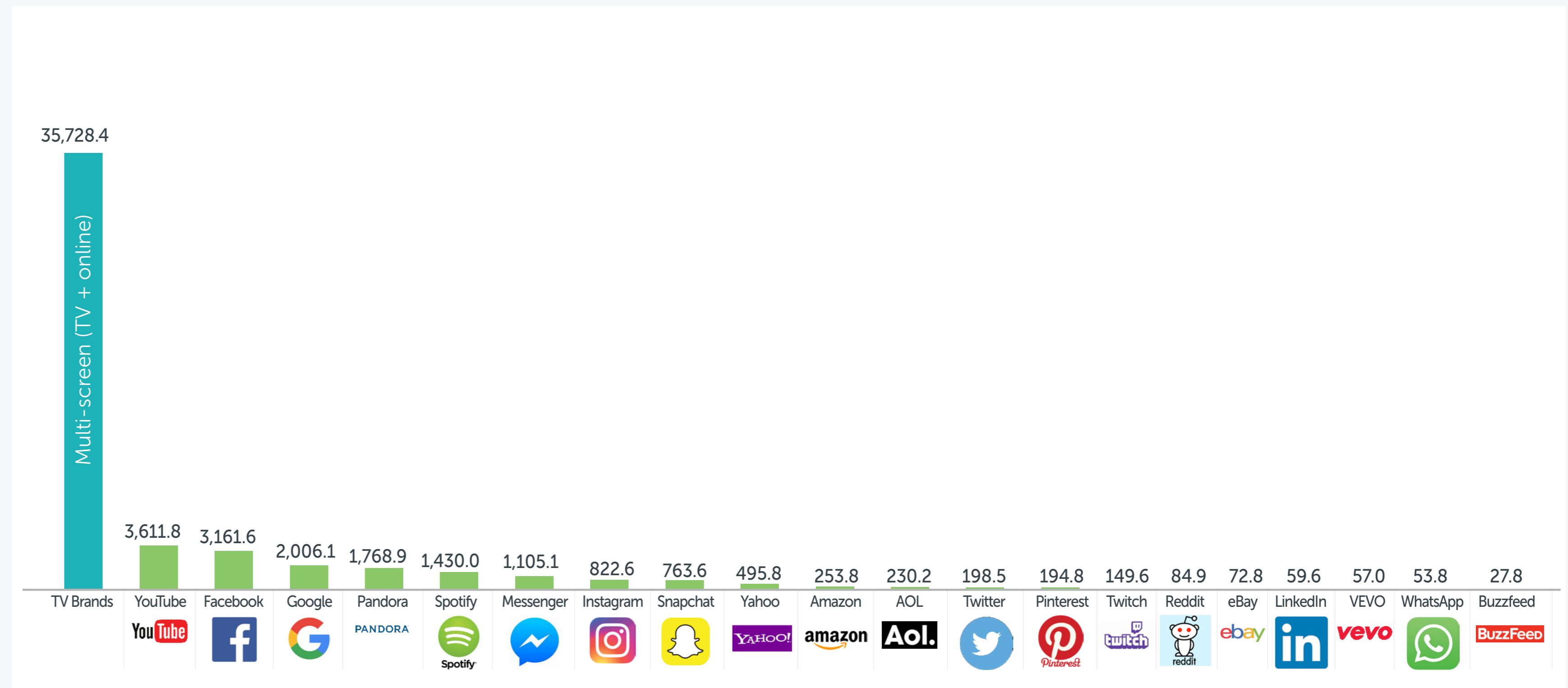
Scale and Reach: Key Takeaways

- The proliferation of devices and platforms for viewing premium video content means more opportunities for marketers to reach and engage with audiences
- Multi-screen TV, across devices and viewing platforms, has the unparalleled ability to drive mass and immediate audience reach
- The scale and engagement of multi-screen TV stirs consumer action and provides a halo to other marketing elements making them more effective

"Average Audience" During Any Given Minute Highlights The Engagement Gap Between Multi-screen TV & Digital Platforms

10x more people are watching ad-supported TV content than are on YouTube
11x more people are watching ad-supported TV content than are on Facebook

Adult 18+ Average Audience (000)

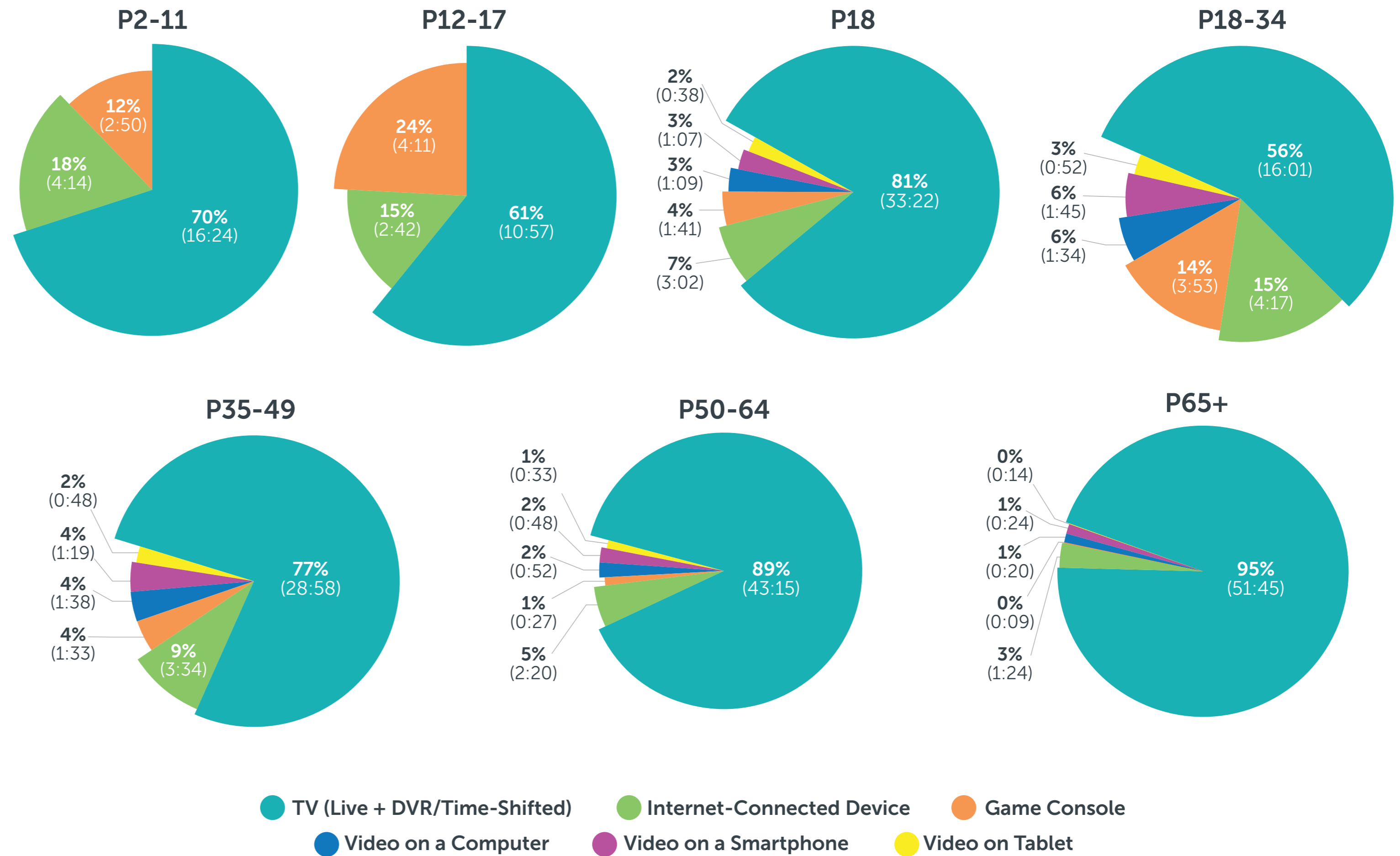


LEFT TO YOUR OWN DEVICES

Source: VAB analysis of Comscore Media Metrix Key Measures multiplatform (desktop + mobile) data, March 2018; P18+. Nielsen R&F Time Period Report, Live + SD, Total Day, March 1-31, 2018; P18+. "Average Audience" is based on the average minute, which is factored across the full month for websites and TV. TV Brands include linear TV and TV-related websites. Digital website measurement includes all visitor activity, not just video consumption.

Television Accounts For A Majority Share Of "Time Spent" With Video But Connected TV Devices Are Growing Especially Among Younger Demos

% Share Of Weekly "Time Spent" By Video Device – Q1 '18
(Hrs:Mins)



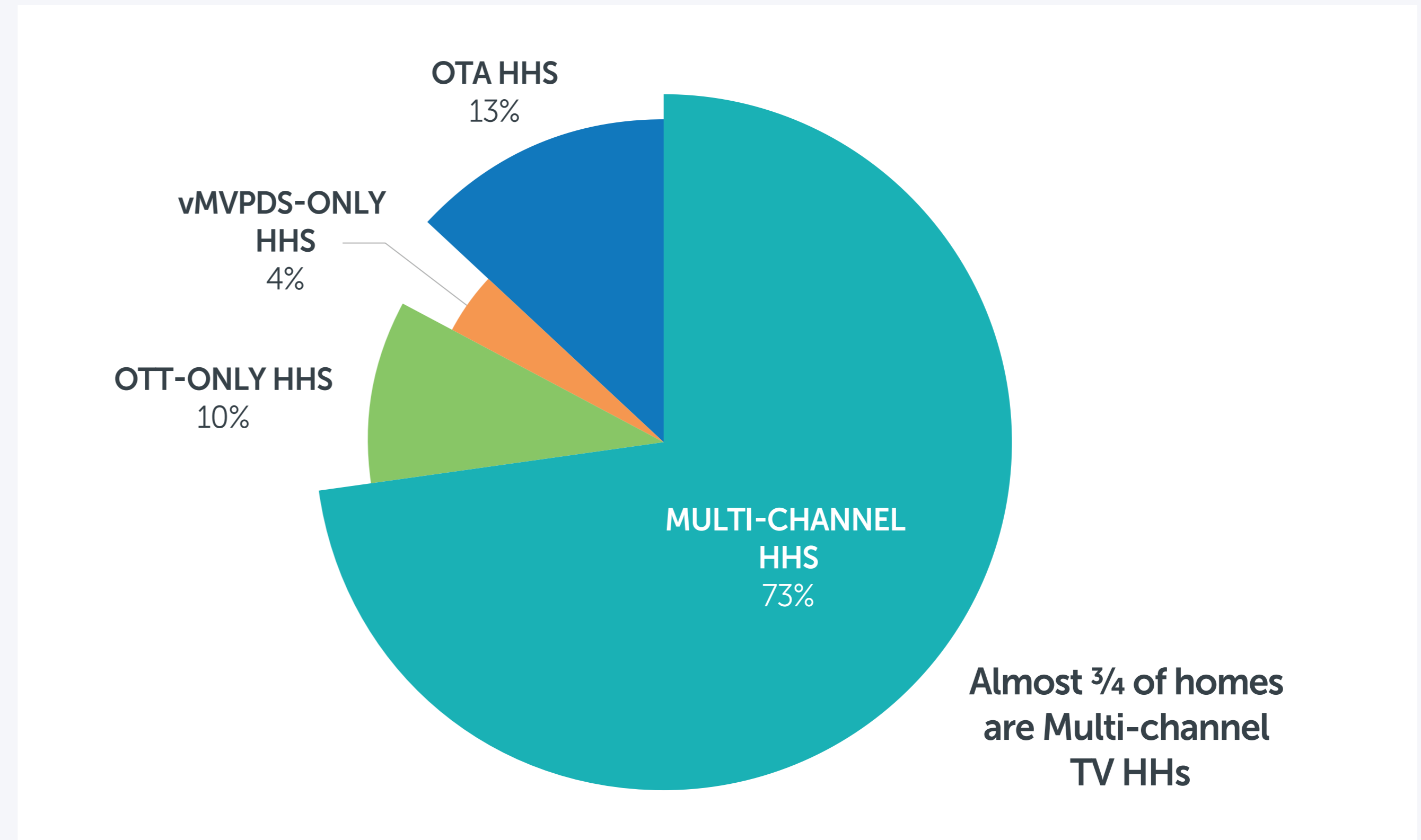
LEFT TO YOUR OWN DEVICES

Source: VAB analysis of Nielsen Total Audience Report 1Q 2018; based on hours:minutes among population; reach based on video-focused app/web use for Smartphone, Computer and Tablet. Mobile and computer-related data is not available for P2-11 or P12-17. Only includes video capable platforms. Internet-Connected Device = devices connected to the TV that are used to stream content such as Apple TV, Roku, Google Chromecast, Amazon Fire TV, Smartphone, Computer/Laptops, etc. Charts exclude time spent with DVD/Blue-ray devices.



OTT-Only Homes
Comprise 10%
Of Total Video
Households;
Separately,
Three-Fourths
Of Homes Are
Multi-channel
TV HHS

Video HHS by Method of Delivery 2018



YOU DOWN WITH OTT?

Source: 2018 S&P Global Market Intelligence, Kagan. As of June 2018.

(1) Multi-channel HHS - Residential multi-channel household count excludes DBS overlap created by households taking multiple multi-channel subscriptions. Includes cable, DBS, telco and other multi-channel platforms. Excludes commercial subs. (2) Online video-only households (OTT or multichannel substitutes) are HHS that rely on unmanaged broadband delivery to view television shows or movies in lieu of a traditional multi-channel subscription. Figure does not include subscribers to virtual multi-channel providers such as Sling TV, PlayStation Vue or DIRECTV NOW. (3) Virtual multi-channels (vMVPD) characterized by unmanaged (Internet/OTT) broadband delivery of aggregated live, linear networks and on-demand content similar to a traditional multi-channel offering for a monthly subscription. (4) Households that receive broadcast network signals using an antenna and do not subscribe to a traditional or virtual multi-channel service, includes HHS with an antenna that also access online video.

Tailor-Made Television: Viewer Segmentation

	DVR User	VOD Viewer	TVE Viewer
Who:	Slightly older than VOD viewers & more affluent than TVE users Median Age: 47 Average HHI: \$92K	Younger than DVR users & the most affluent & educated Median Age: 43 Average HHI: \$93K	The youngest and most ethnically diverse viewers Median Age: 39 Average HHI: \$67K
What:	Drama, Reality, Thrillers & Soap Operas	General Entertainment & Kids Programming	Live TV & Sports, Library Content, Exclusive Content, & Current Episodes
When:	Throughout the day, with the majority occurring outside of Primetime	On their own time, when they can binge-watch multiple episodes	Whenever & Wherever
Why:	Convenience and watching on their own time	Convenience and having a range of content available	Binge-watching premium content on the go
How:	On a TV through a set-top-box recorder or on mobile devices via Cloud DVR through an MVPD	On a TV viewed through MVPDs (Cable, Telco or Satellite Provider) via their set-top-box	Across devices through either a broadcast or cable programmer or an MVPD app

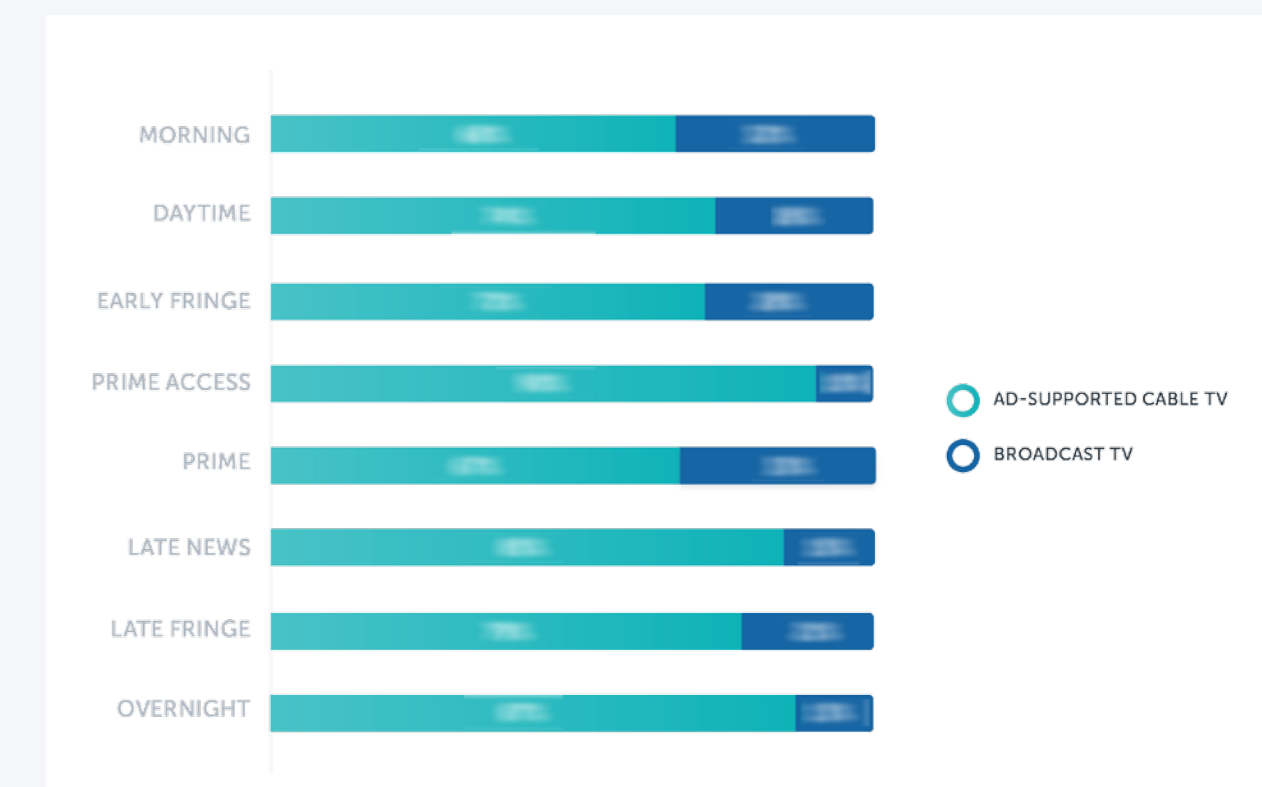
TAILOR-MADE TELEVISION

Source: 2017 GfK MRI Doublebase, DVR User: "How often watch TV programs in the following ways compared to 12 months ago-Using a DVR"; VOD Viewer: "Video-On-Demand # of Times Watched Past 30 days-TV/Shows/Movies (Any)"; TVE Viewer: Watch TV programs in the following ways - Through a TV network's app".

Download The Full 2019 VAB Insights Guide [Here](#) For More On Scale and Reach, Including:

- The trends and dynamics of device usage
- Further exploration of viewing trends in OTT and time shifted TV (DVR, VOD, and TVE)
- Insights and opportunities within Cable
- Richer learnings on Affluent consumers
- A look at the strength of TV viewership during the Summer months
- An additional 45+ charts and insights

	Television	Connected Devices	Smartphone	Tablet	PC Computer	Game Consoles
How:	Via one of their multiple TV sets	Via TV-connected devices such as Apple TV, Roku, Google Chromecast, Amazon Fire TV, SonosHome, CompanionLabs, etc.	Apps/Websites through a smartphone (iPhone, Android, etc.)	Apps/Websites through a tablet (iPad, Android, etc.)	On a desktop or laptop	On an Xbox One, PS4 or Nintendo Switch
Who:	People of all ages & ethnicities. P25+ are frequent users	Skews towards kids and Millennials, good penetration also among P25-49	Internet usage skews Millennials and P25-49 with video usage skewing Millennials	Internet usage skews P25+ with video usage skewing P25-49	Internet usage skews P25-49 with video usage skewing P25-49	Skews towards Teenagers and Millennials
Where:	All home, where they have an average of 2.6 TV sets per household	All home, or someone else's home	Anywhere, anywhere home or on the go	All home, at work or on the go (see commuting)	All home or at work	Usually at home, although newer devices enable "on the go" viewing
When:	Mostly watched live for 9 P25+ average of 33+ hours / week, all day with emphasis on primetime and weekends	2x hours / week on average with 4x hours / week among kids & Millennials, nights & weekends	Video viewing 2.5 hour / week on average and almost 1 hour / week for Millennials, "watching all day"	Video viewing 4.5 hour / week on average and almost 1 hour for P25-49 "watching during the day" nights & weekends	Video viewing 2.7 hour / week on average and a little over 1 hour for P25-49 during the day from nights & weekends	2 hours / week overall and about 4 hours among Teens & Millennials, nights and weekends
What:	A range of long-form premium content via broadcast TV and/or WFTV subscription	Streaming long-form entertainment, sports, children's shows via apps & web	Streaming or downloading of short-form video / clips or long-form content	Streaming or downloading of short-form video / clips or long-form content	Streaming or downloading of short-form video / clips or long-form content	Streaming or downloading of short-form video / clips or long-form content



A lifebuoy with orange and white segments floats in dark blue water. A bright light source in the upper left corner creates a shimmering trail of light particles across the water's surface. The text "Safety and Trust" is overlaid in white on the right side of the image.

Safety and Trust

Safety and Trust: Insights Directory

It's a Matter of Trust
Influence of Media on Voters

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Risky Business
Brand Safety on YouTube

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Safety and Trust: Key Takeaways

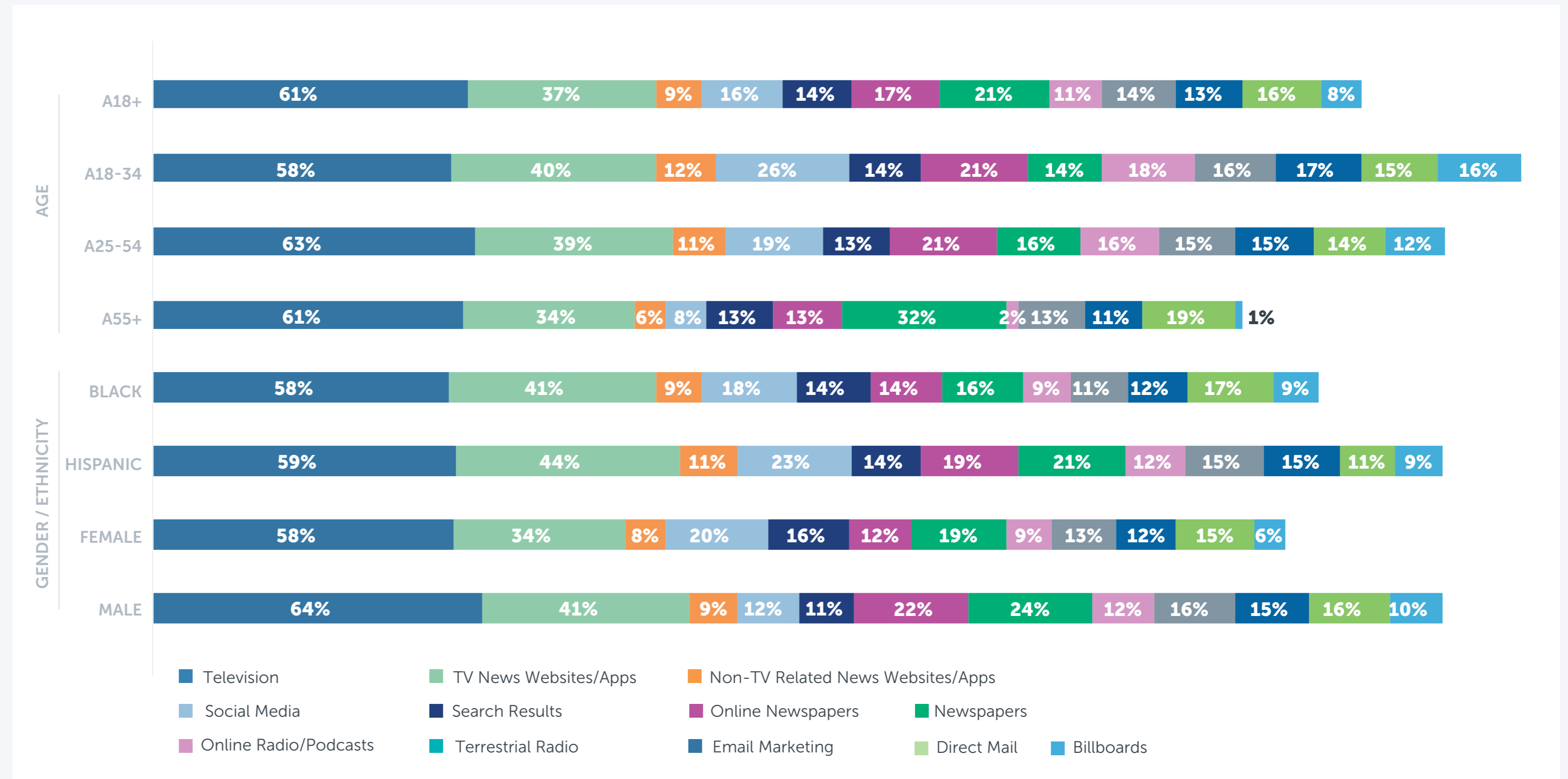
- Premium, multi-screen video platforms offer an unmatched ad environment, brand safety, and buy transparency. This results in heightened trust amongst consumers and advertisers
- A safe content environment has implications for advertisers as viewers often withdraw from offensive content and engage more deeply with premium, brand-safe programming
- With a reported 400 hours of video uploaded each minute, and without a screening process at the point of upload, can brand safety on YouTube be guaranteed?

Trust Translates Into Influence As Multi-Screen TV Is Much More Likely To Influence Voters' Final Decision Than Any Other Media



Survey Fun Fact: 55% of adults 18+ and 65% of adults 18-34 feel that political ads on the radio all seem the same to them.

Which Of The Following *Influences Your Final Decision* When Voting For Political Candidates and Issues?



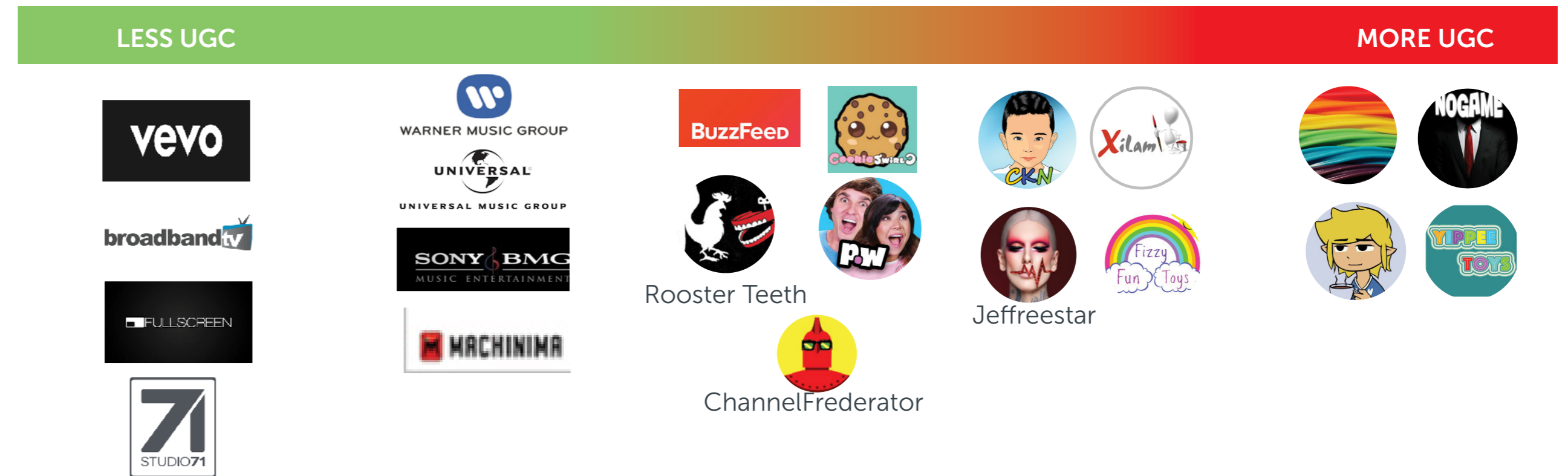
IT'S A MATTER OF TRUST

Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Numbers do not equal 100% as multiple selections were allowed. Q17: Which of the following influences your final decision when voting for political candidates and issues...? Q24: How much do you agree or disagree with the following statements? Political ads on the radio all seem the same to me. Respondents who answered Agree or Strongly Agree. Total Respondents=1,003.

These Long-Tail Channels Are Highly Likely To Be **User Generated Content** And Therefore Can Potentially Present Brand Safety Concerns

YouTube Quintile Analysis (Time Spent)
Measured Properties

	Quintile 1 (the most viewed properties, collectively representing the <u>top 20%</u> of total time spent on YouTube)	Quintile 2	Quintile 3	Quintile 4	Quintile 5 (the least viewed properties, collectively representing the <u>bottom 20%</u> of total time spent on YouTube)
# of Properties	4	14	113	629	16,658
% of Properties	<1%	<1%	<1%	4%	95%

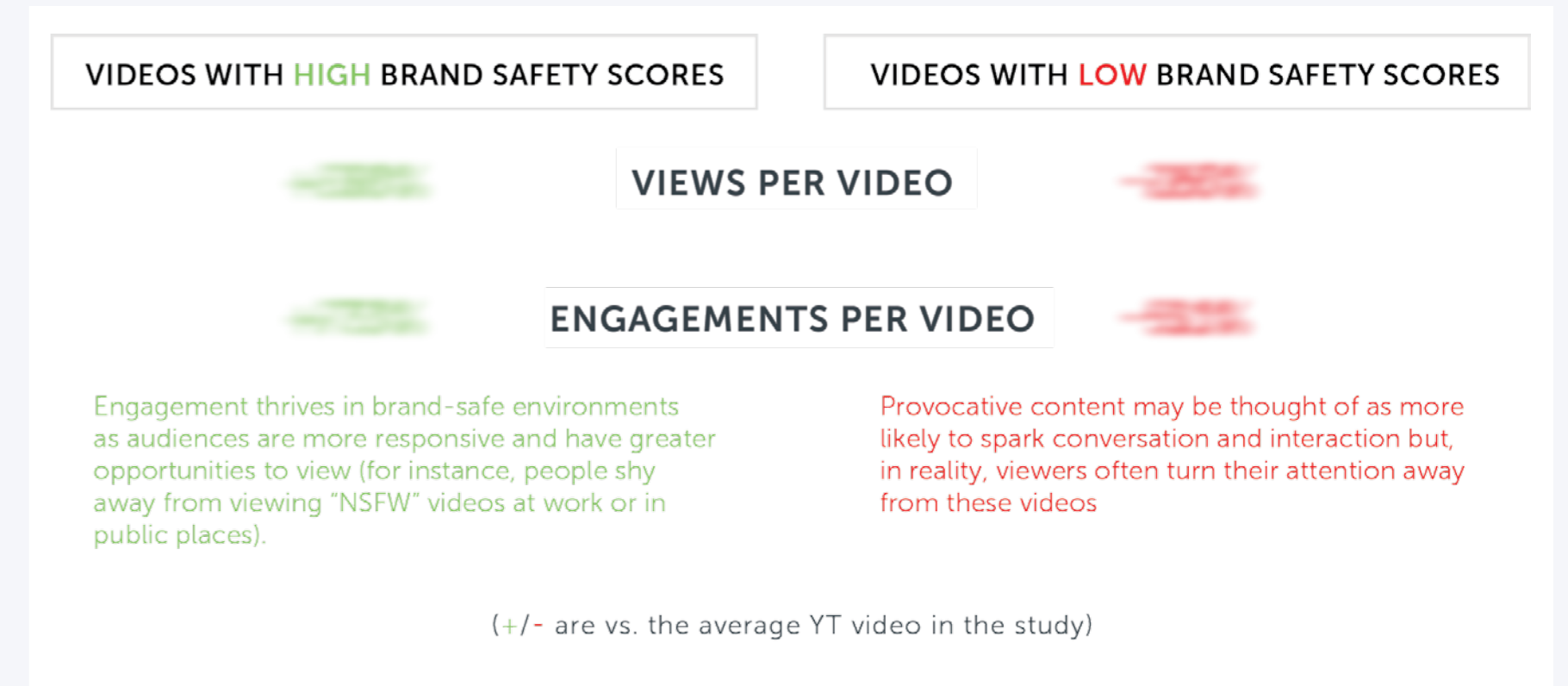


RISKY BUSINESS

Source: VAB analysis of Comscore YouTube Partners Report - total measured properties, 17,398, Video Metrix Multi-Platform, Feb 2018, Total Audience; The number of total channels is based upon the unexpanded view of the Partners Report, with channels rolled-up in to their MCNs. This is done in order to avoid double counting channels that are already included within their MCNs; 'Properties' defined as MCN or Channel. Channel examples (logos) are taken from the top 5% of each quintile

Download The Full 2019 VAB Insights Guide [Here](#) For More On Safety and Trust, Including:

- Insights from our custom political survey on the critical role played by TV in the voting decision
- A review of the anatomy of YouTube and why brand safety has been problematic
- Custom analysis demonstrating the popularity and virality of TV-generated content on YouTube
- An additional 10+ charts and insights



% WHO AGREE	A18+	A18-34	A25-54	A55+	BLACK	HISPANIC	FEMALE	MALE
Local Cable provides extensive news coverage and political information	60%	67%	67%	48%	64%	60%	60%	60%
Local Cable has quality news programs	58%	67%	60%	47%	67%	59%	60%	57%
Local Cable provides an informative local perspective on national issues	60%	72%	67%	47%	72%	60%	60%	60%
I rely upon local cable news to cover local issues that affect my community	60%	70%	60%	33%	60%	60%	60%	60%
I watch more Local Cable news now than in the past	47%	64%	55%	32%	48%	57%	50%	48%



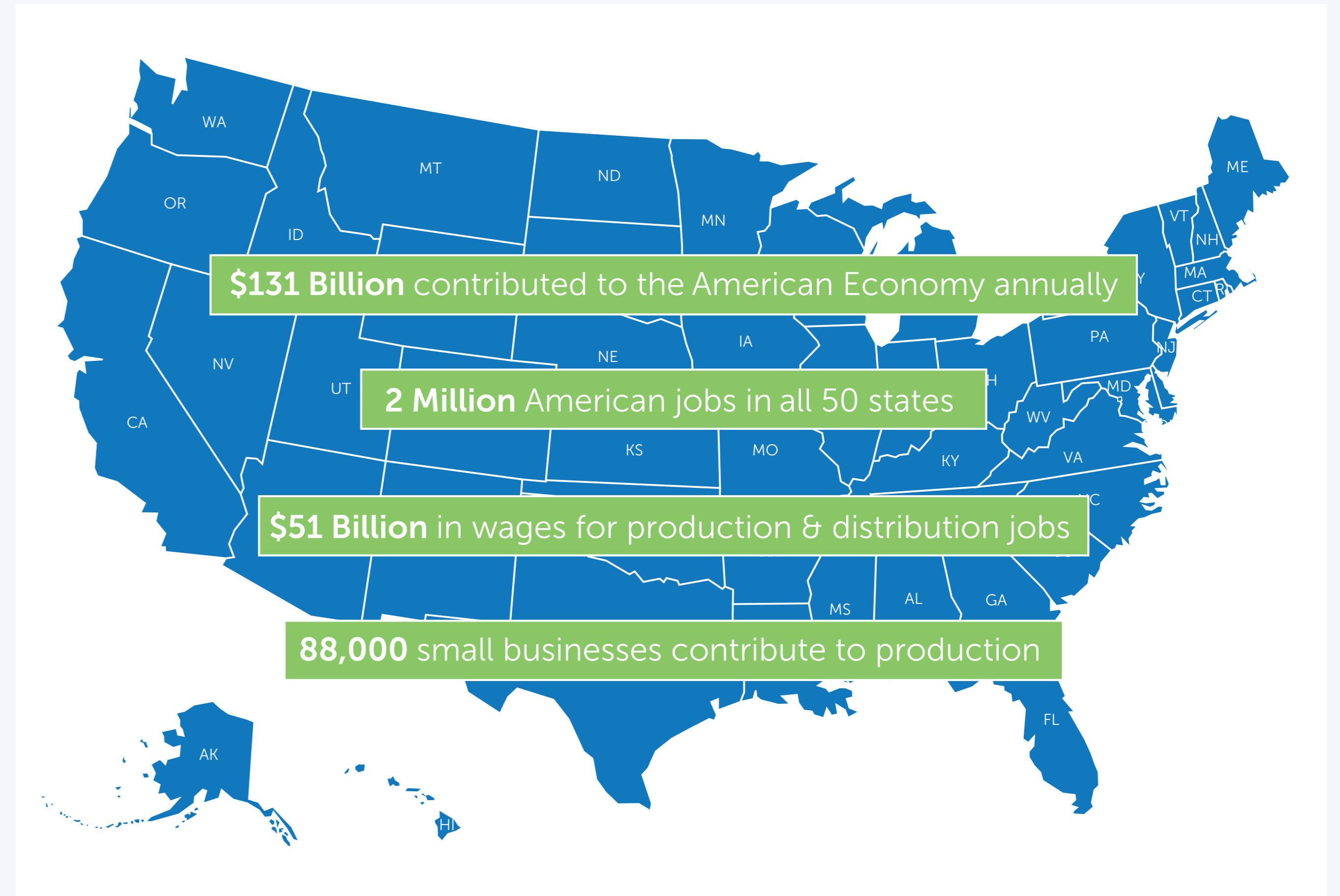
Cinema

IAB
VIDEO ADVERTISING BUREAU

Cinema: Key Takeaways

- Cinema offers tremendous scale in a brand-safe, engaging viewing environment
- The emotional impact of film has the ability to shape culture and influence society
- Its emotional impact, combined with its scale, results in the power to influence commerce in industries such as restaurants/dining, literature, tourism, theater and music

The Film & Television Industry Is Not Just New York & Los Angeles, It's An Industry That Employs **Millions** Across All 50 States



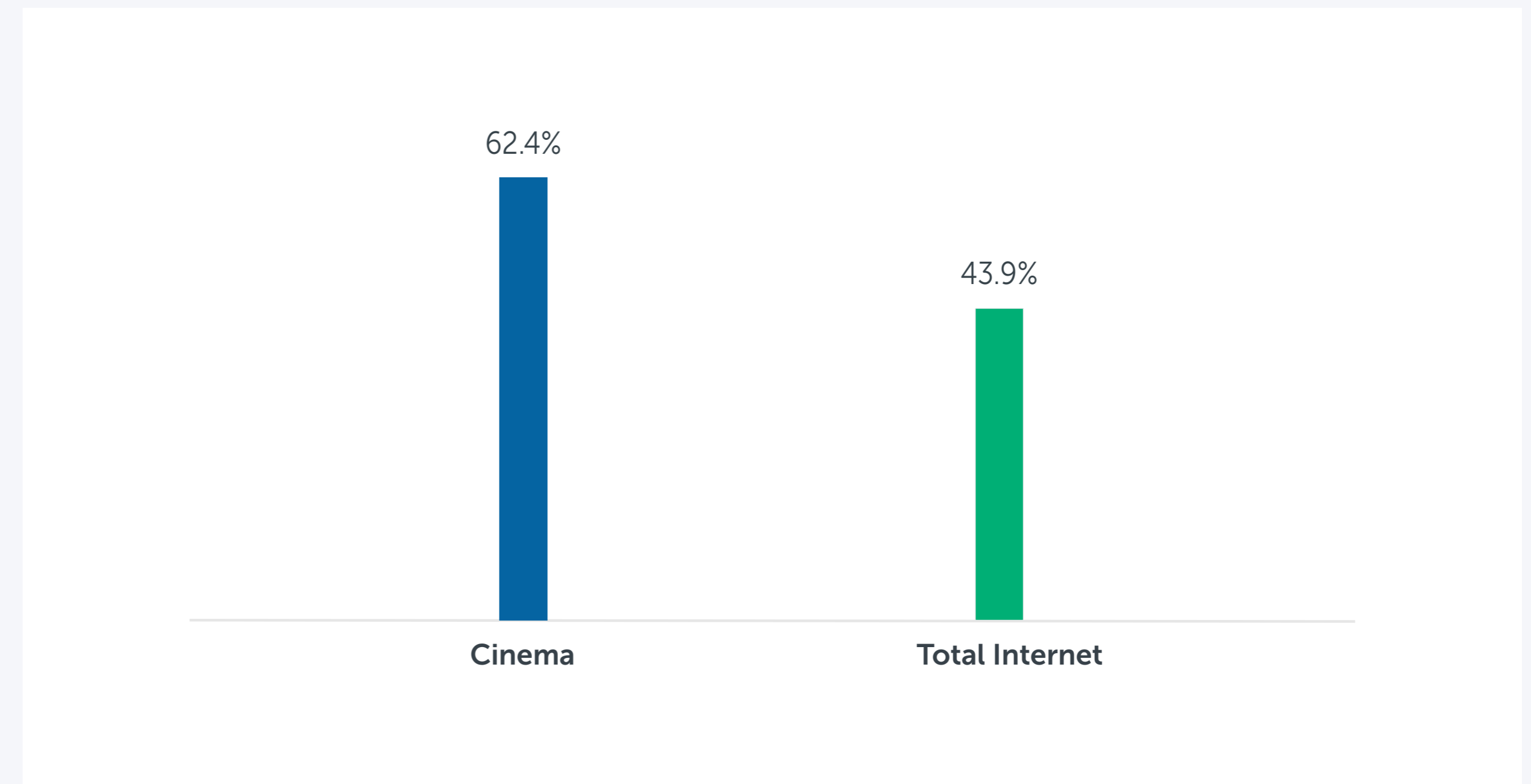
THE SURROUND SOUND OF CINEMA

Source: Motion Picture Association of America, data based on 2015 for film & television industry.
<https://www.mpa.org/jobs-economy/>

Gen Z & Millennials
Represent Over
Half Of The
Movie-Going
Audience, Making It
A More Targeted
Medium Than
The Internet

P6-34 Audience Composition

Cinema vs. Total Internet



THE SURROUND SOUND OF CINEMA

Source: Nielsen Cinema Audience Report, October 2017 for cinema audience composition. Comscore October 2017, mediametrix multiplatform for Total Internet based on unique visitors. Composition for both cinema and digital based on P2+.

Download The Full 2019 VAB Insights Guide [Here](#) For More On Cinema, Including:

- Further demonstration of the cultural impact of Cinema
- Additional detail on the impact Cinema has on commerce
- An additional 10+ charts and insights

Frozen led to a [redacted] increase in tourism to Norway



Harry Potter led to a [redacted] + increase in tourism to all filming locations ([redacted] in some places)



The city where the *Twilight* series takes place – Forks, WA – saw nearly [redacted] visitors...not bad for a city of [redacted]



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