

VAB - MARKETER'S GUIDE - 2020

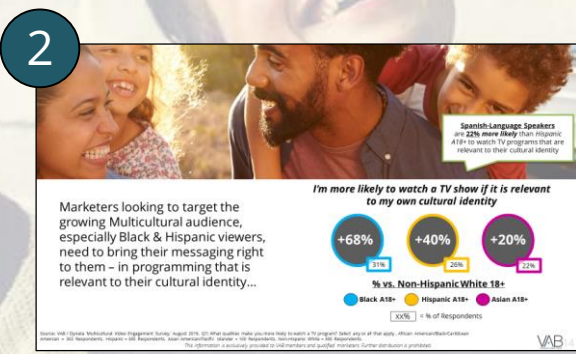
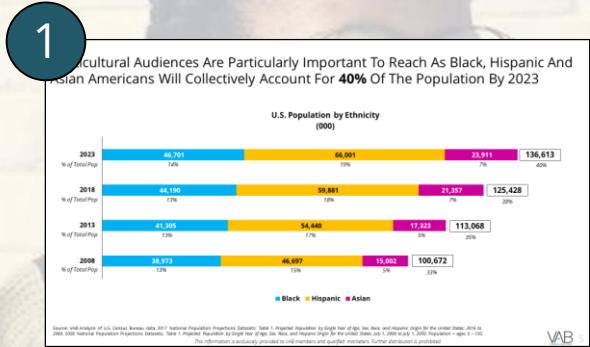
Discover The Difference

How Culturally Relevant Video Content Drives Action
By Multicultural Audiences

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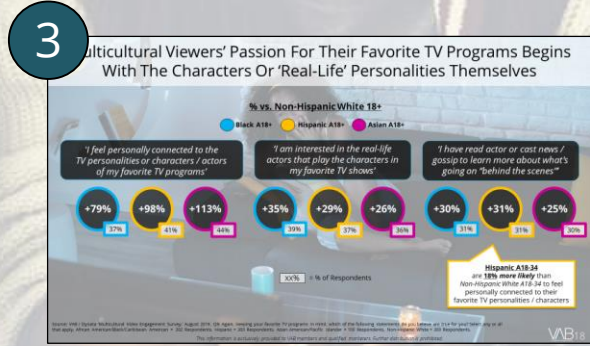
1 Understanding The Opportunity

The Economic Growth Of Multicultural Audiences



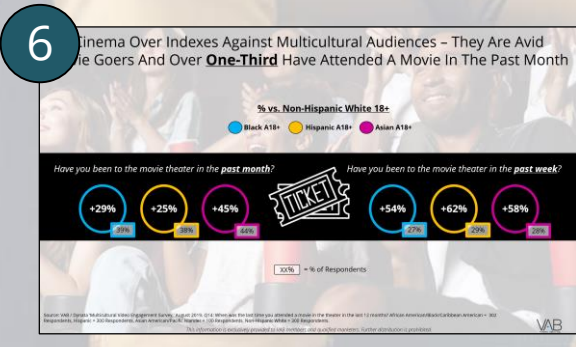
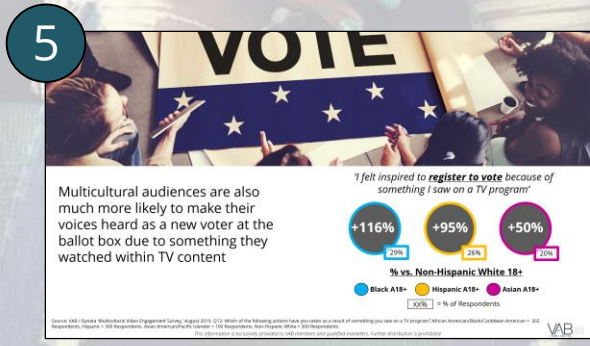
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Discover The Difference

Multicultural audiences are a major force in today's economy. In fact, Black, Hispanic and Asian demographics will collectively account for **40% of the population** by 2023. Although they skew much younger than the average population, their aggregated annual spending has **increased by 57%** over the last 10 years to **\$2.2 trillion**.

With media fragmentation intensifying, the delivery of **relevant content is vital** for grabbing consumer's attention and can help generate rich emotional connections among viewers. This is why not only reaching, but increasing relevancy among, valuable multicultural segments to spur consumer actions and business outcomes for brands has never been more important.

To help marketer's understand multicultural audiences' engagement with premium video content, we conducted the **'Multicultural Video Engagement' custom study** in partnership with *Dynata*. Within this survey, we sought to identify how Black, Hispanic and Asian audiences interact with culturally relevant content, how they further engage with this content both online and offline, and how their connection with relevant content drives involvement and consumer action.

As marketers compete for consumers' attention, it's crucial to **recognize the unique connections** that multicultural audiences have with premium video and how engaging through culturally relevant programming can foster brand recognition and trust that inspires purchases and ignites involvement.

In recognition of these unique connections, we invite you to **discover the difference** as we compare our findings against a Non-Hispanic White demographic and across the three multicultural segments that are the focal point of this study.

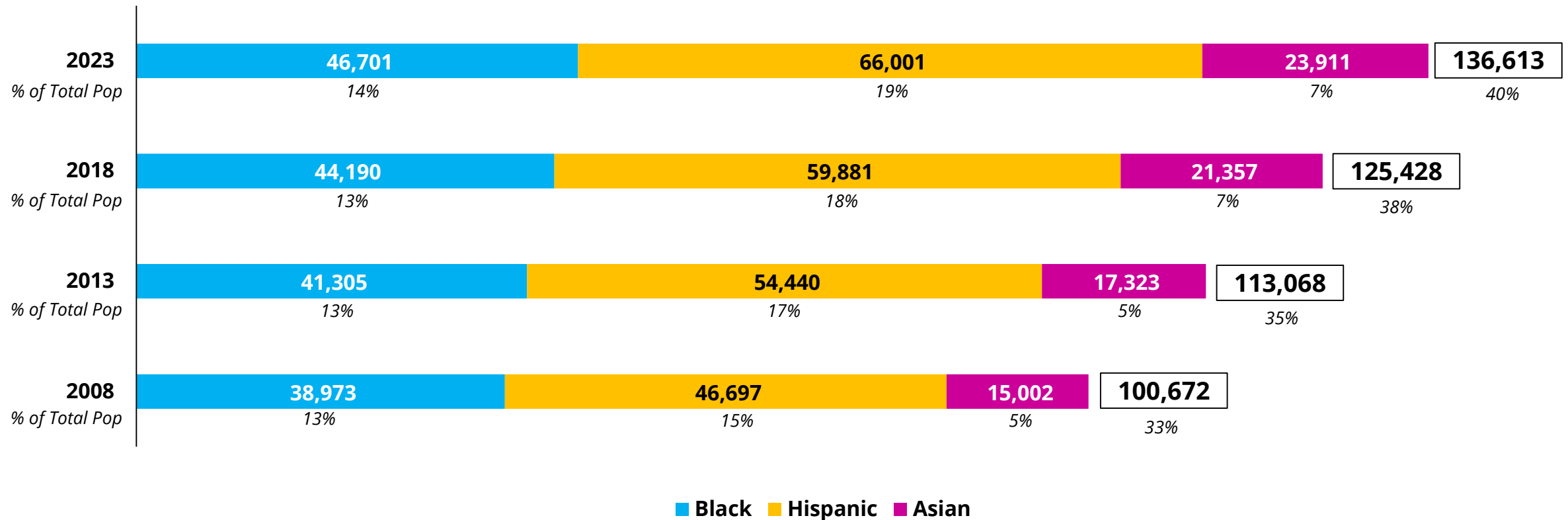
Understanding The Opportunity

Multicultural audiences are a major force within the U.S. economy and they only continue to grow, so reaching and increasing relevancy among these valuable consumers to spur action has never been more important



Multicultural Audiences Are Particularly Important To Reach As Black, Hispanic And Asian Americans Will Collectively Account For **40%** Of The Population By 2023

**U.S. Population by Ethnicity
(000)**

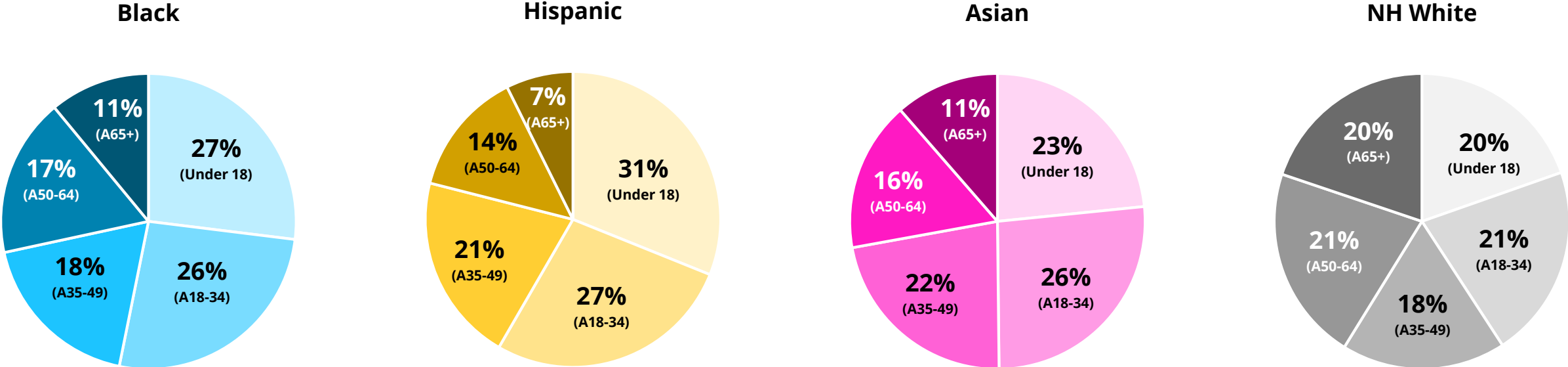


Source: VAB Analysis of U.S. Census Bureau data, 2017 National Population Projections Datasets: *Table 1. Projected Population by Single Year of Age, Sex, Race, and Hispanic Origin for the United States: 2016 to 2060.* 2008 National Population Projections Datasets, *Table 1. Projected Population by Single Year of Age, Sex, Race, and Hispanic Origin for the United States: July 1, 2000 to July 1, 2050.* Population = age 0 - 100.

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Multicultural Audiences Also Skew Much Younger Than Non-Hispanic White Demographic – With Approximately **One-Half** Under The Age Of 34

2018 U.S. Population by Age & Ethnicity (000)

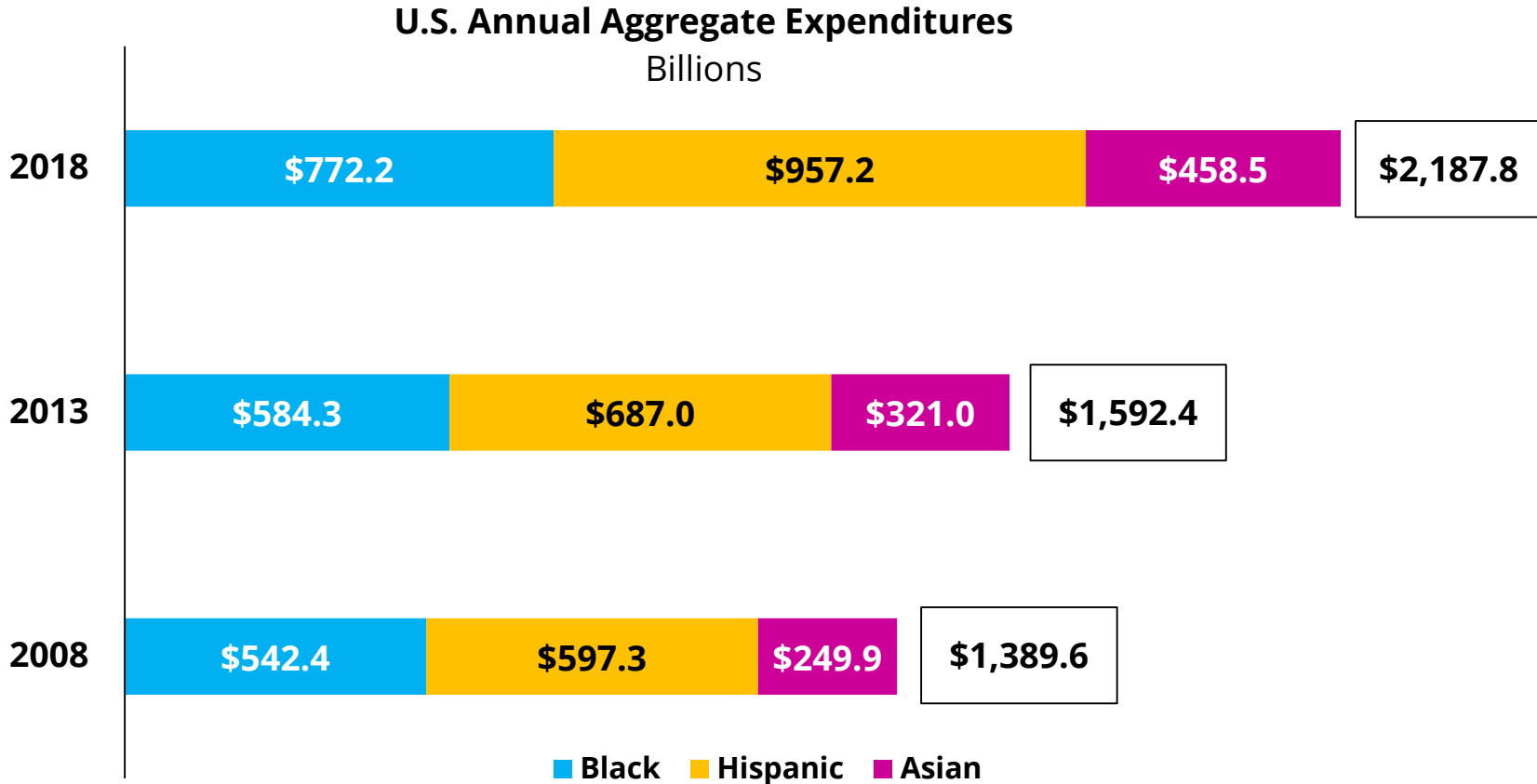


Source: VAB Analysis of U.S. Census Bureau data, 2017 National Population Projections Datasets: Table 1. Projected Population by Single Year of Age, Sex, Race, and Hispanic Origin for the United States: 2016 to 2060.

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Although Younger, Multicultural Audiences Have Collectively Increased Their Spending Over The Last 10 Years By **57%**, Or Almost **\$2.2 Trillion**



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, 2008, 2013 & 2018; Hispanic or Latino origin of reference person: Shares of annual aggregate expenditures and sources of income, Consumer Expenditure Survey, 2008, 2013 & 2018.*

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Marketers' Ability To Enhance Relevancy Among Targeted Audiences Is Critical, Especially Against Valuable Multicultural Audiences, As Media Fragmentation Increases Competition For Consumer Attention



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Relevant Content Is Vital For Grabbing Consumers' Attention And Can Help Generate Rich Emotional Connections Among Viewers



Meet A Consumer Need

Consumers are thankful when advertising reminds them about something they need

+



Meet A Moment In Time

They like when an ad fits with what they are watching/listening to/reading

+



Evoke An Emotion

They like ads that make them feel something

In fact, ads that are relevant to a viewer are deemed more believable and appealing and ad recall is much higher

Campaigns Defined as 'Relevant' vs. Average Campaign



Source: Xandr, *It's About Time: Relevance Report 2019*.

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Since Relevancy Is So Important In Today's Advertising Environment, VAB Conducted A Custom Study To Understand Multicultural Audiences' Connection With Premium Video Content And How Their Engagement Inspires Action



To do this, VAB commissioned *Dynata* to conduct the 'Multicultural Video Engagement' Survey, fielded online in August 2019. In order to get a solid sample size across the major multicultural segments, the results are based on 1,002 adults 18+ who identified themselves as Black (302 respondents), Hispanic (300 respondents), Asian (100 respondents), or Non-Hispanic White (300 respondents).

Within this survey, we sought to understand how multicultural audiences interact with culturally relevant content, how they engage further with this content through online and 'real life' interactions and conversations, and how their passion and commitment drives greater involvement and consumer action.

We hope these findings inspire marketers as they discover the differences across multicultural audiences...

Building Commitment

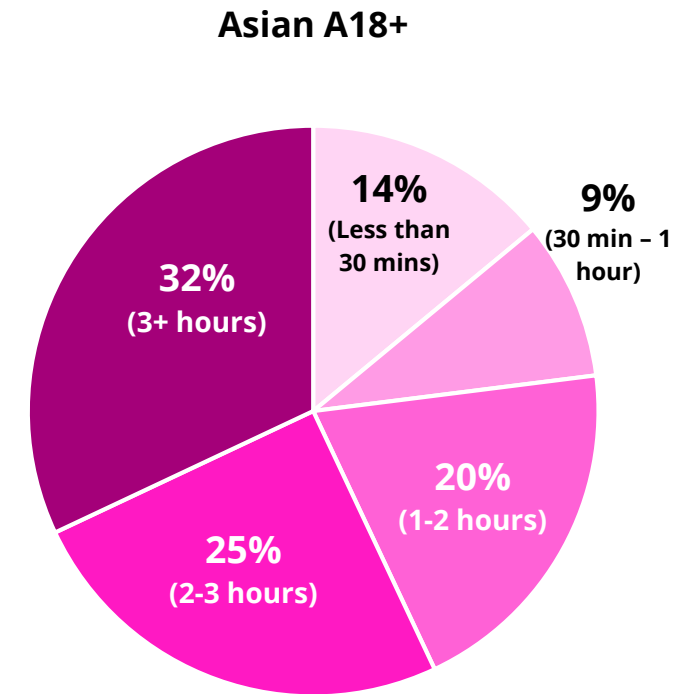
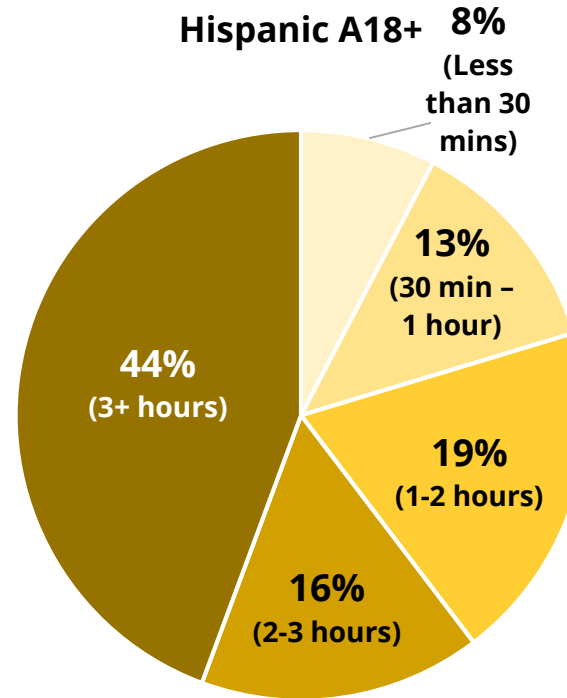
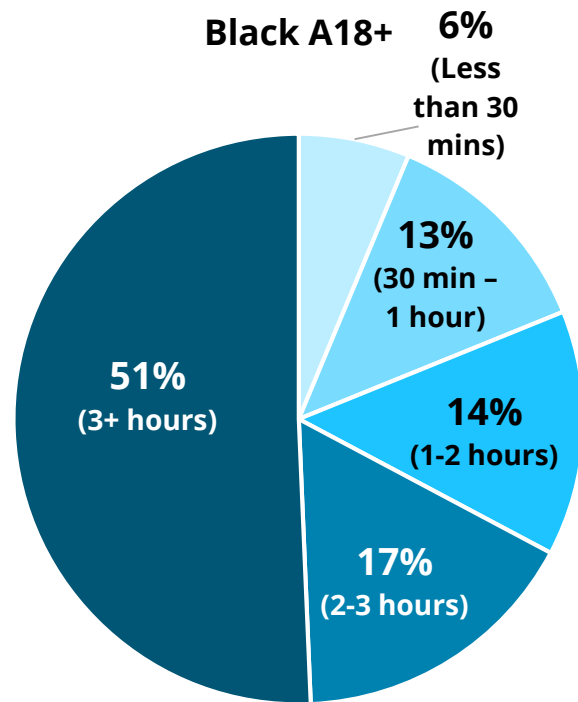
Multicultural audiences have a deep connection with TV programming and respond positively to culturally relevant programming



A Majority Of Multicultural Audiences Commit At Least Two Hours A Day To Watching Broadcast Or Cable TV Programming Across Devices And Platforms

How much time do you spend watching Broadcast or Cable TV content in a given day?

(across all devices and platforms)



Source: VAB / Dynata 'Multicultural Video Engagement Survey,' August 2019. S3. On average, how much time do you spend watching Broadcast (i.e. ABC, CW, NBC, Univision, Fox) or Cable (i.e. FX, ESPN Deportes, AMC, BET, TBS, HGTV, etc) TV content in a given day? Please include any viewing that takes place on a TV, mobile device, computer/laptop, through an app/website (i.e. CBS All Access, Hulu, etc), streaming or on-demand service. African American/Black/Caribbean American = 302 Respondents, Hispanic = 300 Respondents, Asian American/Pacific Islander = 100 Respondents, Non-Hispanic White = 300 Respondents.

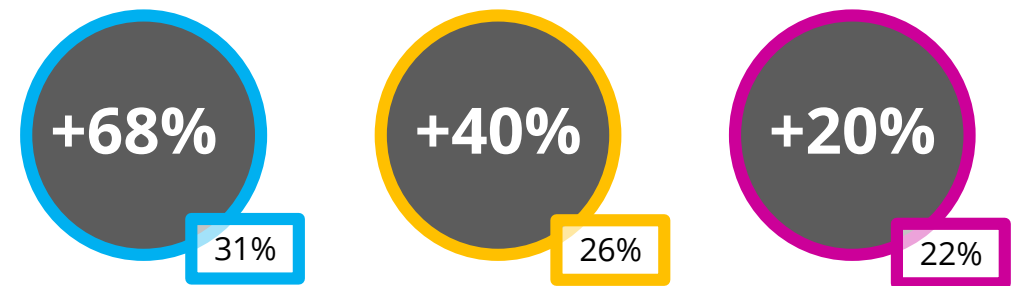
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Spanish-Language Speakers are **22% more likely** than *Hispanic A18+* to watch TV programs that are relevant to their cultural identity

Marketers looking to target the growing Multicultural audience, especially Black & Hispanic viewers, need to bring their messaging right to them – in programming that is relevant to their cultural identity...

'I'm more likely to watch a TV show if it is relevant to my own cultural identity'



% vs. Non-Hispanic White 18+

● Black A18+ ● Hispanic A18+ ● Asian A18+

XX% = % of Respondents

Source: VAB / Dynata 'Multicultural Video Engagement Survey,' August 2019. Q7: What qualities make you more likely to watch a TV program? Select any or all that apply . African American/Black/Caribbean American = 302 Respondents, Hispanic = 300 Respondents, Asian American/Pacific Islander = 100 Respondents, Non-Hispanic White = 300 Respondents.

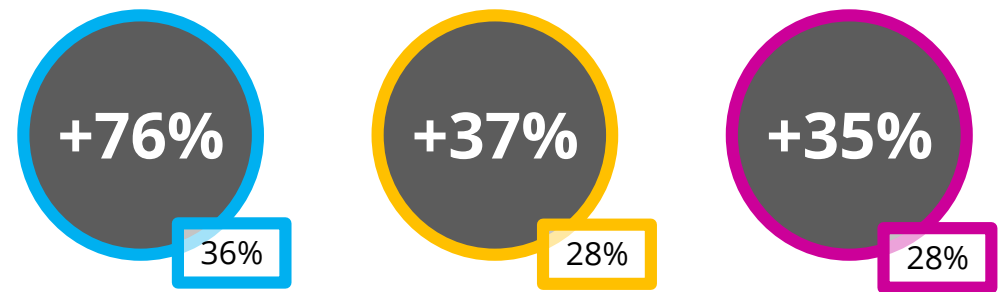
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Spanish-Language Speakers are **33% more likely** than *Hispanic A18+* to watch TV programs that feature a diverse cast

...As well as programs that feature a diverse cast; Black, Hispanic, Asian and Spanish-speaking viewers are more likely to be interested in programming that is representative of people from a mix of ethnicities & cultures including their own.

'I'm more likely to watch a TV show if it features a diverse cast'



% vs. Non-Hispanic White 18+

● Black A18+ ● Hispanic A18+ ● Asian A18+

XX% = % of Respondents

Source: VAB / Dynata 'Multicultural Video Engagement Survey,' August 2019. Q7: What qualities make you more likely to watch a TV program? Select any or all that apply. African American/Black/Caribbean American = 302 Respondents, Hispanic = 300 Respondents, Asian American/Pacific Islander = 100 Respondents, Non-Hispanic White = 300 Respondents.

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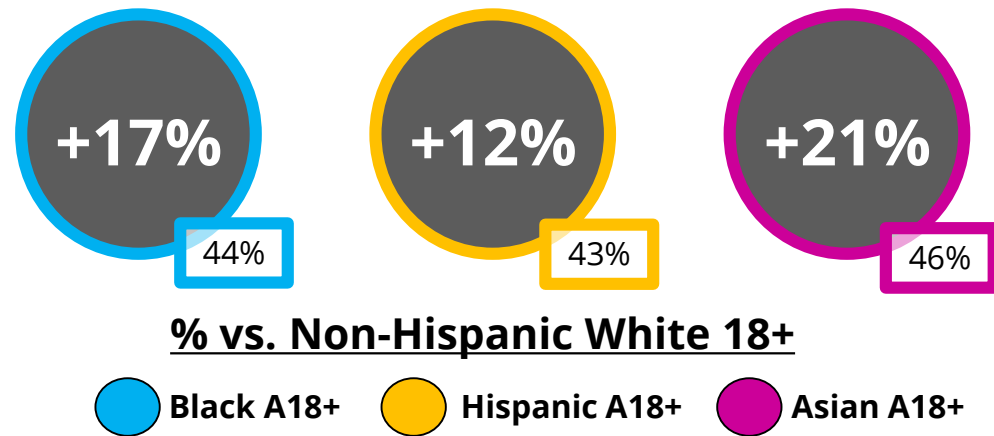


Black A18-34
 are **20% more likely** than
 Non-Hispanic White A18-34 to watch
 TV programs with characters /
 personalities who are relatable

Hispanic A18-34
 are **18% more likely** than
 Non-Hispanic White A18-34 to watch
 TV programs with characters /
 personalities who are relatable

They are also more likely to be interested in programs that showcase main characters or personalities who are relatable to themselves and their environment – some of these characters are not necessarily likeable either (i.e., ‘love to hate’ personalities)

‘I’m more likely to watch a show if I find the main TV personalities or characters relatable’



% vs. Non-Hispanic White 18+

● Black A18+ ● Hispanic A18+ ● Asian A18+

XX% = % of Respondents

Source: VAB / Dynata ‘Multicultural Video Engagement Survey,’ August 2019. Q7: What qualities make you more likely to watch a TV program? Select any or all that apply. African American/Black/Caribbean American = 302 Respondents, Hispanic = 300 Respondents, Asian American/Pacific Islander = 100 Respondents, Non-Hispanic White = 300 Respondents.

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Generating Engagement

Multicultural viewers' passion and commitment for premium video content extends both online to like-minded fans and 'in real life' across family and friends

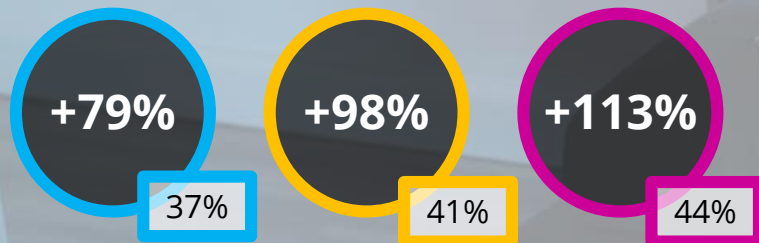


Multicultural Viewers' Passion For Their Favorite TV Programs Begins With The Characters Or 'Real-Life' Personalities Themselves

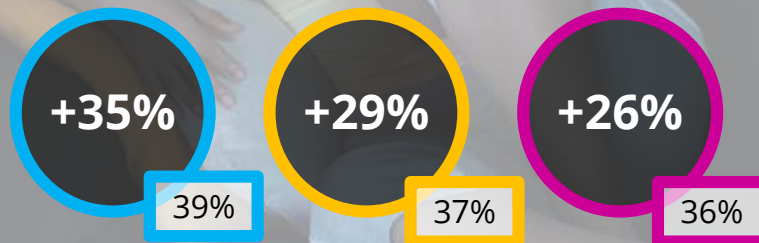
% vs. Non-Hispanic White 18+

● Black A18+ ● Hispanic A18+ ● Asian A18+

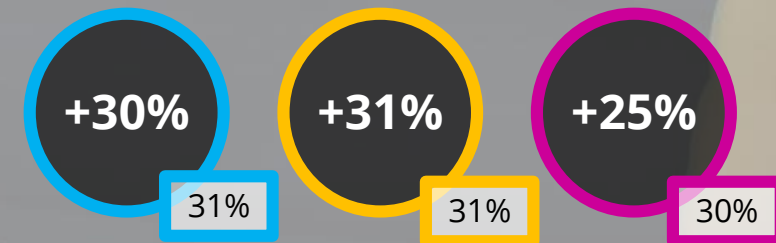
'I feel personally connected to the TV personalities or characters / actors of my favorite TV programs'



'I am interested in the real-life actors that play the characters in my favorite TV shows'



'I have read actor or cast news / gossip to learn more about what's going on "behind the scenes"'



XX% = % of Respondents

Hispanic A18-34 are **18% more likely** than Non-Hispanic White A18-34 to feel personally connected to their favorite TV personalities / characters

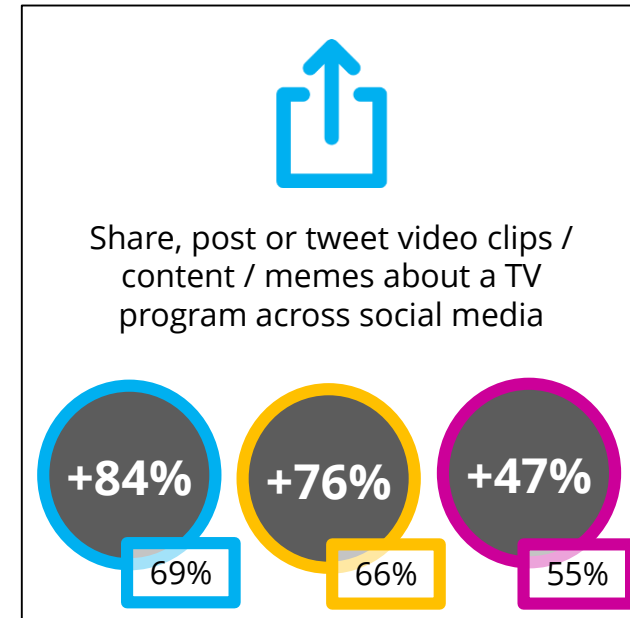
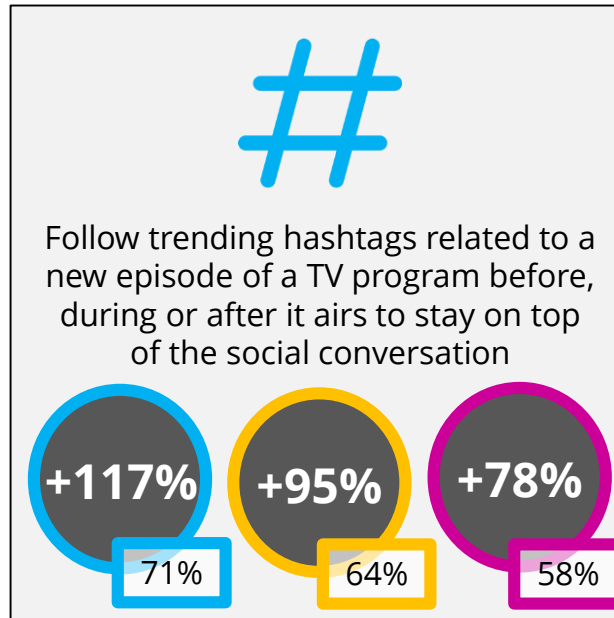
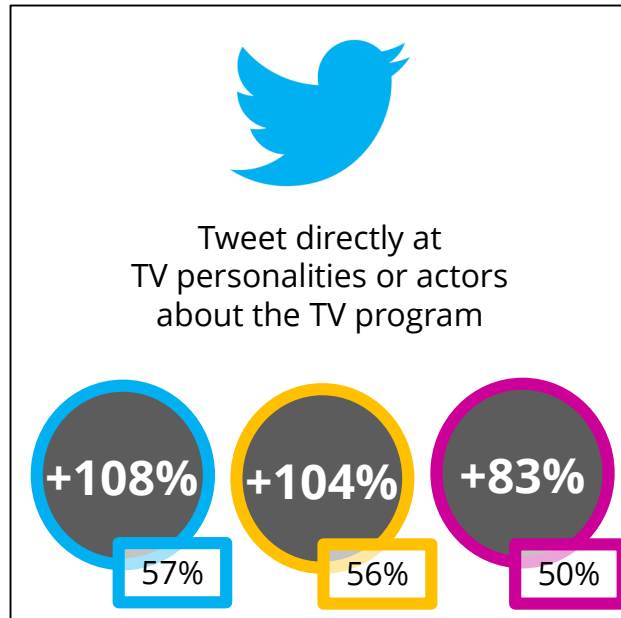
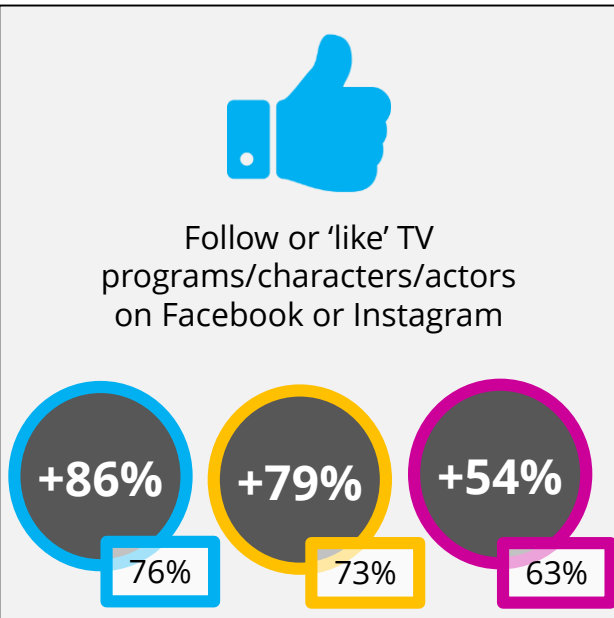
Source: VAB / Dynata 'Multicultural Video Engagement Survey,' August 2019. Q9: Again, keeping your favorite TV programs in mind, which of the following statements do you believe are true for you? Select any or all that apply. African American/Black/Caribbean American = 302 Respondents, Hispanic = 300 Respondents, Asian American/Pacific Islander = 100 Respondents, Non-Hispanic White = 300 Respondents.

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And This Passion Extends To Social Media Where They Are Much More Likely To Directly Interact With TV Programs, Actors And Related Hashtags

% vs. Non-Hispanic White 18+

● Black A18+
 ● Hispanic A18+
 ● Asian A18+



Spanish-Language Speakers are **21% more likely** than Hispanic A18+ to Tweet directly at TV personalities or actors about the TV program

Black A18-34 are **13% more likely** than Non-Hispanic White A18-34 to follow trending hashtags related to a new episode of a TV program

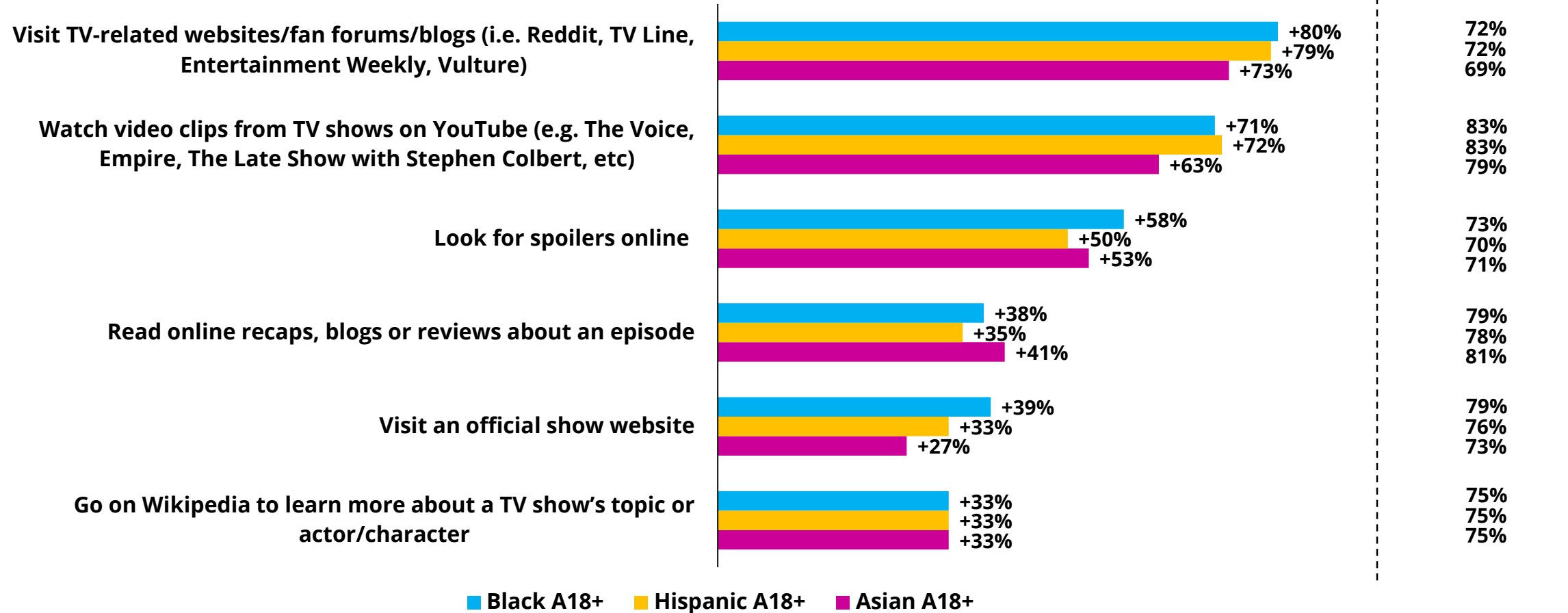
XX% = % of Respondents

Source: VAB / Dynata 'Multicultural Video Engagement Survey,' August 2019. Q8: Keeping your favorite TV programs in mind, please indicate how often you do the following on social media. Respondents Answer = Always, Frequently or Occasionally. African American/Black/Caribbean American = 302 Respondents, Hispanic = 300 Respondents, Asian American/Pacific Islander = 100 Respondents, Non-Hispanic White = 300 Respondents.

Beyond Social Media, Multicultural Audiences Are Also Feeding Their Passion For TV Programming By Seeking Out More Relevant Content Online

How Often Do You Do the Following?

% vs. Non-Hispanic White 18+



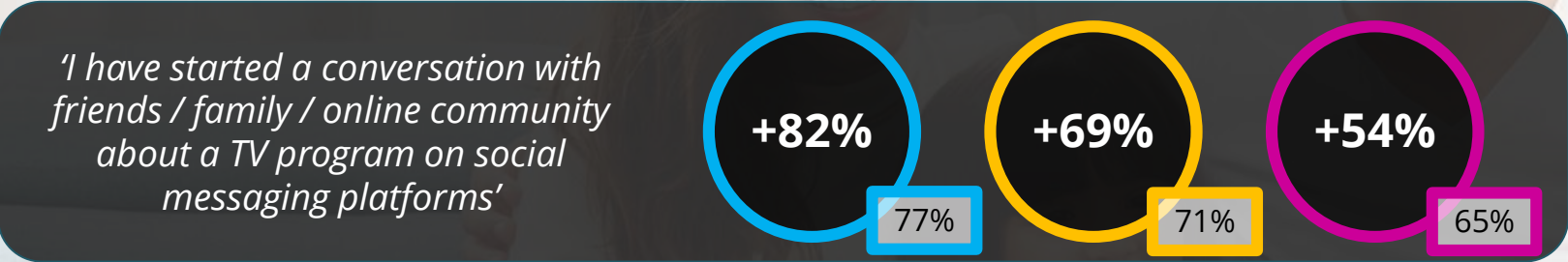
Source: VAB / Dynata 'Multicultural Video Engagement Survey,' August 2019. Q10: Please indicate how often you do the following on social media. Respondents Answer = Always, Frequently or Occasionally. African American/Black/Caribbean American = 302 Respondents, Hispanic = 300 Respondents, Asian American/Pacific Islander = 100 Respondents, Non-Hispanic White = 300 Respondents.

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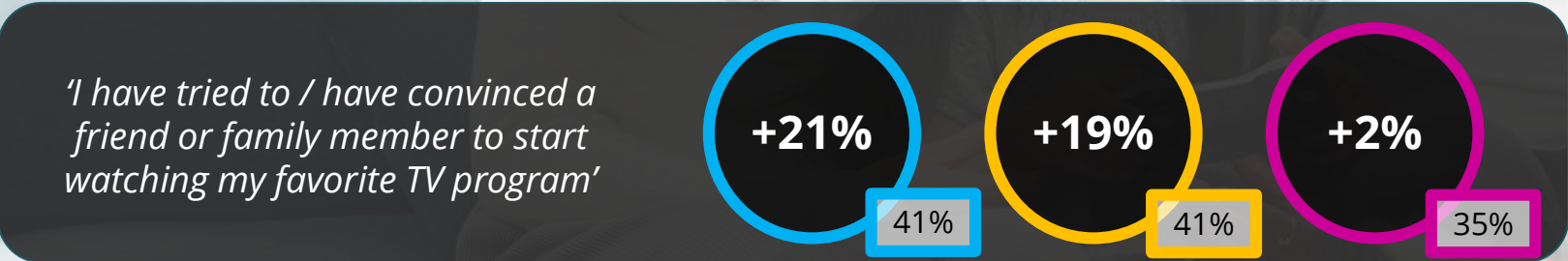
Multicultural Viewers Are Also More Likely To Share Their Interests Around TV Content With Family And Friends Both Online And 'In Real Life'

% vs. Non-Hispanic White 18+

● Black A18+
 ● Hispanic A18+
 ● Asian A18+



Spanish-Language Speakers are **13% more likely** than *Hispanic A18+* to have started a conversation with friends / family / online community about a TV program on social messaging platforms



Hispanic A18-34 are **39% more likely** than *Non-Hispanic White A18-34* to have tried to / have convinced a friend or family member to start watching their favorite TV program

XX% = % of Respondents

Source: VAB / Dynata 'Multicultural Video Engagement Survey,' August 2019. Q8: Keeping your favorite TV programs in mind, please indicate how often you do the following on social media. Respondents Answer = Always, Frequently or Occasionally. Q13: Which of the following statements are true for you? Select any or all that apply. African American/Black/Caribbean American = 302 Respondents, Hispanic = 300 Respondents, Asian American/Pacific Islander = 100 Respondents, Non-Hispanic White = 300 Respondents.

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Inspiring Buying Decisions

Culturally relevant TV programming creates passion and commitment among multicultural audiences that drives consumer actions which delivers greater outcomes for brands

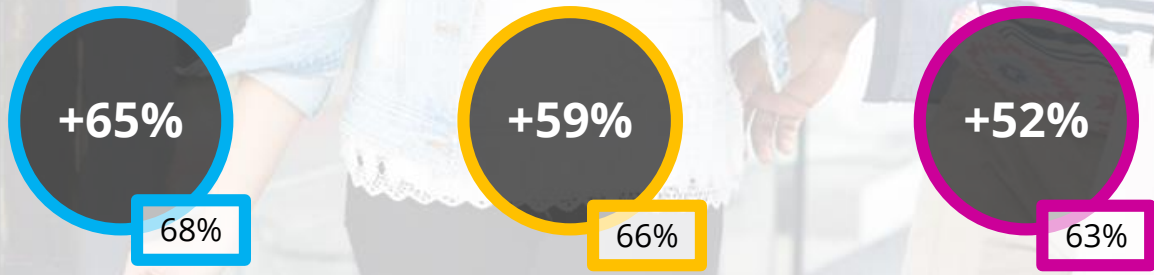


Multicultural audiences have a high affinity toward their favorite TV programming, characters and personalities and this relevancy is much more likely to drive product purchases

% vs. Non-Hispanic White 18+

- Black A18+
- Hispanic A18+
- Asian A18+

*'I have **purchased a product** I saw while watching a TV program or endorsed by a favorite TV personality / actor'*



XX% = % of Respondents

Source: VAB / Dynata 'Multicultural Video Engagement Survey,' August 2019. Q10: Please indicate how often you do the following. Respondents Answer = Always, Frequently or Occasionally. African American/Black/Caribbean American = 302 Respondents, Hispanic = 300 Respondents, Asian American/Pacific Islander = 100 Respondents, Non-Hispanic White = 300 Respondents.

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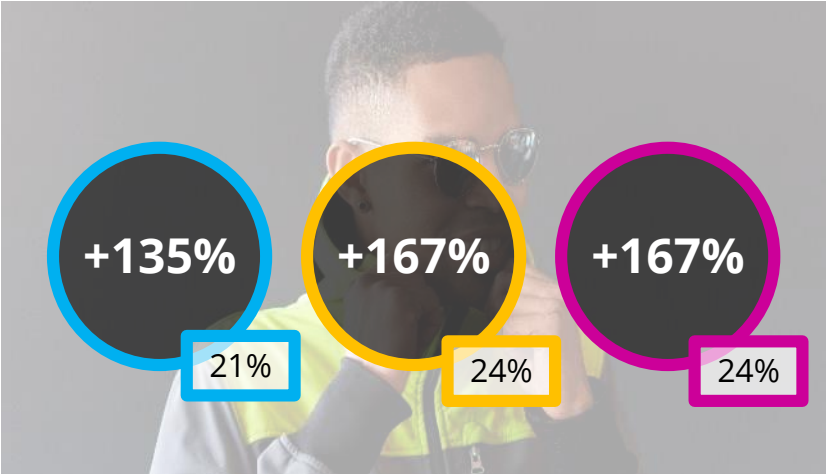


The Emotional Connection Multicultural Viewers Have With Their Favorite TV Characters / Personalities Can Also Influence Their Personal Style Choices

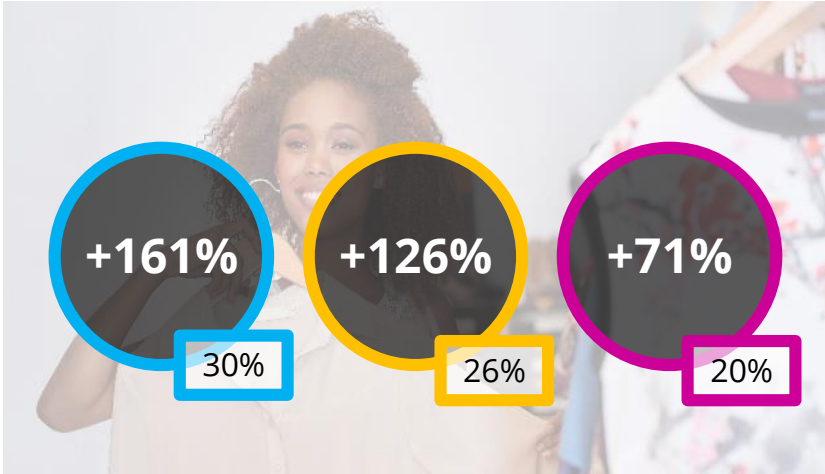
% vs. Non-Hispanic White 18+

● Black A18+
 ● Hispanic A18+
 ● Asian A18+

'I have modeled my personal style after one of my favorite TV personalities or characters'



'I have purchased clothing similar to what my favorite TV personality or character wears on the show'



Spanish-Language Speakers are **16% more likely** than *Hispanic A18+* to have modeled their personal style after one of their favorite TV personalities / characters

XX% = % of Respondents

Black A18-34 are **26% more likely** than *Non-Hispanic White A18-34* to purchase clothing that is similar to what their favorite TV personality / character wears on the show

Source: VAB / Dynata 'Multicultural Video Engagement Survey,' August 2019. Q11: Which of the following statements are true for you? Select any or all that apply. African American/Black/Caribbean American = 302 Respondents, Hispanic = 300 Respondents, Asian American/Pacific Islander = 100 Respondents, Non-Hispanic White = 300 Respondents.

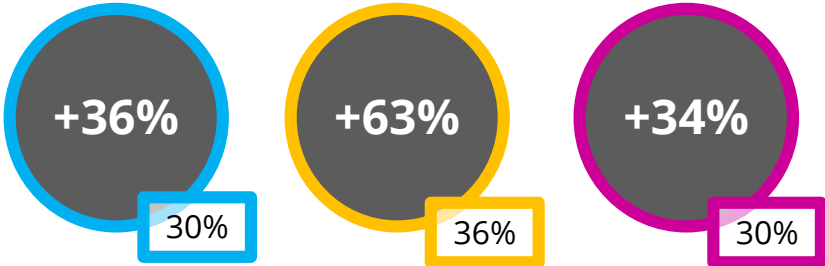
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Culturally Relevant TV Programming Is More Likely To Inspire Viewers When It Comes To Food, Both At Home Or At A Restaurant

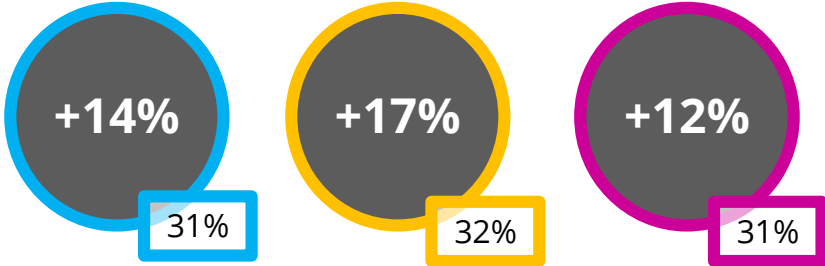
% vs. Non-Hispanic White 18+



'I have eaten at a restaurant / purchased a cook book because it, or it's chef / owner / author, was featured on a TV show'



'I was inspired to make a food recipe based on a TV show or segment'



XX% = % of Respondents

Source: VAB / Dynata 'Multicultural Video Engagement Survey,' August 2019. Q11: Which of the following statements are true for you? Select any or all that apply. African American/Black/Caribbean American = 302 Respondents, Hispanic = 300 Respondents, Asian American/Pacific Islander = 100 Respondents, Non-Hispanic White = 300 Respondents.

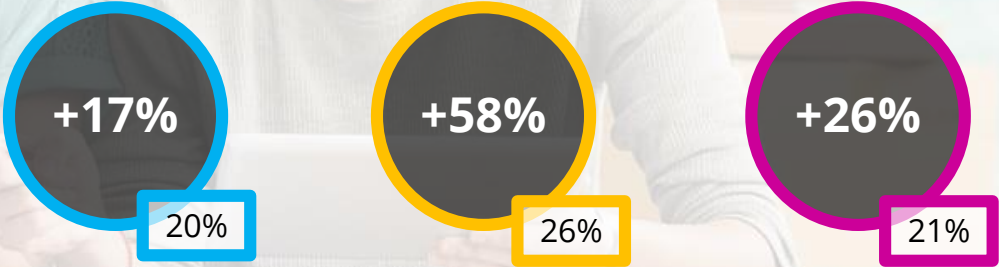
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TV programming is also more likely to inspire Multicultural audiences to take on a home improvement project, especially among Hispanic viewers

% vs. Non-Hispanic White 18+

● Black A18+ ● Hispanic A18+ ● Asian A18+

'I have done a home improvement project inspired by something I saw on a TV show'



XX% = % of Respondents

Source: VAB / Dynata 'Multicultural Video Engagement Survey,' August 2019. Q11: Which of the following statements are true for you? Select any or all that apply. African American/Black/Caribbean American = 302 Respondents, Hispanic = 300 Respondents, Asian American/Pacific Islander = 100 Respondents, Non-Hispanic White = 300 Respondents.

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Igniting Involvement

Beyond inspiring purchase decisions, culturally relevant TV programming is a 'force for good' and can motivate multicultural audiences to get involved in social causes that are important within today's society

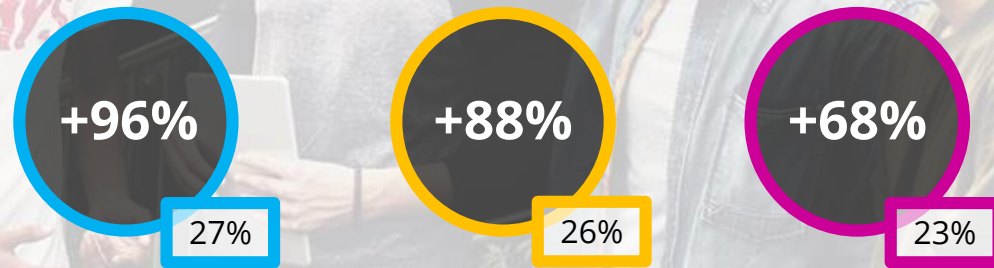


TV programming plays an important role when it comes to inspiring viewers to get involved in social issues that are critical to their community, especially for Black audiences

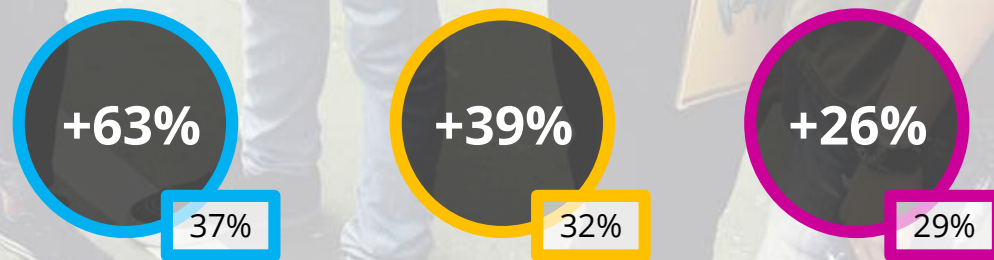
% vs. Non-Hispanic White 18+

● Black A18+ ● Hispanic A18+ ● Asian A18+

*'I felt inspired to **take a social action / take up a cause** because of something I saw on a TV program'*



*'I felt inspired to have **sought out more info about a social cause or historical event** because of something I saw on a TV program'*



Black & Hispanic A18-34 are **23% more likely** than *Non-Hispanic White A18-34* to have sought out more information about a social cause or a historical event because of something they saw on TV

XX% = % of Respondents

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Source: VAB / Dynata 'Multicultural Video Engagement Survey,' August 2019. Q12: Which of the following actions have you taken as a result of something you saw on a TV program? African American/Black/Caribbean American = 302 Respondents, Hispanic = 300 Respondents, Asian American/Pacific Islander = 100 Respondents, Non-Hispanic White = 300 Respondents.

Powerful And Culturally Relevant Storytelling Within TV Content Also Has The Ability To Energize Multicultural Audiences To Make Their Voices Heard

% vs. Non-Hispanic White 18+

● Black A18+ ● Hispanic A18+ ● Asian A18+

'I felt inspired to attend a rally / protest because of something I saw on a TV program'

'I felt inspired to sign a petition because of something I saw on a TV program'



XX% = % of Respondents

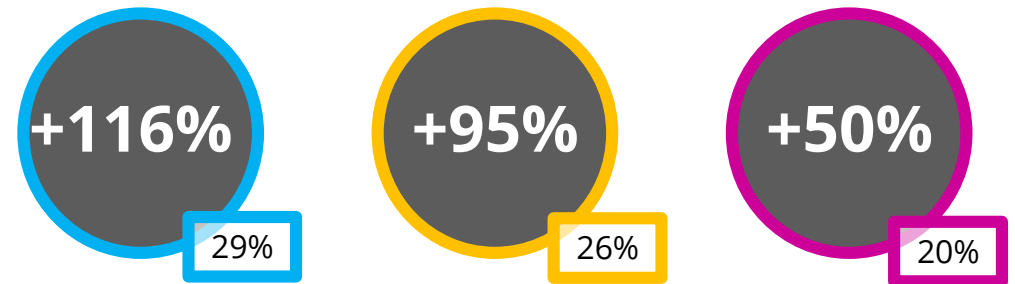
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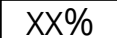
Multicultural audiences are also much more likely to make their voices heard as a new voter at the ballot box due to something they watched within TV content

*'I felt inspired to **register to vote** because of something I saw on a TV program'*



% vs. Non-Hispanic White 18+

 **Black A18+**  **Hispanic A18+**  **Asian A18+**

 = % of Respondents

Source: VAB / Dynata 'Multicultural Video Engagement Survey,' August 2019. Q12: Which of the following actions have you taken as a result of something you saw on a TV program? African American/Black/Caribbean American = 302 Respondents, Hispanic = 300 Respondents, Asian American/Pacific Islander = 100 Respondents, Non-Hispanic White = 300 Respondents.

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Exploring The Cinematic Experience

How Multicultural representation
in Cinema leads to box office
successes and how advertising
drives the avid multicultural
moviegoer to take consumer action



Cinema Over Indexes Against Multicultural Audiences – They Are Avid Movie Goers And Over **One-Third** Have Attended A Movie In The Past Month

% vs. Non-Hispanic White 18+

● Black A18+ ● Hispanic A18+ ● Asian A18+

Have you been to the movie theater in the **past month**?

Have you been to the movie theater in the **past week**?



XX% = % of Respondents

Source: VAB / Dynata 'Multicultural Video Engagement Survey,' August 2019. Q14: When was the last time you attended a movie in the theater in the last 12 months? African American/Black/Caribbean American = 302 Respondents, Hispanic = 300 Respondents, Asian American/Pacific Islander = 100 Respondents, Non-Hispanic White = 300 Respondents.

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Recent Relevant Films With Predominantly Black, Hispanic / Latino Or Asian Casts Have Been Very Effective At Over Delivering Multicultural Audiences

Average Audience Composition by Ethnicity



African-American / Black

African-American/Black Moviegoers were **3x more likely** to see *Black Panther* vs. average attendance



Hispanic/Latino

Hispanic/Latino Moviegoers were **2.5x more likely** to see *The Curse of La Llorona* vs. average attendance



Asian/Pacific Islander

Asian Moviegoers **were 5x more likely** to see *Crazy Rich Asians* vs. average attendance

Source: MPAA, 2018 Theme Report, Comscore/Screen Engine; MarketWatch, *Strong Asian-American turnout helped propel 'Crazy Rich Asians' to No. 1*, Warner Bros. demographic information, 8/21/2018; Deadline, *How Hispanic Audiences Drove New Line's 'La Llorona' To \$26.5M Easter Weekend B.O. Win*, 4/21/2019.

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Due to their passion and desire to seek out relevant and entertaining content, Multicultural audiences have driven the major successes of several recent films that featured a diverse cast

THE **WRAP**

Diverse Audiences Bought Majority of Tickets for Half of Top 10 Films at Box Office, Study Finds

Bloomberg

'Black Panther' Reveals Black Audiences' Box Office Superpower

DEADLINE

How Hispanic Audiences Drove New Line's 'La Llorona' To \$26.5M Easter Weekend B.O. Win

Market**Watch**

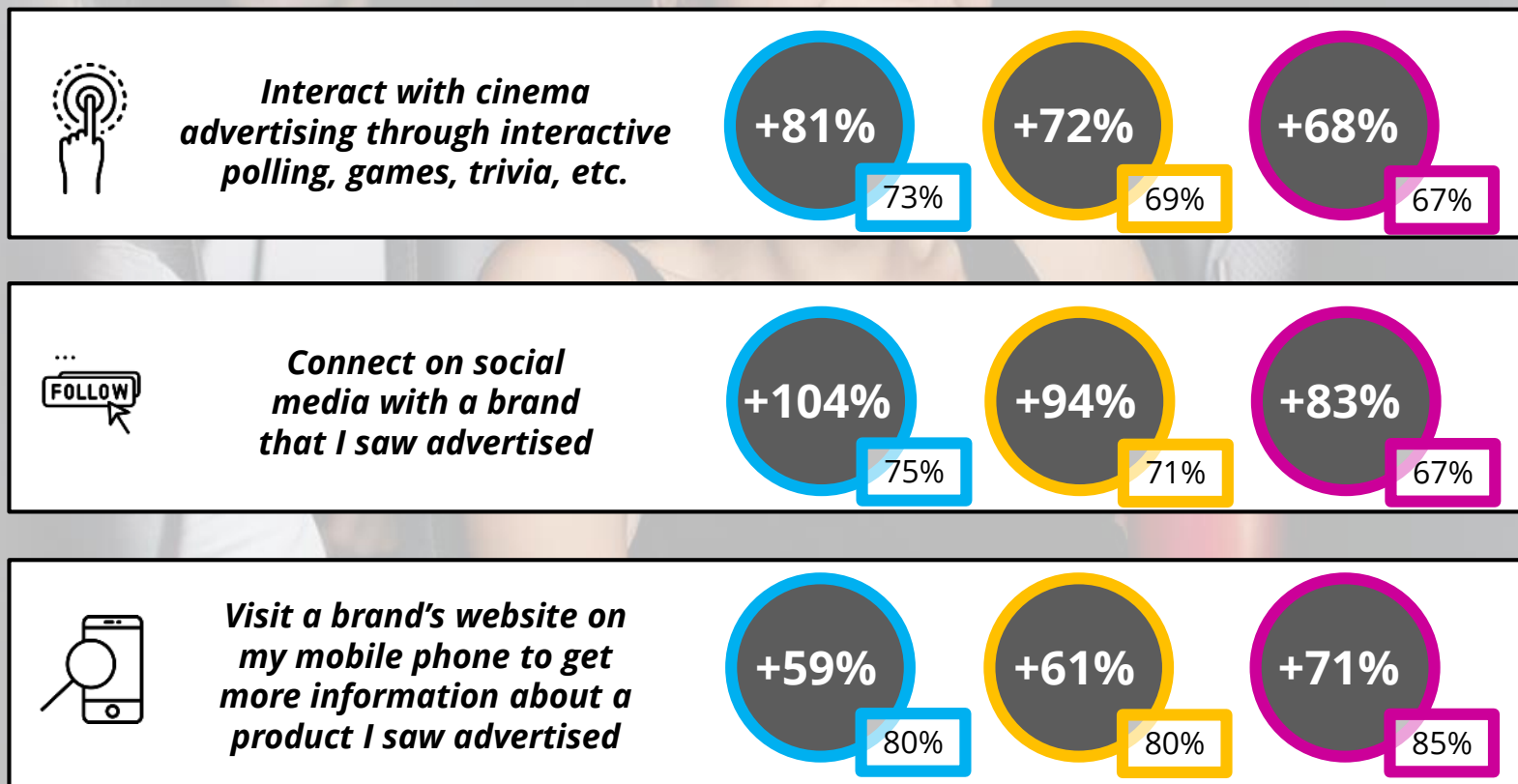
Strong Asian-American turnout helped propel 'Crazy Rich Asians' to No. 1

Driving Consideration & Intent: Multicultural Audiences Are More Likely To Engage With Cinema Advertisers Through In-Theater Games, Social Media And Brand Websites

% vs. Non-Hispanic White 18+

● Black A18+ ● Hispanic A18+ ● Asian A18+

Have You Taken the Following Actions After Seeing an Ad in a Movie theater?



XX% = % of Respondents

Source: VAB / Dynata 'Multicultural Video Engagement Survey,' August 2019. Q16: How often do you interact with cinema advertising through interactive polling, games, trivia, etc.? Q17: How often have you done the following as a result of seeing an advertisement in the movie theater or in the theater lobby? Q15: After seeing an ad in a movie theater, how often do you visit a brand's website on your mobile phone to get more information about a product you saw advertised? Respondents Answer = Always, Frequently or Occasionally. African American/Black/Caribbean American = 302 Respondents, Hispanic = 300 Respondents, Asian American/Pacific Islander = 100 Respondents, Non-Hispanic White = 300 Respondents.

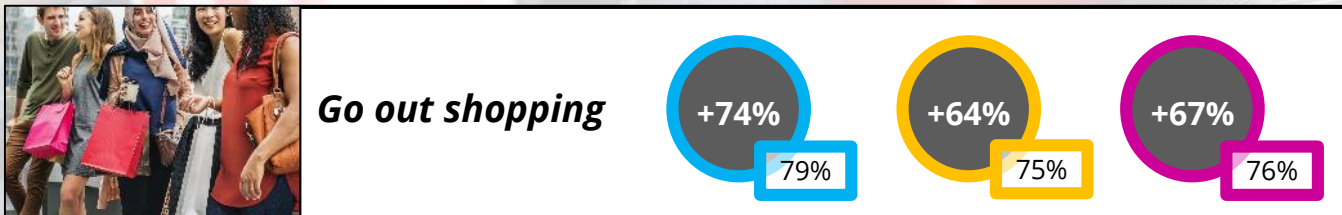
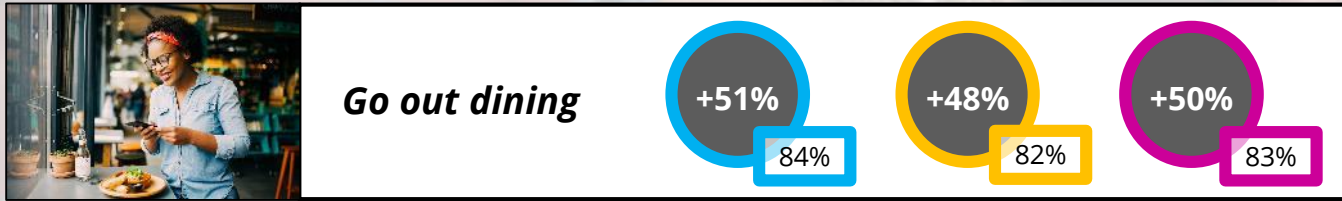
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Inspiring Purchases: Beyond Buying Movie Tickets, Multicultural Audiences Are Also More Likely To Actively Spend On Brands They See Advertised Within Cinema

Have You Taken the Following Actions After Seeing an Ad in a Movie Theater?

% vs. Non-Hispanic White 18+

● Black A18+
 ● Hispanic A18+
 ● Asian A18+



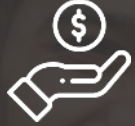
XX% = % of Respondents

Source: VAB / Dynata 'Multicultural Video Engagement Survey,' August 2019. Q17: How often have you done the following as a result of seeing an advertisement in the movie theater or in the theater lobby? Respondents Answer = Always, Frequently or Occasionally. African American/Black/Caribbean American = 302 Respondents, Hispanic = 300 Respondents, Asian American/Pacific Islander = 100 Respondents, Non-Hispanic White = 300 Respondents.

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In Summary, Multicultural Audiences Are...

A Big Opportunity for Marketers



Black, Hispanic & Asian Americans will account for **40%** of the U.S. population by 2023 and will only continue to grow. Although younger, they spend nearly **\$2.2 Trillion** annually, a **57% increase** over the last 10 years

Deeply Committed to Relevant Programming



Multicultural viewers are *more likely* to watch a TV show if it is **relevant to their own cultural identity**, it has a **diverse cast** and / or it features **relatable TV personalities or characters**

Passionate About 'Sharing' Their Favorite TV Programs



They feel personally connected to their favorite TV characters and actors and actively **seek more information** and **content online**. **Conversations** with fellow fans online and 'in real life' with family & friends **fuels their passion**

Inspired by TV Content To Make Purchases



Because of their emotional connections, TV programs and personalities are more likely to influence everything from their **personal style** and the way they **dress**, to what and where they **eat**, and how they **decorate** their home

Motivated by TV Content To Get Involved



Whether they are **attending a rally**, **signing a petition** or **registering to vote**, culturally relevant TV programming acts as a 'force for good' in motivating multicultural viewers to get involved and let their voice be heard

Avid, 'Action-Oriented' Moviegoers

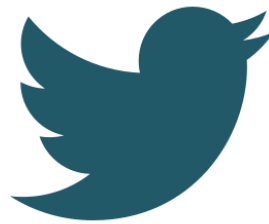


Multicultural audiences have driven the **success of many recent films** featuring diverse casts. Their passion extends to **consumer action** as they are **more likely to spend** on brands they see advertised within cinema

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