



▶ Q1 2026

the essential 10

Our 10 must-read Insights charts of the quarter

In Q1 2026, VAB released insights covering attention on CTV, political advertising, realities of the internet, AI, measurement solutions and more



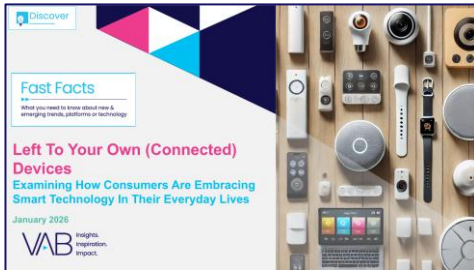
The Impression Gap
What works harder for marketers on CTV – Premium Video or YouTube?



The Lead Story
How Multiscreen TV Drives Cross-Partisan Engagement for Political Ad Campaigns



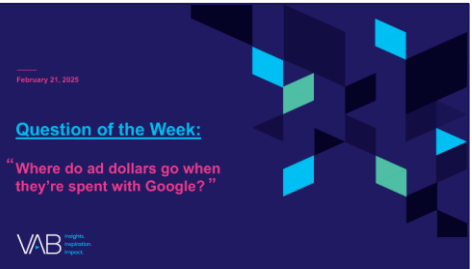
The Illusions of the Internet
Uncovering the Fallacies & Realities of Audience, Advertising & Content



Left To Your Own (Connected) Devices
Examining How Consumers Are Embracing Smart Technology In Their Everyday Lives



What's the Spread?
Examining Key Stats on Audience Growth From the 2025 NFL Season



Where do ad dollars go when they're spent with Google?



What are the most popular sports to reach audiences through streaming?
February 2026 Update



What Is... AI Fluency?
A foundational guide to key terms and concepts



How much do Super Bowl ads drive consumer action, like search?



Advanced Measurement Solutions Directory – January 2026 Update
Your guide to modern measurement solutions and their capabilities

Keep reading to check out our top 10 'must read' charts of the quarter...


CTV Viewer Attention: Premium Video Platforms keep viewers engaged with their 'eyes on screen' for longer than YouTube



[Click here for the full report](#)

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


Average Premium Video Platform Lift vs YouTube on CTV



+5%

more likely to be **in the room when the TV is on**


***Max PVP vs YT : +20%**



+14%

more likely to **have their eyes on screen**

***Max PVP vs YT : +33%**



+18%

more likely to **keep their eyes on screen**

***Max PVP vs YT : +88%**

Source: VAB + TVision Custom Study. July 2024 – June 2025. P2+. Premium Video Platforms represent an average of the 21 Premium Video Platforms. Weighted based on duration of session. | *PVP refers to Premium Video Platforms. Max PVP means the Premium Video Platform with the highest index.

Trusted News Sources: Americans overwhelmingly trust TV news over any other digital media source like social or AI



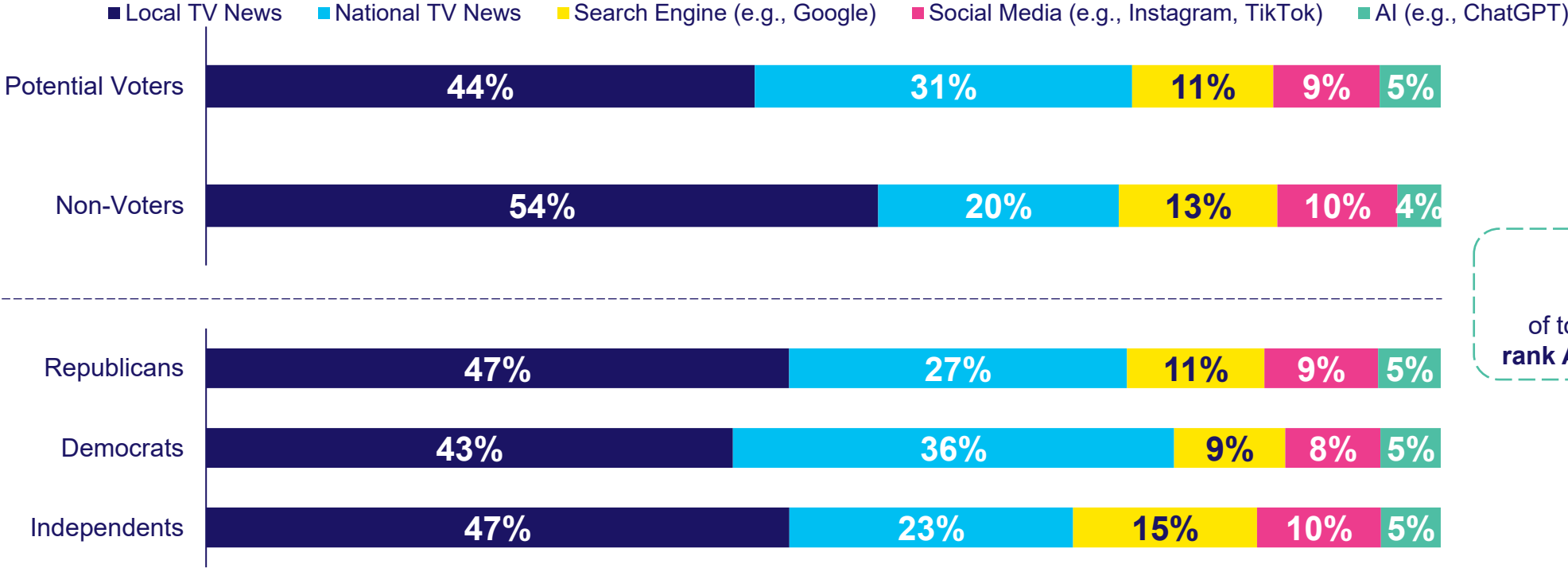
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Marketer's Guide

Innovative thinking to make a lasting impact on your business growth.

% of respondents who trust the following media sources the most



50%
of total respondents
rank AI lowest for trust

Source: Dynata, Media Consumption and Political Sentiment survey, fielded December 2025 (n=2,319). Survey base: A18+ U.S. respondents. Q11. Please rank your level of trust with information from the following sources. Based on respondents who ranked media #1 = 'I trust this source the most'. Base = All News Respondents (n=1,276). Voter respondents (n=988), Non-Voter respondents (n=226), Republican respondents (n=413), Democrat respondents (n=389), Independent respondents (n=309).

Consumer Fraud: Social media scams that tug at the wallet, heart and mind cost U.S. consumers nearly \$2 billion annually



[Click here for the full report](#)

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

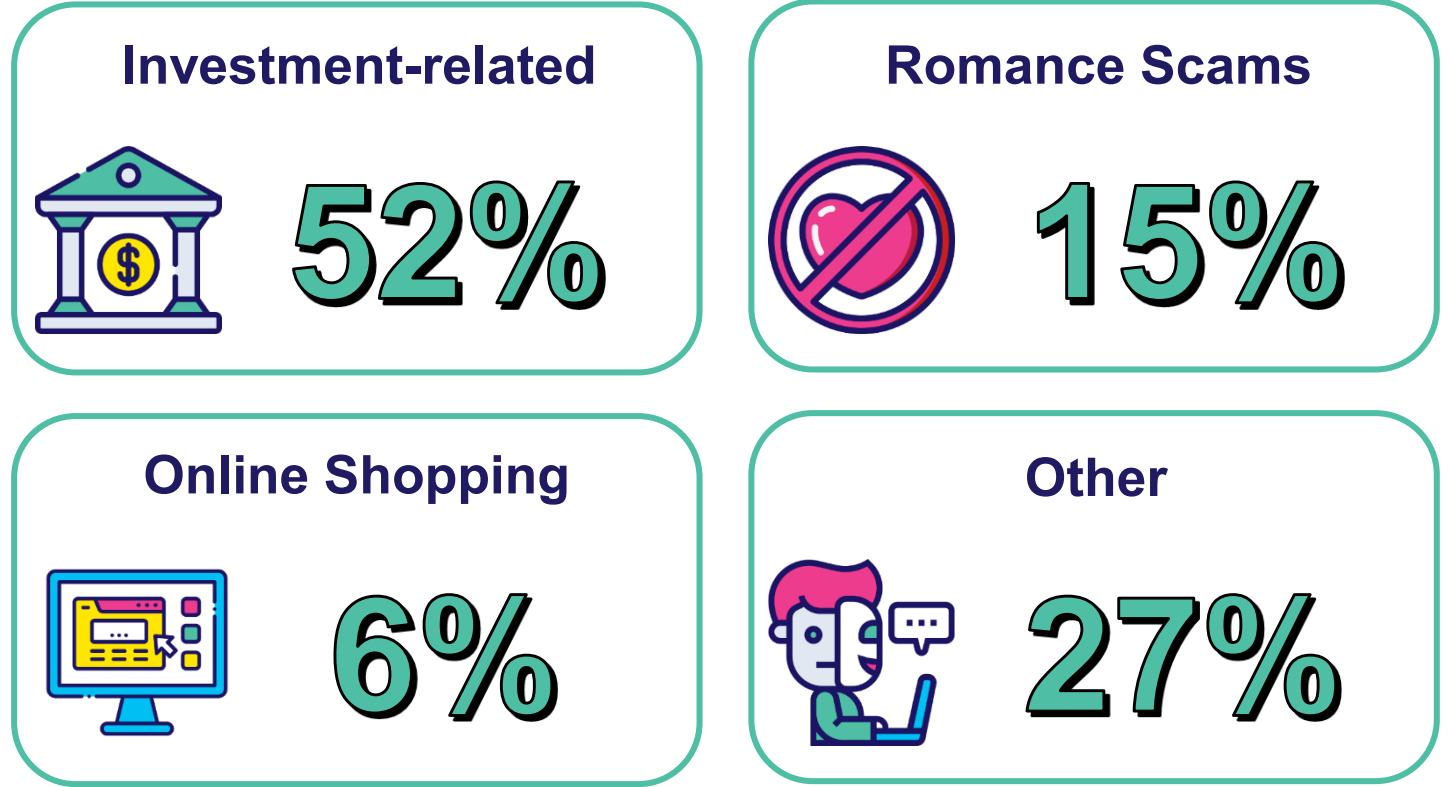


\$1.9 Billion

in consumer losses from **social media scams** in 2024, accounting for the **highest overall** source of losses to scams

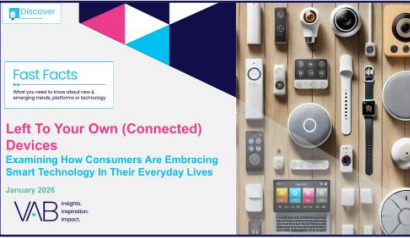
U.S. Consumer Social Media Fraud Losses by Type*

2024



Source: U.S. Federal Trade Commission, *A Scammy Snapshot of 2024*, March 2025. Based on reports to Consumer Sentinel. *U.S. Federal Trade Commission, *All Fraud Reports by Contact Method – Top Subcategories by Total Losses for Contact Method: Social Media, Q1-Q4 2024*, as of 1/30/26.

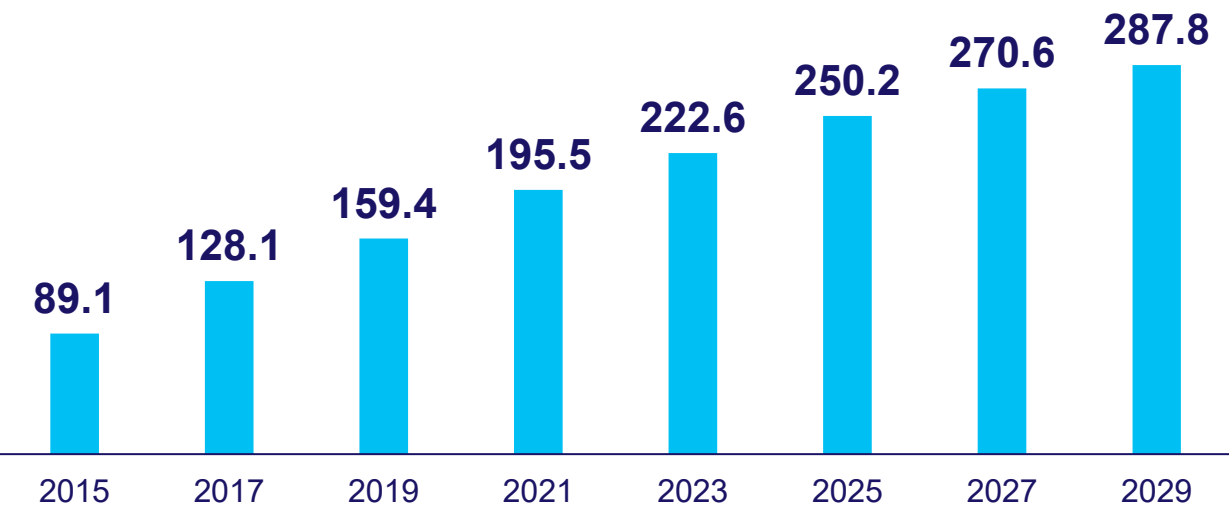
Connected TV Penetration: Growth continues as the prevalence of homes with multiple smart TVs increases



[Click here for the full report](#)



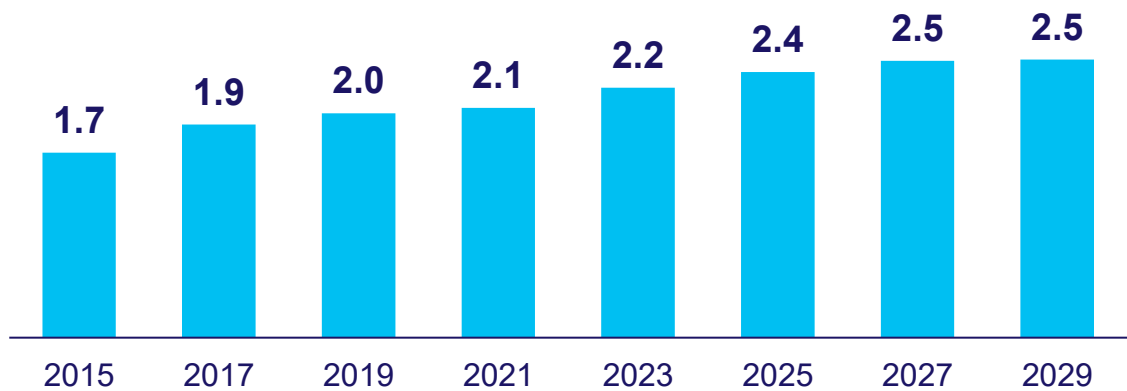
Smart TV Set Installed Base In millions



% of Total TV Households



Average # of Smart TVs per HH

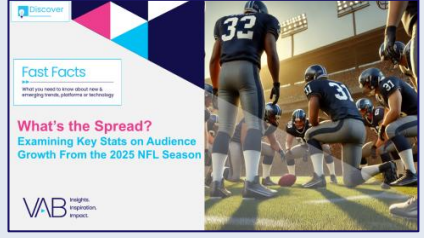


Smart TV % of Total TV Set Installed Base



Source: Industry data; S&P Global Market Intelligence Kagan estimates.. Data compiled October 2025. 'Installed Base' refers to the total number of units of a product currently in use by customers. Compound Annual Growth Rate (CAGR): 9.0%.

NFL Viewership Insights: Divisional matchups deliver double-digit audience lifts as fans flock to watch established rivalries



[Click here for the full report](#)



P2+ Average Audience (000) 2025 NFL Regular Season



(10 Divisional Games)



(4 Divisional Game)



(4 Divisional Games)

	<u>BD+P</u>	vs.	<u>PO</u>	<u>% Diff</u>	<u>BD+P</u>	vs.	<u>PO</u>	<u>% Diff</u>	<u>BD+P</u>	vs.	<u>PO</u>	<u>% Diff</u>
Divisional Game Average:	<u>15.3 MM</u>		<u>14.0 MM</u>	+9%	<u>22.6 MM</u>		<u>21.8 MM</u>	+4%	<u>18.7 MM</u>		<u>17.9 MM</u>	+5%
Non-Divisional Game Average:	13.1 MM		12.6 MM	+4%	16.4 MM		15.6 MM	+5%	15.9 MM		15.0 MM	+6%
Divisional Game Diff:	+16%		+11%		+38%		+40%		+18%		+19%	

Source: VAB analysis of Nielsen Ratings Analysis Program Report, Thursday Night Football (Amazon Prime Video), Sunday Night Football (NBC), Monday Night Football (ESPN, ESPN2, ABC), excludes pre- & post-game shows. Live+SD, P2+, Updated Big Data Plus Panel data, National Panel data. 2025 regular season (9/4/25 – 1/4/26). NBC, ESPN, ESPN2 and ABC reflect linear TV audience only and does not include audiences gained from their digital / streaming apps. 'BD+P' = Big Data Plus Panel, 'PO' = National Panel Only. See appendix for a game-by-game breakout of ABC, ESPN, ESPN2 airings.

Google's Ad Revenue: Ad dollars in 'undefined platforms' are more than the total global spend in other major media platforms



[Click here for the full report](#)

QUESTION OF THE WEEK
 From the latest on consumer behavior to navigating the ever-evolving premium video landscape, our 'Question of the Week' series sheds light on business-driving strategies, insights, and innovations.

Estimated Global Advertising Revenues by Media 2025



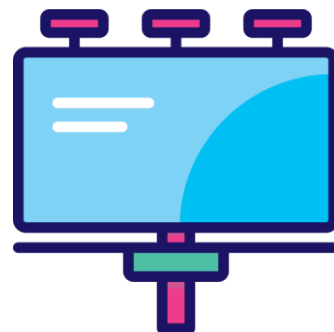
Google Network & 'Other'

\$44.8 Billion



Print

\$43.0 Billion



Outdoor

\$35.9 Billion



Radio

\$28.7 Billion

[Download to understand where ad dollars go when they're spent with Google](#)

Source: Alphabet SEC company 10-K filings via SEC Edgar Search, for fiscal year ended 12/31/25. 'Google Network' includes revenues generated on Google Network properties participating in AdMob, AdSense, and Google Ad Manager. Reflects gross revenue which includes the dollars that Google pays in traffic acquisition costs (TAC) to partner sites. Totalled numbers may equal not total due to rounding. Adalytics Research LLC, ['Does A Lack of Transparency Create Brand Safety Concerns For Search Advertisers?'](#) report, November 2023, for more methodological details see page 6, for 'Other' methodology see page 7. S&P Global Market Intelligence Kagan, *Global Advertising Expenditure Forecasts*, December 2025.

Sports Streaming By Multicultural Audiences: Hispanic, Black and Asian all over index against basketball and boxing

February 10, 2025

Question of the Week:
 "What are the most popular sports to reach audiences through streaming?"

February 2025 Update

VAB

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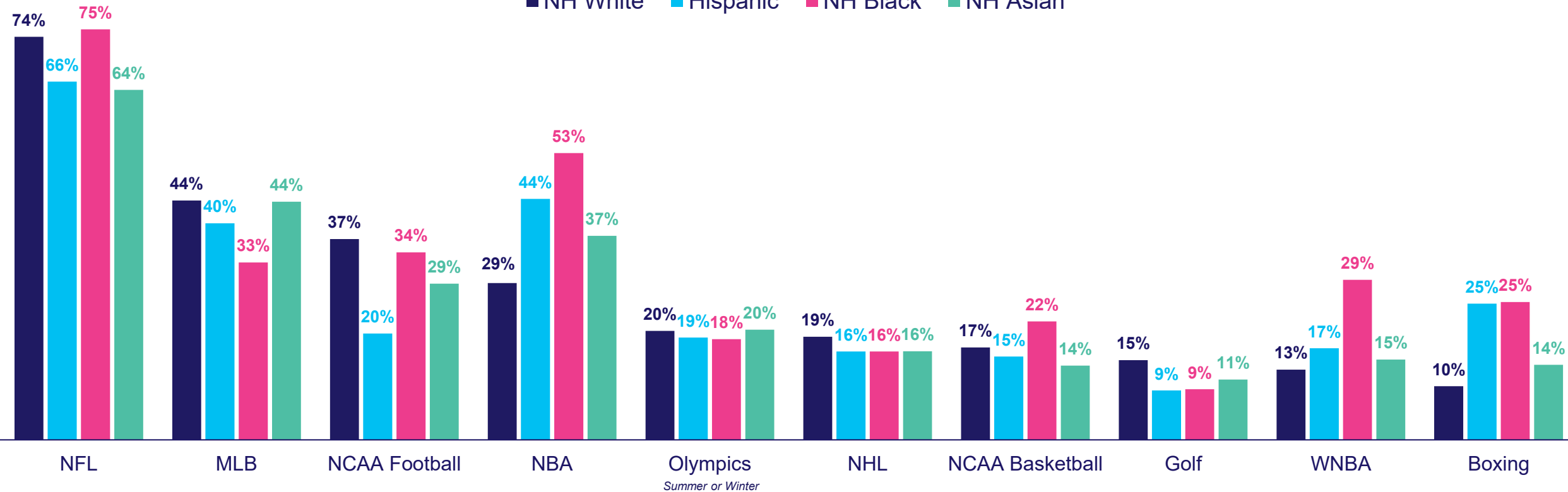
QUESTION OF THE WEEK

From the latest on consumer behavior to navigating the ever-evolving premium video landscape, our "Question of the Week" series sheds light on business-driving strategies, insights, and innovations.

Which of the following sports have you streamed live in the last 12 months?

% of sports streamers

■ NH White ■ Hispanic ■ NH Black ■ NH Asian



Summer or Winter

Source: VAB analysis of MRI-Simmons Cord Evolution November 2025 (fielded Sep 30, 2025 - Oct 20, 2025) studies, Base: has streamed live sports in the last 30 days. NH = Non-Hispanic. Note: Data sorted on NH White. Note: Olympics can include people streaming relevant content such as replays, highlights and other related programming after the Olympics have aired.

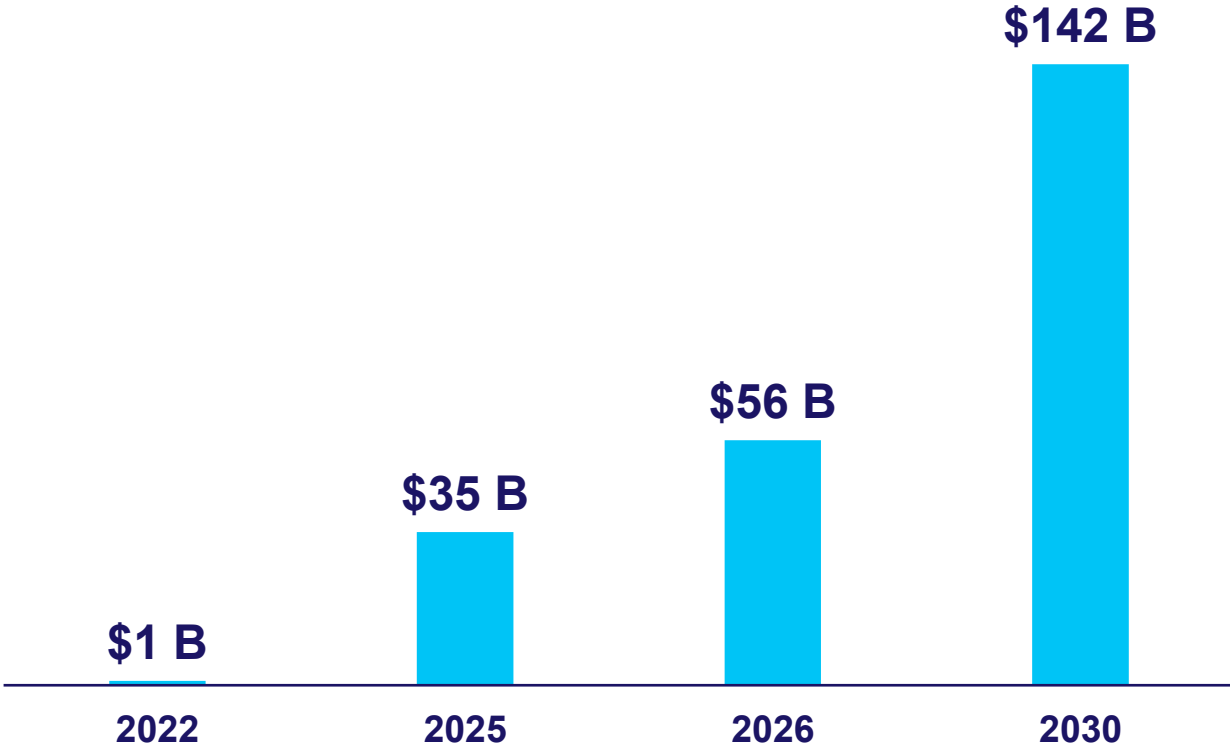
The Need for AI Fluency: The growth of AI-driven advertising is a sign of how important AI education should be for marketers



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Estimated U.S. AI-Powered Advertising Revenue
(in billions)



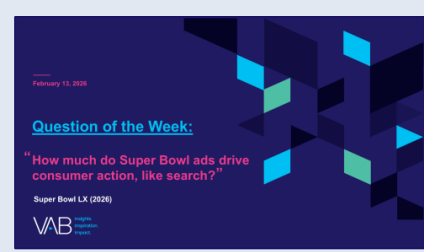
AI-Powered Advertising Revenue is expected to increase

154%

From 2026 to 2030

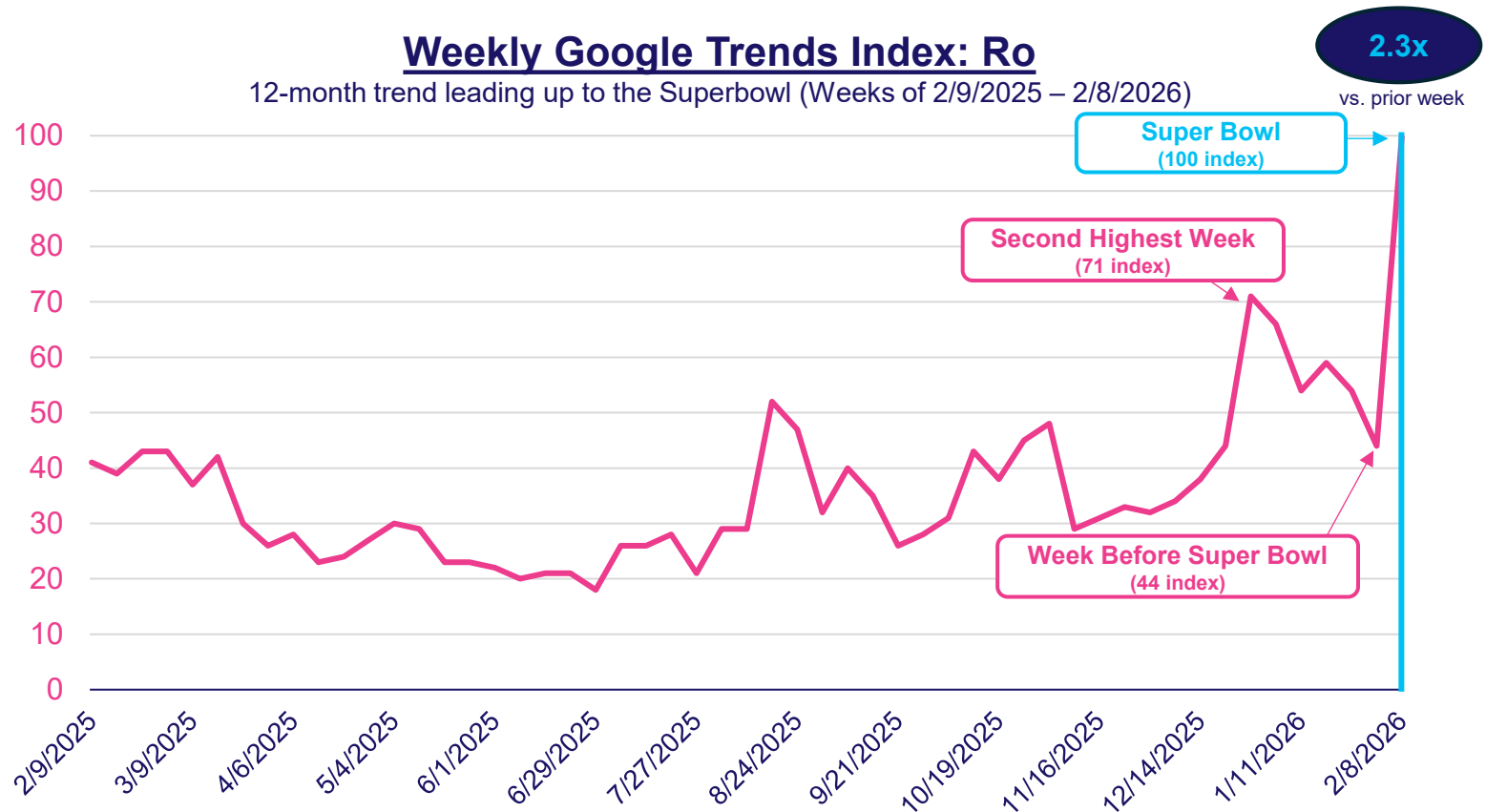
Source: Madison & Wall; *How AI-Powered Advertising Totals \$142 Billion by 2030*: February 2026. To quantify AI-driven spending, Madison & Wall defined AI-powered advertising narrowly based on campaign spending that flows through platforms where AI controls targeting, bidding, budget allocation, placement, and ongoing optimization with minimal human intervention.

Super Bowl Drives Online Engagement: A first-time advertiser in the 'Big Game' more than doubled their branded search



[Click here for the full report](#)

QUESTION OF THE WEEK
 From the latest on consumer behavior to navigating the ever-evolving premium video landscape, our 'Question of the Week' series sheds light on business-driving strategies, insights, and innovations.



ro

“As soon as the spot airs, we know we’re going to see a **whole lot of traffic come to our site**, but what we are really expecting and hoping for is to **reshape how we’re perceived in the category.**”

Will Flaherty
 SVP of Growth, Ro
 (AdExchanger, 2/6/26)

Source: VAB analysis of Google Trends, United States only, All Categories, Web Search, Weeks of 2/9/25 – 2/8/26. Google Search Index represents search interest relative to the highest point on the chart for the given region and time period, a value of 100 is the peak popularity for the term, a value of 50 means that the term is half as popular. Note: Light blue line marks the date of Super Bowl LX. [Click here to view Ro's Super Bowl commercial](#) (via iSpot.tv). Search trend based on ro.co.

VAB's Advanced Measurement Solutions Directory: An update to our guide of measurement companies and their capabilities

Advanced Measurement Solutions Directory
Your guide to modern measurement solutions and their capabilities

[Click here for the full directory](#)



Directory preview

Advanced Measurement Solutions Directory

VAB is proud to share this directory with our 19 partners including 3 new additions!

Click on the company logos to be brought to their capabilities page

We invite all measurement solutions to submit their capabilities for inclusion. If interested, please contact us at info@thevab.com

The Advanced Measurement Solutions Directory serves as a reference guide to simplify and provide clarity in measurement solutions so that you can keep informed.

Developed in partnership with the solutions themselves, the directory is a compilation of the **topline capabilities** and **several applicable case studies**.

We welcome all measurement companies that would like to contribute.

Example of a measurement solution & their capabilities

Upwave

What do you do?
Upwave is the Brands Outcome Measurement Platform. With Upwave, brands, agencies, and media partners can bring science to top-of-funnel-measure Brand Lift, validating Brand Reach, and surfacing Brand Optimization opportunities in one, dynamic platform. With cross-channel capabilities, privacy-safe data, and the industry's most advanced models, Upwave helps maximize brand investment.

What makes your product or platform unique?
Upwave is the only company entirely focused on measuring and optimizing the Brand Outcomes driven by advertising. Brand campaign measurement is our only line of business (not a side hustle) and we have measured over one trillion ad impressions for 1,000+ advertisers.

Which types of companies do you serve?
The Upwave platform is built for Publishers, Platforms, Brands and Advertisers.

How do you build privacy into your product?
Given the limitations of 1:1 identifiers, Upwave tracks at the micro-cohort level. Micro-cohorts are small groups of people, such as a household, that are measured as a privacy-safe surrogate for the underlying individuals.

Which video platforms do you measure or support?
Upwave is truly cross-channel, making it possible to measure across all video platforms.

What are the core elements of a successful partnership?
When we partner with customers—whether it be a publisher looking to prove their brand-building or a brand wanting to effectively reallocate their media—there is one simple goal in mind: maximize brand objective. When looking for a brand measurement partner, ask yourself the following questions:

- Do you have a brand you are advertising?
- Does your advertising have brand objectives?
- Do you want to measure those brand objectives with accuracy?
- Do you want to elevate your on-target audience reach during a campaign?
- Do you want to maximize the outcomes for those brand objectives in real time?

If you have a brand and brand objectives and you want to not only measure those objectives with accuracy, but maximize those outcomes, partner with Upwave—the first and only measurement partner that help you do that.

Website and contact information:
To learn more, or schedule a demo today, visit upwave.com/platform-demo

Product Category: Pharmaceutical / Healthcare
Measurement Category: Outcomes

Upwave in Action: Optimize for Outcomes Among a Brand-Specific Target Audience

 2.5X More likely to reach those in the Hospital Leadership sector	 3X More likely to reach those in the Government sector	 5X More likely to reach those in the Finance sector	 1.5X More likely to reach VP-level audience via Linear TV
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521MM
Total Digital Impressions

4.2B
Total TV Impressions

11.9MM
People Lifted (Awareness)

Lift in Awareness on Digital: 1.9%

Lift in Awareness on Linear TV: 9.5%

Lift in Awareness Cross-Channel (Digital & Linear): 13.4%

Lift in Awareness among Affluent Audience (HHI \$100k+): 19.9%

Challenge
A leading pharmaceutical & health care company invested in an 8-month Digital (Display, Mobile and Desktop) and TV campaign, measuring and optimizing their brand spend. Increasing Brand KPIs, specifically brand awareness and brand reputation, with an end-goal of becoming a household name and measuring overall and on-target reach.

Measurement Solution
Upwave's analytics solution is powered by exposed/control respondent data and includes reach capabilities that allow brands to measure against a broad, national audience, but also niche demographics, beyond age and gender.

Target Segment
Broad National Audience
HHI \$100k+, High-Level Job Title/Industry in Healthcare, Finance, Government.

Learnings
Messaging on TV took time to gain momentum and the brand should utilize programmatic to hyper-target better performing audiences on TV.
The ability to refine their messaging throughout the campaign - optimizing creatives based on *Outperformance* indicators among the target audiences—led to spikes in key KPIs in the final month of the campaign.
In general, the campaign drove higher lift (comparing Control vs. Exposed) across all Brand Outcomes KPIs over time, based on the utilization of Brand Optimization and Brand Reach tools.

Viewing Source / Media Type
Linear TV, Streaming (CTV, OTT) and Digital Platforms (Display, Mobile and Desktop)

Essential one-sheeters: Be prepared for the Upfront with the latest info on streaming, currency providers and historical TV CPMs. **Download Now!**

Bonus Slide!

6 Fast Facts on FAST
UNDERSTANDING THE FAST ECOSYSTEM

Free Ad-Supported Streaming TV (**FAST**) brings together both live and on-demand viewing in a single, ad-supported environment that feels as familiar as traditional TV yet is fully digital and broadband-delivered.

Download to learn more about the FAST ecosystem!

Multi-Currency Menu
A quick guide to the currency options that marketers are evaluating for the 26/27 Upfront season

comscore BIG DATA

DATA SOURCE: Nielsen TV Panel
REPORTING: Advertiser/Agency/Advertiser
M&A: Nielsen TV Panel
M&A: Nielsen TV Panel

SEMI: Advertiser/Agency/Advertiser
ADVERTISING: Advertiser/Agency/Advertiser
JOB CERTIFICATION: Advertiser/Agency/Advertiser

Spot.tv BIG DATA

videoamp BIG DATA + PANEL-INFORMED

DATA SOURCE: Nielsen TV Panel
REPORTING: Advertiser/Agency/Advertiser
M&A: Nielsen TV Panel
M&A: Nielsen TV Panel

SEMI: Advertiser/Agency/Advertiser
ADVERTISING: Advertiser/Agency/Advertiser
JOB CERTIFICATION: Advertiser/Agency/Advertiser

MARKETERS HAVE THE POWER TO CHOOSE THE CURRENCY THAT BEST MEETS THEIR BUSINESS GOALS

Hungry for more? Download our Advertiser Measurement, Analytics, and Insights white paper. [Download Now!](#)

Download for an updated look at currency solutions!

TV Upfront
Historical CPMs
Primetime
20 Broadcast Seasons

VAB Insights. Inspiration. Impact.

For VAB Members only



Q1 2026 Insights & Measurement Content Releases

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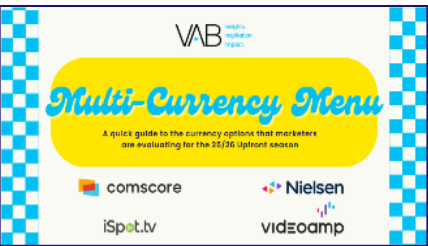
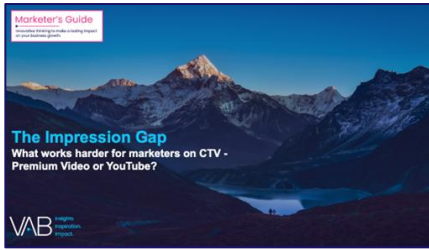
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VAB Members, brand marketers and agencies get free and immediate access to VAB's content library. Get access at [theVAB.com](https://thevab.com)



About VAB

VAB plays a dual role in the video advertising industry. We are leading the change to bring about a more innovative and transparent marketplace. We also provide the insights and thought leadership that enables marketers to develop business-driving marketing strategies.

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.

