



2025 – 2nd Quarter

The VAB Top 10

Our 10 must-read Insights charts of the quarter

VAB Insights.
Inspiration.
Impact.



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.**

Brand is performance: Building customer satisfaction, trust and loyalty is the most vital factor in creating brand success

May 9, 2025

[Question of the Week:](#)

"What does 'brand' mean and how does it drive growth for my business?"

VAB

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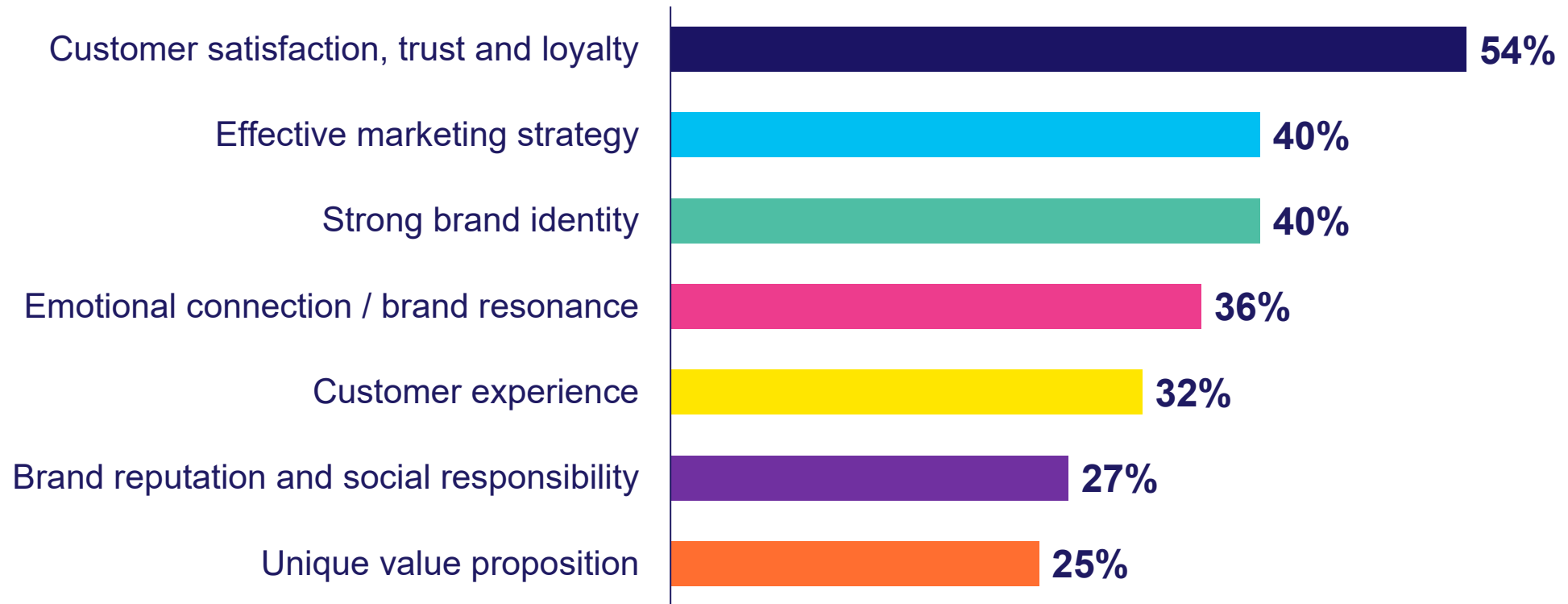


QUESTION OF THE WEEK

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.

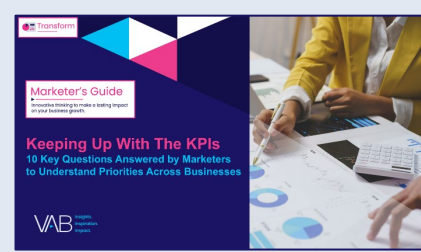
Top Factors That Contribute to the Success of a Brand

% of brand marketers



Source: VAB / Advertiser Perceptions 'Marketer KPI Survey,' February 2025, fielded January 27 – February 7, 2025 (n=200). Survey base: Brand marketers directly involved in influencing or executing video advertising. Q10. Which of the following factors contribute to the success of a brand? [Rank up to 3].

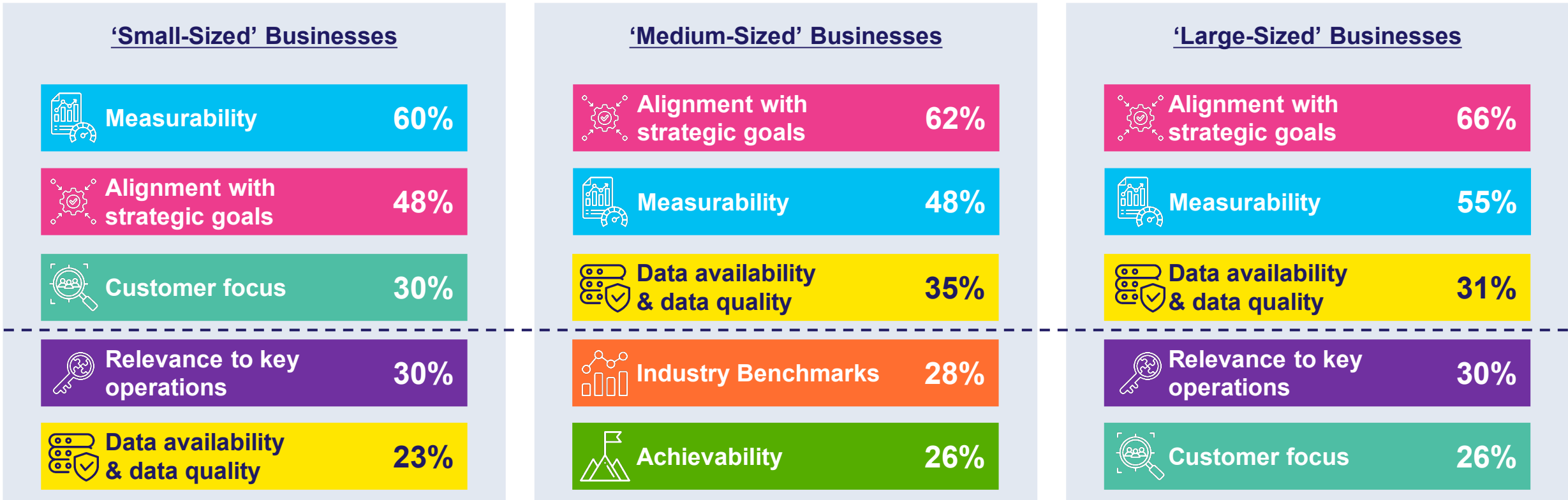
Top KPI influences: Measurability and strategic alignment are driving a reliance on short-term performance by businesses



[Click here for the full report](#)



Top 5 Factors Influencing KPI Selection % of brand marketers



Source: VAB / Advertiser Perceptions 'Marketer KPI Survey,' February 2025, fielded January 27 – February 7, 2025 (n=200). Survey base: Brand marketers directly involved in influencing or executing video advertising. Q13. What factors influenced your organization's decision in selecting your KPIs? [Rank 1-3]. Based on respondents ranking up to 3 choices. 'Small-Sized' Businesses: Less than \$1MM in annual ad spend, 'Medium-Sized' Businesses: \$1MM to less than \$25MM in annual ad spend, 'Large-Sized' Businesses: \$25MM or more in annual ad spend. Dotted line across chart denotes the top 3.

Welcome to TV: 2024 represented the highest investment by first-time multiscreen TV advertisers since our analysis began



[Click here for the full report](#)



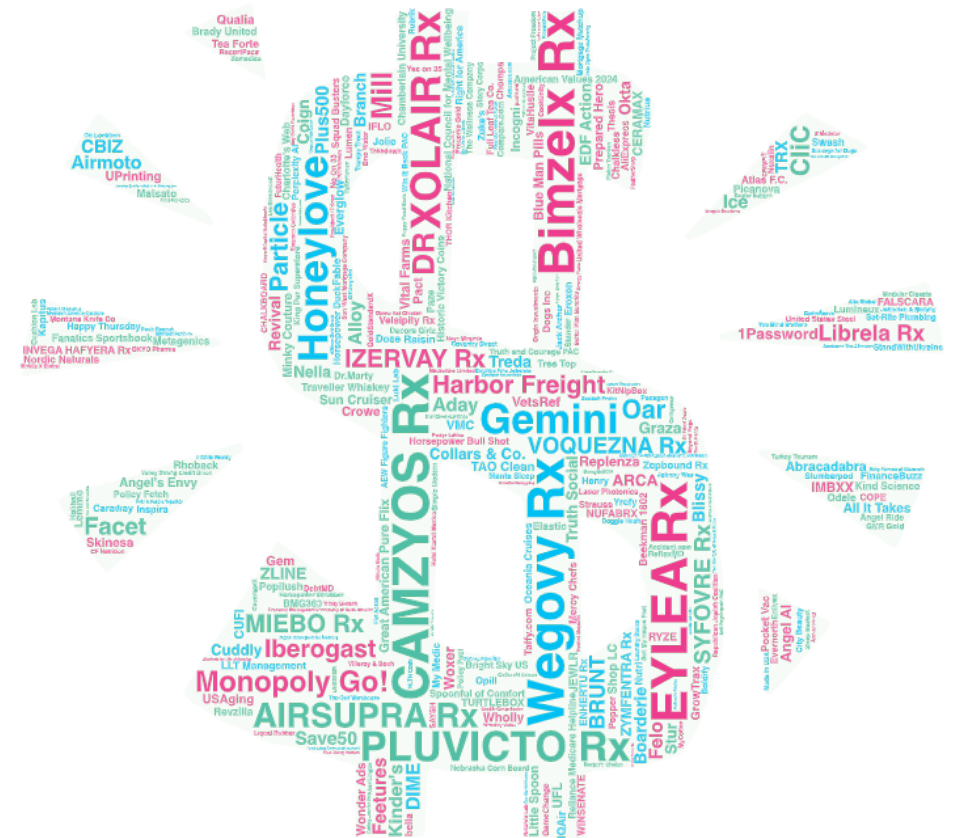
New National Multiscreen TV Advertisers 2019 – 2024



Year	# of New Advertisers	# of Categories	New TV \$\$\$
2019	114	61	\$840MM
2020	283	95	\$1.28B
2021	315	74	\$1.32B
2022	303	71	\$1.33B
2023	313	56	\$1.36B
2024	344	54	\$1.48B

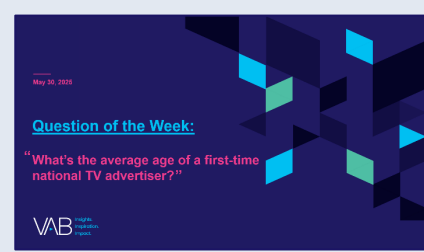
For a full list of the 344 brands with spend [click here](#)

New TV Advertisers



Source: VAB analysis of Nielsen Ad Intel data as of 2/10/25, 1/1/24-12/31/24. Prior years based on VAB analysis of Nielsen Ad Intel Data from the following periods: 1/1/2019-12/31/2019, 1/1/2020-12/31/2020, 1/1/2021-12/31/2021, 1/1/2022-12/31/2022, 1/1/2023-12/31/2023. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV, streaming TV (streaming TV as of 2024). 2024 national TV spend, excluding streaming TV, reflects \$1.479B. Brands reflect those with TV spend over \$100K.

TV is for all lifestages: Nearly 40% of new TV advertisers in 2024 entered national TV within 5 years of product launch



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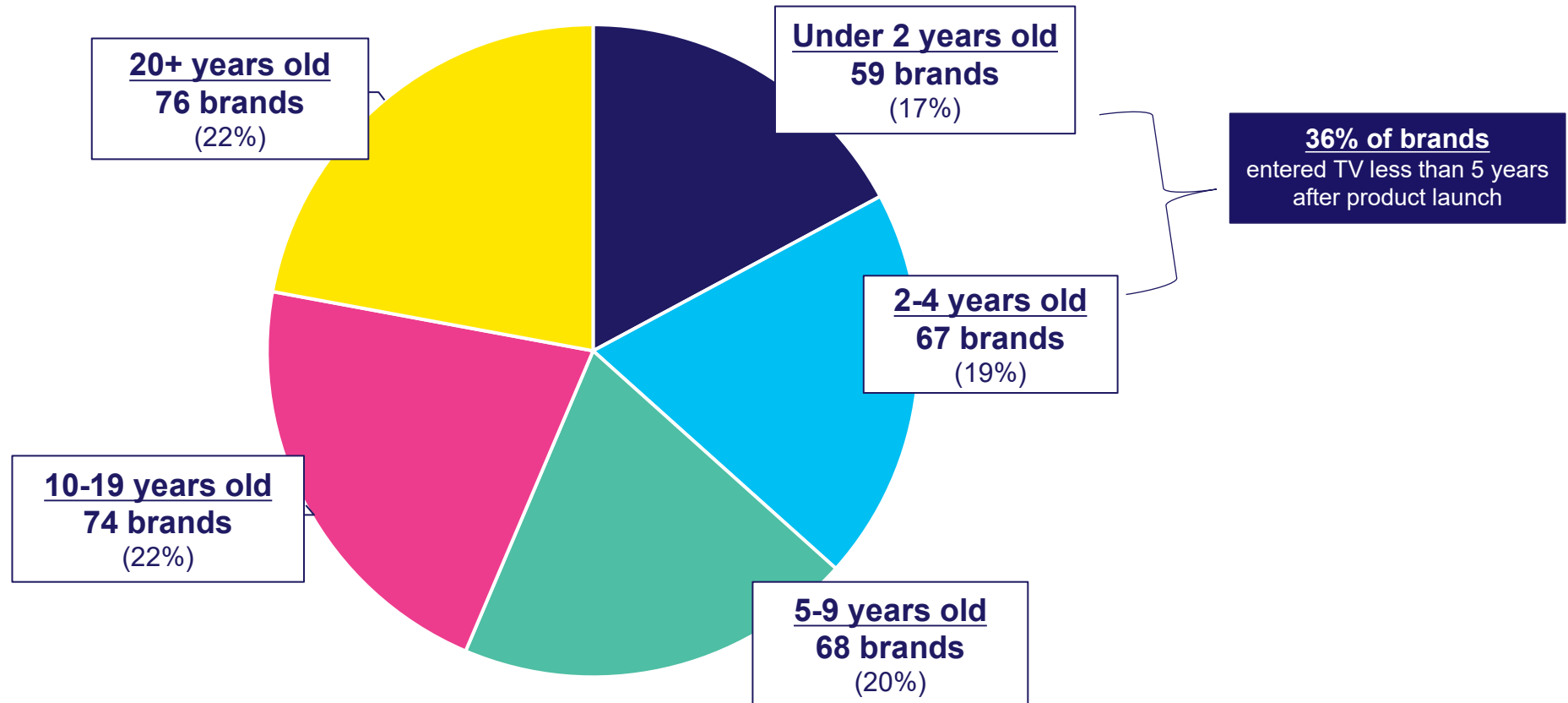
QUESTION OF THE WEEK

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8 years old
Median Age

Brand Lifestage When First National TV Campaign Launched

344 New TV Advertisers



Source: VAB analysis of Nielsen Ad Intel data, 1/1/22-12/31/22, 1/1/23-12/31/24, 1/1/24-12/31/24. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV, streaming TV. Brands reflect those with TV spend over \$100K.

Longer TV campaigns create bigger results: While all lengths drive web traffic, a sustained presence sees the biggest lifts



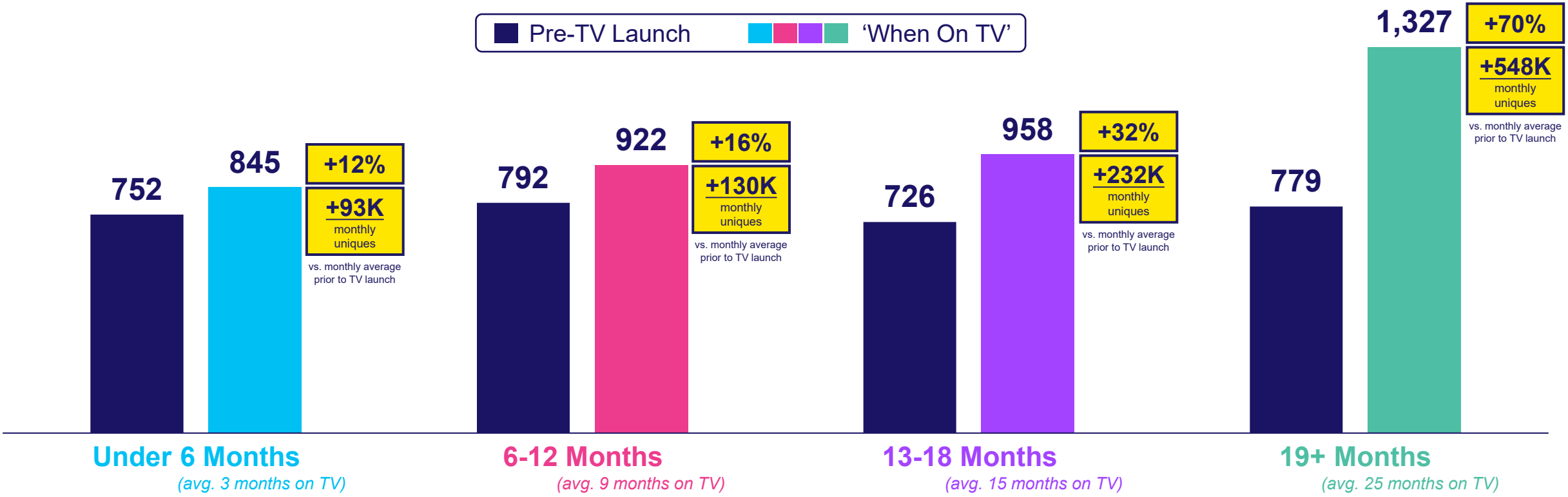
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38 Brands: Average Monthly Website Unique Visitors

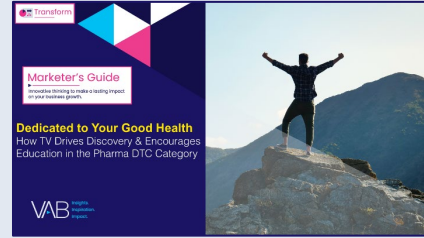
Monthly Website Unique Visitors (000) Comparison
based over a four-year time period: Jan '21 – Dec '24

■ Pre-TV Launch ■ 'When On TV'



Source: VAB analysis of Comscore mediametrix multiplatform media trend data, P18+. January 2021 – December 2024 (calendar months), figures are based on monthly averages for the brands analyzed in each segment. VAB analysis of Nielsen Ad Intel, TV activity based on reported spending across national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV. 'When On TV' represents the monthly average for brands in months where they spent in TV as measured through Nielsen Ad Intel between January 2021 – December 2024 (calendar months), across the brands analyzed in each segment. During this four-year analysis, the average advertiser was on TV for 13 months and spent \$10.8MM.

Pharma ads encourage education: Prescription drug remedies launch TV 23 months after FDA approval, on average



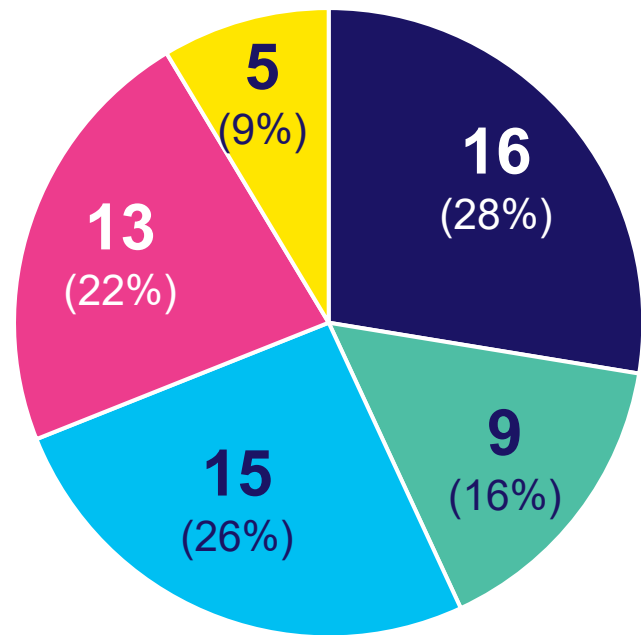
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Transform **Marketer's Guide**
 Innovative thinking to make a lasting impact on your business growth.

of Months Between FDA Approval & First-Time TV Campaign Launch

58 brand analysis

- Less than Six Months
- Six Months to a Year
- One to Two Years
- Two to Five Years
- Five+ Years

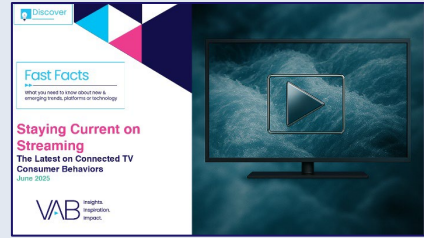


*based on an analysis of **58 prescription drug brand remedies** that launched their first TV campaign **between Jan 2021 – June 2024**

Click here to see what happens immediately after brands launch their first TV campaign

Source: VAB analysis of Nielsen Ad Intel data, calendar year 2021 - June 2024. TV media includes cable TV, network TV, Spanish Language Cable TV, Spanish Language Network TV, Spot TV, Syndication TV; excludes promos and PSAs. Pharma represents brands within 'Pharmaceutical Houses' sub-group category.

Streaming demographics: Higher HHI homes are just as likely to subscribe to ad-supported streaming as they are to ad-free

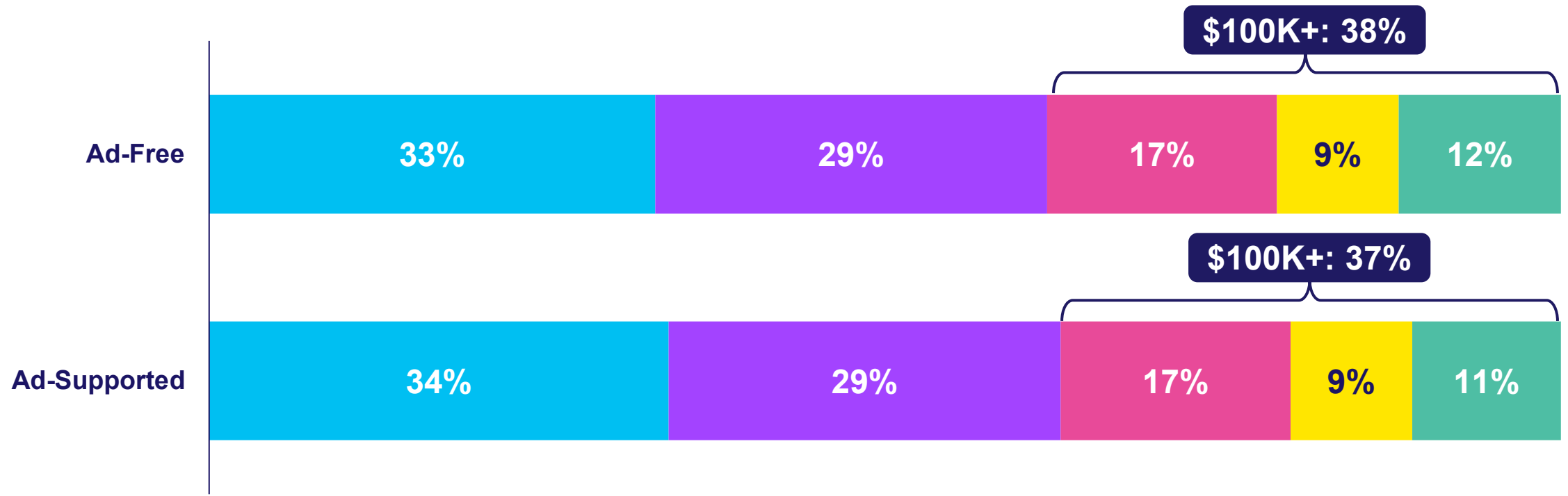


[Click here for the full report](#)



Plan Tier by Household Income

■ <\$50k
 ■ \$50-100k
 ■ \$100-150k
 ■ \$150-200k
 ■ \$200k+



Source: Antenna, *State of Subscriptions Adds and Ads*, May 2025, U.S. only. Note: Excludes free tiers, MVPD + Telco Distribution, and select Bundles. Subscriptions as of March 2025. Premium SVOD includes 9 services.

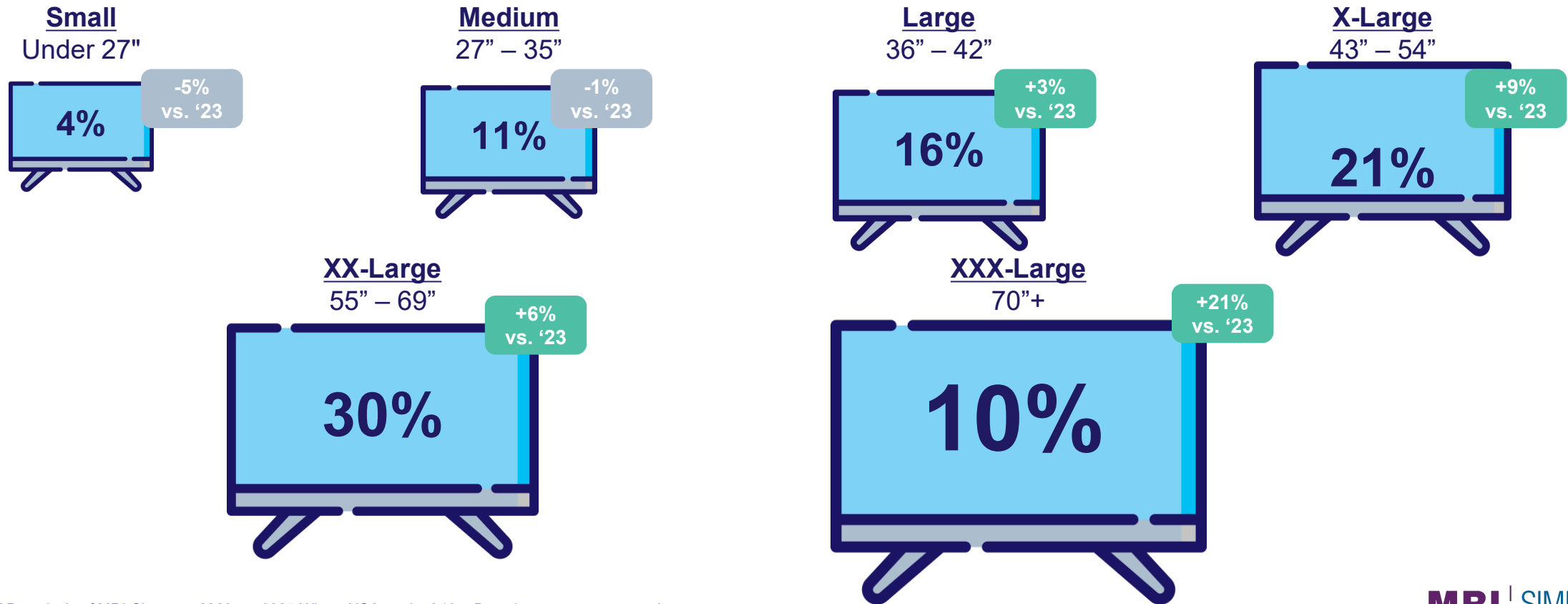
Size matters for viewing experience: More people are buying larger TVs, as 40% of recent sales are for sets over 55 inches



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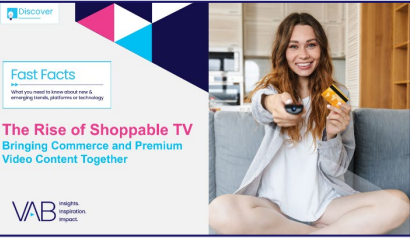
% of A18+ who recently purchased a TV with the following screen size



Source: VAB analysis of MRI-Simmons 2023 vs. 2025 Winter USA study, A18+. Based on most recent purchase.

MRI | SIMMONS

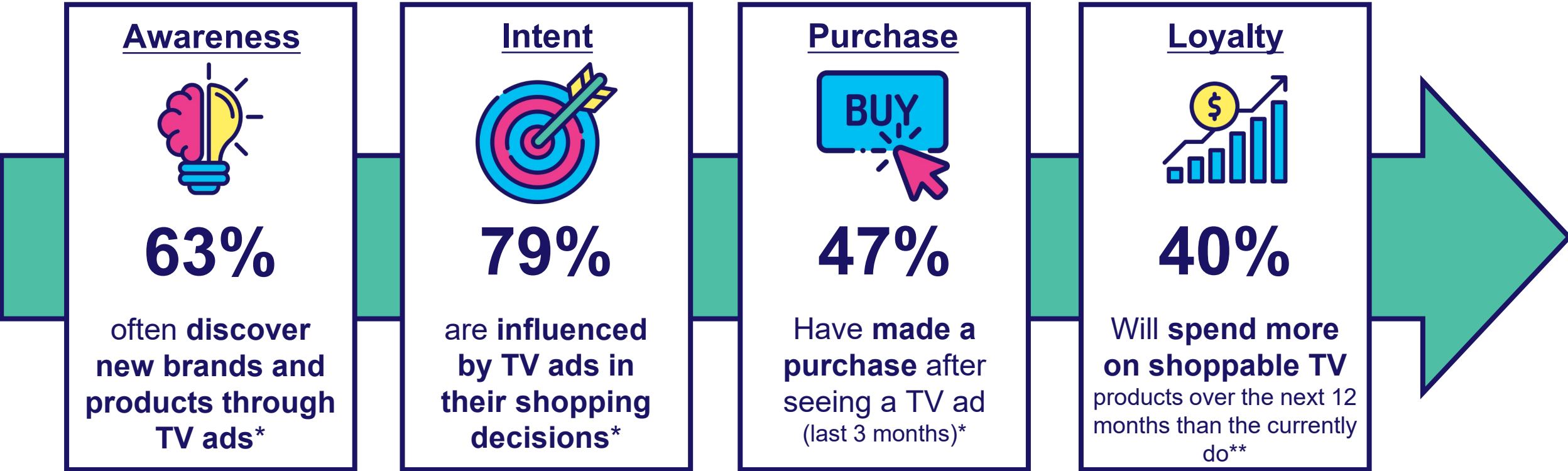
Seamless path to purchase: Shoppable TV ads offer full-funnel conversion through an easy, consumer-friendly buying journey



[Click here for the full report](#)



How Shoppable TV Impacts the Purchase Funnel



Source: *LG Ad Solutions, 'Shoppable TV Report 2025', March 2025. **eMarketer | Shopsense, 'Turning TV into a Retail Powerhouse', Sept 2024 (33% will spend the same amount over the next 12 months).

Driving the 'going out' economy: Moviegoers are a vital target for brands across dining, entertainment and sports

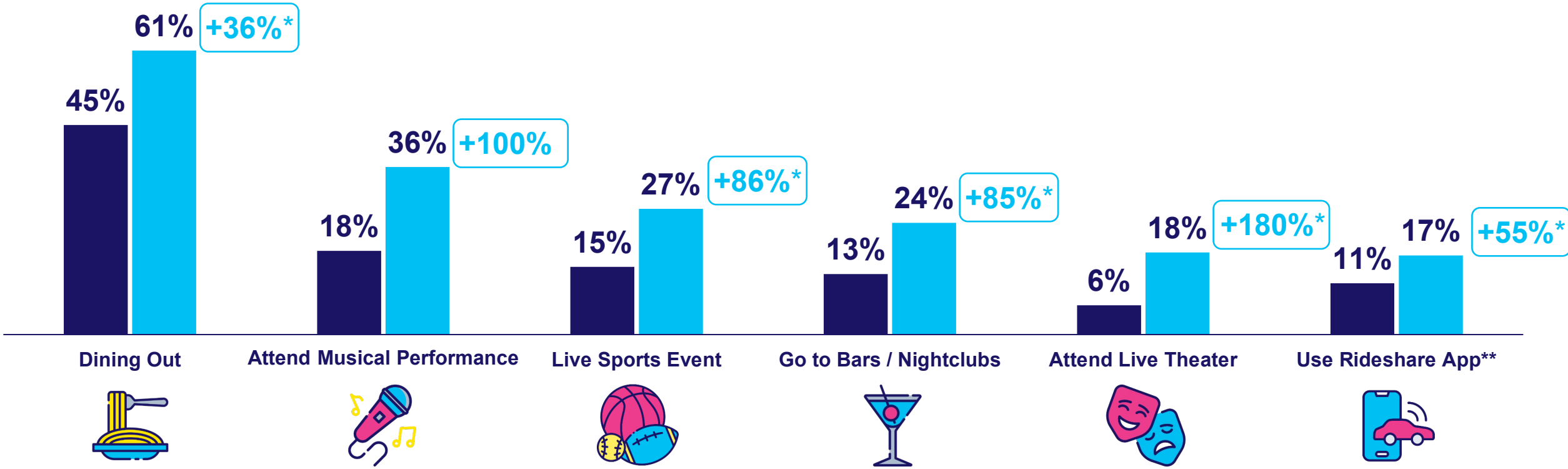


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Discover Fast Facts
 What you need to know about new & emerging trends, platforms or technology

Leisure Activities Participated in the Last 12 Months

■ Non-Moviegoers ■ Moviegoers



Source: VAB analysis of MRI-Simmons Winter Study, 2025. 'Non-Moviegoer' = Has not gone to the movies in the last 12 months, 'Moviegoer' reflects people who have gone to the movies at least once in the last year. Musical performances include rock, country, classical music/opera, R&B/Hip-Hop/Rap, and other. *% difference of moviegoers against non-moviegoers. **Using rideshare apps is based on usage in the last 30 days.

The epidemic of fake accounts: Facebook routinely bans the equivalent of more than half the world's population each year

June 6, 2024

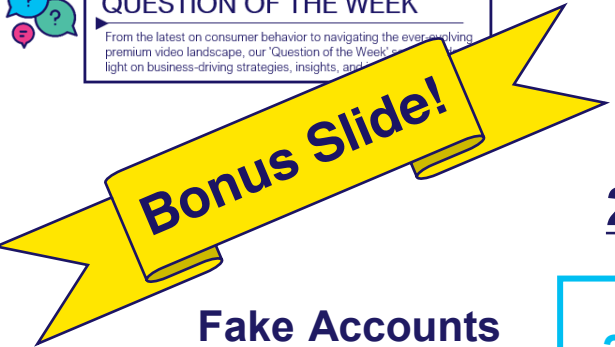
Question of the Week:
"How many fake accounts does Facebook remove each year?"

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' sheds light on business-driving strategies, insights, and trends.



Banned Fake Facebook Accounts' Share of Global Population

	2018	2019	2020	2021	2022	2023	2024
Fake Accounts Banned by Facebook	3.34B	6.50B	5.80B	6.50B	5.80B	2.62B	4.33B
Global Population*	7.73B	7.81B	7.89B	7.95B	8.02B	8.09B	8.16B
Fake Accounts Banned % Share of Global Population	43%	83%	74%	82%	72%	32%	53%

Source: VAB analysis of Meta Transparency Center, Fake Accounts – Facebook, Accounts Actioned, as of 5/15/25. *VAB analysis of United Nations, Department of Economic and Social Affairs, Population Division (2024), World Population Prospects: The 2024 Revision, custom data acquired via UN Data Portal – Population Division website. 'Accounts Actioned' refers to fake accounts banned.

For this quarter, we're including an additional section highlighting even more **thought leadership content** that VAB has released recently which is available for download



Amidst rapid growth, this guide seeks to **define what CTV is** and **explore the benefits of premium inventory to marketers**

What Is...
Clarifying marketing topics and terms

What Is CTV?
Defining and Understanding the Connected TV Advertising Ecosystem
April 2025

[Click here for the full report](#)

Simplify
What Is...
Clarifying marketing topics and terms

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Simplify
VAB Insights. Inspiration. Impact.

What Is CTV?

Defining and Understanding the Connected TV Advertising Ecosystem

April 2025

What Is...
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CTV Advertising Ecosystem

CTV advertising refers to video ads delivered through internet-connected TV devices that enables data-driven personalized ad delivery for more precise targeting, real-time optimization and performance on a large screen. Premium CTV inventory is designed to be bot and fraud free, ensuring ads reach real, engaged viewers in brand-safe environments.

CTV Supply

70% of consumers use ad-supported services on CTV*

CTV supply continuously expands as shifting viewer behaviors drive demand for premium, high quality and engaging content, offering advertisers a powerful method to connect with audiences.

CTV Supply Examples:
VIZIO sling tubi Disney+ COMCAST DIRECTV fubo hulu

CTV Data and Technology Provider Examples
Data Providers / Platforms: PREMIUM SIMULMEDIA SEEDTAG wurl BrightLine IRIS triplelift Identity / Clean Rooms: AWS snowflake TransUnion Experian

CTV Demand

3 in 5 of media professionals plan to increase their CTV spend*

CTV advertising operates within a hybrid model, blending direct and programmatic buying methods giving advertisers flexibility, efficiency and control in reaching premium audiences at scale.

CTV Demand Examples:
theTradeDesk Magnite PubMatic exandr yahoo! amazon ads

CTV Ad Format Examples

PAGE 3 This information is exclusively provided to VAB members and qualified marketers. VAB

What Is...
Clarifying marketing topics and terms

CTV Advertising Benefits for Marketers

As CTV advertising evolves, so do the challenges of fragmentation and fraud, making it critical for marketers to be strategic in their approach. Partnering with premium publishers ensures brands can unlock CTV's full potential by reaching and engaging with real audiences in high-quality, brand-safe, fully measurable environments.

Premium

Professionally produced, long-form content captures audience attention fostering deep emotional connections with brands in secure environments.

Personalization

Leverage more granular targeting and advanced audience segmentations to deliver tailored and relevant messaging to the consumer

Measurable

CTV measurement delivers near real-time results enabling marketers to make informed decisions and optimize campaign strategies

Flexible

Flexible CTV buying, combining direct and programmatic, optimizes cost efficiency, enhances the viewer experience and maximizes ROI

PAGE 4 This information is exclusively provided to VAB members and qualified marketers. VAB

Question of the Week:

"How should I think about my advertising in the wake of economic uncertainty caused by tariffs?"



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An analysis of the last period of economic uncertainty between 2021 – 2023 proves the business value of advertising continuity

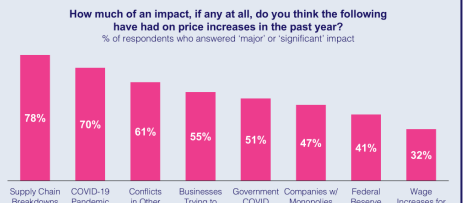


QUESTION OF THE WEEK

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.

In 2022, the inflation rate was at the highest in more than 40 years, driven by a range of factors including the pandemic and global conflicts

In June 2022, on average, the price of goods and services increased **9.2%**



Source: Bureau of Labor Statistics Consumer Price Index News Release, 7/13/22. "The Consumer Price Index (CPI) is a measure of the average change over time in the prices paid by urban consumers for a market basket of consumer goods and services. In June 2022, the CPI increased 9.2% from the same month in 2021, reflecting the largest 12-month increase since November 1981." This information is exclusively provided to VAB members and qualified marketers.

However, consumers continued spending throughout all this uncertainty as retail sales increased by over \$1 trillion annually between 2020 - 2023



Source: National Retail Federation (NRF), NRF Forecast 2023 Retail Sales to Show Resilient 4% and 6%, 3/29/2023. 2023 retail sales sourced from National Retail Federation (NRF), NRF 2024 Annual Retail Outlook Released Feb. 3/27/2024. This information is exclusively provided to VAB members and qualified marketers.

931 new advertisers launched their first national TV campaign during the prolonged three-year period of economic uncertainty

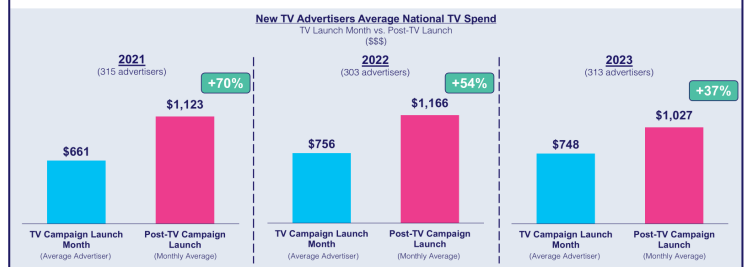
New National TV Advertisers 2021 - 2023

Year	# of New Advertisers	# of Categories	New TV \$\$\$
2021	315	74	\$1.32B
2022	303	71	\$1.33B
2023	313	56	\$1.36B

Over \$4B was invested by **931 first-time national TV advertisers** Between 2021 - 2023

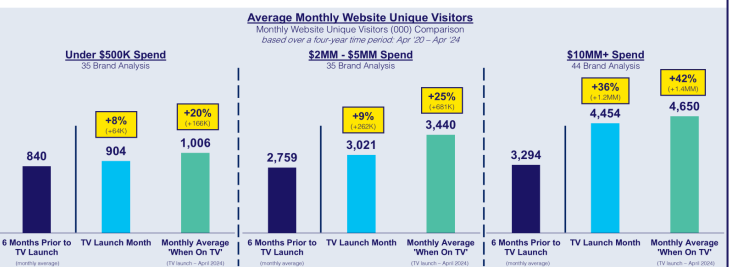
Source: VAB analysis of Nielsen Ad Intel data as of 2/28/23, 1/15/23-1/21/23. This report is based on VAB analysis of Nielsen Ad Intel Data for the following periods: 1/15/2021-1/21/2021, 1/15/2022-1/21/2022. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands selected those who reported TV spend over \$100K. This information is exclusively provided to VAB members and qualified marketers.

As seen across the 931 advertisers, the initial success of a TV campaign prompted an increase in investment as they battle for greater market share



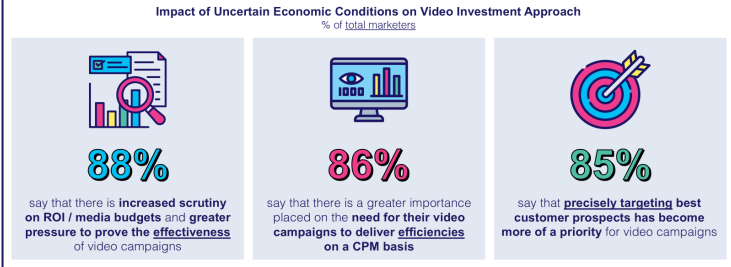
To gauge how advertisers perceived the impact of their TV campaigns, we compared the average investment across brands during the first month of their campaigns with the average investment for the months that followed. Source: VAB analysis of Nielsen Ad Intel data as of 2/28/23, 1/15/2022-1/21/2022. TV spend includes national cable TV, national broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands selected those with national TV spend over \$100K. This information is exclusively provided to VAB members and qualified marketers.

Brands across TV investment levels saw double-digit average increases in their website traffic, with higher investment levels garnering higher lifts



Source: VAB analysis of Comscore media&multimedia multi-brand data, 2/16/23, April 2023 - April 2024 (calendar month). Spikes are based on monthly averages for the brands analyzed. VAB analysis of Nielsen Ad Intel TV activity based on reported spending across national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, Spanish language broadcast TV, Spanish language cable TV, TV, application TV. When On TV represents the monthly average for brands in months where they spent in TV as measured through Nielsen Ad Intel between January 2021 - April 2024 (calendar month). The brands were the ones that reported TV spend over \$100K. This information is exclusively provided to VAB members and qualified marketers.

Economic uncertainty has placed a greater focus on strategies that deliver effectiveness and efficiencies against best customer prospects



Source: VAB Spectrum Research - Advertiser Perspectives: Advertising Based Spending Survey, February 2023, based on January 11 - 27, 2023 (n=210). Survey base: Advertising decision-makers who are involved in buying or planning digital video, cable / broadcast TV, or advanced TV. GfK data used for the application category with the following segments regarding your buying when (2022): video investment approach: increasing video's importance, controlling video's importance, decreasing video's importance. This information is exclusively provided to VAB members and qualified marketers.



Five marketer FAQs each focusing on a **core pillar of premium video**, based on our full marketer's guide [*The Power of Premium Video*](#)



Why is it important for my brand to align with **professionally produced, long form content?**



Why is it important for my brand to align with **emotionally engaging content?**



Why is it important for my brand to align with **brand safe environments?**



Why is it important for my brand to align with **partners that offer cross-platform accessibility?**



Why is it important for my brand to align with **trusted and transparent media partners?**

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2Q 2025 Insights & Measurement Content Releases

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How Ad Continuity in Multiscreen TV Drives Incremental Growth for Brands

April 2025

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April 2025

Marketer's Guide
Essential insights to make a lasting impact on your business goals

Dedicated to Your Good Health
How TV Drives Discovery & Encourages Education in the Pharma DTC Category

April 2025

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What you need to know about new & emerging trends, platforms or technology

The Rise of Shoppable TV
Bringing Commerce and Premium Video Content Together

April 2025

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What you need to know about new & emerging trends, platforms or technology

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20 Trends Exploring the Resurgence & Heightened Value of Cinema

April 2025

Question of the Week:
"How should I think about my advertising in the wake of economic uncertainty caused by tariffs?"

April 29, 2025

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Essential guidance for your next marketing campaign

Welcome to TV
The Billion and a Half Dollar Investment from New Advertisers

Full Year 2024 Update

Question of the Week:
"What does 'brand' mean and how does it drive growth for my business?"

May 9, 2025

Marketer's Guide
Essential insights to make a lasting impact on your business goals

Keeping Up With The KPIs
10 Key Questions Answered by Marketers to Understand Priorities Across Businesses

May 9, 2025

Question of the Week:
"What's the average age of a first-time national TV advertiser?"

May 20, 2025

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Left to Your Own Devices
The Latest on Multiplatform Video Consumption

June 2025

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What you need to know about new & emerging trends, platforms or technology

Staying Current on Streaming
The Latest on Connected TV Consumer Behaviors

June 2025

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