



2025 – 4th Quarter

The VAB Top 10

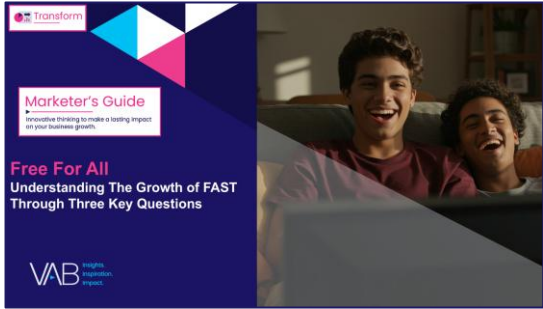
Our 10 must-read Insights charts of the quarter



In Q4 2025, VAB released insights covering **holiday behaviors, FAST services, outcomes-based case studies, cinema fandom and more**



Holidays with Heart
How Marketers Can Authentically Connect with Hispanic Shoppers



Free For All
Understanding The Growth of FAST Through Three Key Questions



What TV investment strategies are digital native brands implementing for the holiday season?



TV Means Business
How Premium Video Drives Sales in the Pharmaceutical Category



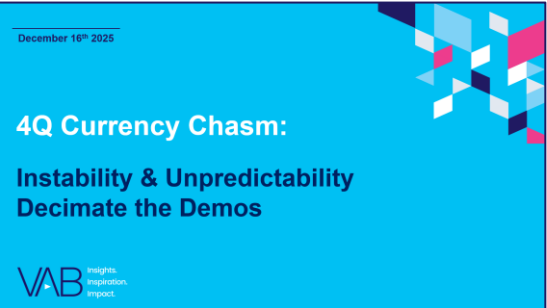
Welcome to TV
Meet the New Advertisers Who Are Creating Consumer Curiosity and Brand Consideration



Direct Momentum
10 Case Studies on How Multiscreen TV Drives Mid-Funnel Outcomes for DTC Brands



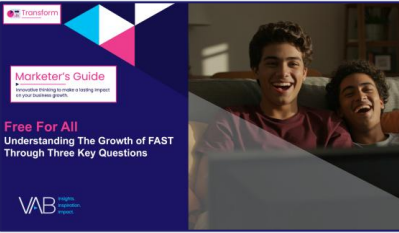
Fandom in Focus
How Cinema Will Captivate Passionate Audiences in 2026



4Q Currency Chasm
Instability & Unpredictability Decimate the Demos

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

FAST Channel Usage: Viewers are exploring more broadly, watching an average of nine channels across a mix of genres



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

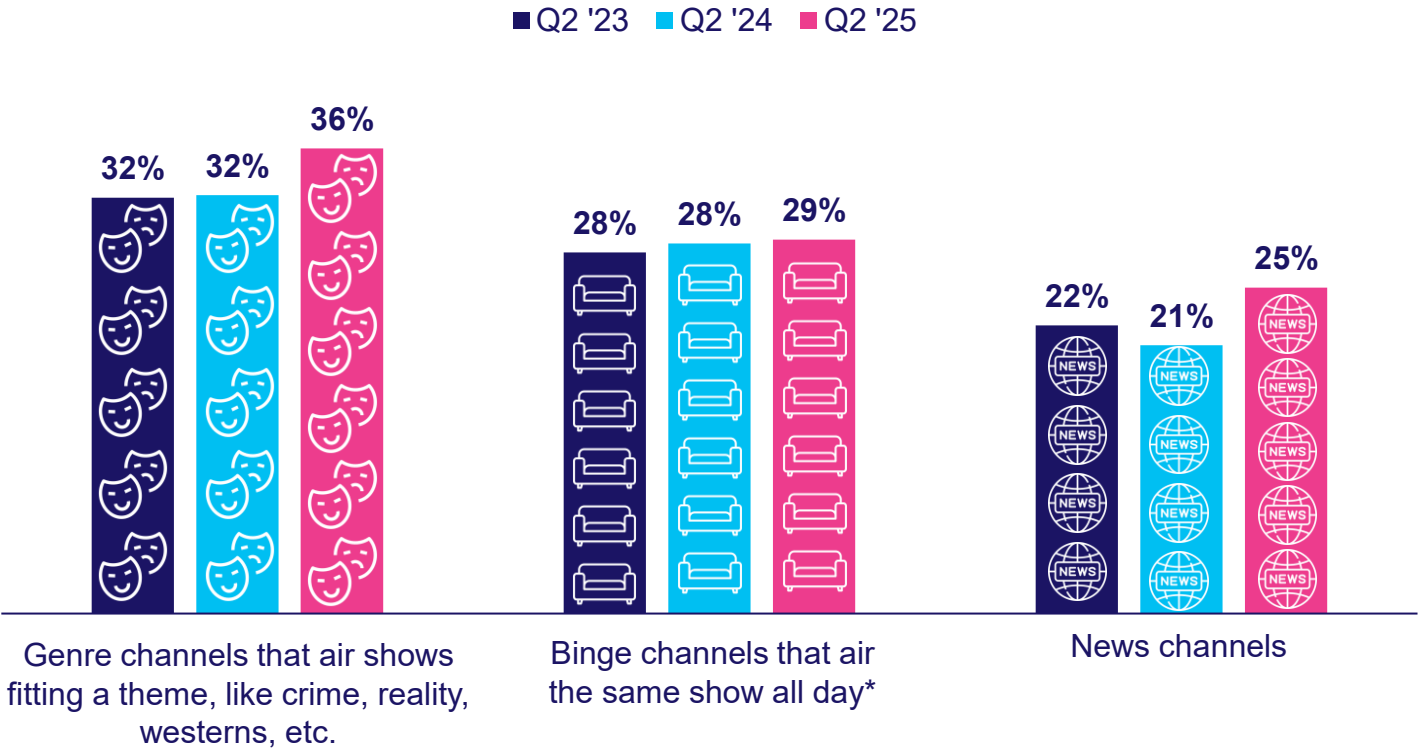


9

average number of FAST channels watched
 (vs. 5 in 2024)

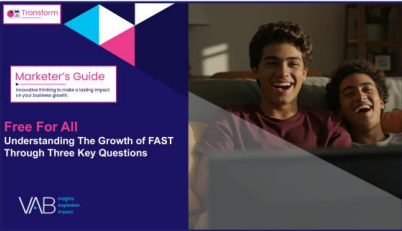
Breakdown of FAST Consumption by Channel Type

% of respondents who use Free AVOD / FAST to watch live TV channels



Source: TiVo, Video Trends Report Q2 2025. *e.g., Star Trek, Baywatch, Hell's Kitchen, etc.

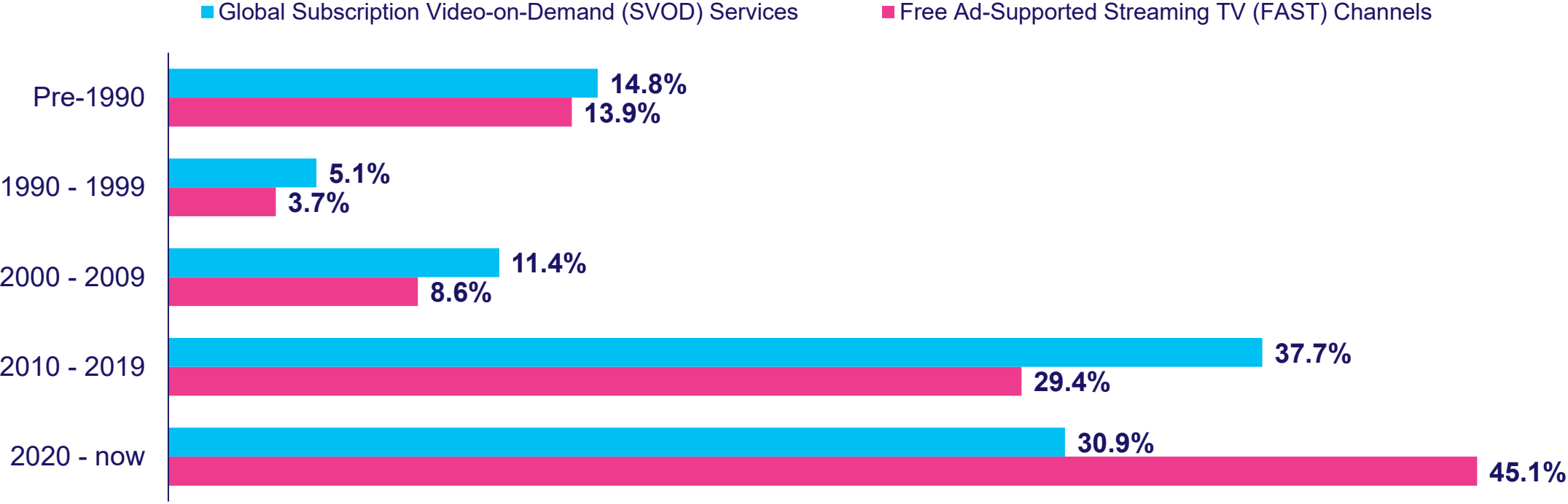
More Fresh Content to Stream: FAST services offer a higher share of the most recent titles available than SVOD platforms



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Share of Available Video Content by Production Years SVOD vs. FAST



Source: Gracenote as cited in a company blog, March 31, 2025. Note: includes TV shows and movies; SVOD includes Amazon Prime Video, Netflix, Disney+ / Hulu, Paramount+, and Apple TV+; numbers do not add up to 100% due to rounding read as 13.9% of all content available on FAST services was produced before 1990.

Cinema Fandom: Passionate audiences drive outsized success, vastly overperforming experts' box office revenue projections



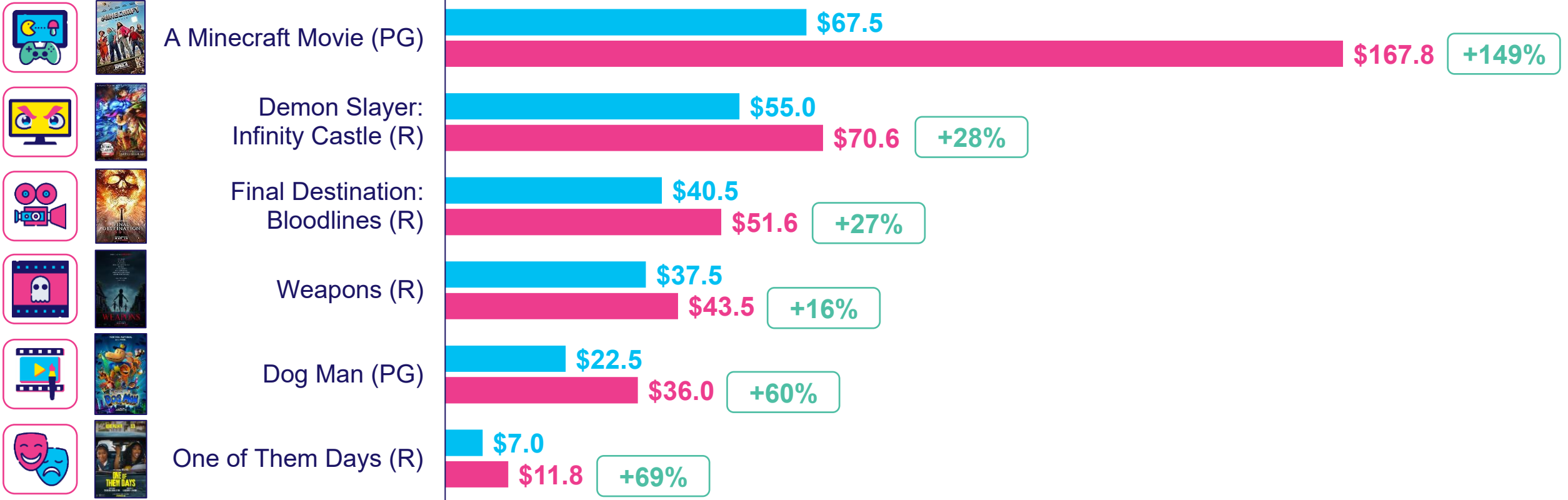
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Discover
A Fresh Take
Staying ahead of evolving dynamics in the marketplace and our culture

Domestic Box Office Projections vs. Opening Weekend Box Office

\$ in MM

■ Projection ■ Revenue



Source: Projections based on VAB analysis of Screendollars, *Wednesday Report Forecast*, 1/15/25, 1/29/25, 4/2/25, 5/14/25, 8/6/25 & 9/10/25. Chart projections reflect a median of projection range (A Minecraft Movie's 4/2 projection was \$65MM to \$70MM, with a median of \$60MM). Opening Weekend Revenue based on finalized opening weekend box office per boxofficemojo.com, as of 11/21/25.

Hispanic Consumers: Spending is amplified during the holiday season, creating opportunities for culturally resonant marketing

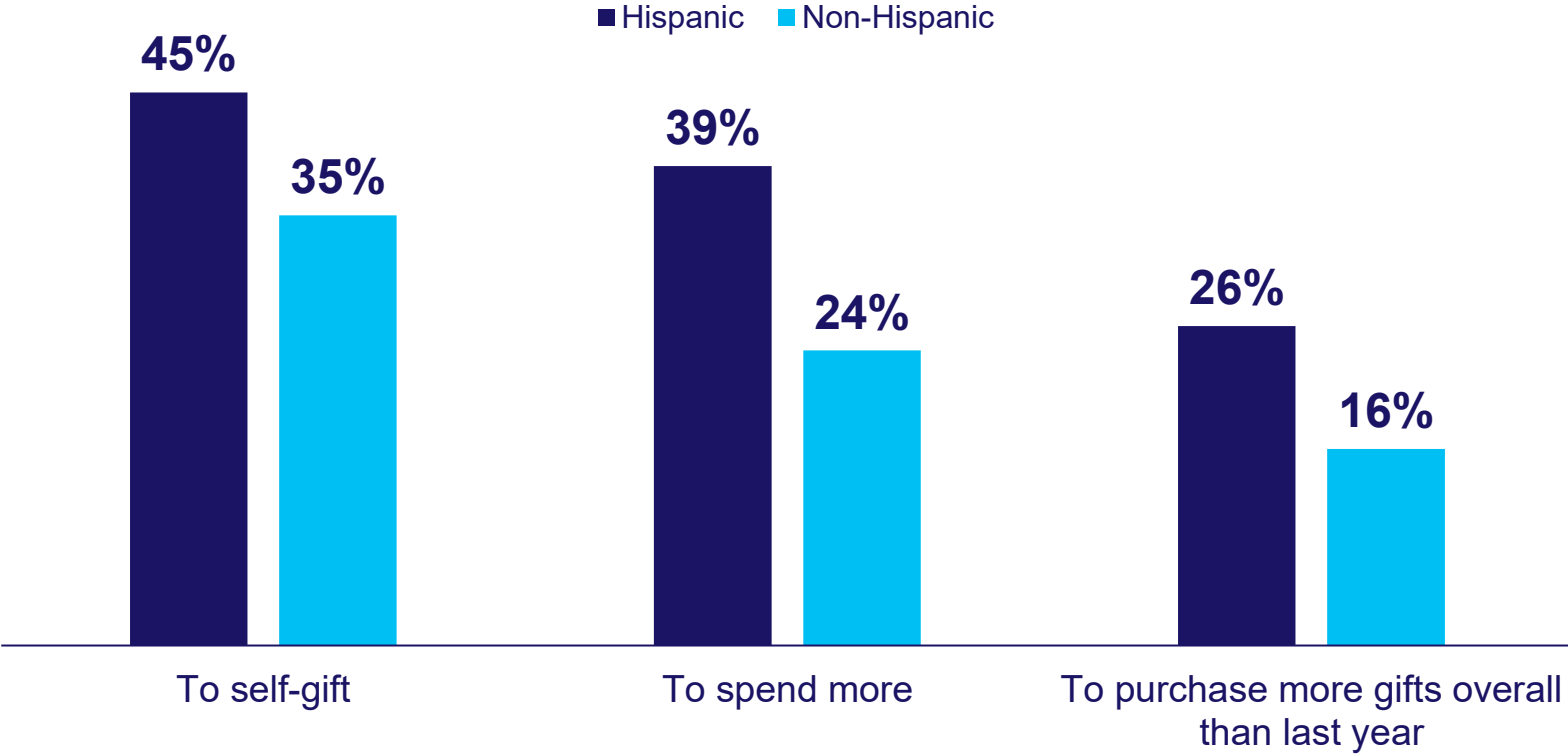


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\$2,218
estimated average amount
Hispanic consumers
spent on holiday expenses
in 2024

% of those who plan to do the following this holiday season*



Source: BMO Survey, U.S. Latinos plan to spend more on the holidays this year, November 2024. *CivicScience, 5 Key Holiday Insights Among Hispanic Americans, December 2024.

Marketer Holiday Investment: 60% of TV advertisers are poised to boost Black Friday / Cyber Monday ad budgets this year

October 21, 2025

Question of the Week:
"What TV investment strategies are digital native brands implementing for the holiday season?"

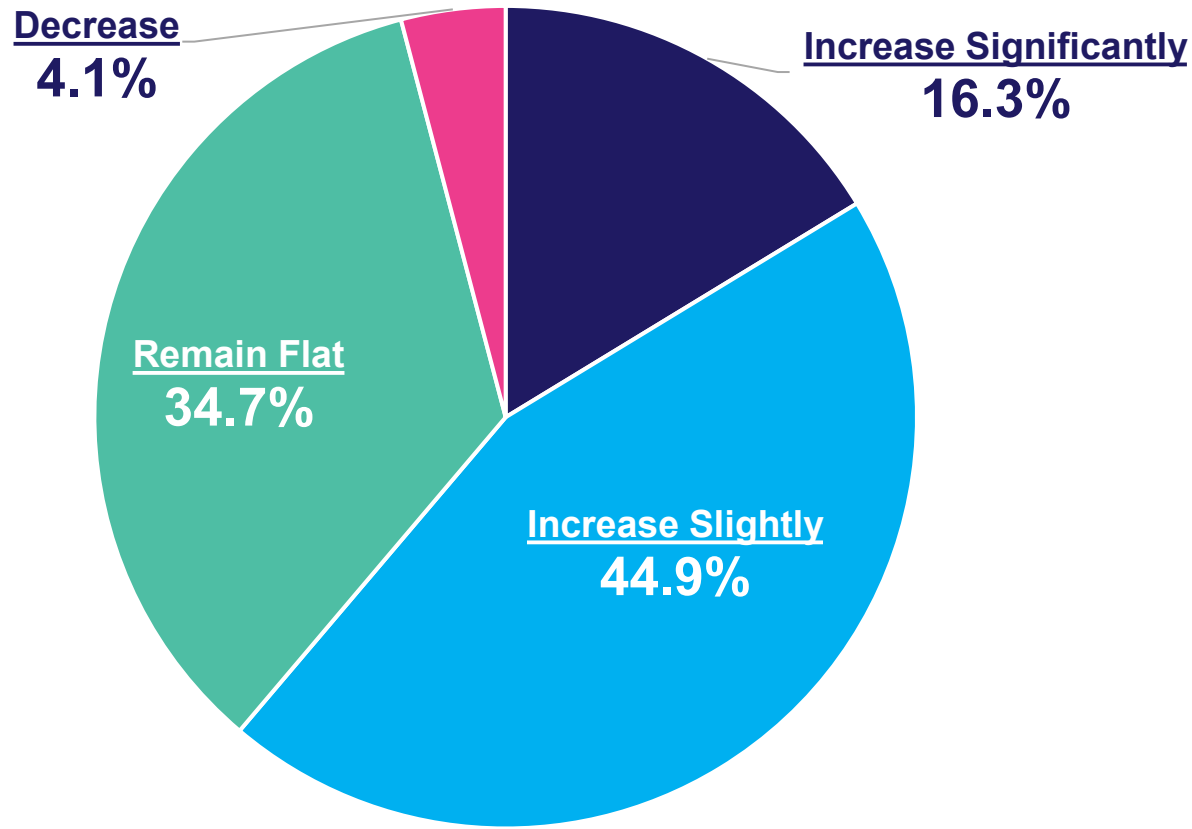
VAB | tatari

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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.

Compared to 2024, how will your Black Friday / Cyber Monday TV ad budget change this year?



Source: Tatari custom research, survey conducted over a 1-week period from August 14 – 21, 2025. 65 responses from Tatari clients across industries including Calm, Ariat, Vuori, Saatva, Nutrafol, Fabeletics, Breeo and more.

New TV Advertisers: Initial investments range from launches by SMBs to immediate 'big bets' by larger brands

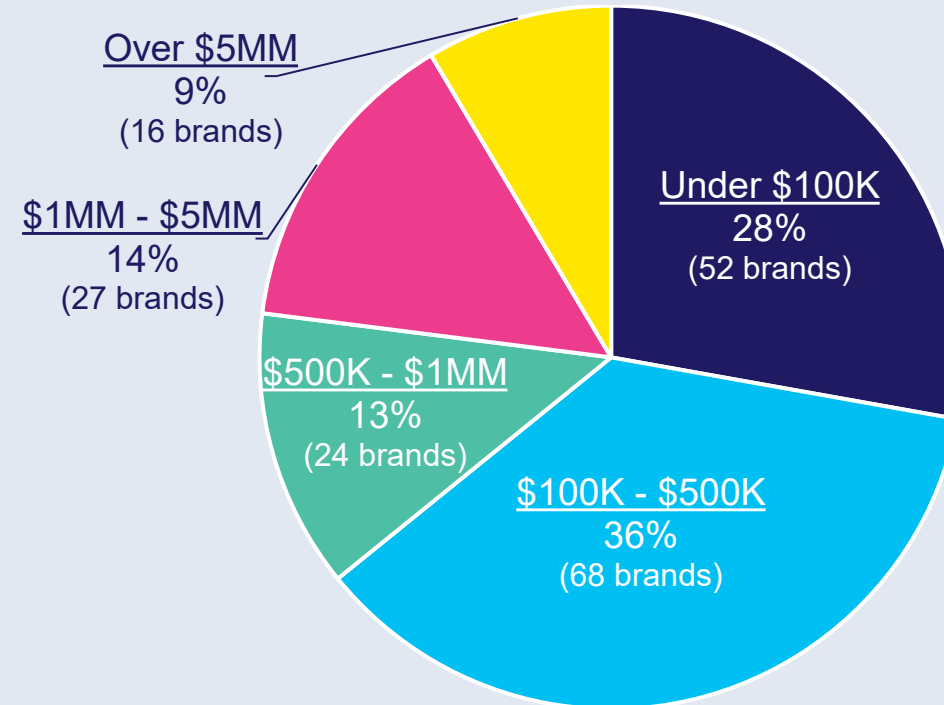


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1H '25 New National TV Advertisers by Spend Segment

% of brands within spend buckets



64% of brands invested \$500K or less

Source: VAB analysis of Nielsen Ad Intel data as of 9/4/25, 1/1/25-6/30/25. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV, streaming TV. Brands reflect those with national TV spend over \$50K.

TV Drives Search: *Royal Kingdom* saw an immediate lift in branded online search once they launched a TV campaign

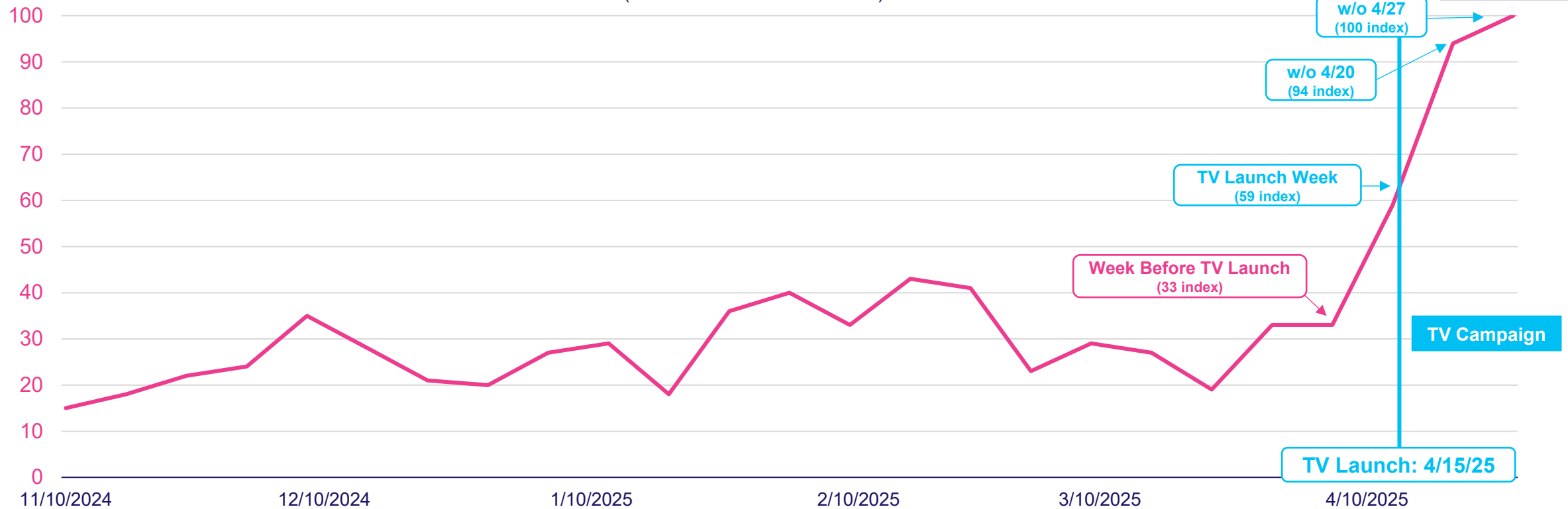


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Royal Kingdom: Weekly Google Search Trends Index

Six Months Pre-TV Campaign vs. TV Campaign Launch
(Weeks of 11/10/24 – 4/27/25)



Source: VAB analysis of Google Trends, United States only, All Categories, Web Search, weeks of 11/10/24 – 4/27/25. **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.** VAB analysis of Nielsen Ad Intel, TV launch month is based on the first activity reported across national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV, January 2025 – June 2025 (calendar months). **Royal Kingdom was launched in the U.S. on November 21, 2024.** Note: **Light blue line marks the first day of TV spending for each brand.**

TV Drives Website Traffic: After launching on TV, Factor saw double-digit traffic lifts ‘when on’ throughout 2024 and beyond



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FACTOR

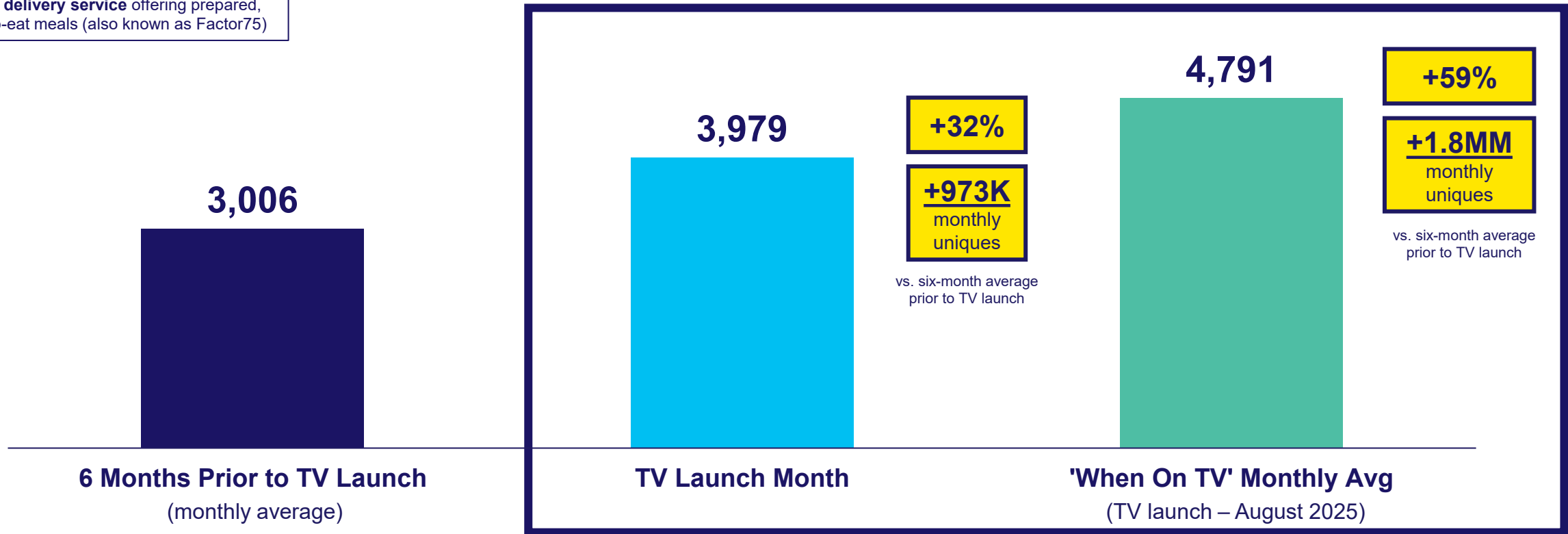
A meal delivery service offering prepared, ready-to-eat meals (also known as Factor75)

Brand Website Traffic Analysis: Unique Website Visitors

Monthly Website Unique Visitors (000) Comparison

Time Period Analysis: Jan '23 – Aug '25

Click the report cover above to see **nine other case studies** across six strategies



Source: VAB analysis of Comscore mediametrix multiplatform media trend data, P18+. January 2023 – August 2025 (calendar months). VAB analysis of Nielsen Ad Intel, TV launch month is based on the first activity reported across national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV, streaming TV. Spend is based on reported national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV, streaming TV spend. 'When on TV' represents the monthly average for brands in months where they spent in TV as measured through Nielsen Ad Intel between January 2023 – August 2025 (10 months 'when on TV'). \$31.4MM spend reflects TV investment between July 2023 – August 2025. Factor brand launched in 2013.

TV Drives Sales: Continued investment in premium video has more than doubled the collective sales of 17 pharma brands



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17 Pharmaceutical DTC Brands: Annual U.S. Sales Revenue vs. TV Spend

	<u>2021</u>	<u>2022</u>	<u>2023</u>	<u>2024</u>	<u>'24 vs '21 % Change</u>	<u>3-Year CAGR*</u>
U.S. Revenue (\$ in B)	\$37.6	\$51.5	\$70.2	\$86.8	+131%	+32%
U.S. TV Spend (\$ in B)	\$1.6	\$1.7	\$2.4	\$3.3	+106%	+27%



Sources: Revenues are based on company filings (10-K) via SEC.gov (EDGAR). TV spend based on VAB analysis of Nielsen Ad Intel data (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), Calendar years of 2021-2024. U.S. revenues for Ozempic & Wegovy were reported in Danish Krone, Dupixent & Arexvy were reported in Euros. *CAGR = compound annual growth rate (i.e., mean annual growth across the time period).

Measurement Unpredictability: Over 20% audience variances are routinely seen among key buying demos on BD+P vs. PO

Differences in Average Audience (AA) by % of Hours

Big Data + Panel (BD+P) vs. Panel Only (PO)

4-week period (w/o 9/15 – w/o 10/6)

33 Network Total

+/- 20% AA Difference	HH	P2+	P18-34	P18-49	P25-54	P55+
% of Hours More Than +20% diff:	12%	15%	31%	24%	19%	20%
<u>% of Hours More Than -20% diff:</u>	<u>7%</u>	<u>9%</u>	<u>27%</u>	<u>27%</u>	<u>27%</u>	<u>8%</u>
+/- 20% Diff Total (% of Hours):	18%	24%	58%	51%	45%	28%

How to read: BD+P average audience was more than 20% higher than PO average audience on Households for 12% of the total measured hours in the 4-week period and more than 20% lower on P18-34 for 27% of total measured hours across the 33 networks.

Source: VAB analysis of Nielsen NPower Ratings Analysis Time Period Report data (as of 10/28/25). Live. 4-week period (672 total measured hours): w/o 9/15 – w/o 10/6 (9/15/25 – 10/12/25). Total Day (6a – 6a). Average Audience % Diff: Updated Big Data + Panel (BD+P) vs. National Panel (PO). Not all networks are measured across all 672 hours within a four-week period (see appendix for more detail), so the percentages in the above chart are based on only the measured hours across each of the 33 networks. Note: only hours with a reported audience for both BD+P & PO are included in the percentages by demo.

Inspiration & Intelligence: See how TV drives holiday decisions and how marketers can tap into modern TV data & buying practices. **Download Now!**

Bonus Slide!

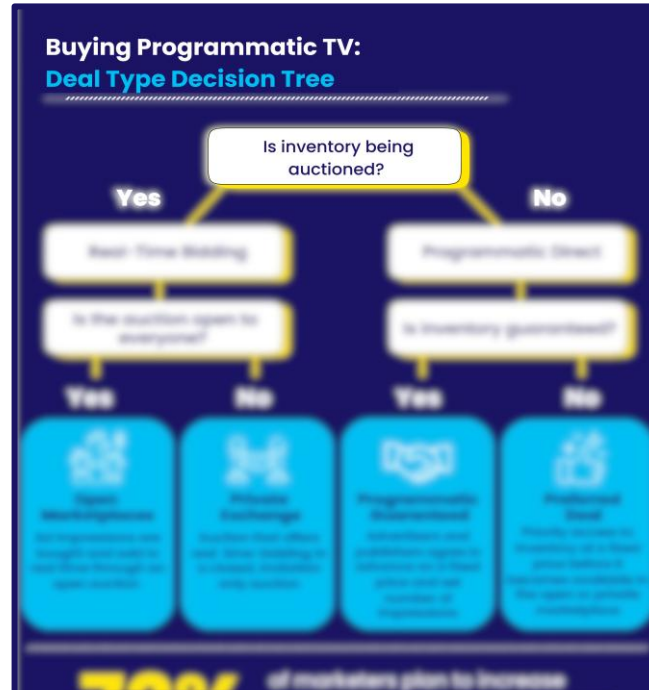
MAKING SPIRITS BRIGHT — WITH TV
FROM FIRST SPARK TO FINAL PURCHASE, TV LIGHTS UP THE HOLIDAY PATH TO PURCHASE.

TV SPARKS INSPIRATION

NEARLY 80%

of marketers plan to increase their TV advertising spend this holiday season.

[Click to download the full infographic, featuring insights from LG Ad Solutions, and learn why TV lights up the holiday path to purchase](#)



[Click to download the full infographic which simplifies the Programmatic TV buying process](#)

Swoop Whitepaper in partnership with the VAB

**It's Not Versus.
It's Premium Video.**

How data bridges the gap between Linear, CTV, OTT, and Addressable TV

[Click to download VAB's whitepaper, co-branded with Swoop, to learn why TV is a unique channel for pharma marketers](#)

Jason Wiese

EVP, Strategic Insights & Measurement
jasonw@thevab.com

Benjamin Vandegriff

SVP, Measurement Strategy & Innovation
benjaminv@thevab.com

Leah Montner-Dixon

VP, Audience & Behavioral Insights
leahm@thevab.com

Reed Kiely

VP, Data Insights & Trends
reedk@thevab.com

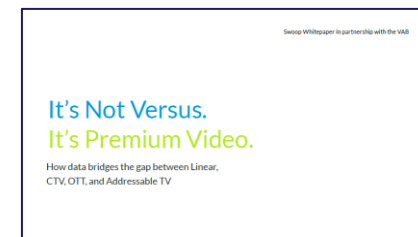
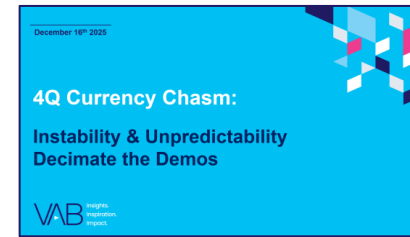
Karolina Guillen

Associate Director, Insights, Strategy & Analytics
karolinag@thevab.com

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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.



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