



2025 – 1st Quarter

The VAB Top 10

Our 10 must-read Insights charts of the quarter



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.

Premium environments boost results: Ads in high quality content are more likely to drive brand salience and action



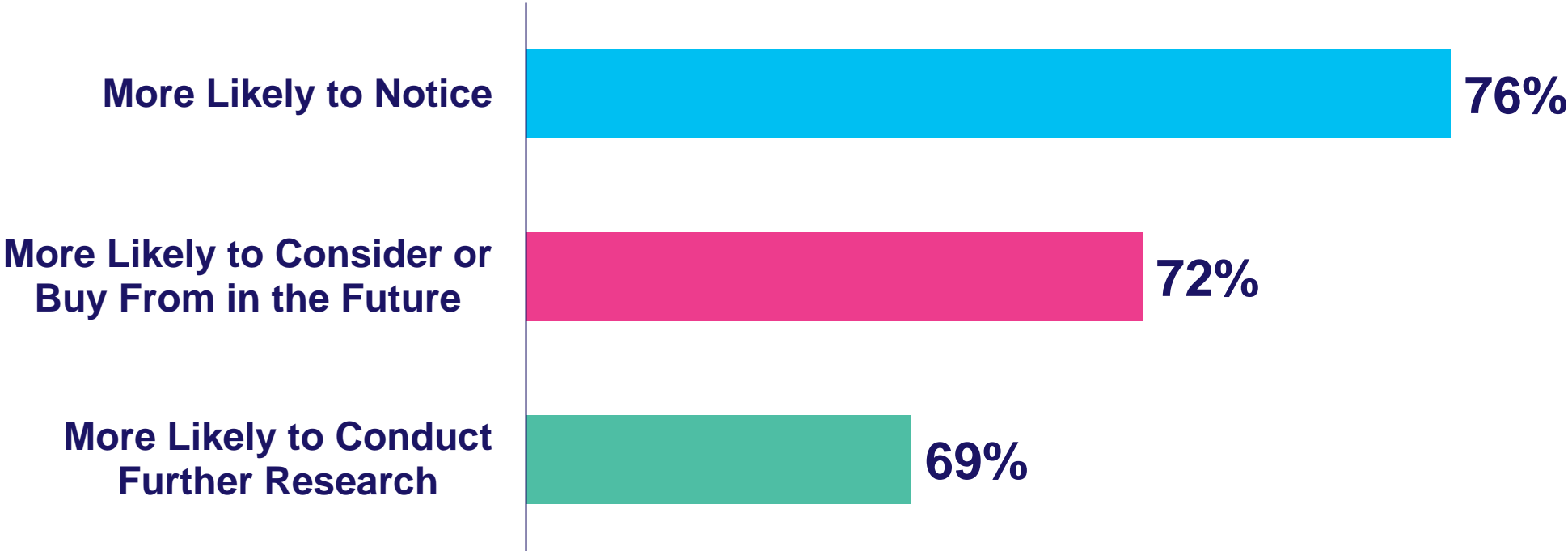
[Click here for the full report](#)



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

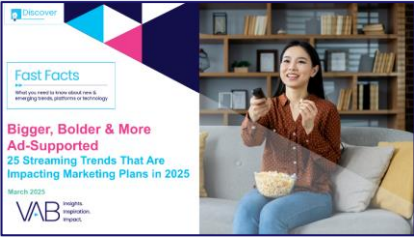
Premium Environments Compared to Non-Premium

% of U.S. respondents who agree



Source: NBCUniversal and FreeWheel, *Prescribing Premium: What a high-quality viewing experience means for consumers and why advertisers should take advantage of it*, September 2024. Reflects U.S. respondents only. Note: Premium content in the study was publisher created episodic content with 100% of the ads viewable. Non-premium content was individual created short form content with 50% of the ads viewable. All content was delivered on a TV screen.

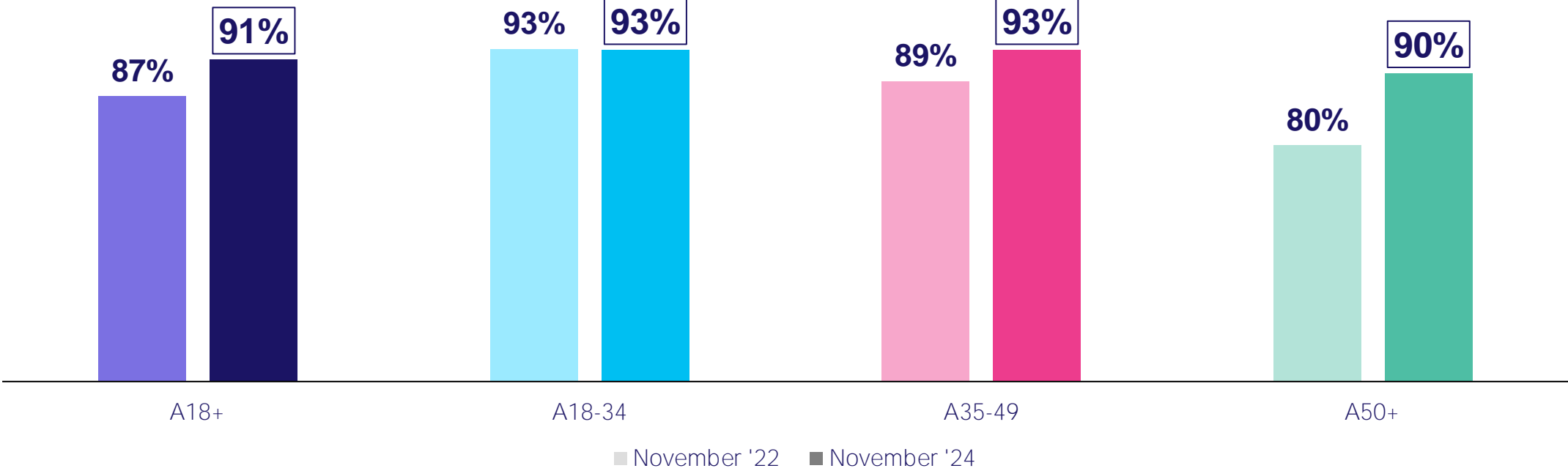
Ad-supported streaming growth: Through organic growth and the launch of new ad tiers, over 90% of streamers now see ads



[Click here for the full report](#)



% of streamers who used at least one ad-supported streaming service Last 30 Days



Source: VAB analysis of MRI-Simmons November 2022 & November 2024 Cord Evolution Study, A18+. Base = 'streamed in the past 12 months'. November '22: reflects % of streamers who have used any ad-supported streaming service in the past 30 days. November '24: reflects % of streamers who have used any ad-supported streaming services in the past 30 days.

NFL matchups matter: Divisional games, which also tend to be more competitive, significantly increase NFL viewership



[Click here for the full report](#)



P2+ Reach

2024 Season

(based on 12-game comparable analysis)



(9 Divisional Games)

Amazon's TNF had a definitive advantage with nine divisional games within the 12-game comparable analysis



(1 Divisional Game)



(2 Divisional Games)

Divisional Game Average **23.7M**

Non – Divisional Game Average **20.6M**
3.1M Difference

Divisional Game Variance **+15%**

Divisional Game Average **39.1M**

Non – Divisional Game Average **35.6M**
3.5M Difference

Divisional Game Variance **+10%**

Divisional Game Average **36.9M**

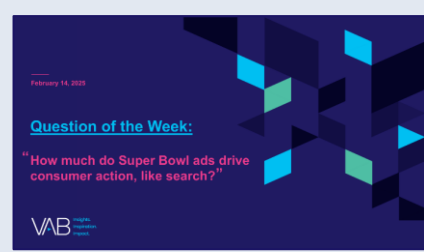
Non – Divisional Game Average **35.0M**
1.9M Difference

Divisional Game Variance **+6%**

An **average +10% lift** in viewership for divisional games vs. non-divisional match ups across the three events

Source: VAB analysis of Nielsen R&F Program Report, Sunday Night Football (Univision & Telemundo), Monday Night Football (ESPN Deportes) and Thursday Night Football (Amazon Spanish), excludes pre- & post-game shows, [Live+SD_P2+_Panel_data](#). **Univision and ESPN Deportes linear TV audience only and does not include audiences gained from their digital / app streaming.** The 12 comparable games reflect all weeks that have standalone NFL night game broadcasts across NFL weeks: 2-11 & 14-15 (excludes Thanksgiving weekend). Note: MNF week 7 includes exclusive game streamed on ESPN+; Telemundo simulcast included for NFL week 8. The average margin of victory for divisional matchups was 7.7 vs. 11.3 for non-divisional matchups with the analysis (almost a 4-point differential).

Young brands in the Super Bowl: Branded search for Liquid Death increased ten-fold after their ad aired in the big game



[Click here for the full report](#)

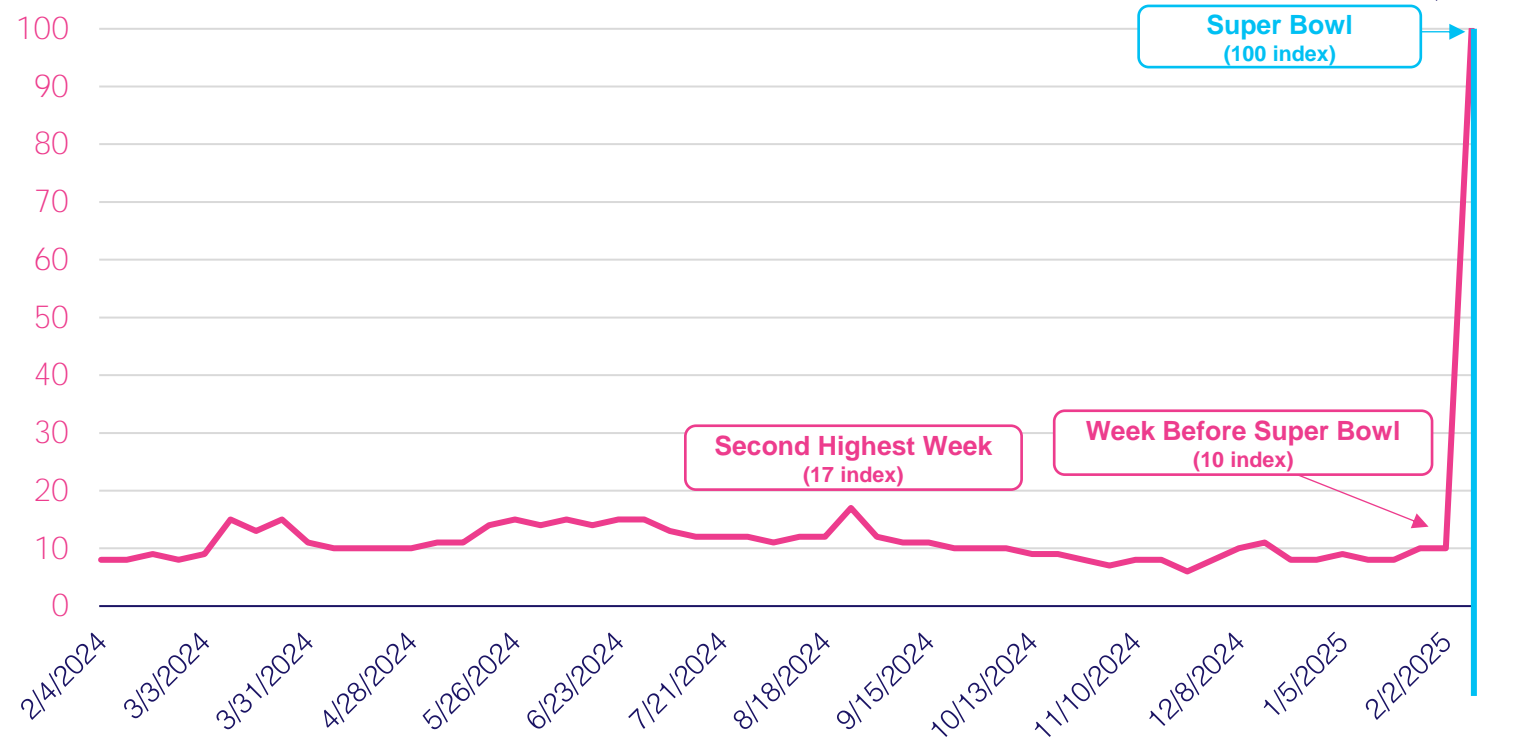


QUESTION OF THE WEEK
From the latest on consumer behavior to navigating the ever-evolving premium video landscape, our 'Question of the Week' series sheds light on business-driving strategies, insights, and innovations.

Download to see [search results for all 15 brands analyzed](#)

Weekly Google Trends Index – Liquid Death

12-month trend leading up to Superbowl LIX (Weeks of 2/4/2024 – 2/9/2025)



Liquid Death

“While we have a massive audience of loyal fans, the Super Bowl is a great opportunity to **introduce ourselves to new people** and **educate everyone** about our entire line of healthy beverages.”

Andy Pearson
VP of Creative, Liquid Death
(Muse by Clio, 2/9/25)

“**[There is] no cheaper way to reach over 100 million unique people** who want to pay attention to the commercials.”

Mike Cessario
CEO, Liquid Death
(Adweek, 2/9/25)

Source: VAB analysis of Google Trends, United States only, All Categories, Web Search, Weeks of 2/4/24 – 2/9/25. 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. Note: [Light blue line marks the date of Super Bowl LIX. Click here to view Liquid Death's Super Bowl commercial](#) (via iSpot.tv).

Understanding Alphabet's ad revenue: Spending on undefined platforms through Google equals the global ad spend in print



[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.

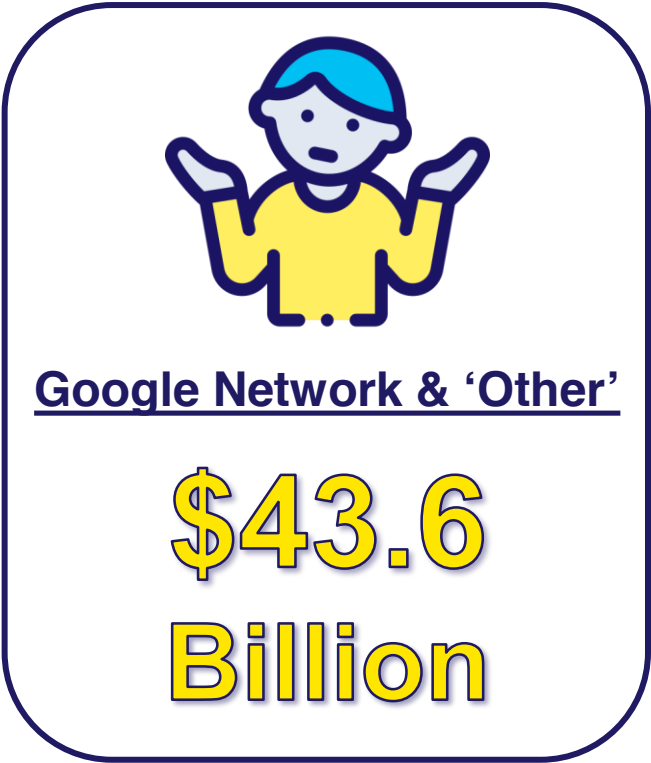
Estimated Global Advertising Revenues by Media

2024



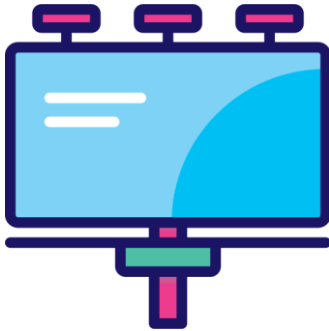
Print

**\$43.7
Billion**



Google Network & 'Other'

**\$43.6
Billion**



Outdoor

**\$36.2
Billion**



Radio

**\$29.3
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 12/31/24. '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. Totaled 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 2024.

Top concerns for marketers: Lack of transparency can lead to brand safety issues like ad fraud and questionable placements

January 04, 2025

Question of the Week:
 "Why is it important to demand transparency from my media partners?"

VAB

[Click here for the full report](#)

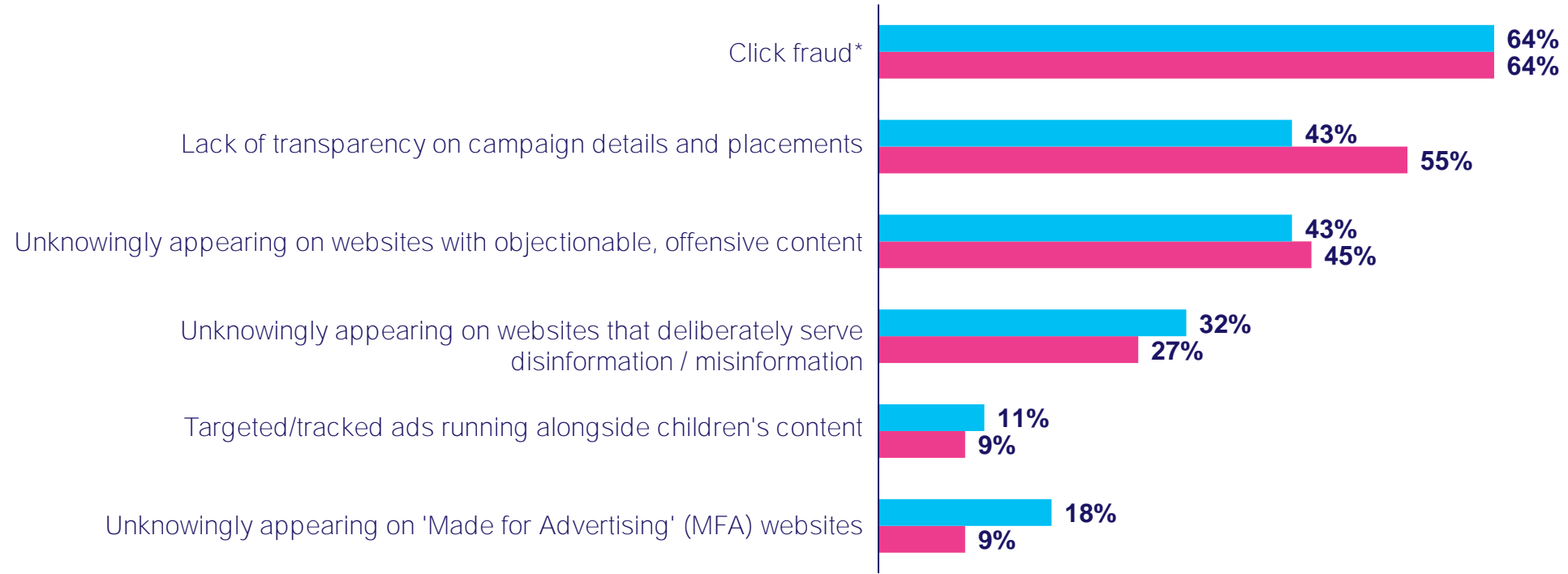


QUESTION OF THE WEEK

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.

% of respondents who are concerned about the following For Their Business / Client's Businesses

■ Brand Marketers ■ Agency Professionals



Source: VAB / Advertiser Perceptions 'Marketer Sentiment on Ad Fraud' Survey, November 2023. Survey base: Marketer and agency contacts from the Advertiser Perceptions 'Senior Marketer' and 'Streaming Video' online communities. Q3A. What are your top 3 concerns surrounding digital ad fraud regarding [your business/your clients' businesses]? Base = Total Respondents. *Click fraud* refers to bots, click farms, etc. that generate fake clicks on an ad or website.

Where else can I engage with TikTok’s audience?: Multiscreen TV creates greater emotional bonds with Gen Z



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.

% of platform users who ‘feel personally connected to a character / personality’ on the following platforms

	Gen Z	Hispanic	Black
TV / Streaming	34%	34%	31%
TikTok	25%	21%	15%
TV / Streaming vs. TikTok % more likely	+35%	+62%	+117%

***How to read:** P13-24 are **21% more likely** to feel personally connected to a character / personality from TV or streaming content vs. TikTok content

Source: VAB custom research fielded by Hub Entertainment Research as part of the 2023 Video Redefined report. Data sourced from Hub’s survey of 1,900 consumers, ages 13-74. Gen Z (P13-24) respondents = 620 (unweighted). Hispanic respondents = 325 (unweighted). Black respondents = 228 (unweighted). Data collected December 2023. Q1: Which of the following statements apply to you when you watch videos, shows or movies on the following platforms? Based on users of the platform.

Connected car penetration: Most vehicles are now connected and nearly half of adults would pay for in-vehicle entertainment



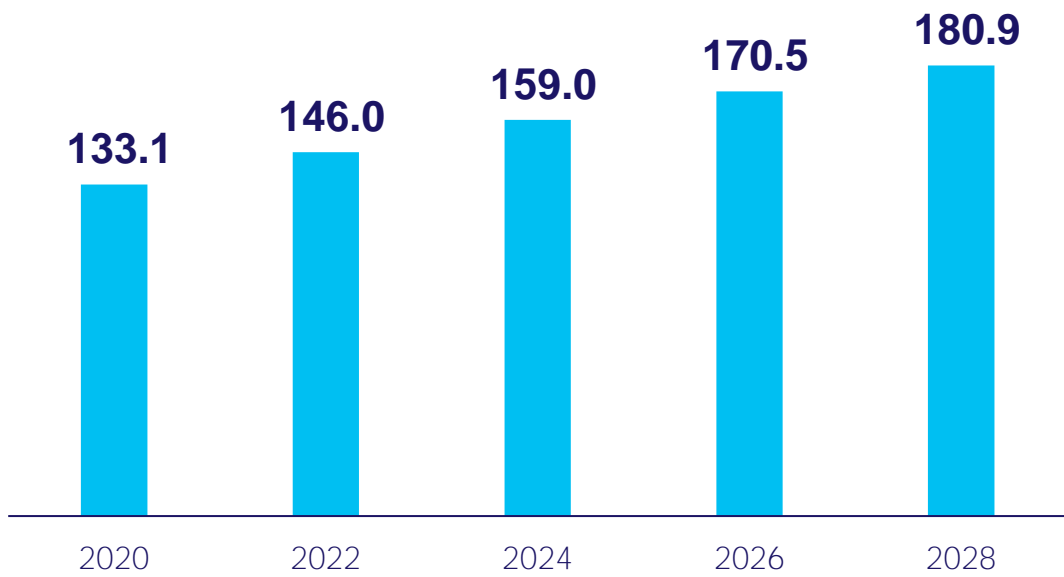
[Click here for the full report](#)



Download to see insights on 15 other connected devices

U.S. Connected Car Drivers

In millions



% of licensed drivers who drive connected cars



Monthly automotive subscription features

U.S. adults are willing to pay for*

% of respondents

66%

In-vehicle Wi-Fi / Connectivity Packages
(Allows passengers to always connect to the internet from the car)

45%

In-Vehicle Entertainment
(Streaming services, movies, games packages)

Source: EMARKETER Forecast, September 2024. Note: ages 14+; licensed drivers who have driven a connected car and accessed its internet-enabled features at least once during the calendar year. *KPMG, KPMG American Perspectives Survey, May 30, 2024. Note: ages 18+. Reflects respondents who would be 'very likely' or 'somewhat' likely to pay for monthly automotive subscription features.



February 7, 2025

Question of the Week:

"How can I capitalize on the growing interest in women's sports?"



[Click here for the full report](#)

Women's sports calendar: Find out where you can engage with highly attentive, growing audiences throughout the year



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.

185MM

Adults 18+ are **interested** in women's sports*

60MM

Adults 18+ are **more interested** in women's sports than last year**

108MM

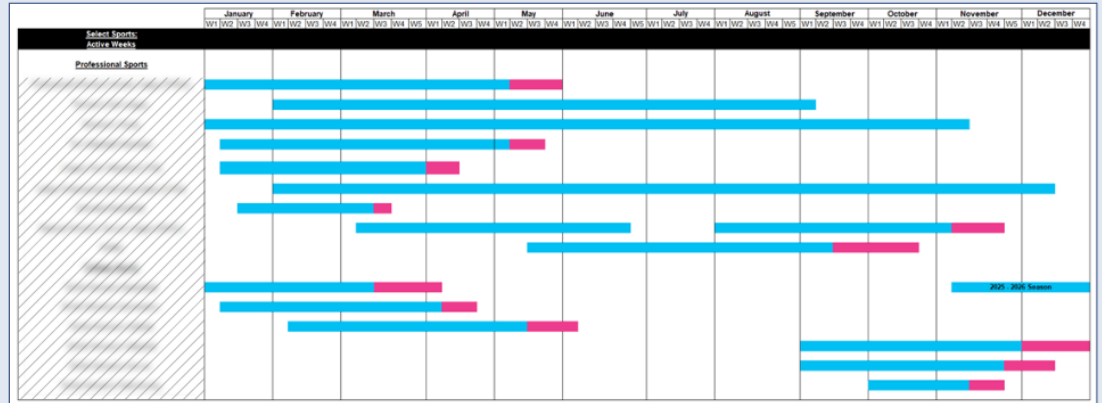
Fans **wish there was more** media coverage of women's sports***

67%

of women sports fans make it a point to **support brands that invest in women's sports*****

2025 Women's Sports Calendar

2025 calendar of 15 select sports league seasons



Note: Light blue indicates regular season games and matches, pink represents post season games and events. Check league websites for specific game and event information



GET THE FULL COPY

Source: VAB analysis of 2024 Fall MRI-Simmons USA Study, A18+. *Reflects respondents who are 'very interested', 'somewhat interested' or 'a little bit interested' in the following women's sports: Mexican Women's National Soccer Team, National Women's Soccer League, Women's National Soccer Team, WNBA, LPGA, Women's Tennis, Figure Skating, Summer Olympics and Winter Olympics. **VAB analysis of MRI-Simmons 2024 Q4 Trending Topics Study, A18+. ***SBJ, Horizon Sports & Experiences releases study on women's sports growth, 2/4/2024.



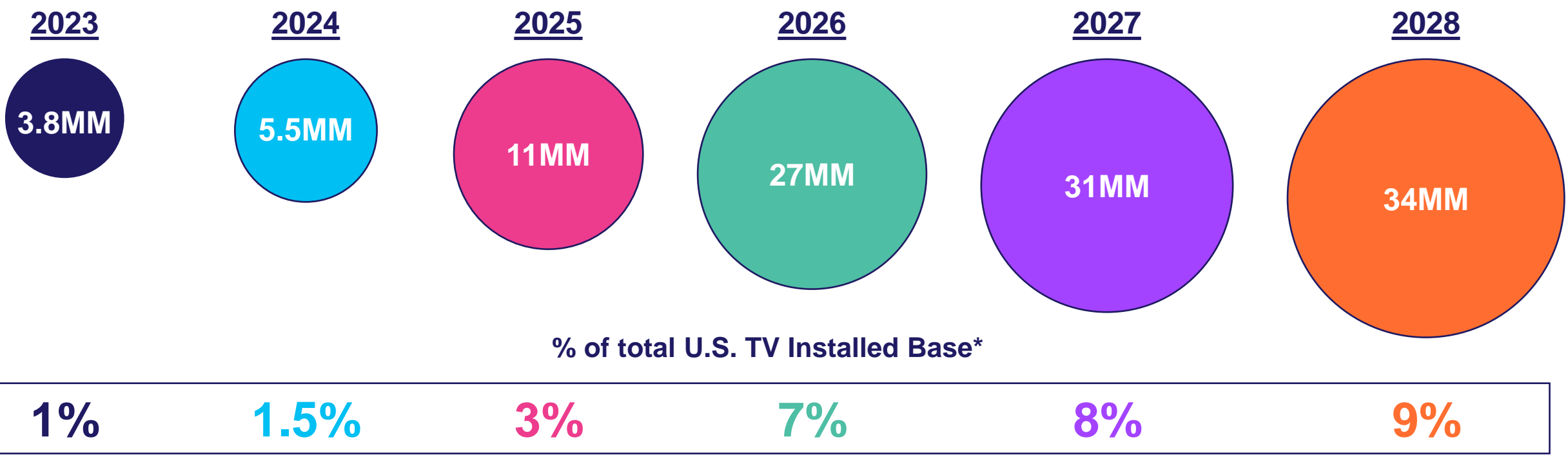
NextGen TV: Only 3% of TVs in the U.S. are NextGen-capable, with penetration projected to still be below 10% by 2028



[Click here for the full report](#)

Simplify What Is...
Clarifying marketing topics and terms

Estimated Number of NextGen-Capable TVs in the U.S.



Source: TV New Check, ATSC Touts 3.0 Progress Despite Spectrum Challenges, 6/20/24. *S&P Global Market Intelligence Kagan estimates; industry data.

Essential one-sheeters: VAB helps to simplify measurement platforms, currency offerings and multiscreen TV terminology. **Download Now!**

Bonus Slide!

Measuring Across Platforms VAB Insights. Inspiration. Impact.

What are the Key Features of 'The Gauge' and 'The Score'?

Nielsen The Gauge™	comscore The Score™ report
Leveraged for measurement purposes , a monthly snapshot of total broadcast, cable, streaming and other consumption through TV screens, reporting on US audiences across the... Reporting Frequency: Monthly	Leveraged for measurement purposes , a weekly report on the share of ad exposure time across broadcast, cable and streaming at both the national and household level across platforms. Reporting Frequency: Weekly
Reporting Level: Household, Person-Level	Reporting Level: Household, Person-Level
MRC Accreditation: National & Local Comscore TV (Time-Based Grid Reports) (Total US Media & Average Audience)	MRC Accreditation: National & Local Under Review
JIC Certification: N/A	JIC Certification: N/A
Scale: 31M Households	Scale: 45M Households
Audience: Broad Demo, Audience-Based Buying	Audience: Broad Demo, Audience-Based Buying
JIC Certification: National Cross-Platform Currency	JIC Certification: National Cross-Platform Currency

Download to learn more about the key features between 'The Gauge' & 'The Score'!

Multi-Currency Menu
A quick guide to the currency options that marketers are evaluating for the 25/26 upfront season

comscore BIG DATA	iSpot.tv BIG DATA
DATA SOURCE: STB + vMVPD	DATA SOURCE: ACB + STB
REPORTING: Household, Person-Level	REPORTING: Household, Person-Level
MRC ACCREDITATION: National & Local Comscore TV (Time-Based Grid Reports) (Total US Media & Average Audience)	MRC ACCREDITATION: National Service; Local Under Review
JIC CERTIFICATION: National Cross-Platform Currency	JIC CERTIFICATION: N/A
SCALE: 31M Households	SCALE: 45M Households
AUDIENCE: Broad Demo, Audience-Based Buying	AUDIENCE: Broad Demo, Audience-Based Buying
JIC CERTIFICATION: National Cross-Platform Currency	JIC CERTIFICATION: National Cross-Platform Currency

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

videoamp BIG DATA + PANEL-INFORMED

DATA SOURCE: STB + ACB
REPORTING: Household, Person-Level
MRC ACCREDITATION: In Process

SCALE: 45M Households
AUDIENCE: Broad Demo, Audience-Based Buying
JIC CERTIFICATION: National Cross-Platform Currency

Download for an updated look at currency solutions!

MULTISCREEN TV ADVERTISING TERMINOLOGY
Lexicon of aligned terms for TV advertising in all its forms, developed by U.S. MVPDs and the VAB.

The following list of unified TV Advertising Terms was developed together by Ampersand, Comcast Advertising, Cox, DIRECTV Advertising, DISH Media, Optimum Media, Spectrum Reach, and Verizon Fios along with the experts at the VAB. The goal of this recommendation is to align the media and advertising industry around the various delivery types of TV advertising in all its forms.

Streaming Notes

Multiscreen TV
When referring to multiple TV/streaming endpoints, use the term multiscreen TV.
Example: Today's consumers view media across many screens, making multiscreen TV advertising necessary to reach a full audience.

As MVPDs transition to IP-based infrastructures, some or all of the ads within a viewer's "traditional TV" experience may be dynamically delivered.

Download for key multiscreen TV ad terms!

Member only resources: Access exclusive content including historical TV upfront CPMs and TV spend by industry, only for VAB members

Member Exclusives

The cover features a dark blue background with a geometric pattern of white and light blue triangles at the bottom. The VAB logo is in the top right corner with the tagline 'insights. inspiration. impact.'

TV Upfront Historical CPMs
Primetime
19 Broadcast Seasons

VAB Member Exclusive

Download to see TV Upfront TV Historical CPMs!

The cover features a dark teal background with a glowing aurora borealis in the lower right. The Simplify logo is in the top left, and the VAB logo is in the top right with the tagline 'insights. inspiration. impact.'

TV Spend Report by Industry: FY 2024
Your guide to national TV spending strategies

VAB Member Exclusive

Download for TV spend insights by industry!

If you're interested in becoming a VAB member, [click here for more information](#)

1Q 2025 Insights & Measurement Content Releases



Jason Wiese

SVP, Director of Strategic Insights
jasonw@thevab.com

Benjamin Vandegriff

VP, Measurement Solutions & Innovations
benv@thevab.com

Kailyn Hartmann

VP, Advanced Analytics & Intelligence
kailynh@thevab.com

Leah Montner-Dixon

Director, Audience & Behavioral Insights
leahm@thevab.com

Reed Kiely

Director, Data Insights & Trends
reedk@thevab.com

Karolina Guillen

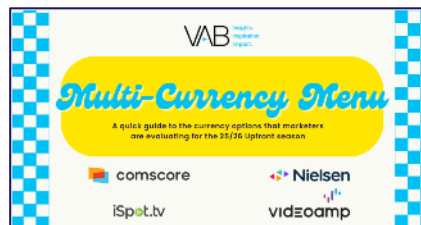
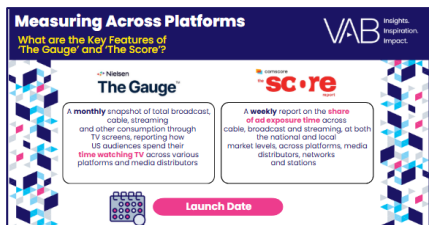
Associate Director, Insights, Strategy & Analytics
karolinag@thevab.com

Kaileen Cain

Senior Insights Analyst
kaileenc@thevab.com

Discover more

Looking for more data, insights and takeaways?
Check out this related VAB content



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