



2024 – 2nd 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.



Gen Z prefers long-form video: While P16-34 enjoy social videos, over two-thirds spend more time with long-form content




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How much do you agree or disagree with the following statements regarding short-form content?

% P16-24 / P25-34 respondents



65% / 75%
of P16-24 agree that... of P25-34 agree that...

'I spend more time watching professionally produced long-form programming through streaming and TV than short-form video content on social media platforms'



66% / 71%
of P16-24 agree that... of P25-34 agree that...

'Watching professionally produced, long-form programming through streaming and TV is more engaging to me than short-form, user-generated videos on social media platforms'

Source: VAB custom research fielded by Hub Entertainment Research as part of the 2023 *Evolution of Video Branding* report. Data sourced from Hub's survey of 2,400 TV consumers, ages 16-24 & P25-34 who meet the following criteria: watch at least one hour of TV / week, have broadband access. U.S. census balanced. Data collected early February 2023. Q: How much do you agree with the following statements?

All the Feels: Gen Z builds more meaningful connections with characters and people from TV and streaming than social media

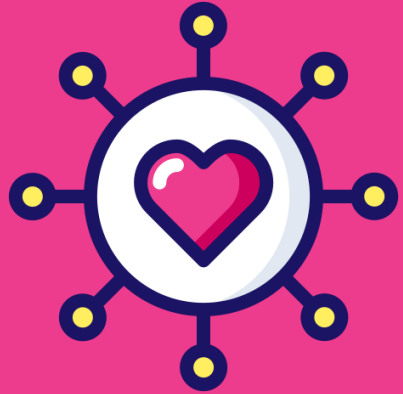


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34%

of Gen Z say they 'feel personally connected to a character / personality' from **TV or streaming** content

VS.

% of P13-24 who feel personally connected to a character / personality from content on the following platforms

TikTok 25%

Snapchat 15%

Instagram 21%

facebook 16%

YouTube 27%

TV / Streaming vs. Social Media*
% more likely

+35%

+125%

+61%

+117%

+26%

***How to read:** P13-24 are **35% 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. P13-24 respondents = 620 (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?

Inspiring action among Hispanics: TV and streaming is more likely to influence tech product purchases than social media

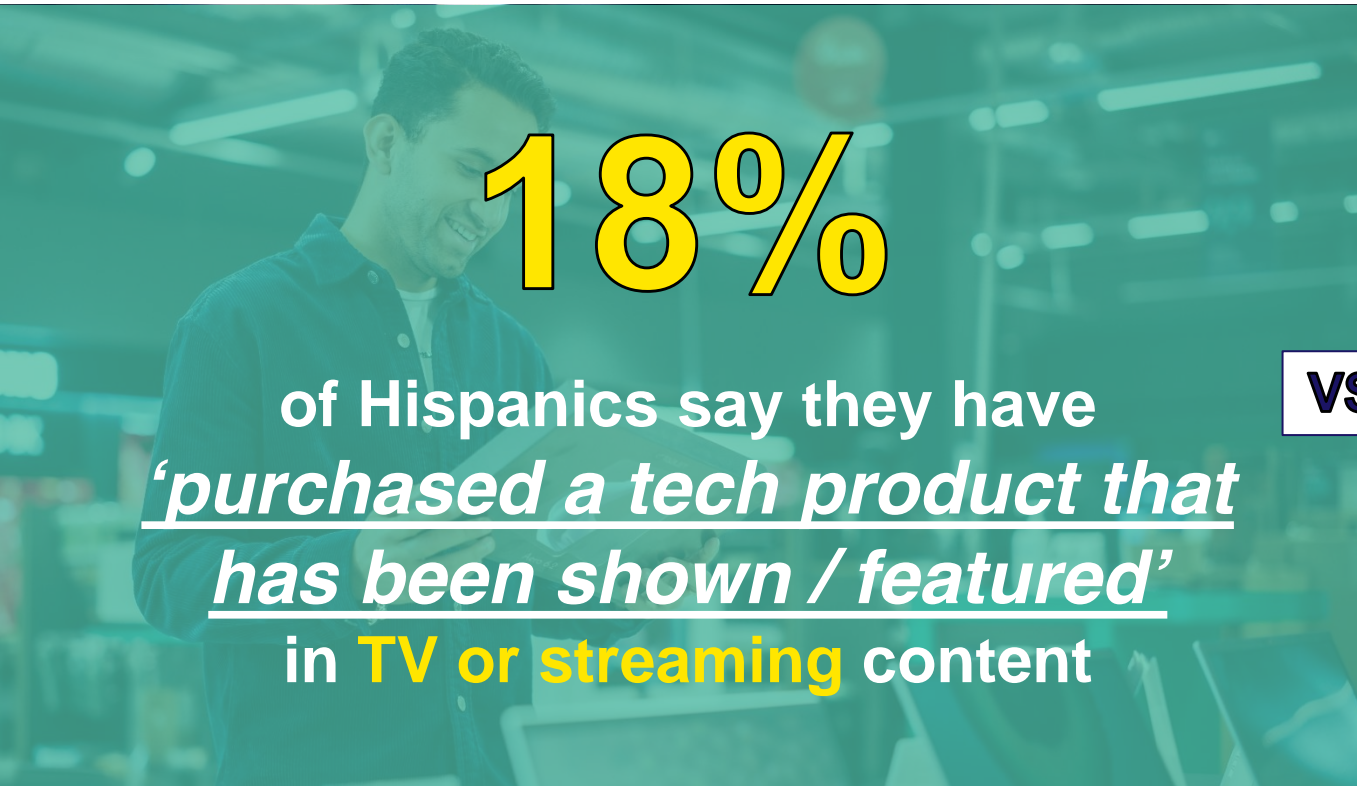


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% of Hispanics who have purchased a tech product that has been shown / featured on the following platforms

TikTok 14%

Snapchat 12%

Instagram 13%

facebook 16%

YouTube 16%

TV / Streaming vs. Social Media*
% more likely

+26%

+51%

+30%

+12%

+10%

***How to read:** Hispanics are **26% more likely** to purchase a tech product that has been shown / featured in 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. Hispanic respondents = 325 (unweighted). Data collected December 2023. Q3: Which of the following actions have you taken as a result of watching something on the following platforms?

2023 new TV advertisers: Despite economic uncertainty, more dollars were invested by new advertisers than in prior years

▶ During the full year of 2023, **313 advertisers** across **56 categories** invested over **\$1.36 billion** in national TV for the first time



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New National TV Advertisers 2019 – 2023



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

For a full list of the 313 brands with spend [click here](#)

Source: VAB analysis of Nielsen Ad Intel data as of 2/7/24, 1/1/23-12/31/23. 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. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100K.

New TV Advertisers



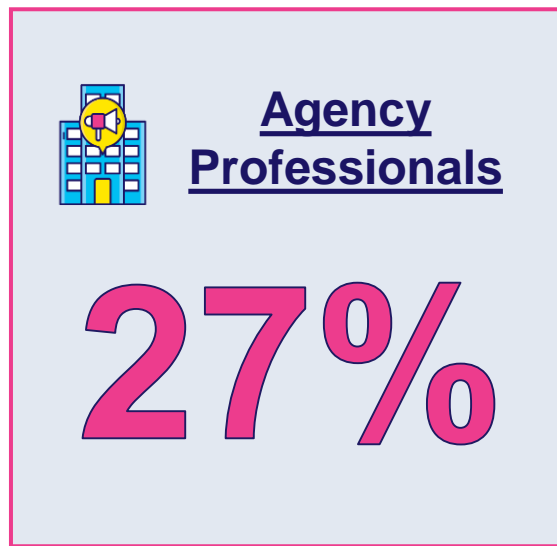
An inconvenient truth: More than two out of three marketers & agencies prioritize cost over brand safety in their ad campaigns



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

% of respondents who are prioritizing brand safety over lower CPMs



*Brands and agencies have different reasons to push for lower costs including **cost suppression tied to compensation** or **KPI directives***



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. Q6. What solutions [is your company/are your clients] using to prevent digital ad fraud? Base = Total Respondents.

Consumer interest in cinema: Upcoming theatrical releases were the two most engaging ads in this year's Super Bowl



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2024 Superbowl Ads Ranked by Engagement Index

“Deadpool & Wolverine” (Walt Disney Studios)



#1

~6 months
from release

23.4x
more engagement
as the median-performing Super Bowl LVIII ad airing

“Wicked: Part One” (Universal Pictures)



#2

10 months
from release

21.1x
more engagement
as the median-performing Super Bowl LVIII ad airing

“Twisters” (Universal Pictures)



#6

~6 months
from release

16.9x
more engagement
as the median-performing Super Bowl LVIII ad airing

*Note: Each Super Bowl ad performance is indexed to the median-performing in-game spot (the median airing is scored at 100). Engagement is based on online activity like search and website visits after airing.

Source: EDO, 'Super Bowl LVIII Ad Rankings', February 2024. Rank #3 was 'Volkswagen – An American Love Story' (1,694 index), Rank #4 was 'Poppi – The Future of Soda is Now' (1,661 index), Rank #5 was 'Temu Billionaire' (1,443 index). Click imagery above to watch commercial.

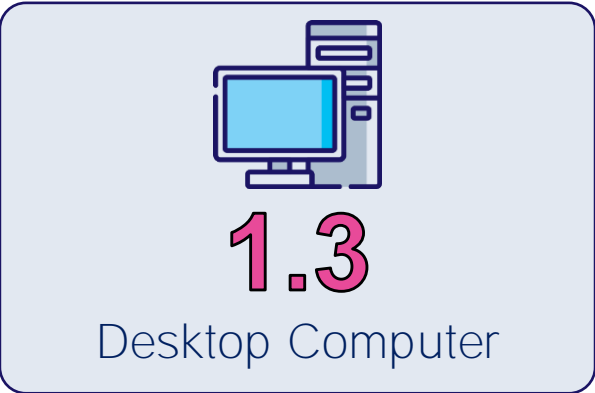
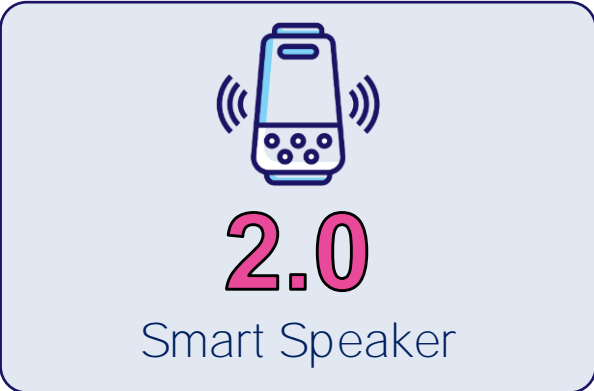
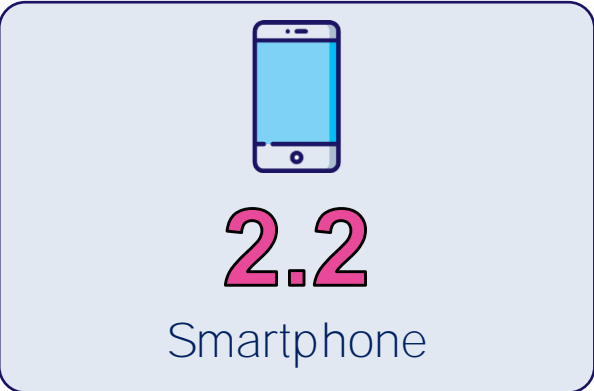
Device ownership: HHs have more TVs than any other device, which creates more opportunities for brands on a big screen



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Households: Average Number of Devices Owned



Source: VAB analysis of ARF DASH study, full year 2023. Based on survey of 10,000 A18+. Q4: How many of the following devices do you and the members of your household own and have used in the past 6 months? Based on household weighting.

Growth of ad-supported streaming: A majority of new streaming subscriptions are now for an ad-supported tier

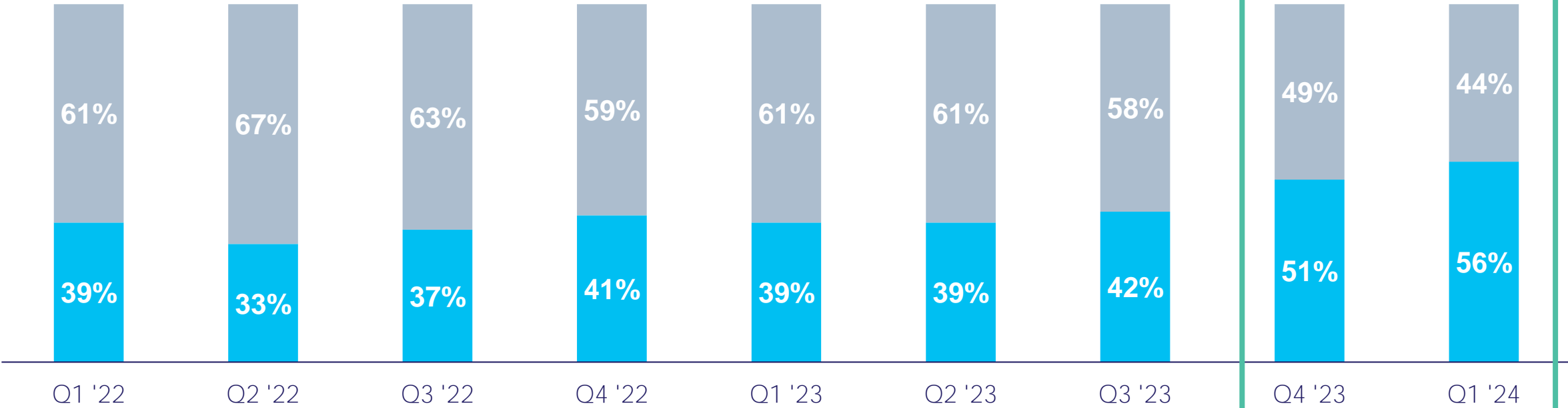


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Select SVOD Gross Adds Ad-Free vs. Ad-Supported

■ Ad-Supported ■ Ad-Free



Source: Antenna. U.S. only. Excludes free tiers, MVPD + Telco Distribution, and select Bundles. Services include AMC+, Apple TV+, BET+, Discovery+, Disney+, Hulu, Max, Netflix, Paramount+, Peacock and Starz. AMC+ does not include Direct distribution.

Snackable Insights: Download two of VAB's most popular infographics for quick insights on video consumption and the latest on currency!

The Story of Us: How Americans Spend Their Leisure Time



Download to get the full picture!

Multi-Currency Menu: Quick Guide on Currency Options



Download to learn more!

Gen Z Glossary: 101 terms to decoding Gen Z, helping brands understand and connect with young audiences






Bonus Slide!



Sampling of Gen Z Terms Included



- ▶ **Basic:** Someone who likes and prefers mainstream products, music, fashion and trends
- ▶ **Cap:** Not the truth, a lie 
- ▶ **Eras:** A stage of life that you are in (I'm in my fitness era!)
- ▶ **Flavortown:** Guy Fieri slang term, it is a state of mind where food and fun meet in harmony 
- ▶ **FRFR:** For Real For Real, to emphasize the truth in a statement
- ▶ **Hits Different:** Something that has a profound impact on you 
- ▶ **Main Character:** A type of energy someone gives off, thinking they are the main character in their own story
- ▶ **Understood the Assignment:** Someone who is giving 100% in whatever they are doing



Download **'Untangling Gen Z Slang'** for the full list of 101 terms!



Your Questions, Answered: Stay up-to-date on relevant industry topics through our new Question of the Week series

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.

[Click here for the hub](#)

New Feature!

Have a question you want us to answer? We're always fielding them! [Click here](#) to reach out to us.

'Despite Google's recent delay, how do I reduce my dependency on third-party cookies?'

Solution: Leverage future-proofing technology like Universal IDs which offer a privacy-focused alternative for targeting

While Universal IDs have been around for several years, the increased adoption and interoperability of Universal IDs will play an important role in enhancing audience targeting and measurement capabilities.

Multiple Universal IDs

Universal ID (UID) - Unique identifier that allows publishers and advertisers to recognize and authenticate users across publishers, platforms & devices, providing a holistic view of audiences.

There are several Universal IDs in the marketplace that can serve as a futureproof way to target and measure audiences for CTV and programmatic campaigns.

Universal IDs can help marketers to...

- Eliminate dependency on 3rd party cookies
- More seamlessly partner with publishers and data providers to match first-party data on PII in a privacy compliant and secure manner
- Achieve greater precision in audience targeting
- Increases accuracy of cross-channel measurement

Universal ID Examples

- theTradeDesk UID 2.0
- Open ID
- /LiveRamp Ramp ID

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'As a small business owner, how can I effectively advertise on TV?'

Audience-based buying enables businesses to seamlessly engage with multiple customer targets across premium, brand-safe TV platforms

Tactics currently being used within audience-based TV buying strategies

- 49% are running their campaign across different platforms / screens beyond linear TV
- 44% are targeting multiple audiences in order to focus on best customer prospects
- 41% are targeting different audiences across different screens
- 31% are using an audience-based TV buying self-serve platform developed by a media partner

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'How can I be more innovative with my TV campaign?'

Younger audiences are more likely to recall seeing shoppable TV ads, providing brands an opportunity to connect with this valuable segment

% of A18+ who recall seeing different types of interactive ad formats when watching TV

Ad Format	% of total respondents (P18+)	% of total respondents (A18+)
Ads with a scannable QR code	27%	33%
Ads that appear on the screen when a program is paused (pause ads)	19%	20%
Promos with an 'add to watch list' button	14%	18%
'Click to buy' ads (via methods like Roku Pay, etc.)	12%	19%
Explosive ads that let you browse different video clips, product types, or information screens	12%	20%
Click to receive information to your email device	10%	14%

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'Are ads with creative that run in contextually relevant content more effective?'

By leveraging psychographic targeting and context within their campaigns, marketers can drive greater brand resonance and purchase intent

Resonance Proven Against Branding Measures

Measure	Low Resonance	High Resonance
Unaided Resonance Lift %	2.9	4.7 (+62%)
Purchase Intent Lift %	5.4	7.4 (+37%)

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'During this election year, how can I get the most impact from my local ad campaign?'

Local news is valued by many Americans because it is trustworthy, provides useful information and can positively impact their community

- 83% Find local news coverage on TV to be most trustworthy
- 77% Feel local news provides people with important info about their community & critical national news
- 72% Agree local news helps enact positive change in their local community

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'How can I optimize my local video campaigns across screens to extend reach, drive site visits and increase sales?'

VAB INSPIRE Spotlight on INNOVATION & OUTCOMES

NEW WEBINAR

MASTERING THE ART: OPTIMIZING MARKETING IMPACT WITH PREMIUM VIDEO

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- Joe Rutuff, VP, Product Management, comscore
- Ashley Arena, Head of US Advanced Video Activation, PMD
- Armen Adjemian, Co-Founder & CEO, DISQO
- Danielle DeLauro, VP, Marketing, VAB

[Click to watch](#)

Note: the above reflects a sampling of slides from each 'Question of the Week' content piece

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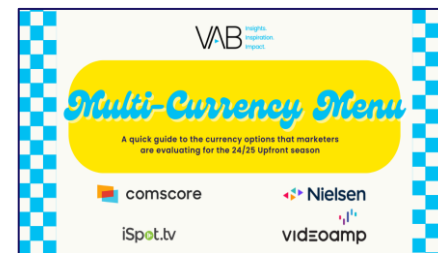
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