



2024 – 4<sup>th</sup> 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](https://theVAB.com).



# Generating brand interest: Multiscreen TV drive more search queries than a mobile-first campaign strategy

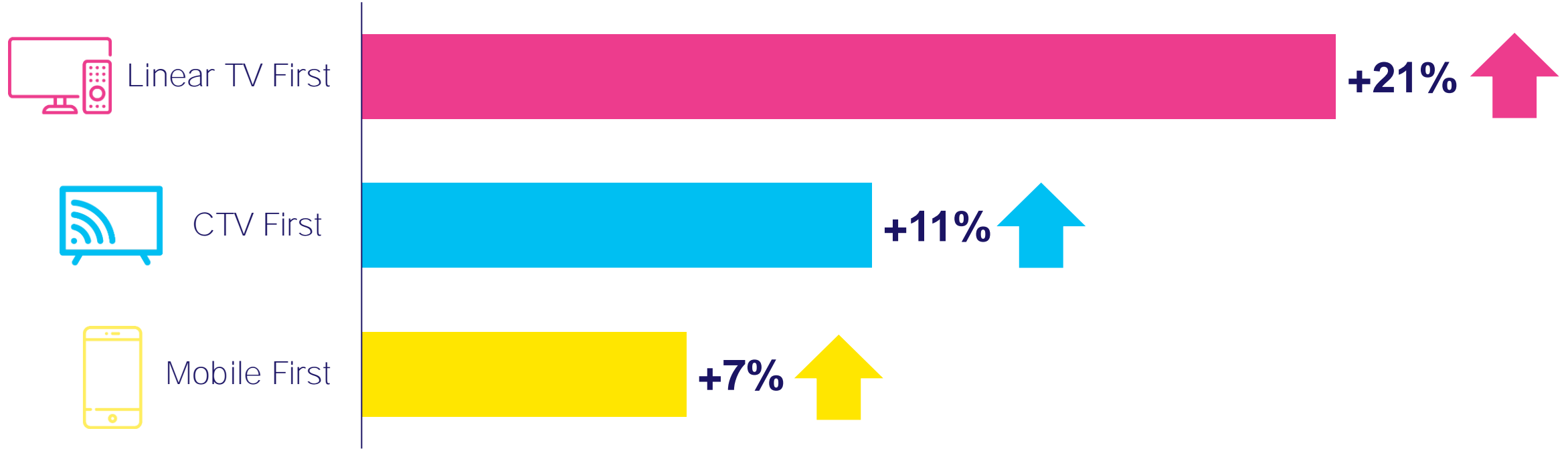


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**Transform**  
**Marketer's Guide**  
Innovative thinking to make a lasting impact on your business growth.

## Search Intent

Based on Order of Exposure within Full Media Mix



Source: Spectrum Reach and Magna, *Ad Mix Synergy*, 2022. Note: Order of Exposure within full media mix, delta (exposed – control) frequency exposure = 3. Q: How likely are you to search for information about the following brands of [brand]? □ indicates statistical significance between exposed and control groups at >=90% confidence level. Sample sizes: Linear TV Only (control n=222; exposed n=222); CTV Only (control n=217; exposed n=217); Mobile Only (control n=256; exposed n=256); Linear + CTV (control n=247; exposed n=247); Linear + Mobile (control n=212; exposed n=212); CTV + Mobile (control n=260; exposed n=260); Linear TV + CTV + Mobile (control n=270; exposed n=270).

# Trust in media: Consumers trust multiscreen TV the most and are four times more likely to trust TV over social media



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Marketer's Guide

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

“Trust is very for brand marketing. It’s the driver for purchasing behavior for most consumers. A lot of the time, trust is going to play a different role in the relationships consumers have with brands.” **important**

- Matt Prince, Head of PR, Taco Bell  
*Taco Bell's Matt Prince on how trust ties brands to new consumers, WARC, 9/24/24*

TV is the **#1 trusted media platform** among adults, and they are...

**4x**

over 4x more likely to trust TV vs. social media

Source: VAB analysis of MRI-Simmons Spring 2024 USA Study, A18+. Q: What is the media you trust the most? (pick one: TV, radio, podcasts, mobile internet, internet on computer, social media, magazines, newspapers).

# Igniting customer action: DTC brands achieve significant lifts in website traffic from their first multiscreen TV campaign launch

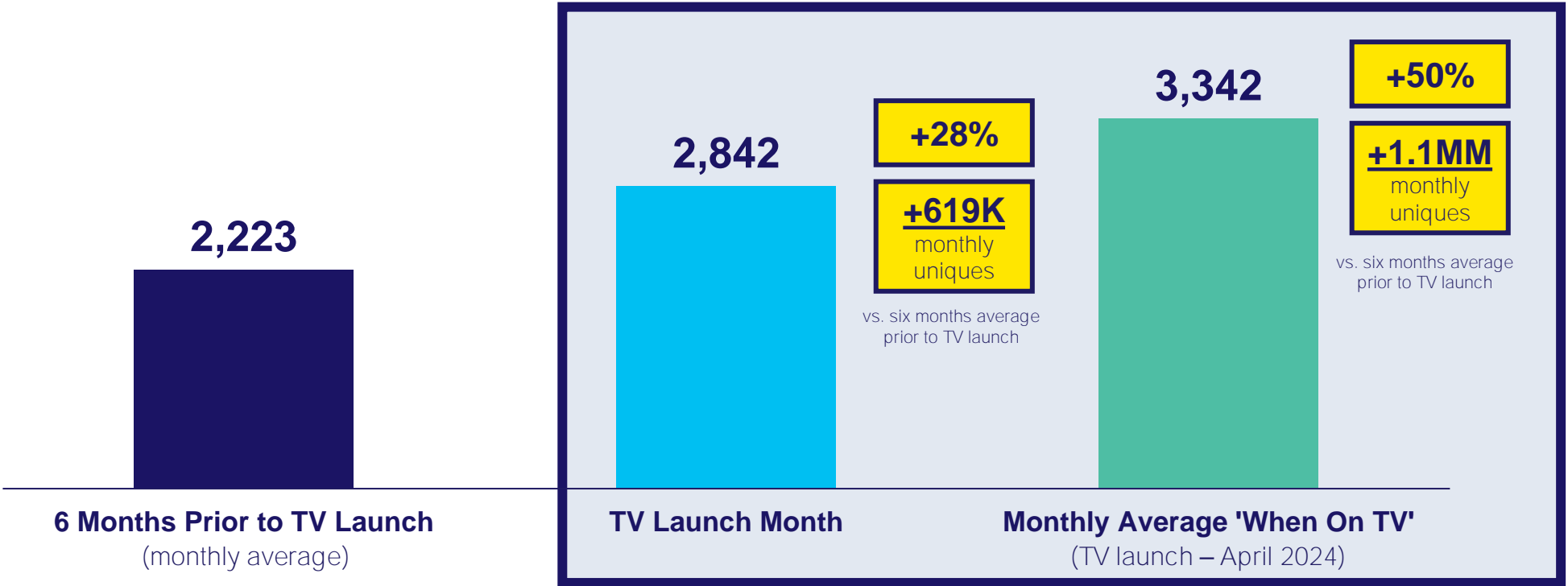


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## 83 'Direct-to-Consumer' Brands Analysis: Average Monthly Website Unique Visitors

Monthly Website Unique Visitors (000) Comparison  
based over a four-year time period: Apr '20 – Apr '24



Source: VAB analysis of Comscore mediametrix multiplatform media trend data, P18+. April 2020 – April 2024 (calendar months), figures are based on monthly averages for the 83 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, 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 – April 2024 (calendar months), across the 83 brands analyzed. Note: Direct-to-Consumer is defined by the company's ability to sell their product directly to end customers without third-party retailers, wholesalers or other middlemen.

# Time spent with content: People across all ages spend more much time with TV & streaming than with non-premium video



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## Hours per week spent watching TV Shows & Movies vs. Non-Premium Videos

Among weekly non-premium video content viewers

■ TV Shows / Movies   ■ Non-Premium Video



Source: Hub Entertainment Research, *Video Redefined*, January 2024. Based on survey of 1,900 consumers, ages 13-74. P13-24 respondents = 620 (unweighted); P25-34 respondents = 285 (unweighted); P35+ respondents = 995 (unweighted). Data collected December 2023. 'Non-premium video' includes short-form or user-generated video on YouTube, influencer video content, etc.

# Emotional connection: Stronger bonds are formed with TV & streaming characters than social media influencers



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

	13-24		25-34		35+	
	%	TV / Streaming vs. Social Media % most likely*	%	TV / Streaming vs. Social Media % most likely	%	TV / Streaming vs. Social Media % most likely
TV / Streaming	<b>39%</b>		<b>41%</b>		<b>38%</b>	
TikTok	32%	<b>+21%</b>	26%	<b>+56%</b>	23%	<b>+67%</b>
snapchat	24%	<b>+63%</b>	22%	<b>+83%</b>	21%	<b>+84%</b>
Instagram	30%	<b>+29%</b>	33%	<b>+23%</b>	26%	<b>+48%</b>
facebook	27%	<b>+47%</b>	27%	<b>+51%</b>	20%	<b>+91%</b>
YouTube	31%	<b>+27%</b>	33%	<b>+23%</b>	27%	<b>+40%</b>

**\*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. P13-24 respondents = 620 (unweighted). P25-34 respondents = 285 (unweighted). P35+ respondents = 995 (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.

# New Multiscreen TV Advertisers: Brands of all investment levels are launching their first ever multiscreen TV campaign

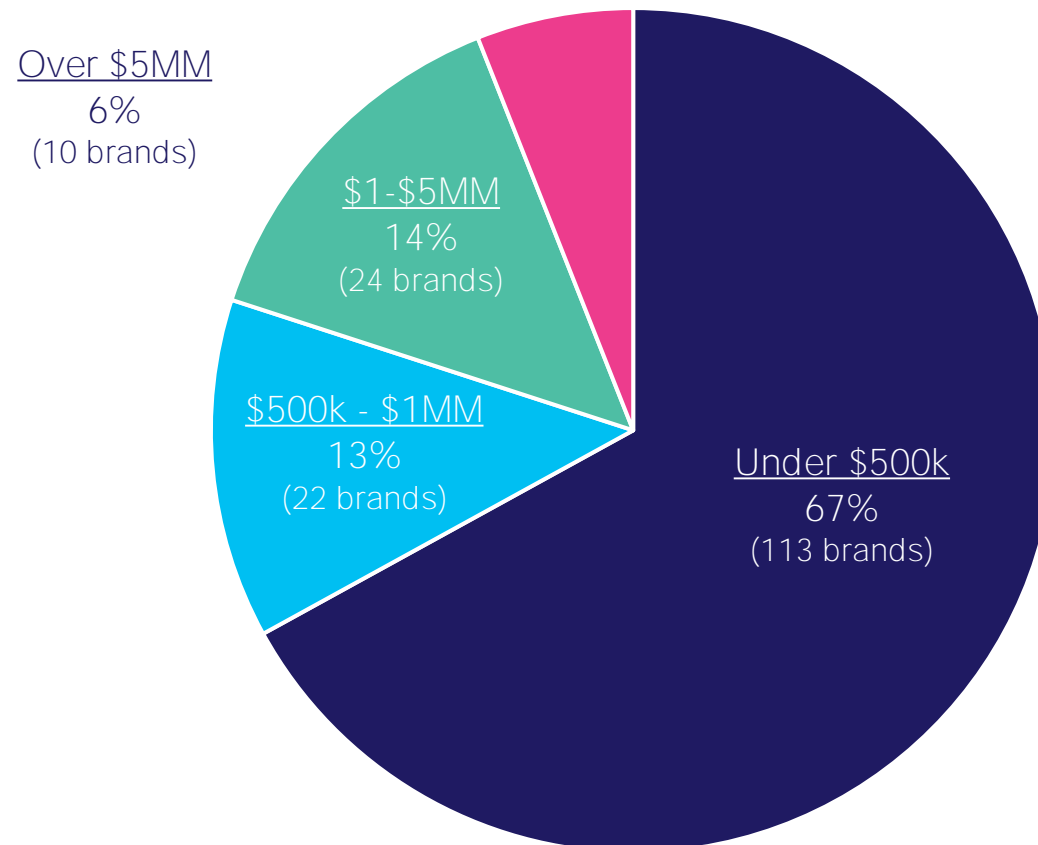


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## 1H '24 New National TV Advertisers by Spend Segment

% of brands within spend buckets



Download our latest ['Welcome to TV'](#) report to see all the advertisers that fall into each spending segment

Source: VAB analysis of Nielsen Ad Intel data as of 9/16/24, 1/1/24-6/30/24. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$50K.

# Time spent on social: Gen Z has significantly cut down on how much time they spend on major social media platforms



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**-25%**

**A18-24 YoY Total Time Spent on Social Networking Apps**  
(Snapchat, Facebook, TikTok, X, Instagram)  
May - July '23 vs. May - July '24



Source: VAB analysis of Comscore Media Metrix multiplatform media trend data (includes mobile, desktop). Based on A18-24 total minutes spent during a three-month period YoY (May – July '23 vs. May – July '24) across Snapchat, Facebook, TikTok, X and Instagram. Among P13-17, YoY time spent was down -18% across Snapchat, Facebook, TikTok, X and Instagram (desktop only, excludes mobile).

# Passion for long-form: Professionally produced, Multiscreen TV content is a common bond among most of Gen Z



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## Gen Z's Passion for Premium Video Across Screens



Streaming

**75%**

say that they  
**'love streaming TV shows'**



Linear TV

**72%**

say that they  
**'just love watching TV'**

Source: VAB analysis of MRI-Simmons August 2024 Cord Evolution, Study/ Based on A18-24 respondents, 'any agree.'

# Value of the cinema audience: The average movie goer spends much more on products and services than non-moviegoers



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## 19 Categories: Aggregated Annual Expenditure Per Person (% difference vs. Non-Moviegoers)

Demo	Non-Moviegoers	Moviegoers	'Frequent' Moviegoers
A18+	\$16,241	\$19,233 (+18% higher)	\$19,677 (+21% higher)
A18-34	\$15,691	\$17,843 (+14% higher)	\$18,314 (+17% higher)
Affluent HHI \$100K+	\$20,190	\$22,421 (+11% higher)	\$22,907 (+13% higher)



Source: VAB analysis of MRI-Simmons Spring 2024 Doublebase Study, A18+. 'Non-Moviegoer' = Has not gone to the movies in the last 12 months; 'Moviegoer' = Attended a movie in the last 12 months; 'Frequent Moviegoer' = Attend a movie at least once a month.

# Scale of cybercrime: The global cost of cybercrime is projected to increase by 50% from 2024 to 2028 to almost \$14 trillion

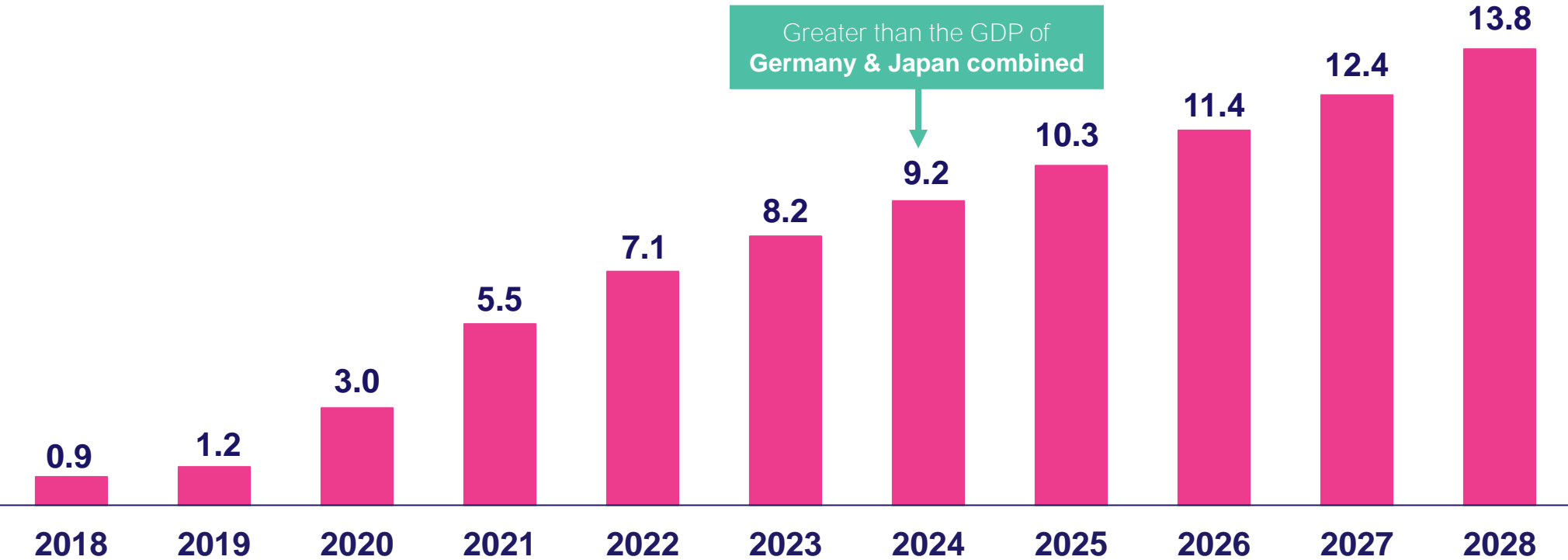
October 4, 2024

**Question of the Week:**  
"How can I improve cybersecurity in both my professional and personal life?"

VAB

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**Estimated Cost of Cybercrime Globally**  
\$ in Trillions



Greater than the GDP of Germany & Japan combined

Source: Statista, *Quantifying the Cost of Ad Fraud: 2023-2028*, 9/26/2023. 2024 GDP by country estimates based on International Monetary Fund, *World Economic Outlook*, April 2024.

# TV Upfronts week: See a historical view of the calendar over the last three years so you can start planning for 2025

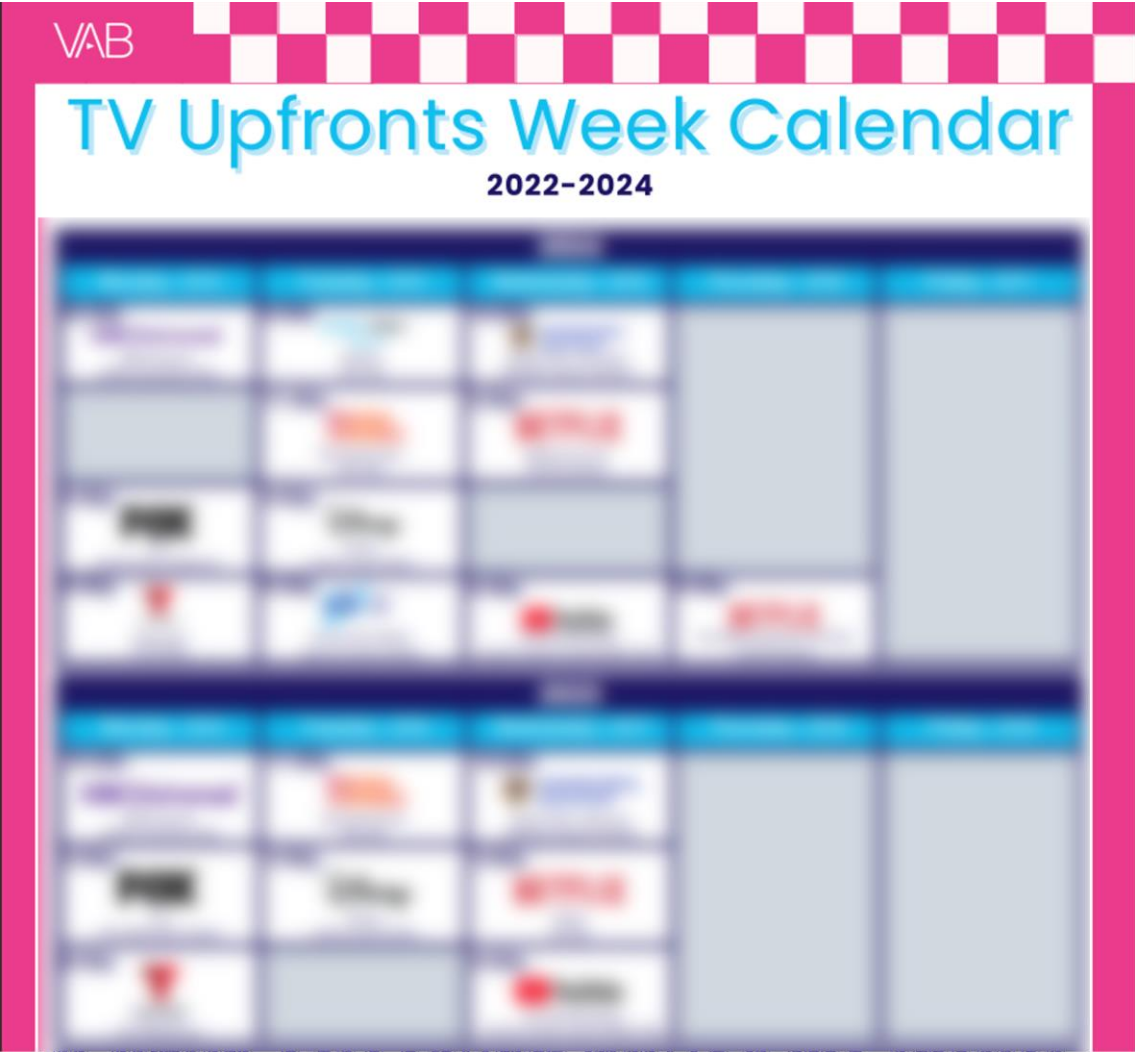
October 25, 2024

**Question of the Week:**  
"Is there a calendar for TV Upfronts Week?"



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**Bonus Slide!**



# Interested in real-world case studies on successes in multiscreen TV?

## Discover VAB's extensive collection of [12 category case study compilations](#)



**Automotive**



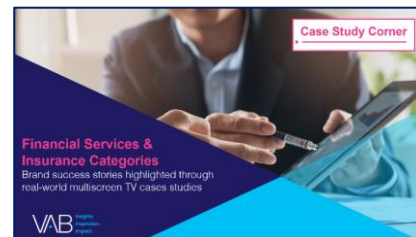
**B2B**



**Consumer Packaged Goods (CPG)**



**Entertainment & Tune-In**



**Financial Services & Insurance**



**Health, Wellness & Beauty**



**Home**



**Pharmaceuticals**



**Restaurants**



**Retail**



**Tech & Telco**



**Travel**

# 4Q 2024 Insights & Measurement Content Releases



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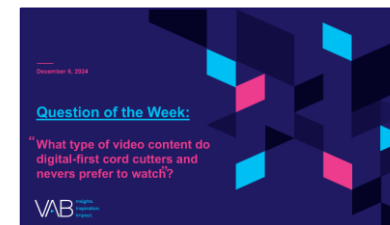
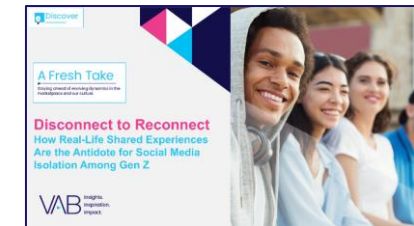
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