

2023

Let's Get Down to Business

How Brand-Building Drives Outcomes for Innovative B2B Advertisers

What You'll Learn...

- ▶ **Understand** the importance of brand-building for niche advertisers in categories like business-to-business
- ▶ **Explore** how strong brand-building strategies drive outcomes through real world examples and inspiration from 25 innovative B2B advertisers, many of which are digital-first companies
 - ▶ **What** are the six key strategies that successful brands are employing within their video creative to develop greater emotional connections with their customers and best prospects?
 - ▶ **How** are advertisers balancing the branding power of marquee TV events with the targetability of audience-based buying TV to engage their best prospects across TV programming?
 - ▶ **What** kind of business outcomes are B2B TV campaigns achieving across the purchase funnel – from awareness to sales - and beyond to advocacy?

Why is brand-building so important for brands with niche audiences, like **'business-to-business'** (B2B)?

Click [here](#) to download **'Let it Grow'** to learn more about the importance of branding for niche marketer

A key challenge for B2B marketers is their need to effectively reach very niche audiences of business decision makers, regardless of category

U.S. Business Decision Maker Universes

% of Adults 18+

Total Business Decision Makers

14.8%
(38MM)

Business Decision Makers by Purchase Category



Banking Services

2.4%
(6.2MM)



Telco / Communications

2.4%
(6.2MM)



Computer Software

2.2%
(5.6MM)



Temporary Help

1.8%
(4.5MM)



Consultation Services

1.6%
(4.0MM)



Comm. Real Estate

0.7%
(1.9MM)

Business Decision Makers by Business Size



Small Business

(<\$10K spend)

7.2%
(18MM)



Medium Business

(\$10k-\$100k spend)

4.7%
(12MM)



Large Business

(>\$100k spend)

2.9%
(7MM)

Source: MRI-Simmons Summer 2022 USA Study, Business Decision Makers represent respondents that have made business purchases in the last 12 months. Base = Adults 18+. Purchase categories reflects a sampling of business categories. Business size spend is based on last 12 months.

Additionally, B2B brands face a **set of unique challenges** that most ‘consumer-facing’ brands don’t have to overcome

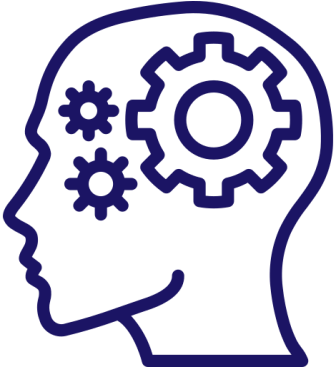
▶ The average B2B purchase decision for a complex solution can involve **between 6-10 people***

Business-to-Business Purchase Decision Challenges



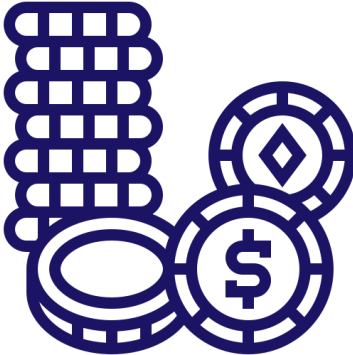
Stakeholders

Multiple stakeholders, including decision-makers, procurement, influencers and analysts



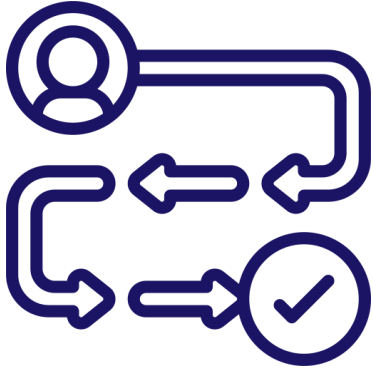
Rationality

Individual stakeholders who are discouraged from acknowledging the role that emotion plays, instead focusing on data and analysis



High Stakes / High Costs

Higher stakes decisions often impact future success of business and careers due to the high cost and commitment



Purchase Journey

Longer customer journeys during which emotions and biases may evolve

Source: ARF, ‘Professionals are People Too’ webinar including HawkPartners data in the panel discussion, 7/20/22. *Gartner, ‘The B2B Buying Journey: The B2B buying process has changed, has your sales strategy?’, 2021.

Establishing ‘top-of-mind’ awareness is important for B2B marketers due to the **greater likelihood they will be included in a customer prospects’ consideration set** even before they start their research process

95%

of business clients are **not in the market** for many goods and services at any one time

90%

of B2B decision makers ultimately choose a vendor they had in mind before **beginning the search process***

Source: ‘How B2B Brands Grow,’ The B2B Institute at LinkedIn with Ehrenberg-Bass Institute for Marketing Science (The University of South Australia), August 2021. *Harvard Business Review, ‘What B2Bs Need to Know About Their Buyers’, September 2022, survey by Bain and Google of 1,208 people at U.S. companies who are involved in buying software, cloud hosting, hardware, telecommunications, logistics, marketing, and industrial equipment

With most of the research process for B2B solutions taking place through online channels now, it's imperative for marketers to **develop branding strategies that drive qualified prospects** to their brands' digital storefronts



88%

of B2B buyers/sellers **transact via online channels**



52%

of B2B buyers **prefer online transactions** to buy from B2B sellers



41%

of B2B buyers choose vendors that **provide relevant information** that makes purchase decisions easier

Source: GoodFirms, 'B2B Services: Intelligence, Competition, and Future', September 2022, Survey of 410 B2B buyers and sellers across comprise of ecommerce, SaaS, IT, logistics, fashion, healthcare, finance, and more.

Brand-building is increasingly important for B2B companies as marketers are using it to drive **key business outcomes from awareness to advocacy**

▶ 81% of B2B marketing leaders say brand marketing is critical or very important to their **organization's revenue growth***



71%

of B2B marketing leaders say **brand marketing has increased in importance** in the last 12 months

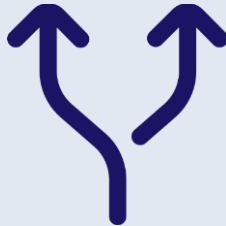
What Are Your Top Five Brand Marketing Objectives for the Next 12 Months?

% of B2B Marketers



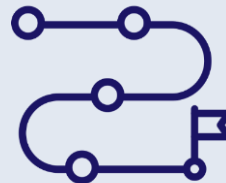
43%

Growing **brand awareness** and familiarity



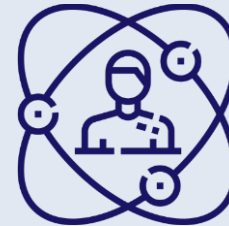
42%

Improving **creative stand out** and creative identity



41%

Strengthening brand **strategy and positioning**



40%

Improving **brand experience** (digitally and physically)



40%

Growing **brand loyalty and advocacy**

Source: Transmission, 'The State of B2B Brand Building 2022', Base: 500 B2B senior marketing leaders. Question: Summary of Top 5 - "Looking ahead to the next 12 months, what are your top five brand marketing objectives or priorities?" *Question: "How important are brand building programs compared to demand/lead generation programs in terms of contribution to your marketing goals?"

When it comes to brand-building and establishing ‘top-of-mind’ awareness while fostering customer action, advertisers of all sizes and life stages are capitalizing on the key benefits of TV to accelerate their growth

7 key reasons brands launch TV campaigns



Availability & Accessibility
Greater product availability creates greater TV accessibility both on the national and local level



Legitimazer
Creates, builds and enhances brand reputation while legitimizing their product or service offerings



Targetability
Scalable data-driven targeting solutions like addressable TV and data-enabled TV create efficiency and limit wastage



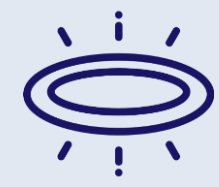
Full-Funnel Outcomes
Through greater measurement and enhanced attribution capabilities, TV has shown its ability to drive brand results



Inclusivity
Enhanced targeting capabilities through advanced TV solutions creates efficiencies which lowers the traditional cost of entry



Storytelling
Sight, sound and motion a TV ad can convey brand identity and further humanizes the brand and what it stands for



Halo Effect
TV significantly improves the performance and ROI of all other digital channels as well as a brand's online platforms

Click here to download [‘The Halo Effect: TV as a Growth Engine’](#) to learn more about why and how brands are accelerating their path to TV

How do brand-building TV campaigns drive outcomes for niche advertisers in categories like B2B?

To understand this, we **analyzed 25 B2B brands that launched their first TV campaign** within the last four years and explored how they are utilizing TV and audience-based buying to fuel business outcomes

Our analysis includes 25 B2B advertisers, across 14 categories, that recently launched their first TV campaign in the last four years

▶ The 14 categories include banking/finance, commercial real estate, consulting, expense management, security, software, staffing and more with the analysis time period spanning between April '18 – April '22

 <p>AAPC (Healthcare)</p>	 <p>ABM Building Value ABM Industries (Commercial Real Estate)</p>	 <p>AON AON Consulting (Consulting)</p>	 <p>Avira (Software)</p>	 <p>Blue Vine (Banking/Finance)</p>	 <p>Canva (Graphic Design)</p>	
 <p>CLEAR Clear (Security)</p>	 <p>Expensify Expensify (Expense Management)</p>	 <p>EY Parthenon EY-Parthenon (Consulting)</p>	 <p>fiverr. Fiverr (Freelancing)</p>	 <p>Kabbage Kabbage (Banking/Finance)</p>	 <p>KAJABI Kajabi (Software)</p>	
 <p>LEVITON Leviton Manufacturing (Manufacturing)</p>	 <p>LoopNet Loopnet (Commercial Real Estate)</p>	 <p>paloalto Palo Alto Networks (Security)</p>	 <p>PATRIOT Patriot Software (Software)</p>	 <p>PAYCHEX Paychex (Payroll)</p>	 <p>peopleready A TRUEBLUE COMPANY Peopleready (Staffing)</p>	
 <p>servicenow ServiceNow (Software)</p>	 <p>smartsheet Smartsheet (Software)</p>	 <p>Ten-X Ten-X Realtors (Comm. Real Estate)</p>	 <p>twilio Twilio (Communications)</p>	 <p>upwork Upwork (Freelancing)</p>	 <p>webflow Webflow (Software)</p>	 <p>workhuman* Workhuman (Human Resources)</p>

Most of these B2B brands have a **strong digital component to their business**, which increases their product availability and creates more opportunities to use TV as a driver for growth

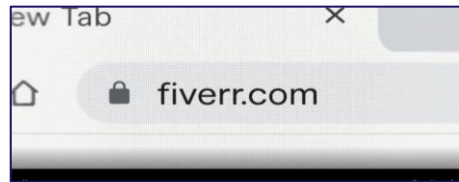
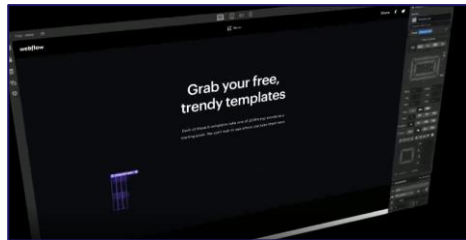
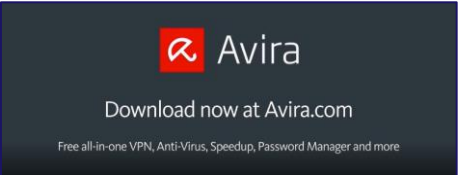
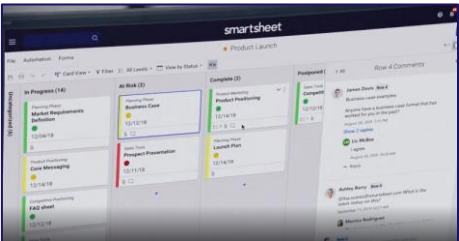
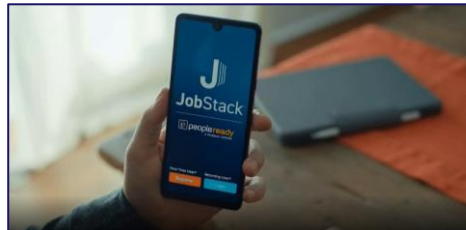
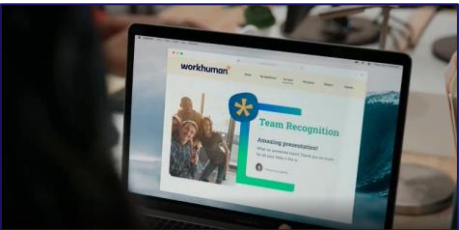


Availability & Accessibility

Greater product availability creates greater TV accessibility both on the national and local level

B2B brands are promoting their online capabilities, which enables greater accessibility and flexibility to meet customer needs, by showcasing either their URL or digital platform within their advertising

Examples of B2B creatives showcasing their URL or digital platforms



Source: Creative from iSpot.tv, time period of airing 4/1/18 – 4/30/22.

Although digital-driven, B2B executives credit their TV campaigns for establishing their brands as a household name and market leader

▶ 86% of B2B brand marketing leaders say ‘brand marketing’ is very high or high importance for their CEO and board



“The **world's first music video you can expense** is basically the **greatest and most fun product demonstration ever**, and even better with legendary "Expensivest" 2 Chainz. **We want everyone to experience Expensify**, so they can get back to what they truly set out to do.”

Hannes Ciatti, Executive Creative Director of JohnXHannes NY
(PRNewswire, *Expensify Teams Up with 2 Chainz and Adam Scott for World's First Music Video You Can Expense and Super Bowl Campaign*, 1/24/2019)



“Fiverr has gone through some dramatic changes these past ten years and this brand evolution reflects the advancement and sophistication of the company while simultaneously **embodying its purpose of providing opportunities for anyone, anywhere, to build their business, brand or dreams**. Every detail, down to the font sizes and intricate color palette, was examined and reviewed to ensure that this **shows the boldness of who we are as a company**.”

Duncan Bird, Vice President of Brand and Digital, *Fiverr*
(*Fiverr Unveils New Brand Campaign "It Starts Here"*, *Spotlights Three Real Businesses on Their Path to Digital Transformation*, 9/9/2020)



“This is **an important opportunity for ABM to raise our profile** and continue to **position ourselves as a leader** with diverse capabilities to create healthier spaces. The spotlight on essential workers and essential services is here to stay and celebrated in this commercial and across our business. It is our hope that people will feel more confident in returning to the places and spaces they love when they recognize the ABM logo.”

Cary Bainbridge, Chief Marketing Officer, *ABM*
(CleanLink, *ABM Launches First Ever National TV Commercial*, 2/24/21)



“As we **expand the scope and reach** of CLEAR’s offerings, we’re excited about the potential of “You Get You Places” [campaign] and other investments we’re making in our brand, to **elevate awareness** about the benefits of membership, and to **help establish CLEAR into a household name**.”

Pamela Catlett, Chief Brand & Strategy Officer, *CLEAR*
(BusinessWire, *CLEAR Launches First Nationwide Brand Campaign*, 10/9/2018)

Source: Transmission, ‘The State of B2B Brand Building 2022’, Base: 500 B2B senior marketing leaders, Question: How much importance is placed on brand marketing by your board and/or leadership team of your company?



“For a while, there was a lot of buzzworthy conversation about TV being a dying channel. The reality is that TV is anything but that. It continues to **show up, deliver eyeballs** and **show interest**. We found a **more engaged audience**. That coupled with what’s happening on the digital front with rising CPMs ... in many cases we weighed out **higher efficiencies on TV.**”

Orlando Baeza, Chief Marketing Officer, *Kajabi*

(Digiday, ‘We found a more engaged audience’: Why Kajabi is increasing its media spending on TV now, 7/29/2021)

These new B2B TV advertisers launched with **fresh, dynamic creative messaging** that moved beyond most of the ‘traditional norms’ of what business-to-business advertising was



Storytelling

Sight, sound and motion a TV ad can convey brand identity and further humanizes the brand and what it stands for

B2B brands are evolving their video creative with more dynamic messaging by employing **six key strategies** to develop a greater emotional connection with their customers and best prospects

Utilizing the credibility of premium video to establish themselves as a trusted brand

Highlighting the value proposition of their product or service through strong visual branding

Humanizing their brand through emotional messaging and personal stories

Becoming more approachable with lighthearted, humorous messaging

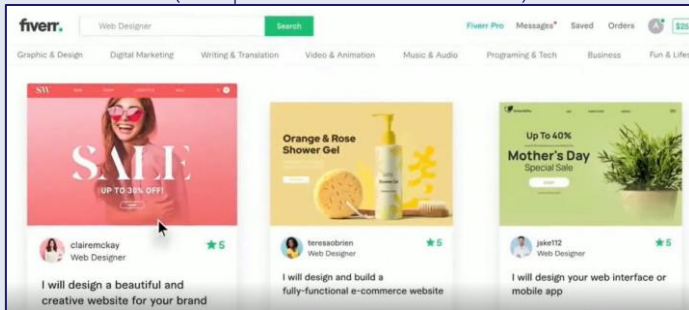
Leveraging celebrities with wide appeal

Reflecting authentic representation by incorporating greater diversity & inclusion

B2B brands are utilizing strong visual branding to demonstrate their products and services – which often includes showcasing their digital user interfaces and software design

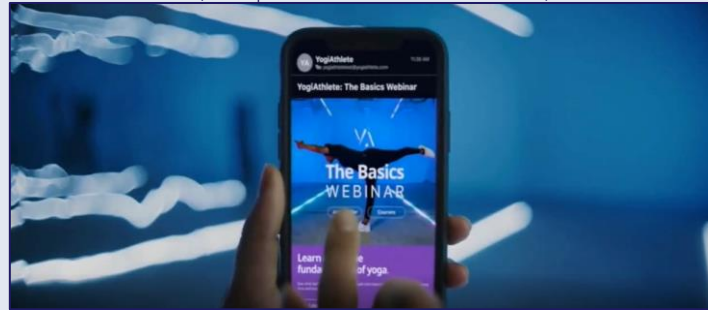
fiverr.

‘Patina & Co.: Digital Presence’ TV Spot
(TV spot first aired: 9/14/2020)



KAJABI

‘What Will You Create: Yoga’ TV Spot
(TV spot first aired: 6/24/2021)



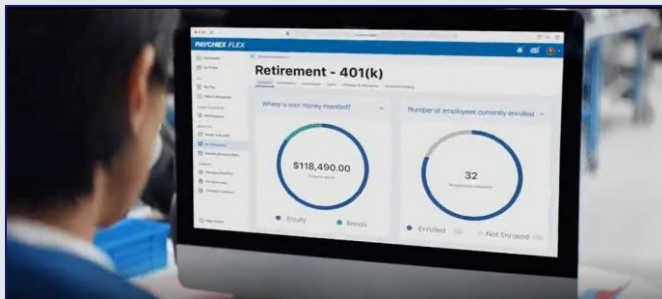
LEVITON®

‘Use Your Voice with Decora Smart’ TV Spot
(TV spot first aired: 11/26/2018)



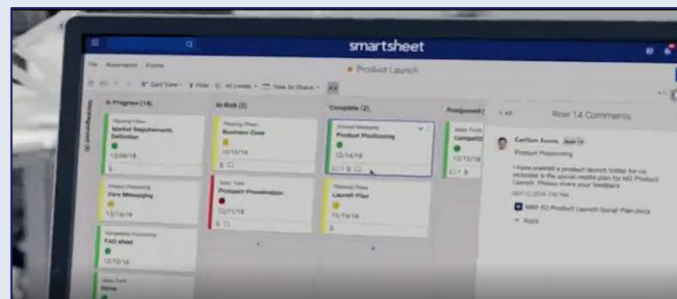
PAYCHEX

‘HR Can Be Hard. Paychex HR Technology Makes It Simple’ TV Spot
(TV spot first aired: 11/23/2021)



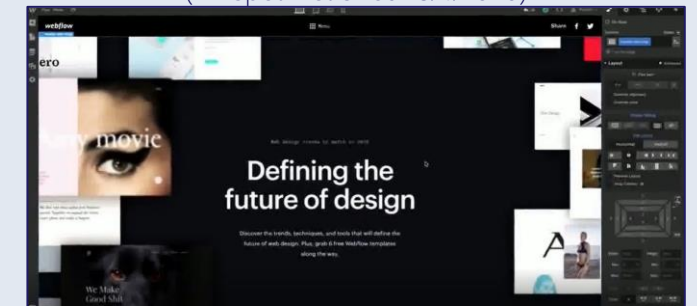
smartsheet

‘Achieve More With Smartsheet’ TV Spot
(TV spot first aired: 9/16/2019)



webflow

‘Design Tool From the Future’ TV Spot
(TV spot first aired: 8/4/2020)



Source: Creative from iSpot.tv, time period of airing 4/1/18 – 4/30/22, note: each creative execution had to launch before 4/30/22 so some may still be actively airing on TV. [Click above images to watch TV spots.](#)

Beyond showcasing the functional product benefits, marketers are **humanizing their brands through emotional messaging** by integrating personal stories to better connect with best prospects and stakeholders

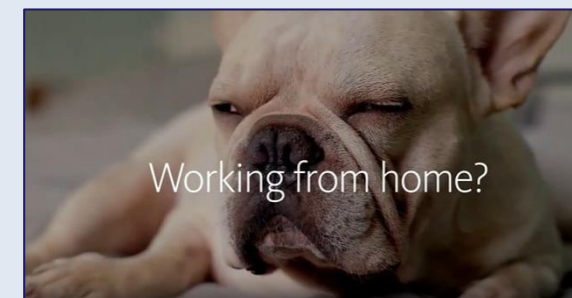
Business purchase decision makers are people too.

Through **personal stories** and **emotional messages**, brands are engaging their customers by showing they understand their goals as well as their daily challenges, like working from home and balancing their professional and personal lives.

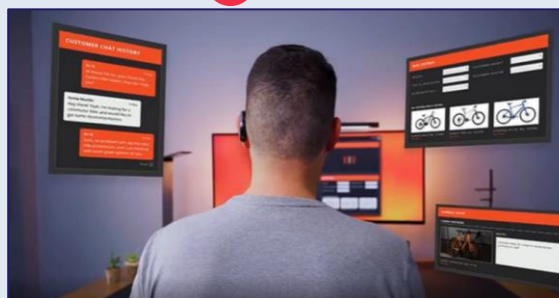
B2B campaigns targeting professionals who work from home and / or have families



(TV spot first aired: 2/22/21)



(TV spot first aired: 4/13/20)



(TV spot first aired: 9/7/20)



(TV spot first aired: 4/29/22)

Source: Creative from iSpot.tv, time period of airing 4/1/18 – 4/30/22, note: each creative execution had to launch before 4/30/22 so some may still be actively airing on TV. [Click above images to watch TV spots.](#)

Brands are also emotionally connecting with stakeholders by becoming **more approachable** through lighthearted, humorous and fun messaging

▶ 42% of B2B brand marketing leaders state that **improving creative stand out and creative identity is an important brand building focus area** for the year ahead*

servicenow

‘Experiences without Barriers’



(TV spot first aired: 3/30/2020)

‘Digital Workflows Are Just the Ticket to Help Wonka’s Fantastical Factory’



(TV spot first aired: 4/26/2021)

‘Sound Effects’



(TV spot first aired: 3/13/2020)

‘Even Santa Needs a Holiday From Complexity’



(TV spot first aired: 1/18/2021)

KAJABI

‘All in One Platform: Free Trial’



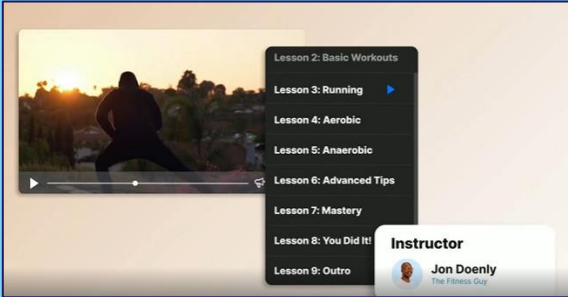
(TV spot first aired: 4/19/2019)

‘Get Out Of Your Own Way With Carl: FroYo Machine’



(TV spot first aired: 10/5/2020)

‘Digital Product Creation’



(TV spot first aired: 9/22/2020)

‘Get Out Of Your Own Way With Kim: The Dougie’



(TV spot first aired: 9/29/2020)

Source: Creative from iSpot.tv, time period of airing 4/1/18 – 4/30/22, note: each creative execution had to launch before 4/30/22 so some may still be actively airing on TV. [Click above images to watch TV spots.](#) *Transmission, ‘The State of B2B Brand Building 2022’, Base: 500 B2B senior marketing leaders.

Successful B2B brands are also standing out by leveraging celebrities with wide appeal – such as actors, athletes, musicians, comedians



'Ride to Work' TV Spot
(TV spot first aired: 5/22/2021)



'Elevator' TV Spot
Featuring Keegan-Michael Key
(TV spot first aired: 4/19/2021)



'PGA Tour: Risk Reward Challenge' TV Spot
(TV spot first aired: 1/26/2019)



Super Bowl 2019 'Expensify This' TV Spot
Featuring 2 Chainz and Adam Scott
(TV spot first aired: 2/3/2019)



2019 Cannes Lions
2 Gold Lion Awards
2 Silver Lion Awards
3 Bronze Lion Awards



'We Got Next' TV Spot
Featuring Lena Waithe, Gustavo Dudamel, Robin Frijns
(TV spot first aired: 8/30/2021)



2022 SC Awards
Winner for Security Marketing Campaign of the Year



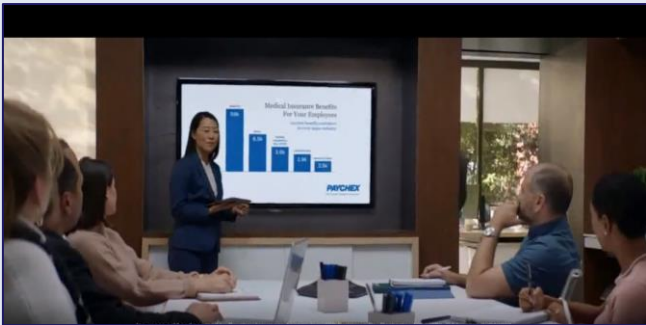
Source: Creative from iSpot.tv, time period of airing 4/1/18 – 4/30/22, note: each creative execution had to launch before 4/30/22 so some may still be actively airing on TV. [Click above images to watch TV spots.](#) The SC Awards are the cybersecurity industry's most prestigious and competitive honor from SC Magazine.

Understanding the importance of **authentic representation**, B2B brand messaging is increasingly reflective of inclusive stories and casting

▶ Going beyond diverse casting, B2B campaigns are seen appealing to audiences from all ages, genders and family structures



(TV spot first aired: 9/26/2019)



(TV spot first aired: 9/21/2020)



(TV spot first aired: 10/6/2020)



(TV spot first aired: 2/3/2019)



(TV spot first aired: 8/20/2021)



(TV spot first aired: 9/20/2021)

Source: Creative from iSpot.tv, time period of airing 4/1/18 – 4/30/22, note: each creative execution had to launch before 4/30/22 so some may still be actively airing on TV. [Click above images to watch TV spots.](#)

From an ad attention perspective, B2B video creative that features **lighthearted messaging and strong visual branding** tends to be the most engaging and helps initiate the purchase journey for their best prospects

Lighthearted, funny and relatable messaging

servicenow

'Experience Without Barriers'

(TV Spot first aired: 3/30/20)

159

Ad Attention Index

Work without barriers
even from home

Expensify

Super Bowl 2019 TV Spot, 'Expensify This'

Featuring 2 Chainz, Adam Scott

(TV Spot first aired: 2/3/19)

152

Ad Attention Index

KAJABI

'Get Out Of Your Own Way With Kim: What People Want'

(TV Spot first aired: 9/29/20)

155

Ad Attention Index

smartsheet

'Make it Easier'

(TV Spot first aired: 10/26/19)

132

Ad Attention Index

Visual branding with a focus on products services

KAJABI

'Every Business Needs a Website'

(TV Spot first aired: 9/20/20)

160

Ad Attention Index

Foolproof Pasta

New mini-courses

smartsheet

'96 of 100'

(TV Spot first aired: 10/9/18)

141

Ad Attention Index

96 of the Fortune 100
use Smartsheet.

PAYCHEX

'Making 401(k) Simple'

(TV Spot first aired: 7/30/21)

154

Ad Attention Index

LEVITON

'Protect Your Home' Featuring Danny Lipford

(TV Spot first aired: 10/11/20)

132

Ad Attention Index

How to read: 'Experience Without Barriers' (159 index) had 59% less interruptions than other ads in the context of the media placement with a 100 score being average.

Source: Creative from iSpot.tv, time period of airing 4/1/18 – 4/30/22, note: each creative execution had to launch before 4/30/22 so some may still be actively airing on TV. Ad Attention Index within iSpot.tv's Attention Analytics. Index scale is 0-200 with a 100 index seeing ad performance as expected. [Click above images to watch TV spots.](#)

Even with a niche target, B2B advertisers are **balancing the branding power of marquee TV events with the targetability of audience-based TV buying** to engage their best customer prospects across TV programming



Legitimizer

Creates, builds and enhances brand reputation while legitimizing their product or service offerings



Targetability

Scalable data-driven targeting solutions like addressable TV and data-enabled TV create efficiency and limit wastage.



Inclusivity

Enhanced targeting capabilities through advanced TV solutions creates efficiencies which lowers the traditional cost of entry

B2B advertisers are leveraging marquee TV events like the **Superbowl, sports playoffs, awards specials and entertainment series** to legitimize their brand across a wide array of stakeholders

▶ 54% of B2B brand marketing leaders say brand building is equally as important as demand generation*

Sampling of Marquee Nat'l TV Programs Advertised On

Based Over a Four-Year Time Period: Apr '18 – Apr '22



Source: VAB analysis of Nielsen AdIntel, 04/01/18-04/30/22, National TV includes cable TV, broadcast TV, Spanish language cable TV and Spanish language broadcast TV across 25 brands included in analysis. Note: Listed genres and programs are only a sampling. *Transmission, 'The State of B2B Brand Building 2022', Base: 500 B2B senior marketing leaders, Question: How important are brand building programs compared to demand/lead generation programs in terms of contribution to your marketing goals?

Successful brands with niche audiences, like in B2B categories, are utilizing the personalization and targetability of audience-based buying to effectively **optimize their TV buys against their best customer prospects**

Marketers can buy TV on buying habits, characteristics or viewing behaviors (programs, genres watched) which is a more accurate, and cost-effective, surrogate for their customer than a prescribed age bucket

B2B Targeting Examples

Buying Habits

- Software
- Business Licenses
- Computers
- Commercial Real Estate

Personal Characteristics

- Business Decision Makers
- C-Suite Executives
- Small Business Owners
- Managers

TV Viewing Behaviors

- Business News
- Award Shows
- Sports
- Drama

B2B brands implement an audience-first approach, evidenced by their TV campaigns which run across a broad mix of programming

▶ Over the last four years, the 25 brands in total have advertised across 118 national TV networks, 132 genres and 6,843 programs



25 B2B Brand Average: Nat'l TV Programs, Genres and Networks

Based Over a Four-Year Time Period: Apr '18 – Apr '22



To reach targeted stakeholders, B2B brands are advertising across a mix of sports, lifestyle and entertainment networks in addition to business and news programming

Source: VAB analysis of Nielsen AdIntel, 04/01/18-04/30/22, National TV includes cable TV, broadcast TV, Spanish language cable TV and Spanish language broadcast TV across 25 brands included in analysis. *Number of Genres includes sub-genres, e.g. 'Sports Event: NFL Football / Regular Season.' The total count for the 25 brands reflects an unduplicated count across national TV networks, genres and programs.

B2B TV campaigns featuring dynamic creative messaging, impactful media placements and targeted program alignments **ignited business outcomes through the purchase journey and beyond**



Full-Funnel Outcomes

Through greater measurement and enhanced attribution capabilities, TV has shown its ability to drive brand results



Halo Effect

TV significantly improves the performance and ROI of all other digital channels as well as a brand's online platforms

B2B TV campaigns drove awareness and interest among potential customers resulting in a **spike in online brand searches** across the launch period and beyond

► Brands that launched campaigns, even with different flight lengths, saw the **direct impact of TV spend on their search volume**

Weekly National TV Spend vs. Weekly Google Trends Index

— Google Trends Index — TV Spend

1 Month Campaign

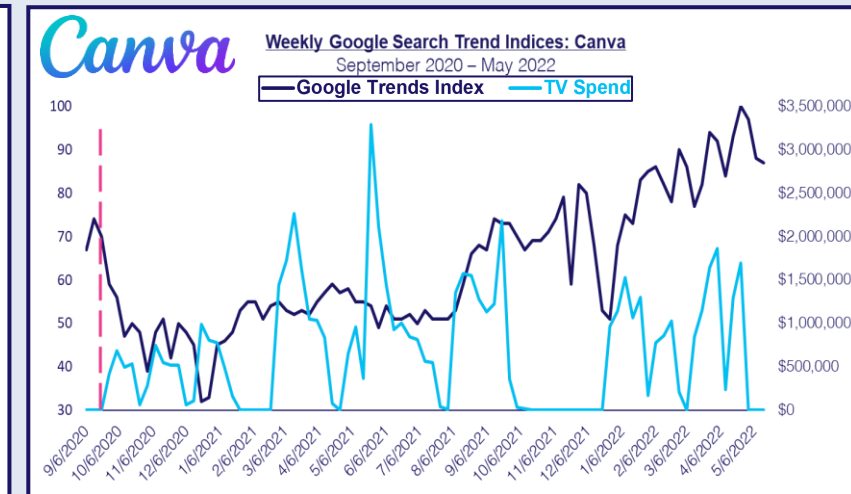
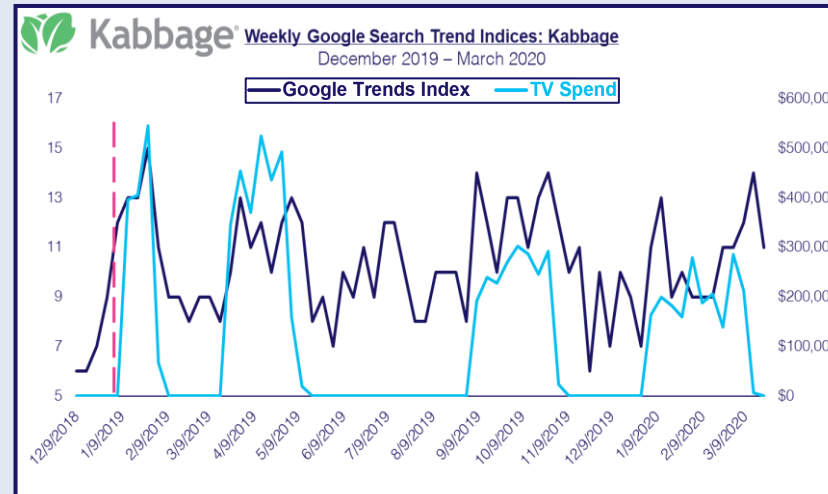
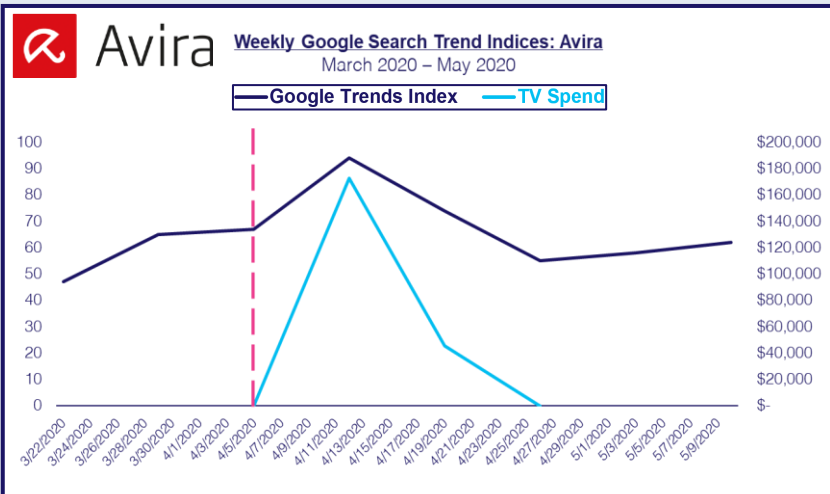
Avira saw an immediate spike in searches, their highest level, when they launched their first-ever TV campaign

12 Month Campaign

Kabbage's TV campaign drove their brand to see it's highest level of search queries and lifts through the campaign

18+ Month Campaign

Canva launched their first TV campaign and saw sustained highest-ever levels of search activity with their TV spend



[Click here to see three more real-world examples of how TV spend drives search for brands](#)

Source: VAB analysis of Google Trends, United States only, All Categories, Web Search, 04/01/18-04/30/22. *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 AdIntel for TV spending, 07/01/18-06/30/22, TV spend includes cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV, spot TV, and syndicated TV. U.S. TV spend only; Note: Magenta line marks the first week of TV spending for each brand.

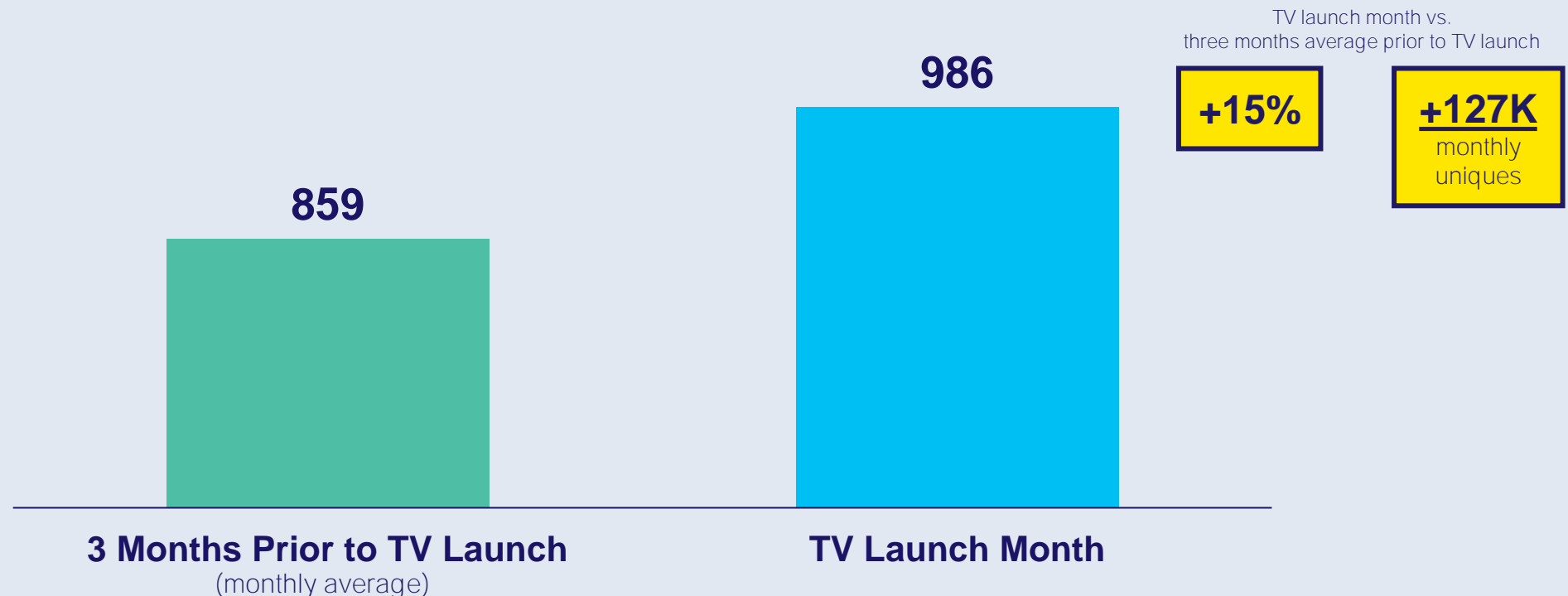
Beyond increased search volume, TV campaign launches drove **immediate, double-digit lifts** in prospects to B2B brands' own websites

- ▶ These lifts were achieved even with the average brand age being 30 years old and presumably other media buys (such as social, search and print) implemented in the years prior to their TV launch

25 B2B Brands Analysis: Average Monthly Website Unique Visitors

Monthly Website Unique Visitors (000) Comparison

Based Over a Four-Year Time Period: Apr '18 – Apr '22



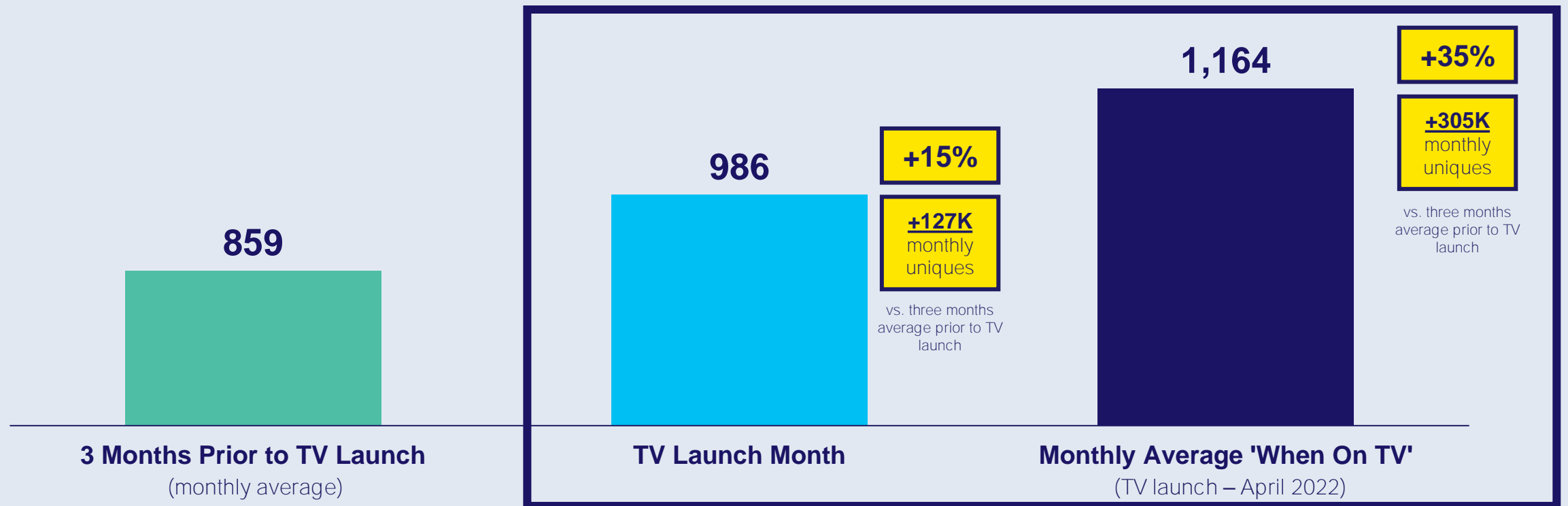
Source: VAB analysis of Comscore mediametrix multiplatform media trend data, P18+. April 2018 – April 2022 (calendar months), figures are based on monthly averages for the 25 brands analyzed.

Since most B2B buyers are not currently in-market at any one time, a **sustained presence on TV beyond its launch drives more new customer prospects** to a brand's digital platform each month across their campaign

25 B2B Brands Analysis: Average Monthly Website Unique Visitors

Monthly Website Unique Visitors (000) Comparison

Based Over a Four-Year Time Period: Apr '18 – Apr '22















Source: VAB analysis of Comscore mediаметrix multiplatform media trend data, P18+. April 2018 – April 2022 (calendar months), figures are based on monthly averages for the 25 brands analyzed. 'When On TV' represents the monthly average for brands in months where they spend on national TV as measured through Nielsen AdIntel across the April 2018 – April 2022 (calendar months) time period across the 25 brands analyzed. During this four-year analysis, the average B2B advertiser was on TV for 12 months.

Many individual B2B brands saw **double- and triple-digit increases** of prospective buyers to their digital platforms when they were actively on TV, with smaller brands seeing some of the largest increases

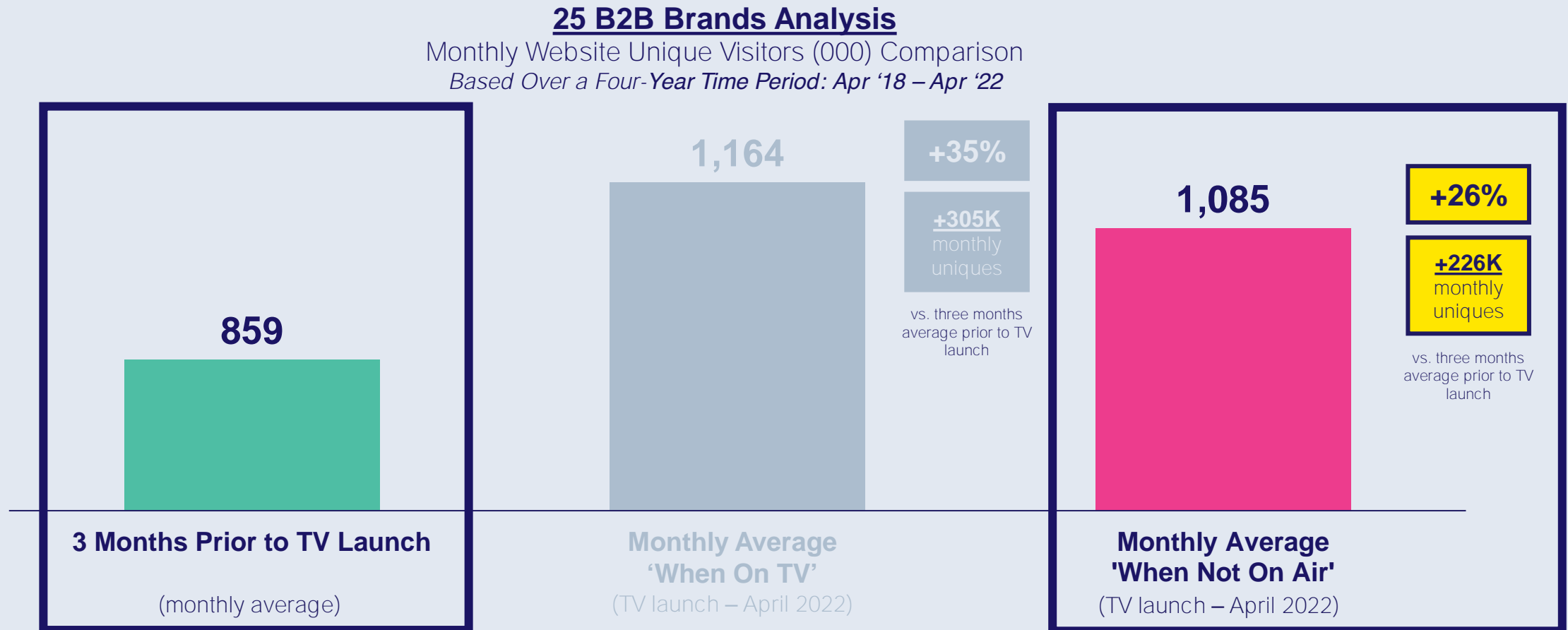
Sampling of Brands: Monthly Website Unique Visitors (000) Comparison

Based Over a Four-Year Time Period: Apr '18 – Apr '22

Brand	B2B Category	Three-Month Average: Prior to TV Launch	Monthly Average: 'When On TV'	# Diff (000)	% Diff
 Avira	Software	71	153	+82	+115%
 Canva	Graphic Design	5,281	9,480	+4,199	+80%
 CLEAR	Security	217	644	+427	+197%
 Expensify	Expense Mgmt.	240	477	+237	+99%
 Kabbage	Banking/Finance	118	241	+123	+105%
 KAJABI	Software	142	306	+164	+116%
 peopleready <small>A TRUEBLUE COMPANY</small>	Staffing	118	163	+45	+38%
 smartsheet	Software	1,288	1,723	+434	+34%
 Ten-X™	Comm. Real Estate	144	419	+275	+191%
 upwork™	Freelancing	1,542	1,759	+216	+14%
 webflow	Software	387	698	+312	+81%
 workhuman*	Human Resources	15	156	+141	+929%

Source: VAB analysis of Comscore mediаметrix multiplatform media trend data, P18+. April 2018 – April 2022 (calendar months), figures are based on monthly averages for the 25 brands analyzed. 'When On TV' represents the monthly average for brands in months where they spend on national TV as measured through Nielsen AdIntel across the April 2018 – April 2022 (calendar months) time period across the 25 brands analyzed.

A 'halo effect' exists after campaign launch due to the memorability of brand advertising which means that companies' websites continue to see **more visitors than pre-TV launch even in months when they are not on TV**



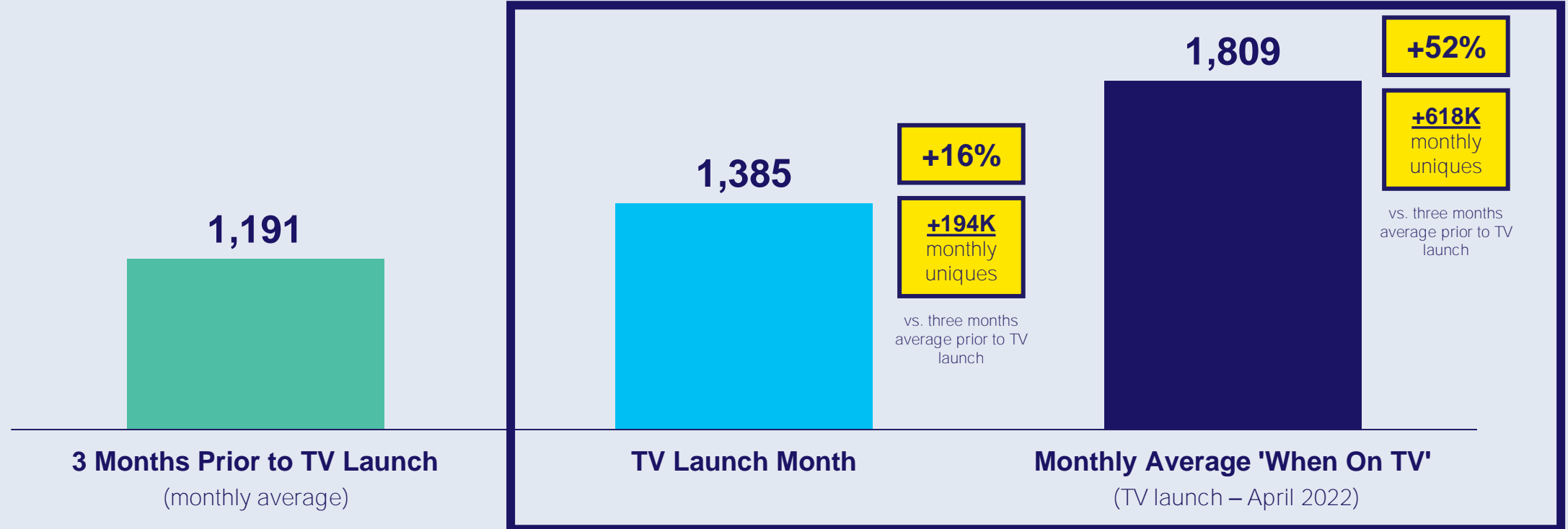
Source: VAB analysis of Comscore mediаметrix multiplatform media trend data, P18+. April 2018 – April 2022 (calendar months), figures are based on monthly averages for the 25 brands analyzed. 'When On TV' represents the monthly average for brands in months where they spend on national TV as measured through Nielsen AdIntel across the April 2018 – April 2022 (calendar months) time period across the 25 brands analyzed. 'When Not On Air' represents the monthly average for brands in months where they don't spend on national TV, after their first month of TV spend, as measured through Nielsen AdIntel across the April 2018 – April 2022 (calendar months) time period across the 25 brands analyzed.

Younger brands that accelerated their path to TV saw the largest impact from their campaign launch as they used the platform to establish their product, story and identity in the marketplace among targeted stakeholders

Average brand age: 11 years old

15 Years or Younger: 10 B2B Brands Analysis

Monthly Website Unique Visitors (000) Comparison
Based Over a Four-Year Time Period: Apr '18 – Apr '22



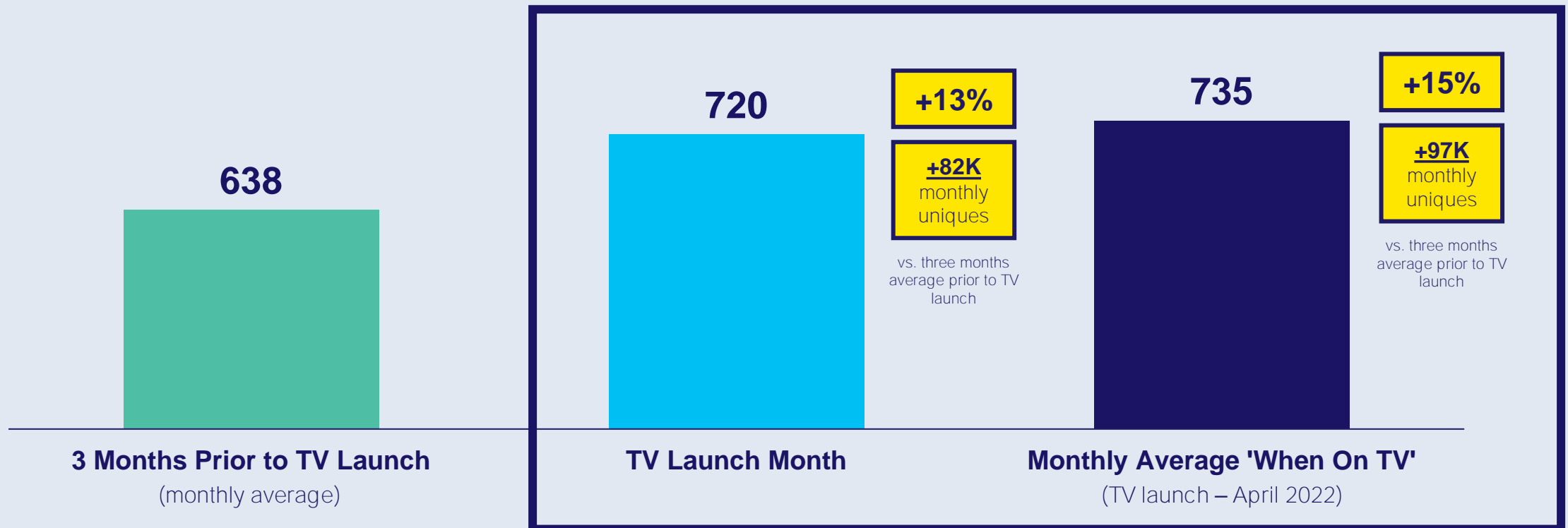
Source: VAB analysis of Comscore mediametrix multiplatform media trend data, P18+. April 2018 – April 2022 (calendar months), figures are based on monthly averages for the 10 brands analyzed. 'When On TV' represents the monthly average for brands in months where they spend on national TV as measured through Nielsen AdIntel across the April 2018 – April 2022 (calendar months) time period across the 10 brands analyzed. '15 Years and Younger' represents 10 B2B brands of the 25 total. '15 Years and Younger' Brands: BlueVine, Canva, Clear, Expensify, Fiverr, Kabbage, Kajabi, Twilio, Upwork and Webflow.

Even more **established brands** that have existed for decades witnessed **double-digit increases** in traffic as their TV campaign launch funneled new sets of potential customers to their company's website

Average brand age: 40 years old





16 Years or Older: 15 B2B Brands Analysis

Monthly Website Unique Visitors (000) Comparison
Based Over a Four-Year Time Period: Apr '18 – Apr '22






Source: VAB analysis of Comscore mediametrix multiplatform media trend data, P18+. April 2018 – April 2022 (calendar months), figures are based on monthly averages for the 15 brands analyzed. 'When On TV' represents the monthly average for brands in months where they spend on national TV as measured through Nielsen AdIntel across the April 2018 – April 2022 (calendar months) time period across the 15 brands analyzed. '16 Years and Older' represents 15 B2B brands of the 25 total. '16 Years and Older' Brands: AAPC, ABM Industries, AON Consulting, Avira, E-Y Parthenon, Leviton Manufacturing, Loopnet, Palo Alto Networks, Patriot Software, Paychex, Peopleready, ServiceNow, Smartsheet, Ten-X Relators and Workhuman.

Not only are the creative and TV strategies, including utilizing audience-based buying to target key stakeholders, driving greater engagement but they are also delivering **substantial revenue growth** for public companies

<u>Brand</u>				
<u>Year Before TV</u>	<u>2019</u>	<u>2019</u>	<u>2018</u>	<u>2020</u>
U.S. Revenue (000)	\$808,900	\$1,725,300	\$105,900	\$5,032,000
Annual TV Spend (000)	\$0	\$0	\$0	\$0
<u>Year of TV Launch</u>	<u>2020</u>	<u>2020</u>	<u>2019</u>	<u>2021</u>
U.S. Revenue (000)	\$1,282,200	\$2,276,000	\$137,400	\$5,459,000
Annual TV Spend (000)	\$937	\$18,913	\$1,746	\$1,934
<u>TV Launch Year vs Year Prior</u>				
U.S. Revenue Lift %	+59%	+32%	+30%	+8%

Sources: Revenues are based on company filings (10-K) via sources such as SEC.gov (EDGAR) and S&P Global Market Intelligence. 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). For comparison purposes, annual TV spend is representative of the correlating calendar year. Note: Upwork revenues are based on 'Talent' & 'Client' U.S. revenues.

Capitalizing on their established legitimacy and increased customer base, several private B2B companies have also raised a **sizeable amount of investor funding** after they launched their initial TV campaign

<u>Brand</u>	<u>Year Founded</u>	<u>TV Start Month</u>	<u>Total Funding</u> \$\$\$	<u>Funding %</u> (TV Start – May '22)	<u>Cume TV Spend</u> \$\$\$
 Canva	2012	Sep '20	\$572.6 MM	47%	\$60.4 MM
 CLEAR	2010	Oct '18	\$135.0 MM	74%	\$6.3 MM
 Expensify	2008	Feb '19	\$138.2 MM	72%	\$6.2 MM
 Kabbage	2008	Jan '19	\$2.5 B	36%	\$8.3 MM
 KAJABI	2010	Sep '20	\$550.0 MM	100%	\$8.7 MM
 twilio	2008	Sep '20	\$614.4 MM	62%	\$1.4 MM
 webflow	2013	Aug '20	\$334.9 MM	78%	\$2.2 MM

Sources: Funding figures based on VAB analysis of crunchbase.com, as of August 2022. 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), May 2018 – May 2022. Cume TV spend reflects the aggregated spending between May 2018 – May 2022.

In summary, **successful B2B brands are achieving positive business outcomes** when they capitalize on the key benefits of multiscreen TV

7 key reasons brands launch TV campaigns



Availability & Accessibility

Greater product availability creates greater TV accessibility both on the national and local level



Legitimizer

Creates, builds and enhances brand reputation while legitimizing their product or service offerings



Targetability

Scalable data-driven targeting solutions like addressable TV and data-enabled TV create efficiency and limit wastage.



Full-Funnel Outcomes

Through greater measurement and enhanced attribution capabilities, TV has shown its ability to drive brand results



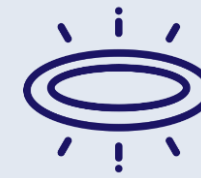
Inclusivity

Enhanced targeting capabilities through advanced TV solutions creates efficiencies which lowers the traditional cost of entry



Storytelling

Sight, sound and motion a TV ad can convey brand identity and further humanizes the brand and what it stands for



Halo Effect

TV significantly improves the performance and ROI of all other digital channels as well as a brand's online platforms

Click here to download ['The Halo Effect: TV as a Growth Engine'](#) to learn more about why and how brands are accelerating their path to TV

Key Takeaways For Business-to-Business Marketing Plans



With much of the research process for niche products and services occurring **online now, it's imperative** for marketers to develop branding strategies that drive qualified customers to their digital storefronts



Creative messaging that humanizes the brand through personal stories, more lighthearted moments and strong visuals can drive a deeper connection with their best customer prospects



Keep in mind that business decision makers are people too, so balancing the power of marquee TV events with the targetability of audience-based TV buying can maximize reach and engagement across key stakeholders



Data-enabled multiscreen TV campaigns ignite full-funnel business outcomes **by building 'top-of-mind'** awareness, encouraging consideration, driving sales and creating advocates

Download our companion guide **'Let It Grow'** to learn more about the **importance of brand-building** for niche marketers and how they are using multiscreen TV to effectively engage best customer prospects

What You Will Learn In 'Let It Grow'...

How does **branding impact purchase decisions** for business buyers?



What are the **short- and long-term benefits** of B2B branding?



How are niche marketers capitalizing on the **brand-building benefits of multiscreen TV**?



How can **audience-based TV buying** drive outcomes for niche brands?



Transform

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

2023

Let it Grow
Understanding the Importance of Brand-Building for Niche Marketers

VAB insights. inspiration. impact.

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Creators

Jason Wiese

SVP, Director of Strategic Insights
jasonw@thevab.com

Reed Kiely

Associate Insights Director
reedk@thevab.com

Karolina Guillen

Insights Manager
karolinag@thevab.com

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The Secret of My Success
Examining the winning marketing strategy that's fueling high-growth DTC brands



The Halo Effect
TV as a growth engine



You Oughta Know
Why all impressions aren't created equal & what it means for video measurement



Under Pressure
6 marketing strategies to successfully navigate your brand through inflation



The VAB Top 10
A top-line view of how the industry is adopting audience-based buying



An Insider's Look
Why agencies and brands are shifting to audience-based TV buying



Proven Strategies & Tactics in Audience-Based TV Buying
Success stories highlighted through real-world case studies



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VAB is an insights-driven organization that inspires marketers to reimagine their media strategies resulting in fully informed decisions.

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.**

Curious to learn more about VAB? Check out this [quick video](#) to see what we do and how we can help you develop business-driving marketing strategies.

Appendix:

Additional Google Trends Analysis



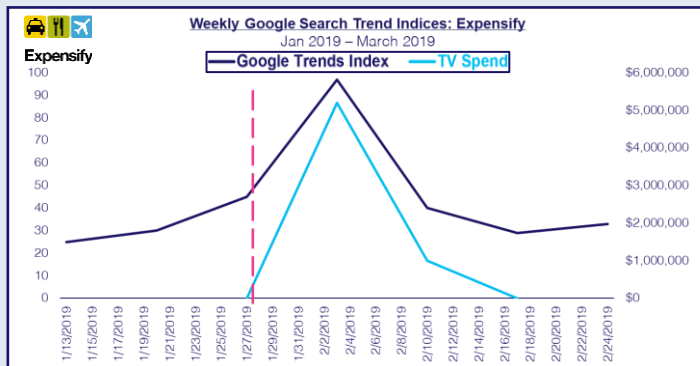
Additional B2B brands that saw a **spike in online brand searches** across their TV campaign launch period and beyond

- ▶ Brands that launched with campaigns of different lengths saw the **direct impact of TV spend on their search volume**

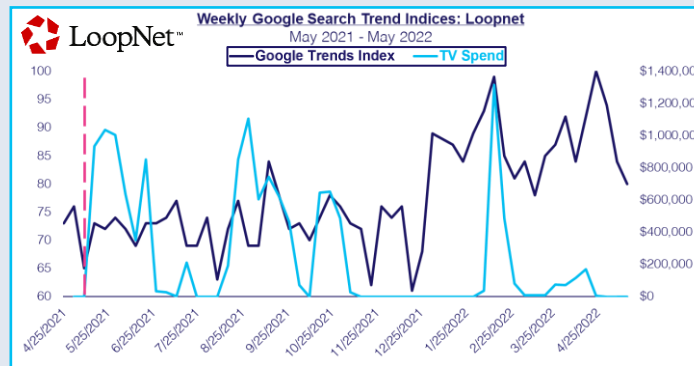
Weekly National TV Spend vs. Weekly Google Trends Index

— Google Trends Index — TV Spend

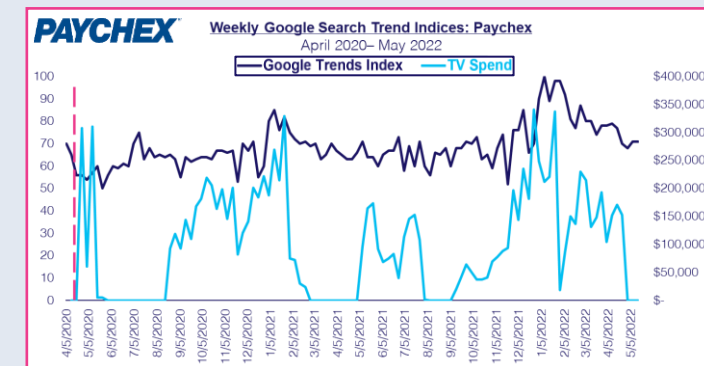
1 Month Campaign



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18+ Month Campaign



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