



2023 – 1st Quarter

The VAB Top 10

Our 10 must-read Insights charts of the quarter



About VAB

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.

One of 25 ways TV grows brands: TV is the catalyst for short-term business results, igniting revenue growth for brands during the launch year of their first TV campaign



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Sales: Ignites short-term business performance

[Click here](#) to learn about the **24 other ways** that TV Grows Brands

Company		Year Prior to TV	TV Launch Year	YoY Diff	%*
Etsy <small>Founded in 2005</small>	(TV launch: 2018)	TV Spend (000): ---	\$7,662	+\$7,662	
		Revenue (000): \$317,755	\$425,841	+\$108,086	+34%
AWAY <small>Founded in 2013</small>	(TV launch: 2018)	TV Spend (000): ---	\$10,548	+\$10,548	
		Revenue (000): \$48,000	\$150,000	+\$102,000	+213%
LE TOTE <small>Founded in 2012</small>	(TV launch: 2017)	TV Spend (000): ---	\$3,438	+\$3,438	
		Revenue (000): \$100,000	\$150,000	+\$50,000	+50%
POSHMARK <small>Founded in 2011</small>	(TV launch: 2017)	TV Spend (000): ---	\$535	+\$535	
		Revenue (000): \$50,000	\$100,000	+\$50,000	+100%
MVMTM <small>Founded in 2013</small>	(TV launch: 2017)	TV Spend (000): ---	\$2,670	+\$2,670	
		Revenue (000): \$60,000	\$80,000	+\$20,000	+33%

[Click here](#) to learn about how consumers define TV today

Source: Revenues reflect estimated revenue data from Pivotal Research. TV spend based on VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), CY 2016 & 2017 & TV spend based on VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), CY 2016-2018. Revenues for public companies are based on company filings (10-K) for U.S. revenue via SEC.gov (EDGAR). Revenues for private companies are based on reports/projections/guidance provided publicly by company founders/representatives, or analyst estimates/forecasts, and reported within business/technology news outlets such as Bloomberg, CNBC, Digiday, Forbes, Inc., Recode, TechCrunch, WSJ, etc.. *Revenue increase after launching TV.

TV delivers outcomes for small & mid-sized businesses: Brands see significant increases in their online traffic when they are on TV, with smaller brands seeing some of the largest increases



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Sampling of B2B 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%
people ready <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.

TV creates a 'halo effect' on digital: Brands' websites see more visitors after their TV campaign launch, even in months when they are not actively on TV

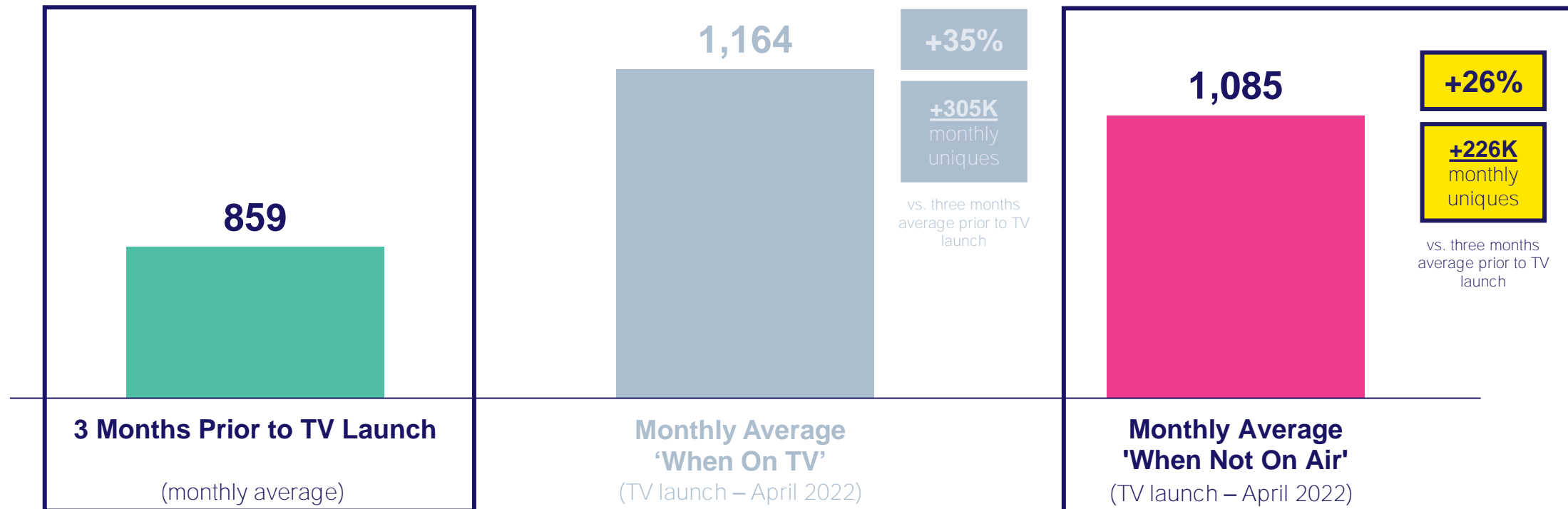


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25 Business-to-Business (B2B) Brands Analysis

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



Source: VAB analysis of Comscore 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.

The importance of brand-building for B2B categories: Marketers are increasingly using brand marketing to drive key business outcomes across the funnel from awareness to advocacy



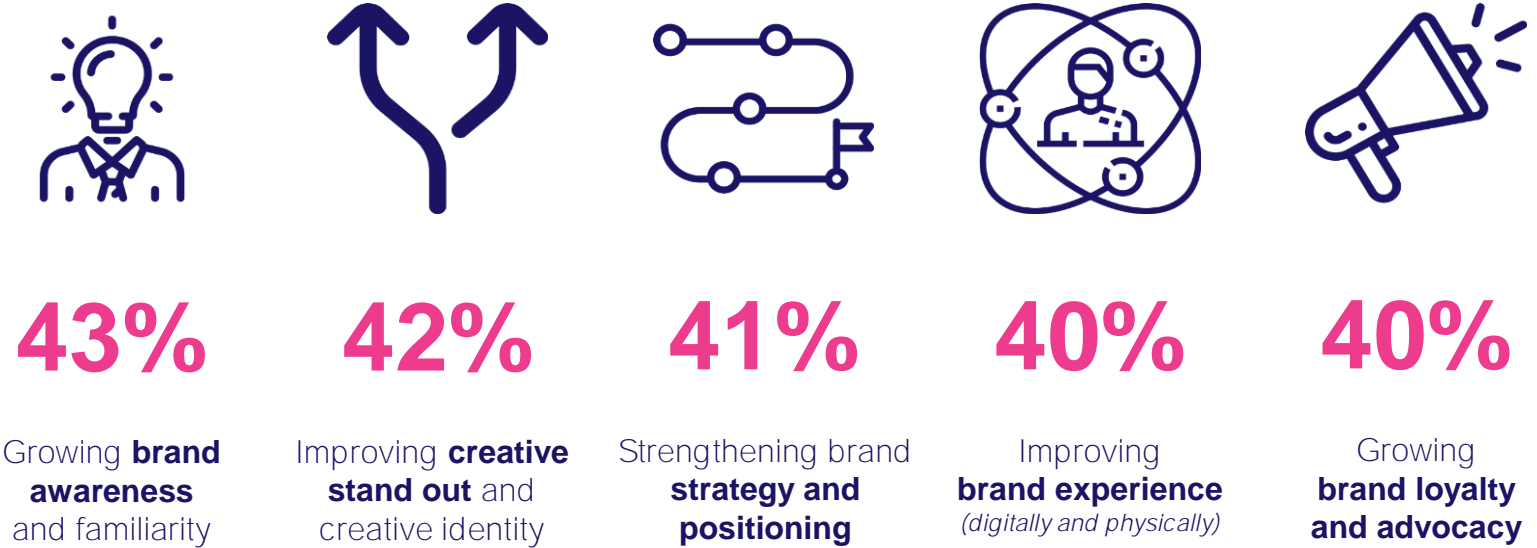
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71%
of B2B marketing leaders say **brand marketing has increased in importance** in the last 12 months

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

% of B2B Marketers



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?"

Audience-based TV buying for niche advertisers: B2B brands are using an audience-first approach across a broad mix of programming to reach their best customer prospects



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25 B2B Brand Average: National TV Networks, Genres and Programs

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.

TV engages best prospects for advertisers with niche targets: B2B TV campaigns drove double-digit increases in potential new customers to brands' digital platforms

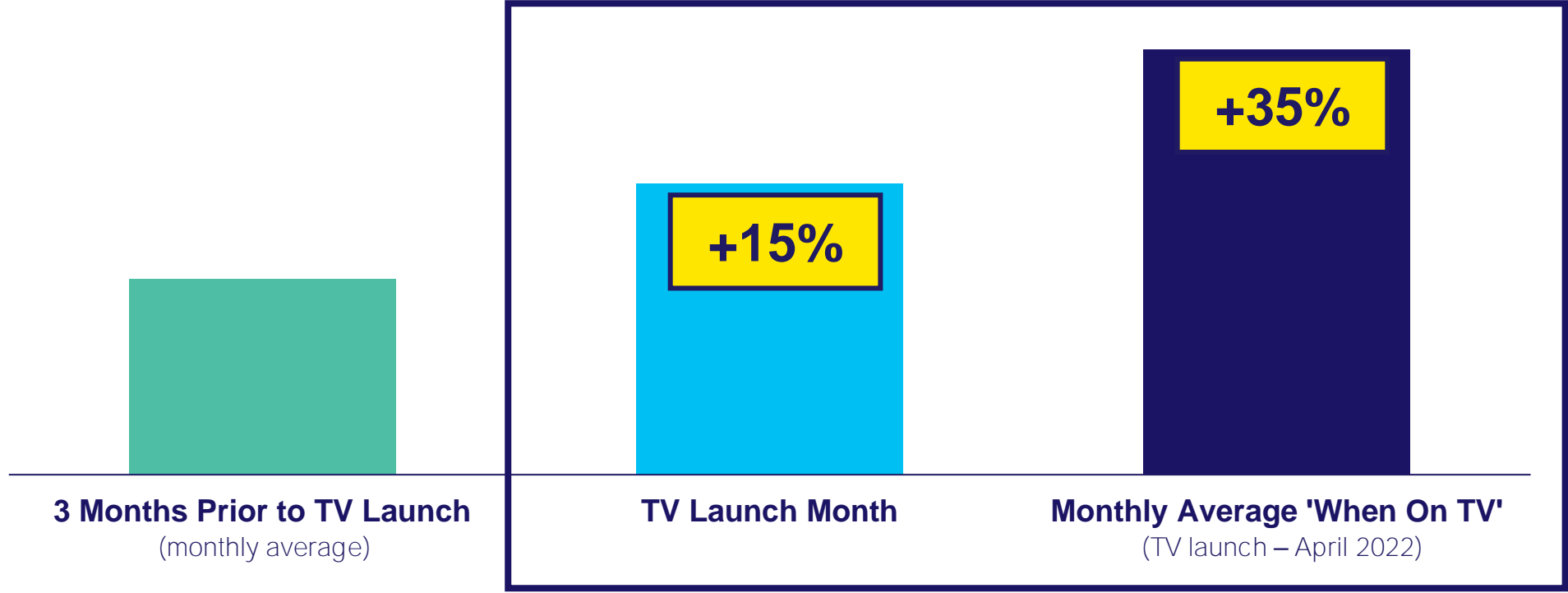


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25 B2B Brands Analysis: Average Monthly Website Unique Visitors

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. '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. Average Monthly Visitors (000) – 3 Months Prior to TV Launch: 859; TV Launch Month: 986; 'When On TV': 1,164.

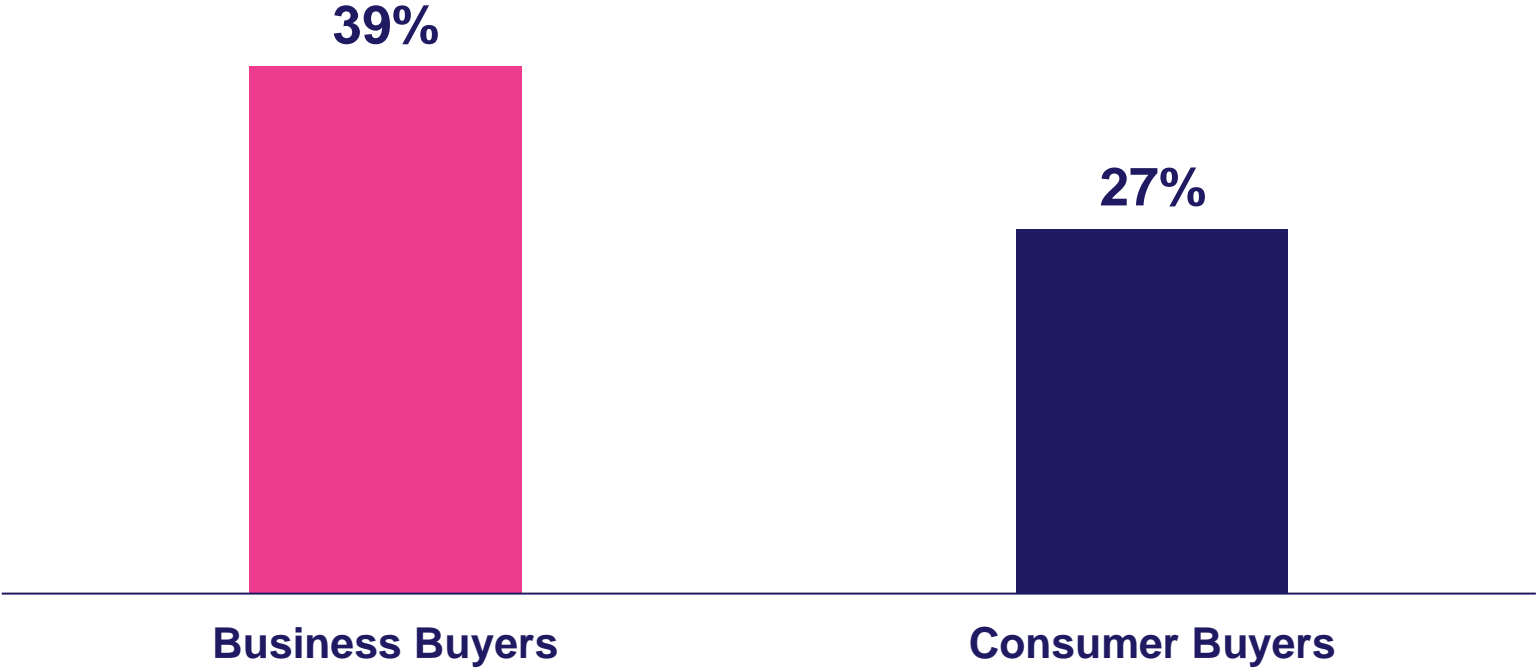
Branding is even more important for business purchases: This is driven by the need to build ‘top-of-mind’ awareness and gain buy-in from multiple stakeholders & decision makers



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% of Purchase Decisions Driven by ‘Brand’



Source: Lippincott, *'B2B Brands in the Human Era'*, November 2019. Analysis and survey based on tablet purchasers which is a product category with both business & consumer buyers. Business purchase decisions: 39% driven by brand, 34% driven by features, 27% driven by price; Consumer purchase decisions: 39% driven by price, 34% driven by features, 27% driven by brand.

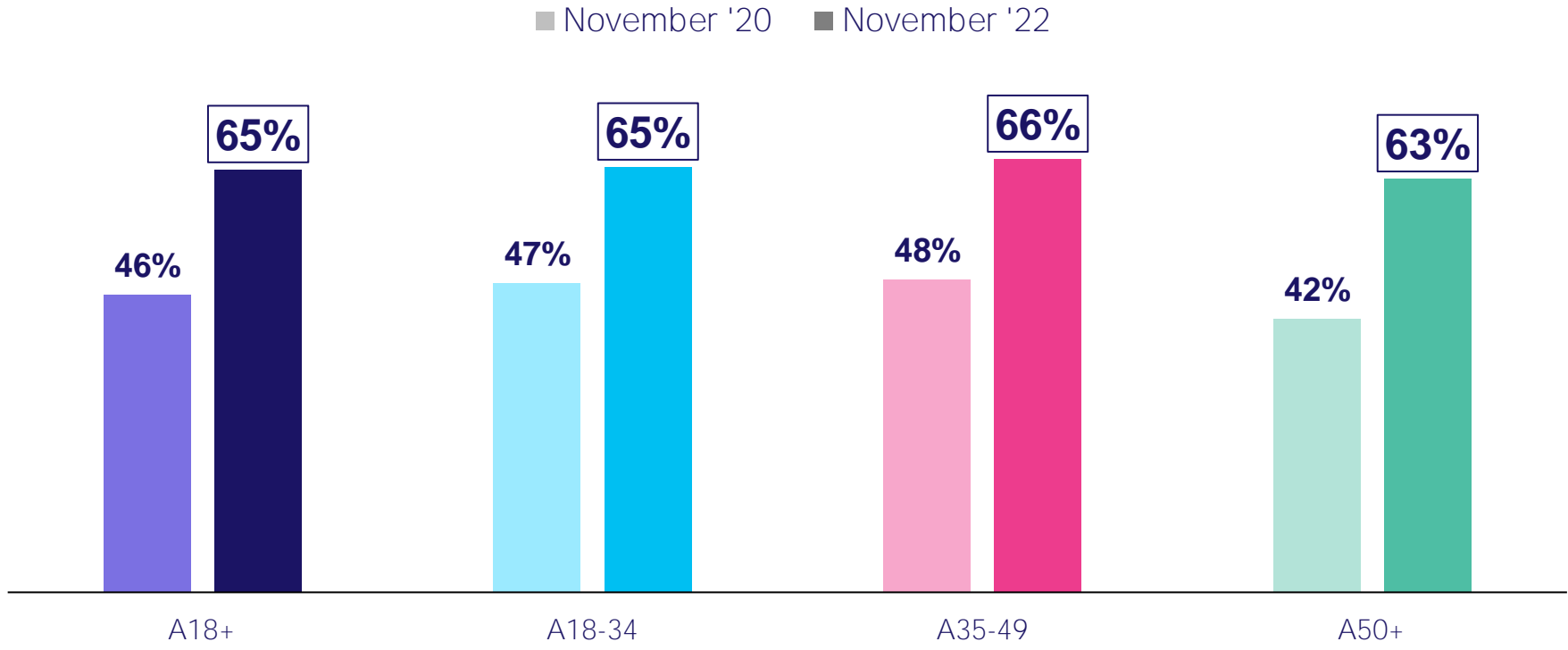
Ad-supported streaming at scale: Most streamers across all ages, are now watching at least one ad-based streaming service



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% of streamers who use at least one ad-supported streaming service



Source: VAB analysis of MRI-Simmons November 2020 & November 2022 Cord Evolution Study, A18+. Base = 'streamed in the past 12 months'. November '22: reflects % of streamers who have used any of the following streaming services in the past 12 months: Crackle, Crunchyroll (Limited Commercial Subscription), Discovery + (Limited Commercial Subscription), Freevee (Formerly IMDB TV), HBO Max (Limited Commercial Subscription), Hulu (Limited Commercial Subscription), LG Channels, Local Now, Newsy, Paramount + Essential (Limited Commercial Subscription), Peacock Free (Free Service W/Limited Commercial), Peacock Premium (Limited Commercial Subscription), Pluto TV, Redbox., Roku Channel, Samsung TV Plus, Tubi TV, Vudu or Xumo. **November '20:** reflects % of streamers who have used any of the following streaming services in the past 12 months: Hulu (Limited Commercial Subscription), Freevee (Formerly IMDB TV), Local Now, Pluto TV, Redbox., Roku Channel, Samsung TV Plus, Sony Crackle, Tubi TV, Vudu or Xumo.

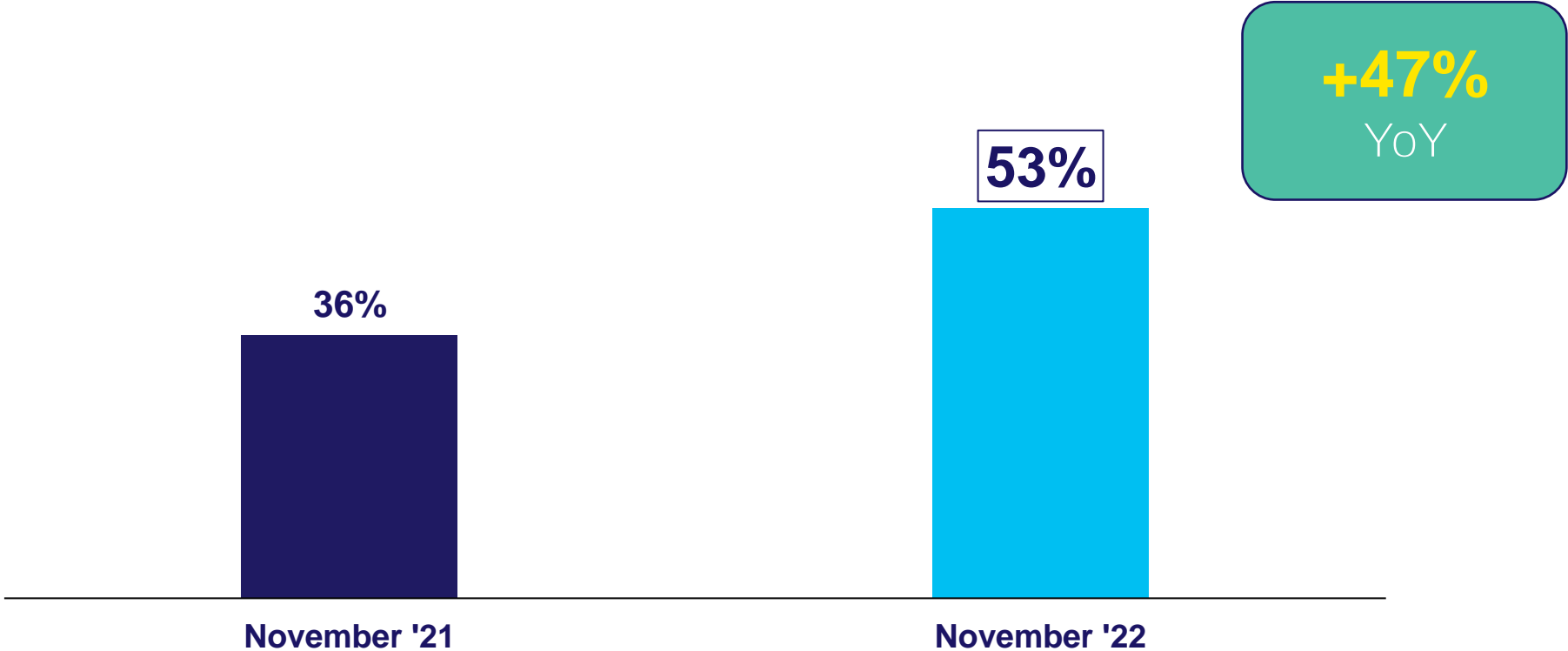
The fastest growing streaming platform: FAST services are now being watched by over half of all adult streamers



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% of U.S. adult 18+ streamers that watch FAST services (Free Ad-supported Streaming TV) services



Source: VAB analysis of MRI-Simmons November 2021 & November 2022 Cord Evolution Study, A18+. Base = 'streamed in the past 12 months'. November '22: FAST = used any of the following streaming services in the past 12 months: Peacock (free service w/ limited commercials), Roku Channel, Tubi TV, Freevee (formerly IMDb TV), Pluto, Samsung TV Plus, Xumo, Local Now. November '21: FAST = used any of the following streaming services in the past 12 months: Roku Channel, Tubi TV, Freevee (formerly IMDb TV), Pluto, Samsung TV Plus, Xumo, Local Now.

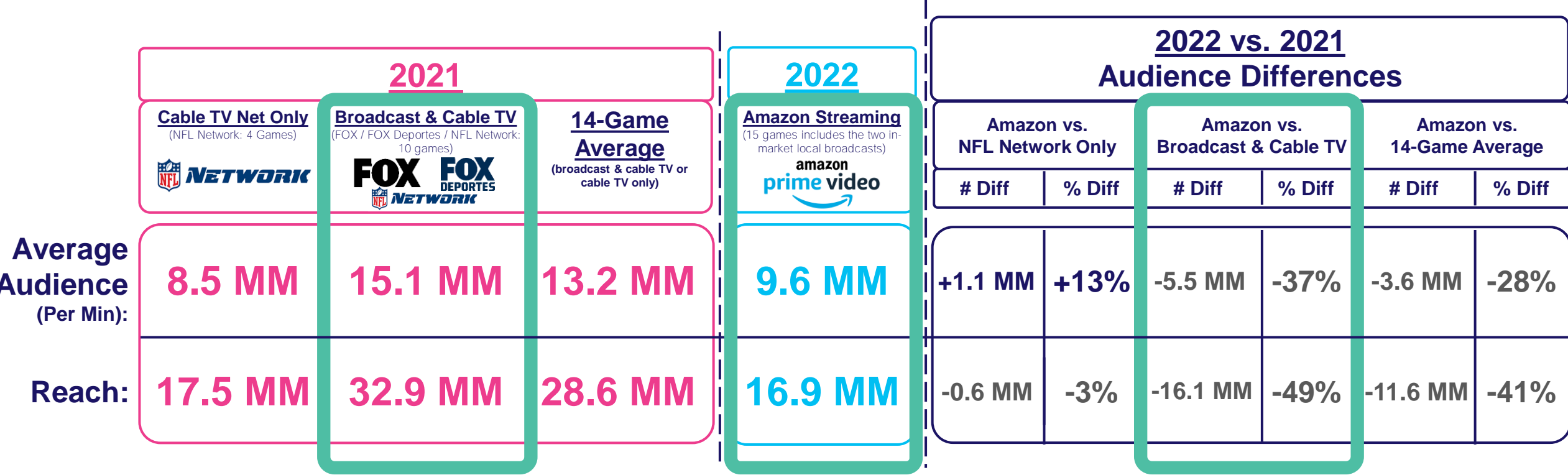
Amazon Thursday Night Football exclusivity: Average audience and weekly reach declined 37% and 49% respectively vs. game that were available across major video platforms in 2021



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Weekly Averages - NFL Thursday Night Football 2022 vs. 2021 Comparable 'Thursday Night' Games



Source: VAB analysis of Nielsen NPower Powerplay and R&F Program Report, 2021 Season: FOX, FOX Deportes & NFL Network; 2022 Season: Amazon & local broadcast for in-game markets only (excludes pre- & post-game shows), Live+SD, P2+ . FOX, FOX Deportes & NFL Network reflects linear TV audience only and does not include audiences gained from their digital / app streaming. 2021 reflects 14 games total (4 NFL Network only games: Weeks 2-4 & 16; 10 games with Fox / Fox Deportes, NFL Network & Amazon: Weeks 5-11 & 13-15). 2021 audience figures excludes Amazon since the platform was not measured by Nielsen in 2021. 2022 reflects 15 games total, streamed by Amazon (Weeks 2-11 & 13-17). *See appendix for schedule and single game details. Analysis reflects only those games played on Thursday Night.

Viewership data collection: What is census level data and what role does it play in measurement?



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Census Level Data

Census level data means every viewer in an ad environment universe is counted.

(Not to be confused with the US census)

Census level data can help marketers...

- ▶ Reduce ad waste
- ▶ Enable more representative measurement
- ▶ Identify audiences in a more granular way
- ▶ Receive greater coverage across people, platforms, and geographies
- ▶ Attribute response more granularly

Role of Census Level Data



People Who is being measured

- ▶ Census level data can allow for a more demographically representative measurement. All audiences should be counted fairly and accurately.
- ▶ Enables more accurate measurement of diverse audiences. This creates economic growth opportunities for marketers with audiences that are rapidly growing (and historically have not been fairly counted/measured).



Platform / Devices What is being measured

- ▶ Viewership is across multiple screens, and all screens can and should be counted. Consumers have broadened their definition of TV and will find and follow their favorite premium content across platforms and the devices they use.
- ▶ Coverage across multiple platforms and devices results in reach extension capabilities.



Geography Where is being measured

- ▶ Census level data can allow for greater flexibility in the geographies measured
- ▶ Creates opportunities for more precise measurement at the local, regional and national level



Additionally, we released three excerpts from our popular ‘You Oughta Know’ marketer’s guide that focuses on each stage of the purchase funnel: **awareness**, **consideration** & **sales**



Click here to download the Marketer's Guide, *You Oughta Know*, to learn more

Awareness



Consideration



Sales



Click above to download each report

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