



# TV @ THE EPICENTER OF AMERICAN SOCIETY

Vol. I – Commerce & Communal Experiences

2017 REPORT

# Contents

The Epicenter of American Society: TV <u>IS</u> Everywhere	3-7
<i>No Platform Drives...</i>	
<b><u>Commerce</u></b>	<b>8-30</b>
• TV's Direct Economic Impact	9-10
• TV's Influence On Other Industries	11-24
• TV-Related Consumer Product Lines & Extensions	25-28
• The "One-Day Outlier" For Commerce	29-30
<b><u>Communal Experiences</u></b>	<b>31-37</b>
• In-Home Gatherings	32-34
• Out-Of-Home Get-Togethers	35-37
<i>...Like TV's Premium Video-At-Scale</i>	
<b>Conclusion</b>	<b>38-39</b>
<b>Contact Information</b>	<b>40</b>

# The Epicenter of American Society: TV IS Everywhere

TV is everywhere...more specifically, Ad-Supported TV is everywhere.

It extends well beyond the living room and connected devices and into the physical world. It directly contributes billions to the economy, it impacts many industries outside of entertainment and, as further proof of its economic clout, it drives “real-life” communal experiences throughout the year.

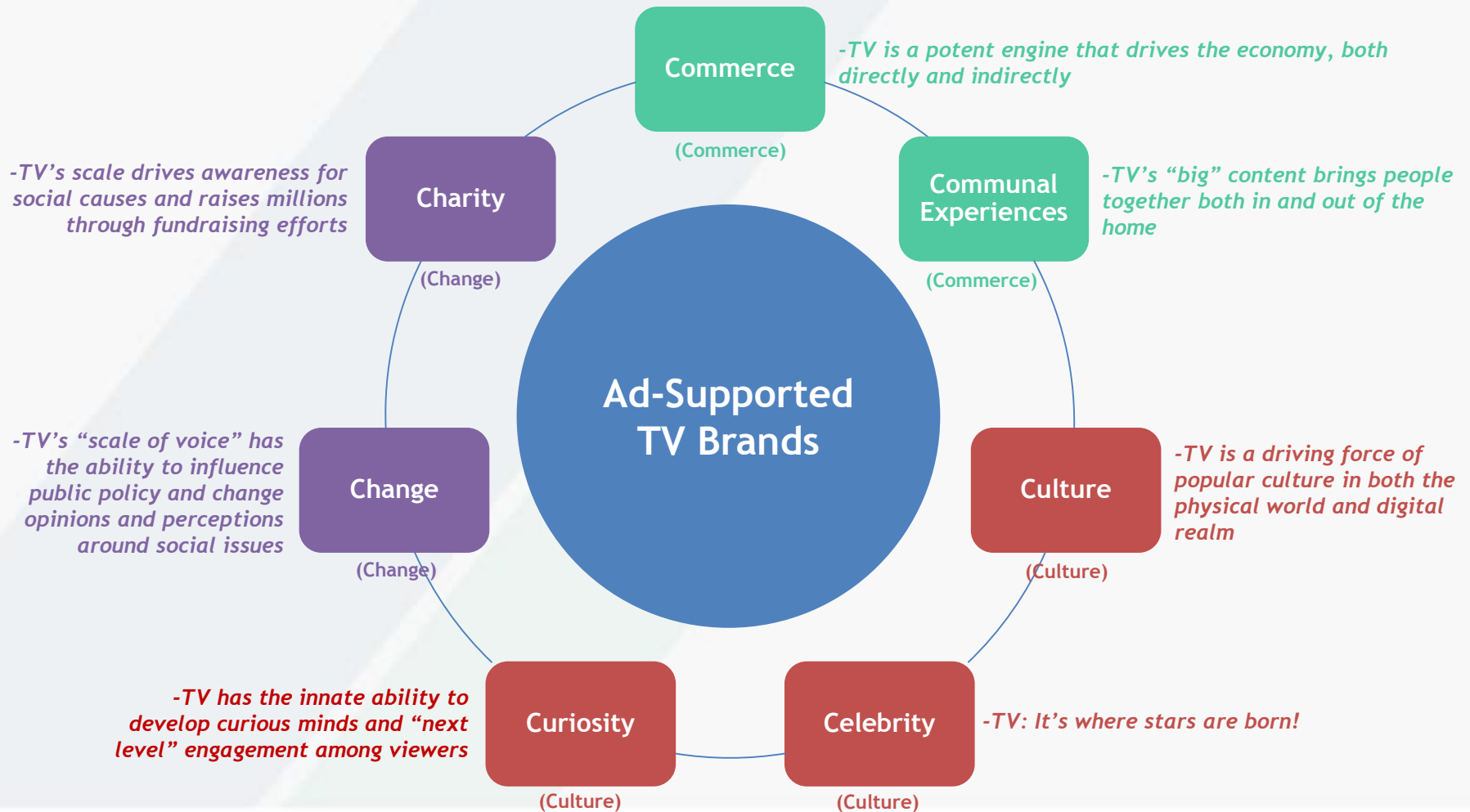
It permeates popular culture by sparking trends, creating celebrities, inspiring viewers and igniting curiosity. It influences consumers in outlets beyond TV and it engages them through interactive experiences within local communities.

The physical presence of TV brands is complemented by constant virality within the digital realm. Whether it’s short clips from long-form programming, comedy sketches from a previous night’s show, user-generated memes or popularized phrases; the Internet is inundated with tailored TV content every day.

Furthermore, TV’s “scale of voice” can influence public policy while also changing people’s opinions and perceptions around hot button issues. It’s this same scale that drives awareness for social causes and raises millions in charitable donations through televised fundraisers and telethons.

*Keep reading to see how TV brands live at the center of commerce & communal experiences...and stay tuned for the release of Volume II which shows how TV brands live at the center of culture & change.*

# No Platform Drives Commitment Like Ad-Supported TV's Premium Video-At-Scale

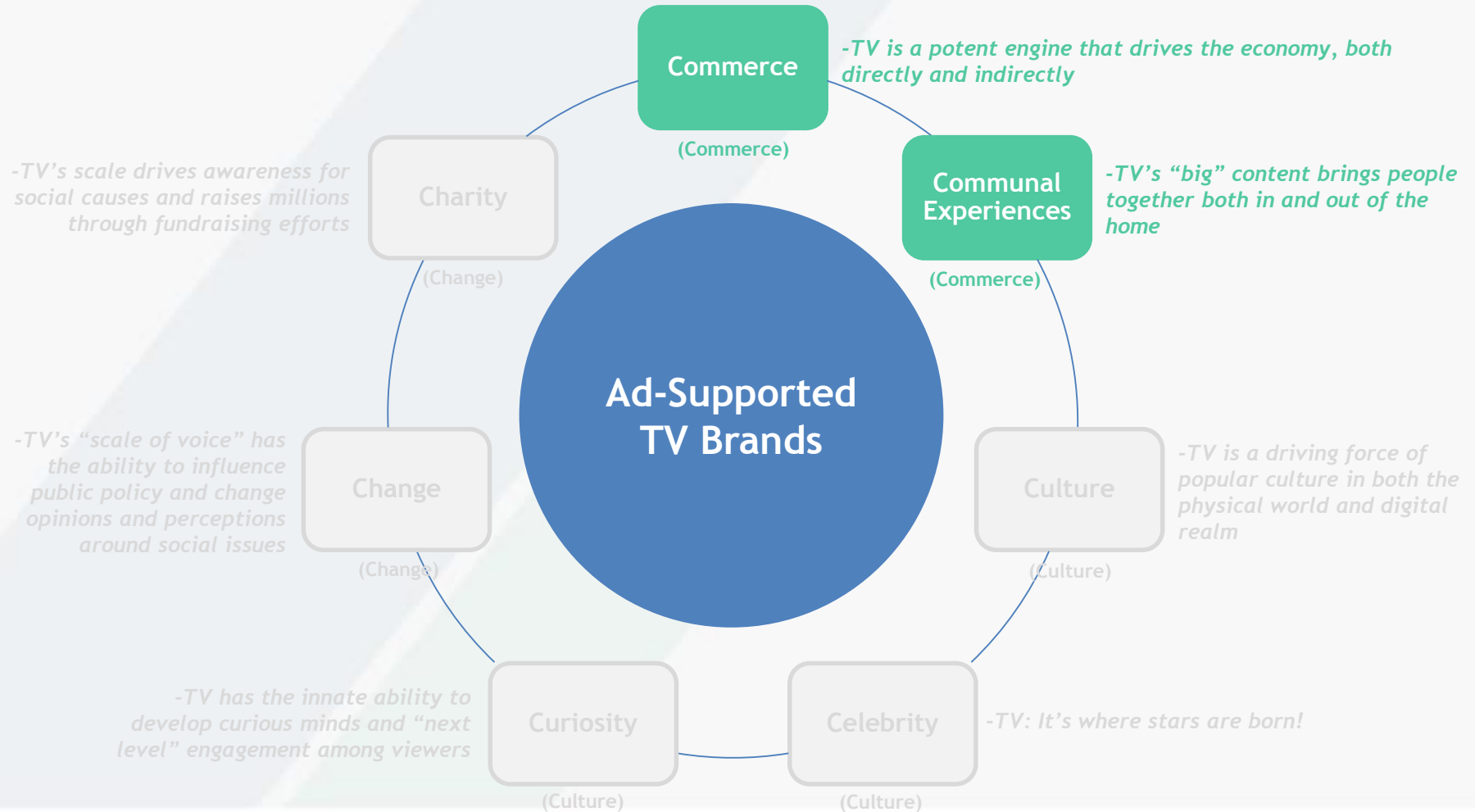


# Hundreds Of Ad-Supported TV Shows Contribute To Commerce, Culture & Change...These Are Just A Few



And many, many more...

# In This First Report Of Our Two-Part Series, We Focus On How Ad-Supported TV Impacts *Commerce*, Both Directly & Indirectly



# Before We Dive In Though, It's Pop Quiz Time!

## *Theme: How TV Drives Commerce*

Do you think you can answer these questions correctly? Don't worry, all the information you need is provided in the following pages of this report.

- 1) In 2017, how much are ad-supported TV networks expected to directly contribute to the economy?\_\_\_\_\_
- 2) Which TV personality is credited with changing the way people travel by generating greater interest in local cuisines & experiences?\_\_\_\_\_
- 3) Over the last decade, 30+ food & travel-related programs have featured this many restaurants & bars on their shows?\_\_\_\_\_
- 4) What reality TV star founded *Skinnygirl Cocktails* which she later sold for a reported \$100MM?\_\_\_\_\_
- 5) In 2017, Kim Kardashian launched her own make-up line called *KKW Beauty*. How long did it take before it sold out?\_\_\_\_\_
- 6) Scrub Daddy had \$100K sales prior to being featured on *Shark Tank*, what has its cumulative sales been in the four years since their pitch?\_\_\_\_\_
- 7) According to DoorDash, how much did cupcake orders increase by on Election Night 2016?\_\_\_\_\_
- 8) On average, how much did consumers spend on food & related purchases during the Super Bowl?\_\_\_\_\_
- 9) How many chicken wings were estimated to have been eaten during Super Bowl 50?\_\_\_\_\_
- 10) How many people were estimated to have missed work the Monday after Super Bowl 50?\_\_\_\_\_

No Platform Drives Commerce  
Like TV's Premium Video-At-Scale

# The Film & Television Industry Is Not Just New York & Los Angeles, It's An Industry That Employs *Millions* Across All 50 States



**\$131 Billion** contributed to the American Economy annually

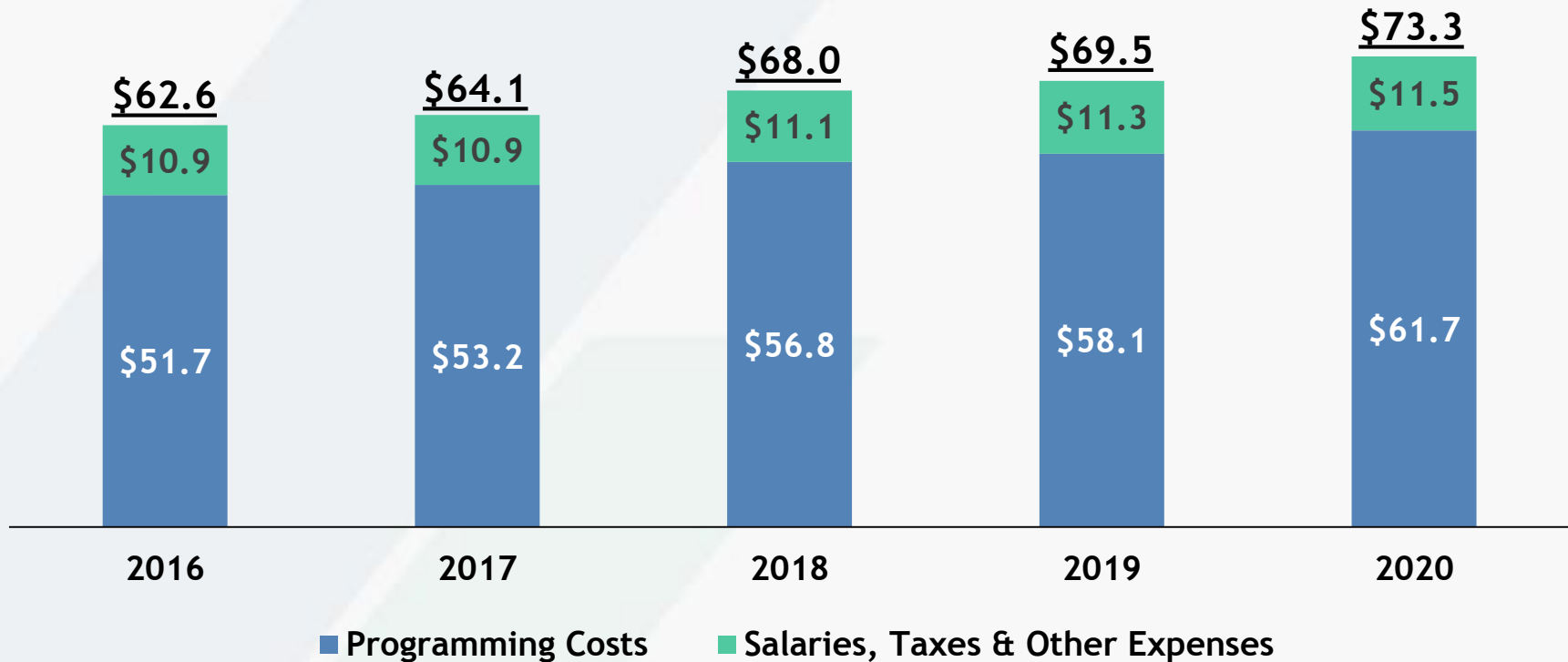
**2 Million** American Jobs in All 50 States

**\$51 Billion** in wages for production & distribution jobs

**88,000** small businesses contribute to production

# In 2017, Ad-Supported TV Networks Alone Will Contribute Over **\$64 Billion** To The Economy Through Programming Costs & Salaries

Ad-Supported TV Networks: Five-Year Annual Expenses Trend  
(in billions)



# **With It's Ability To Influence Other Industries, Television's Economic Impact Extends Well Beyond Entertainment**

**Three Examples Include The Following Categories:**

- **Home Improvement / Do-It-Yourself**
- **Food (Both At Home & Dining Out)**
- **Travel / Tourism**

# The Growth Of The Home Improvement Category Coincided With The Growth Of The “Home” TV Genre In The 2000’s

Home Improvement Category: U.S. Revenues  
(in billions)



Popular  
“Home”  
TV Shows  
(launch year)



# Today, “Home” TV Show Hosts Have Become Stars While Extending Their Brands Well Beyond The TV Screen

## Top “Home” TV Personalities



### Jonathan & Drew Scott

Have 2 book deals - 1 book was on both the *NYT* & *WSJ* bestsellers lists

Instagram Followers:  
Jonathan-817,000  
Drew- 811,000

### Chip & Joanna Gaines

Have 2 books, as well as a magazine, *The Magnolia Journal*

Own Magnolia Market - which sells their home & garden collection - as well as a realty company

### Nicole Curtis

Released a book which has made it onto the *NYT* & *USA Today* bestsellers lists

Has a line of home goods and apparel

212,000 Instagram Followers

### Christina & Tarek El Moussa

Have 1 pending book deal, put on hold due to divorce, which has made for tabloid fodder

Instagram Followers:  
Christina-805,000  
Tarek-218,000

### Hilary Farr & David Visentin

Hilary runs her own company, Hilary Farr Design

Both Hilary & David have done stage-acting

Instagram Followers:  
Hilary- 31,000  
David- 5,000

# Culinary Is Another Category Whose Rise Coincided With The Rise Of Related TV Programming In The 2000's

**Food Category: U.S. Revenues**  
(in billions)



Popular  
"Food"  
TV Shows  
(launch year)



# With The Rise Of The Food TV Genre Came The Creation Of The “Celebrity Chef”



**Alton Brown**



**Buddy Valastro**



**Gordon Ramsey**



**Bobby Flay**



**Martha Stewart**



**Tom Colicchio**



**Guy Fieri**



**Curtis Stone**



**Rachael Ray**



**Wolfgang Puck**



**Anthony Bourdain**



**Giada De Laurentiis**



**Mario Batali**

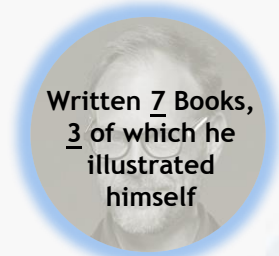


**Jamie Oliver**



**Emeril Lagasse**

# Celebrity Chefs Go Beyond Just Educating TV Viewers - Most Have Restaurants And Sell Cookware, Books And Much More



Written 7 Books,  
3 of which he  
illustrated  
himself

Alton Brown



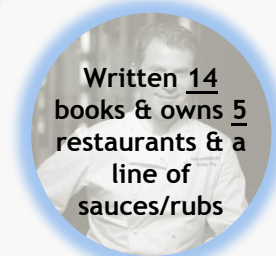
Owens Buddy V's  
Ristorante in  
Las Vegas &  
Runs Buddy V's  
Events

Buddy Valastro



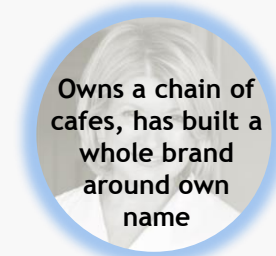
Owens 26  
restaurants  
located all over  
the world & has  
a line of  
cookware

Gordon Ramsey



Written 14  
books & owns 5  
restaurants & a  
line of  
sauces/rubs

Bobby Flay



Owens a chain of  
cafes, has built a  
whole brand  
around own  
name

Martha Stewart



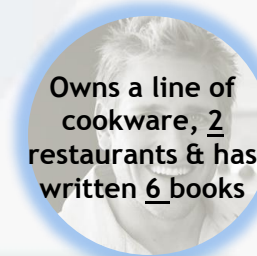
Owens 7  
restaurants &  
has written 3  
cookbooks

Tom Colicchio



Owens 6  
restaurants, has  
written 5 books  
& has lines of  
jewelry &  
cookware

Guy Fieri



Owens a line of  
cookware, 2  
restaurants & has  
written 6 books

Curtis Stone



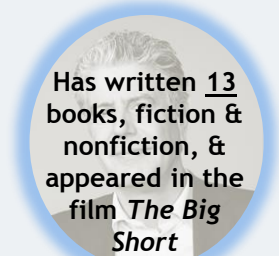
Owens a line of  
cookware,  
endorsements  
range from  
mobile carriers  
to home décor,  
& wrote 27  
books

Rachael Ray



Owens 20  
restaurants with  
locations  
worldwide & has  
lines of cookware,  
food, wine, books  
etc.

Wolfgang Puck



Has written 13  
books, fiction &  
nonfiction, &  
appeared in the  
film *The Big  
Short*

Anthony Bourdain



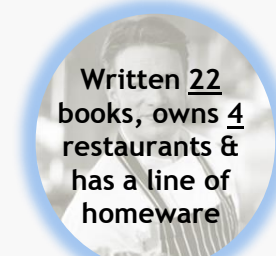
Has written 8  
books, 2 of which  
have been on the  
NYT Best Sellers  
List & owns a  
restaurant in Las  
Vegas

Giada De Laurentiis



Founded the  
*Mario Batali  
Foundation*,  
has 13 books, &  
owns 25  
restaurants

Mario Batali



Written 22  
books, owns 4  
restaurants &  
has a line of  
homeware

Jamie Oliver

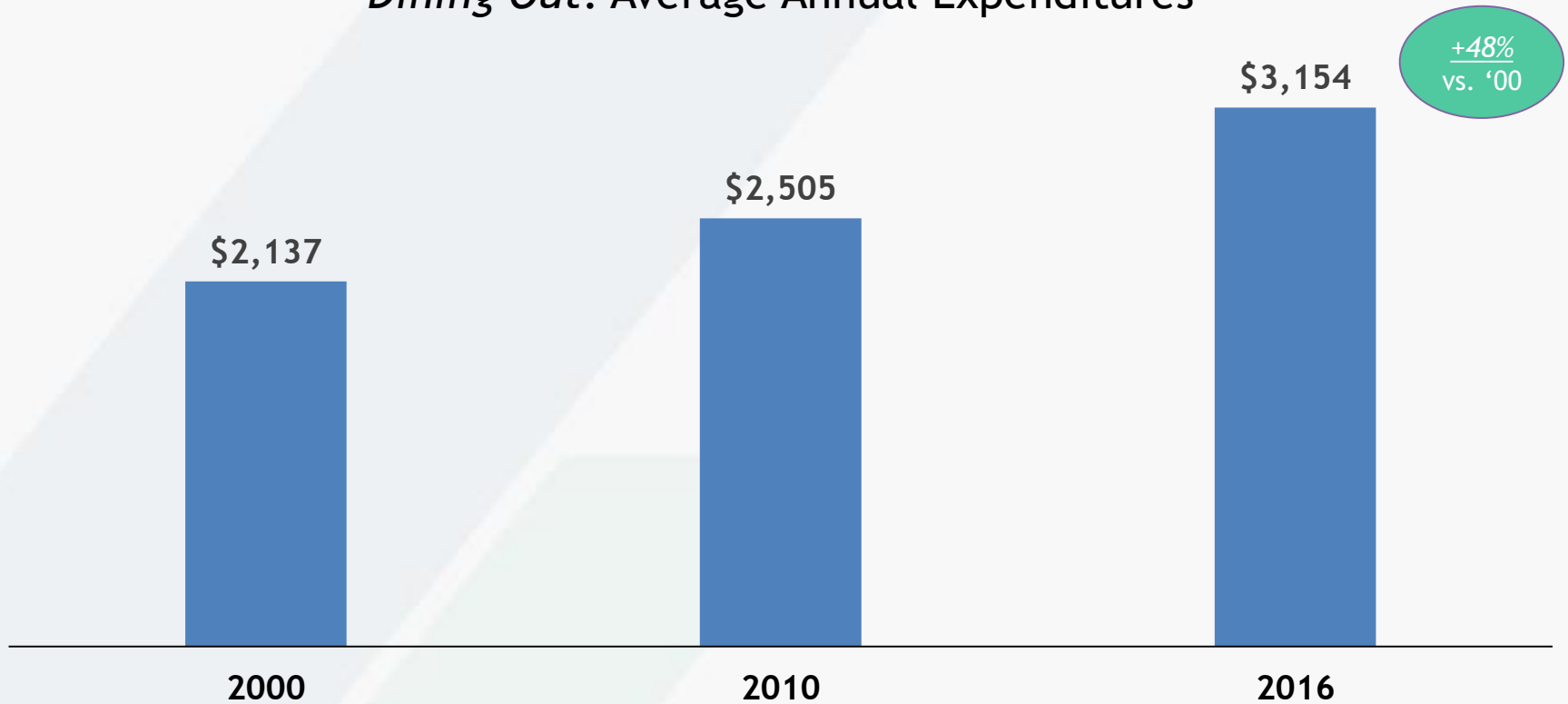


Founded the  
*Emeril Lagasse  
Foundation*, owns  
13 restaurants, &  
has wide range of  
branded products  
& 29 books

Emeril Lagasse

# Certainly, The “Cult” Of Celebrity Chef Fandom Has Made Dining Out Cool Again Amongst Both Epicureans & Regular Diners

*Dining Out: Average Annual Expenditures*



# Through Their Restaurants, Celebrity TV Chefs Are “Physically” Well Represented Across The Country’s Biggest Cities



**Gordon Ramsey**  
*The Boxwood Café - West Hollywood*



**Bobby Flay**  
*Bar Americain - New York City*



**Tom Colicchio**  
*Craft - New York City, Los Angeles*



**Giada De Laurentiis**  
*Giada - Las Vegas*



**Buddy Valastro**  
*Buddy V's Ristorante - Las Vegas*



**Guy Fieri**  
*Guy's American Kitchen & Bar*



**Curtis Stone**  
*Maude - Beverly Hills*



**Wolfgang Puck**  
*CUT - NYC, Beverly Hills, Las Vegas*



**Mario Batali**  
*Eataly - New York City, Chicago*



**Emeril Lagasse**  
*Emeril's - New Orleans, Orlando*



**Chris Santos**  
*Vandal - New York City*

# The Popularity Of Celebrity Chefs Has Driven The Success Of Reality Cooking Competitions & Created Untold Opportunities



**Christine Hà**

Having never studied cooking, she was the first blind contestant to compete in *MasterChef* and the winner of season 3. She took home a prize of \$250K, as well as a cookbook deal. Her book *Recipes from My Home Kitchen* was published in 2013.



**Jeff Mauro**

The season 7 winner of *Food Network Star*, he is now the host of the Emmy-nominated show *Sandwich King* and co-hosts *The Kitchen*.

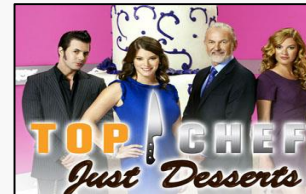
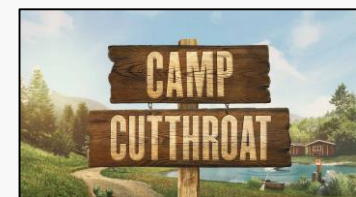
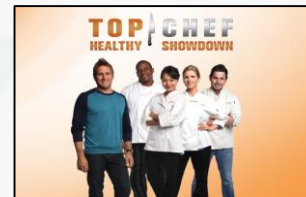


**Stephanie Izard**

The first female winner of *Top Chef*. Along with the \$100K prize, she also received a \$10K prize during the *Top Chef Season 4 Reunion Special* for being the Fan Favorite. She now owns 3 restaurants in Chicago, IL.

---

Cooking competition shows have become so popular with viewers, many have inspired spinoffs



# Beyond TV, Reality Cooking Show Contestants Have Been Making Their Mark Recently With Their Own Restaurants



**Richard Blais - Top Chef Winner**  
*Juniper And Ivy - San Diego*



**Jeff McInnis & Janine Booth - Top Chef Contestants**  
*Root & Bone - New York City*



**Stephanie Izard - Top Chef Contestant**  
*The Girl & The Goat - Chicago*



**Hosea Rosenberg - Top Chef Winner**  
*Blackbelly - Boulder, CO*



**Leah Cohen - Top Chef Contestant**  
*Pig and Khao - New York City*



**Bryan & Michael Voltaggio - Top Chef Winner**  
*Voltaggio Brothers - Oxon Hills, MD*



**Carl Dooley - Top Chef Contestant**  
*The Cambridge Table - Cambridge, MA*



**Dale Talde - Top Chef Contestant**  
*Talde - Miami, Brooklyn*



**Brooke Williamson - Top Chef Winner**  
*Hudson House - Redondo Beach, CA*



**Frank Terzoli - Cutthroat Kitchen Winner**  
*Fishmonger's Market & Seafood Bar - San Diego*

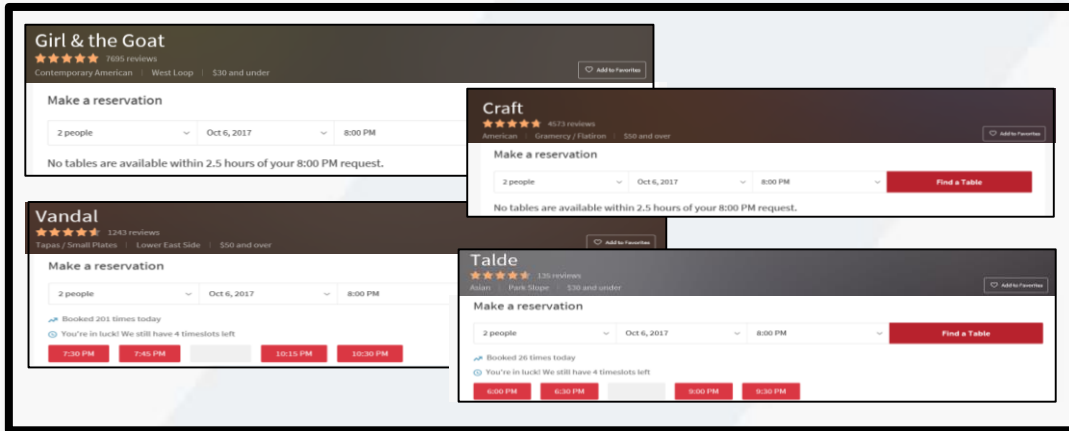


**Mike Isabella - Top Chef Contestant**  
*Arroz - Washington, DC*

# Celebrity TV Chefs & Reality Show Contestants Have Some Of The Hottest, Critically Acclaimed, Most Liked Restaurants

*Reservations For Desired Restaurants Are Consistently Hard To Get, Even A Week In Advance*

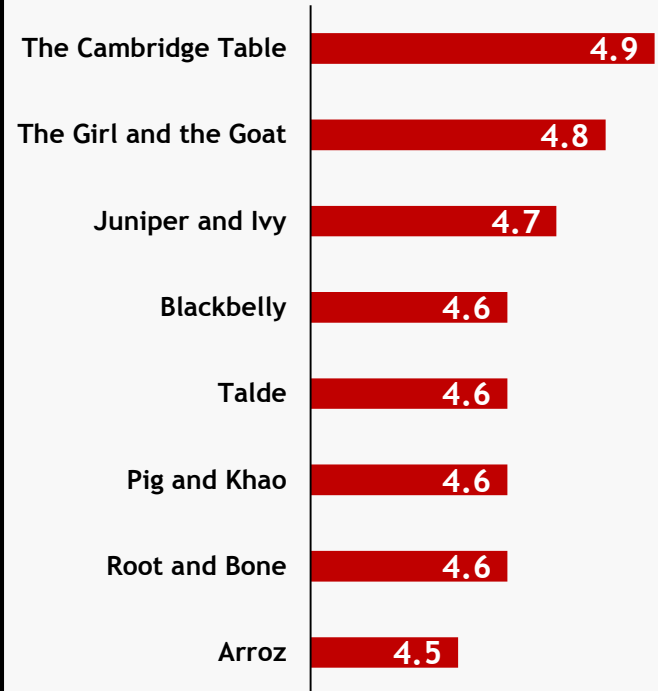
*Reality Show Contestants' Restaurants Have Garnered High Ratings From Very Satisfied Customers*



*Many Restaurants Are Also Critically Acclaimed By Well-Respected Reviewers*



## Overall Rating from Open Table out of 5 stars



# People's Love Of Food Programming Is Also Changing The Way Many Travel & Helping Increase Local Tourism

TV personalities like Anthony Bourdain have been credited with changing the way people travel, generating more interest in delving into local cuisine and experiences

**Forbes**

Is Anthony Bourdain Leading The Next Food Revolution?



Chef Eric Ripert said that "by traveling and by communicating the culture of where he is visiting through sharing food, [Bourdain] has inspired us to not only travel, but to be adventurous -- to leave the resorts and explore the surroundings and to connect with a culture even more profoundly by sharing food as natives of that destination."

TRAVEL WEEKLY

..And on a more localized level, Guy Fieri's *Diners, Drive-Ins & Dives* has been cited with improving the sales of beloved restaurant gems throughout the country



## The Diners, Drive-Ins And Dives Effect

When the popular TV show comes calling, hang on, because your business will never be the same again.



The Smack Shack at Bar 1029, Minneapolis, MN  
Saw 300% Long-Term Increase in Business



Casper & Runyon's Nook, St. Paul, MN  
Saw 100% Increase in Business shortly after airing



Twisted Root Burger Co, Dallas, TX  
Saw 200% Increase in Business shortly after airing



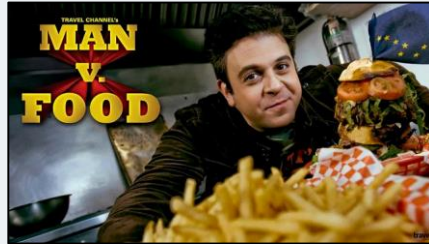
Joe's Gizzard City, Potterville, MI  
Saw 40% Long-Term Increase in Business

# In Fact, Many Food Shows Have Gone Into Local Communities To Unveil Hidden Culinary & Libation Gems To The Masses

In the last several years, more than 30 ad-supported TV shows have featured over 4,000 local restaurants and bars as a part of their programming. Many of these establishments have boasted double- and triple-digit sales increases in the weeks following both their premiere date and re-run airings



Visited over 930 restaurants & bars in 45 states



Visited over 185 restaurants in 36 states



Rescued over 125 bars in 21 states



Visited over 180 restaurants in 29 states



Featured over 465 restaurants in 45 states



Visited over 40 restaurants in 11 states



Renovated 105 restaurants in 38 states



Featured 112 restaurants in 20 states

# Along With Purely Food-Based TV Shows, Other Programming Has Also Influenced People's Travel Plans

1 in 5 (20%) Global Travelers Have Visited A Destination Because They Saw it On A TV Show



In the 48 hours after a *Parts Unknown* Sicily episode aired, U.S. online search activity for the three airports in Sicily soared 89% over the previous week



After the season 7 finale of *The Bachelorette* aired, which took place in Fiji, a major travel operator on the island saw a 250% increase in website page visits



The Seaside Heights Business Improvement District stated that they saw an estimated 20% increase in beach visitors during the run of *Jersey Shore*

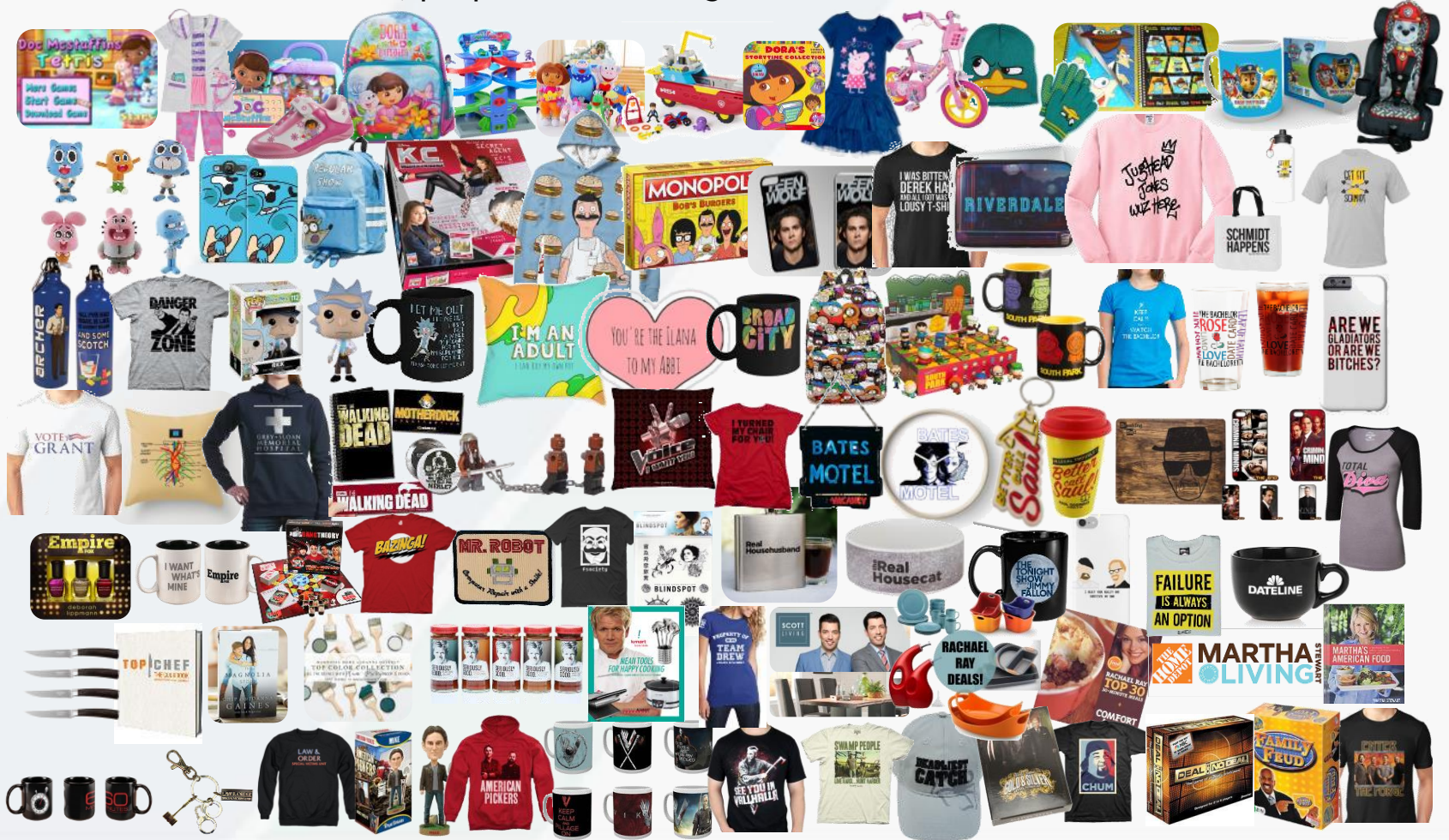


After an episode of *Bethenny Getting Married*, where she and her husband honeymooned in St. Barts, a local reservations company stated that revenue from near term bookings were up 37%

**Furthermore, TV Impacts A Variety of Other Categories Through Consumer Product Extensions, Branded Lines Owned By TV Personalities And Support Of Entrepreneurs**

# People Aren't Just Watching TV Content, They're Physically "Consuming" Their Favorite Brands As Well

From Babies to Boomers, people love to "badge" themselves with merchandise from TV shows



# Additionally, Many TV Stars Are Branching Out With Their Own Product Lines Which Have Been Well-Received By Consumers



Bethenny Frankel, from *The Real Housewives of New York City*, founded Skinnygirl Cocktails which she later sold for an estimated \$100 million



Jessica Alba, who gained fame by starring in *Dark Angel*, founded The Honest Company which sells safe, ethical, effective baby & household products. \$300MM annual sales / \$1.7B valuation



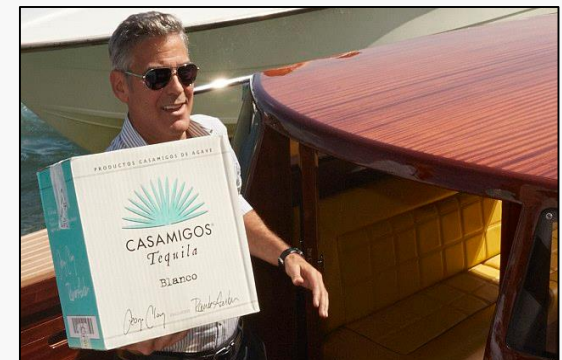
Earlier in 2017, Kim Kardashian launched her own make-up line called KKW Beauty. The 300K available kits were sold out in less than three hours, bringing in an estimated \$14.4MM in sales.



Lauren Conrad, who gained fame from *Laguna Beach* & *The Hills*, has two fashion lines - LC Lauren Conrad & Paper Crown - with estimated annual sales of \$60MM



Kylie Jenner, from *Keeping Up With The Kardashians*, launched Kylie Cosmetics in 2015 which has a reported \$400MM in sales since inception



George Clooney, who achieved superstardom from *ER*, co-founded Casamigos Tequila which he later sold for an estimated \$1 billion

# Also, TV Shows Like “Shark Tank” Are Empowering & Enriching The Lives Of Everyday Inventors & Entrepreneurs

## Examples of Shark Tank Success Stories

### “Scrub Daddy”



As of January 2017, the brand’s total revenues had surpassed \$100MM in the four years since their pitch. Before Shark Tank, the company had \$100K in sales

### “Squatty Potty”



24 hours after the deal, the brand saw \$1MM in sales. Revenues rose to \$19MM in 2015 and 2016 sales were expected to top \$30MM

### “Tippy Elves”



The brand brought in \$600K a year in sales before appearing on Shark Tank. In 2016, the company’s revenue was projected to hit \$8MM

### “Groovebook”



A gain of 50K subscribers shortly after the pitch then acquired by Shutterstock Inc. in 2014 for \$14.5MM

### “Buggy Beds”



International growth across 23 countries with sales of more than \$1.2MM after the pitch

### “Ten Thirty One Productions”



Since the pitch, the company made \$2MM and revenues are expected to grow to \$2-3MM in 2017

### “Wicked Good Cupcakes”



In 2016, the company had \$8MM in sales since the episode aired in season four

### “Lollacup”



More than \$1MM in sales since the pitch

**Ad-Supported TV Generates *Billions* For The U.S. Economy  
And Sells More Stuff For Brands Everyday...**

**...However, It Should Be Noted That On One Day A Year  
- *And Only One Day A Year* -  
TV Is The Primary Suspect In A Decrease Of Commerce...  
*At Least In The Workforce***

# The Day After The Super Bowl Is So Unproductive That People Have Started Petitions To Make It A National Holiday

- In 2016, an estimated 1 in 10 Americans, or *16.5 Million*, missed work the Monday after Super Bowl 50
- 64% of them (10.5MM) at least had the foresight to request the day off in advance
- Another estimated 7.5 Million showed up late for work
- Productivity drops precipitously with the country losing an estimated \$1 Billion due to absences and tardiness
- Thankfully, someone has tried to do something about this. Last year, Heinz Ketchup started a petition - now signed by 70,929 people - to make the Monday after the game a national holiday

**Make the Monday after the "Big Game" a National Holiday!**

[change.org](https://www.change.org)

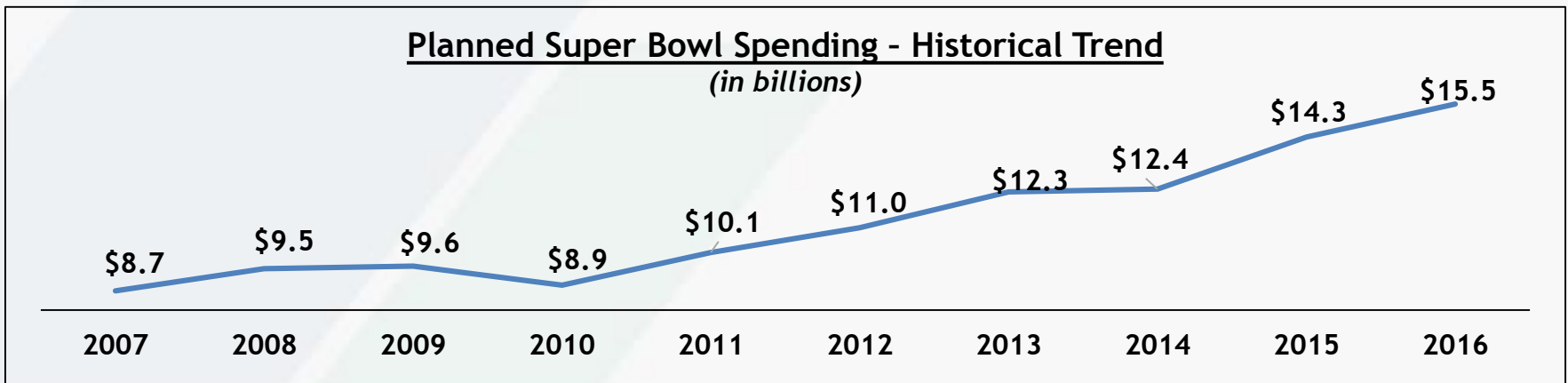
No Platform Drives *Communal Experiences*  
Like TV's Premium Video-At-Scale

# Speaking Of The Super Bowl, The TV Event Is The Pinnacle For Get Togethers And Leads To Billions In Spending Each Year

Consumers watching the “big game” spend an average of \$75 each on food and related purchases



**Planned Super Bowl Spending - Historical Trend**  
(in billions)



# In Fact, You Can't Search For A Major TV Event Without Finding Countless Articles On How To Plan The Perfect Viewing Party

Popular Party Planning Websites & Blogs Offer an Array of Viewing Party Planning Ideas

*3 DIYs to Make for the Most Dramatic Bachelor Viewing Party Ever*

OSCAR PARTY IDEAS: 7 WAYS TO THROW THE PERFECT PARTY!

**3 Recipes That Bring Something New to Your Golden Globes Viewing Party Menu**

Couchgating: Throwing the Perfect Football Viewing Party

**Host a Winning Super Bowl Party**



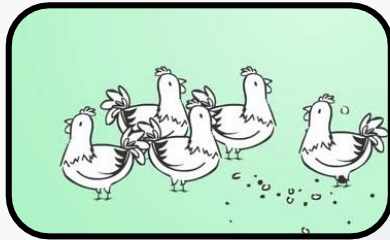
**The Ultimate March Madness Viewing Party Guide**

**How To Throw An Election Night 2016 Party That's Just As Epic As The Election**

SECRETS OF THE LYONS DEN: HOW TO HOST THE ULTIMATE EMPIRE SEASON FINALE WATCH PARTY

THE WALKING DEAD: 25 RECIPES AND CRAFTS FOR A ZOMBIE APPROVED PARTY

# With All This In-Home Congregation, It's No Surprise That Online Food Orders Surge During Major Televised Events



Super Bowl 2016 - 1.3 Billion Chicken Wings Were Eaten & GrubHub Orders for *Wings* Increased 97%.

2016 World Series - Orders for *Chicken Wings* Grew 47% on DoorDash.



2016 World Series Game 7 - GrubHub Orders for *Hot Dogs* Increased 36% in Chicago.

Orders for *Hot Dogs* in Chicago Doubled & Orders Increased 12% Nationally on DoorDash.



2016 World Series Game 7 - *Pizza Orders* Increased by 67% on DoorDash.

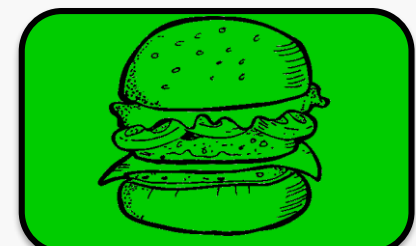
Super Bowl 2016 - *Pizza orders* increased 37% compared to normal Sundays.



Election Night 2016 - Orders for *Cupcakes* Increased 79% on DoorDash.



Election Night 2016 - *Alcohol Orders* Almost Doubled on DoorDash & Postmates.



Election Night 2016 - *Burgers* Surged to Become the 2<sup>nd</sup> Most Popular Order on Postmates.

# Viewing Parties For Big TV Events Are Also A Popular Draw Outside The Home

Restaurants & bars attract viewers for anything from political debates to March Madness

**State Of The Union 2016 Watch Party NYC: Best Bars, Events Where You Can Watch Obama In New York City**

**5 can't-miss viewing parties in Atlanta for Falcons-Patriots Super Bowl**

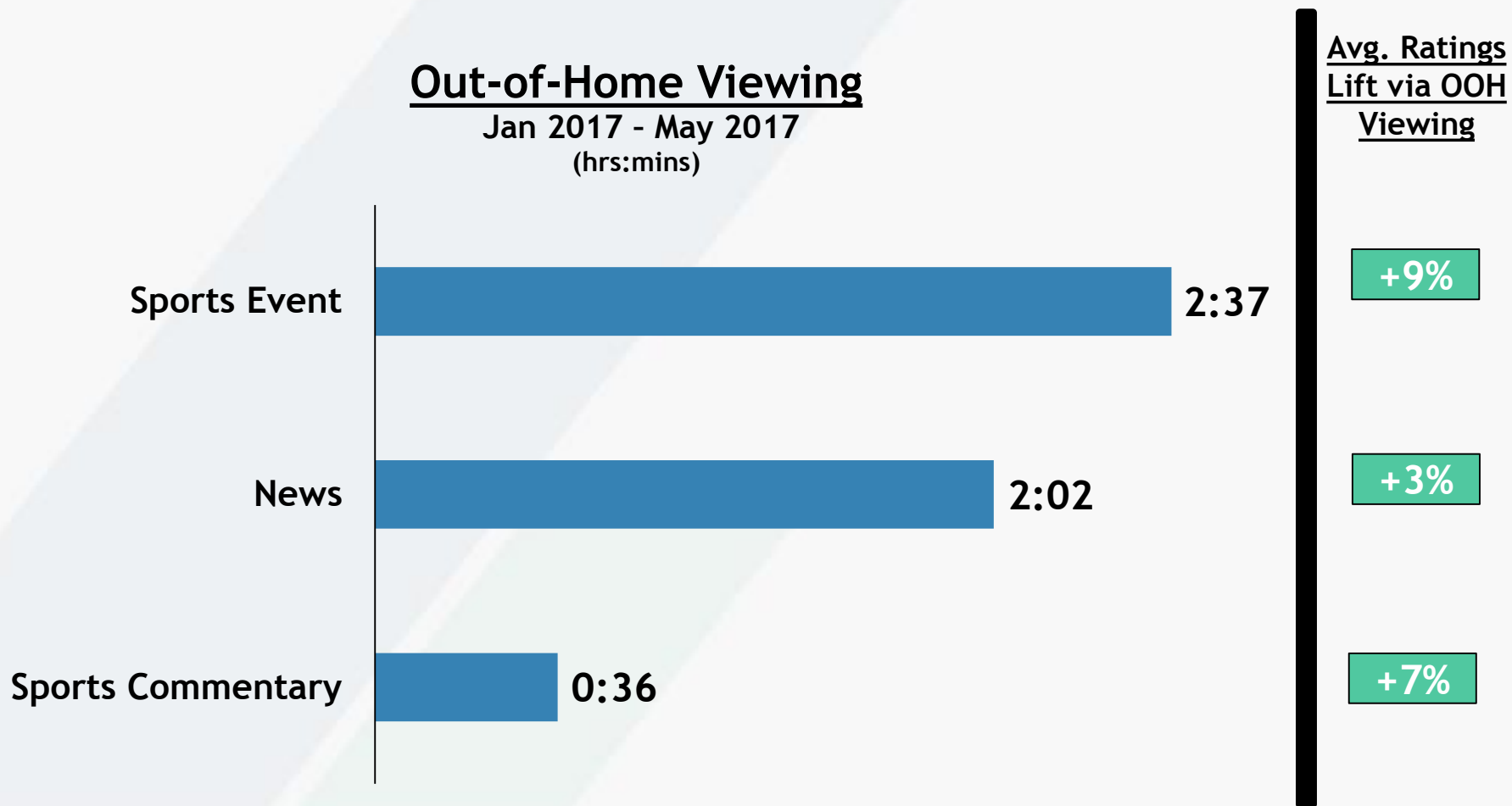
**Bars Are Holding Viewing Parties For James Comey's Testimony**

**9 Places in Cleveland to Watch the Cavaliers in the NBA Finals**

**Apollo Theater To Host Presidential Debate Viewing Party**

**March Madness 2017: Where To Watch In NYC**

# These Out-Of-Home Social Gatherings Around TV Content Contribute Significantly To Program Rating Lifts As Well



## VOL. I - COMMERCE & COMMUNAL EXPERIENCES

Source: Nielsen's "Content On The Go: A Look At Viewing Trends Among Out-Of-Home Consumers" Report, 8/4/17. P6+ Jan 2017 - May 2017. Out-of-home viewing includes locations such as bars, restaurants, gyms, airports, offices, etc. Read as: Viewers spent an additional 2 hours and 37 minutes watching Sports Events on TV outside of their home. Out-of-home viewing provided a 9% lift from the genre's in-home viewership.

# Thousands Join Large Viewing Parties Of Sporting Events & Celebrate In The Streets After Watching Their Team Win

Over 50K+ joined an outdoor viewing party in downtown Nashville for the Predators 2017 Stanley Cup Finals games



Over 40K+ fans gathered at a viewing party in Chicago's Soldier Field to watch USA vs. Belgium in the Round 16 of the 2014 Men's Soccer World Cup



Super Bowl viewing parties are held by large venues across the country every year, such as the Marquee Dayclub in Las Vegas



Fans celebrate in Kenmore Square after seeing the 2013 Boston Red Sox win their first World Series at home since 1918



Clevelanders celebrate after the Cavaliers win the 2016 NBA Finals and bring the city their first major sports championship in 52 years



Fans pack the streets outside of Wrigley Field immediately after watching the Chicago Cubs win their first World Series in 108 years



# The Consumer Commitment To TV Content Is Unrivaled

## No Platform Drives Commerce Like TV's Premium Video-At-Scale...Why?

- Unrivaled consumer commitment enables ad-supported TV networks to directly contribute *\$64 billion* annually to the U.S. economy
- TV content sparks trends across a variety of categories and ignites growth within other industries
- From Babies to Boomers, people love to personally “badge” themselves with products related to TV brands and personalities

## No Platform Drives Communal Experiences Like TV's Premium Video-At-Scale...Why?

- When people gather around a shared experience, both in and out of the home, they spend money...a lot of it.
- Whether it's the Super Bowl, an awards show or the season premiere of your favorite TV show, nothing delivers the scale of a shared experience like TV
- There's a near constant stream of “big” TV moments occurring throughout the year which elicits intense passion and drives incredible commitment from the viewing audience

# Before You Go, Check To See How You Did On The Pop Quiz! Remember, The Theme Is “*How TV Drives Commerce*”

With the answers below, you can wow your family, friends and co-workers with your TV knowledge at the next holiday family gathering, weekend get-together or Thursday night happy hour!

- 1) In 2017, how much are ad-supported TV networks expected to directly contribute to the economy? *\$64 Billion*
- 2) Which TV personality is credited with changing the way people travel by generating greater interest in local cuisines & experiences? *Anthony Bourdain*
- 3) Over the last decade, 30+ food & travel-related programs have featured this many restaurants & bars on their shows? *Approximately 4,000*
- 4) What reality TV star founded *Skinnygirl Cocktails* which she later sold for a reported \$100MM? *Bethenny Frankel*
- 5) In 2017, Kim Kardashian launched her own make-up line called *KKW Beauty*. How long did it take before it sold out? *less than three hours*
- 6) Scrub Daddy had \$100K sales prior to being featured on *Shark Tank*, what has its cumulative sales been in the four years since their pitch? *over \$100 million*
- 7) According to DoorDash, how much did cupcake orders increase by on Election Night 2016? *+79%*
- 8) On average, how much did consumers spend on food & related purchases during the Super Bowl? *\$75*
- 9) How many chicken wings were estimated to have been eaten during Super Bowl 50? *1.3 billion*
- 10) How many people were estimated to have missed work the Monday after Super Bowl 50? *16.5 million*

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