

2022

Welcome to TV

Meet the Advertisers Seizing Opportunities
During a New Wave of Uncertainty

1st Half of 2022



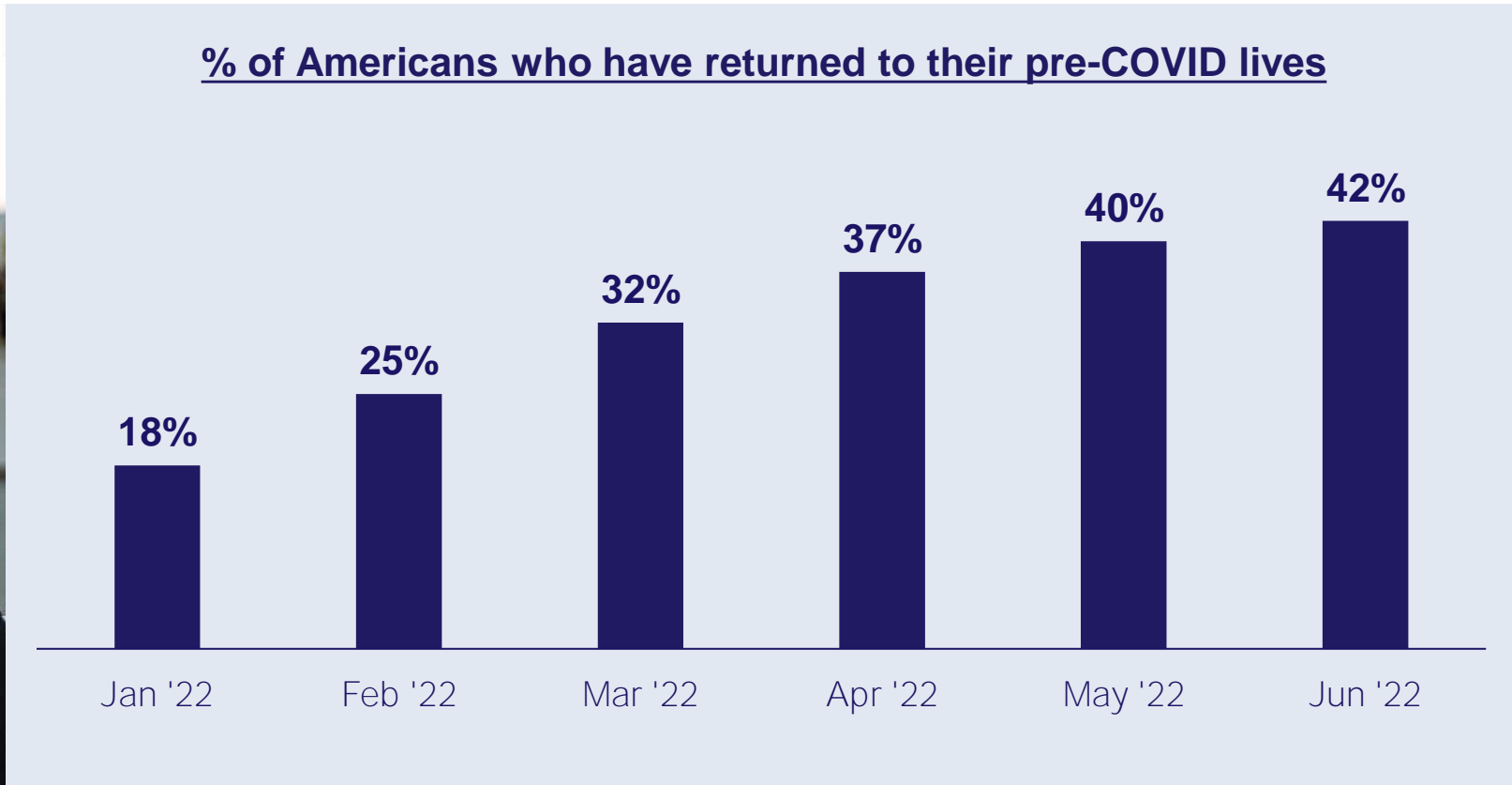
After two years of global disruption caused by Covid, new economic uncertainties emerged around inflation in 2022

The TV marketplace saw an influx of entrants in new categories during 2020 & 2021 as brands looked to leverage pandemic-driven behaviors.

As 2022 began, brands that serve pre-pandemic, **'everyday' needs like pharma, insurance and financial** services have taken on a renewed importance. However, just as consumers were seeking a return to normalcy, new economic uncertainties arose through the first half of 2022.

These bold new advertisers are looking for an opportunity to build relationships with consumers and win market share among their competitors.

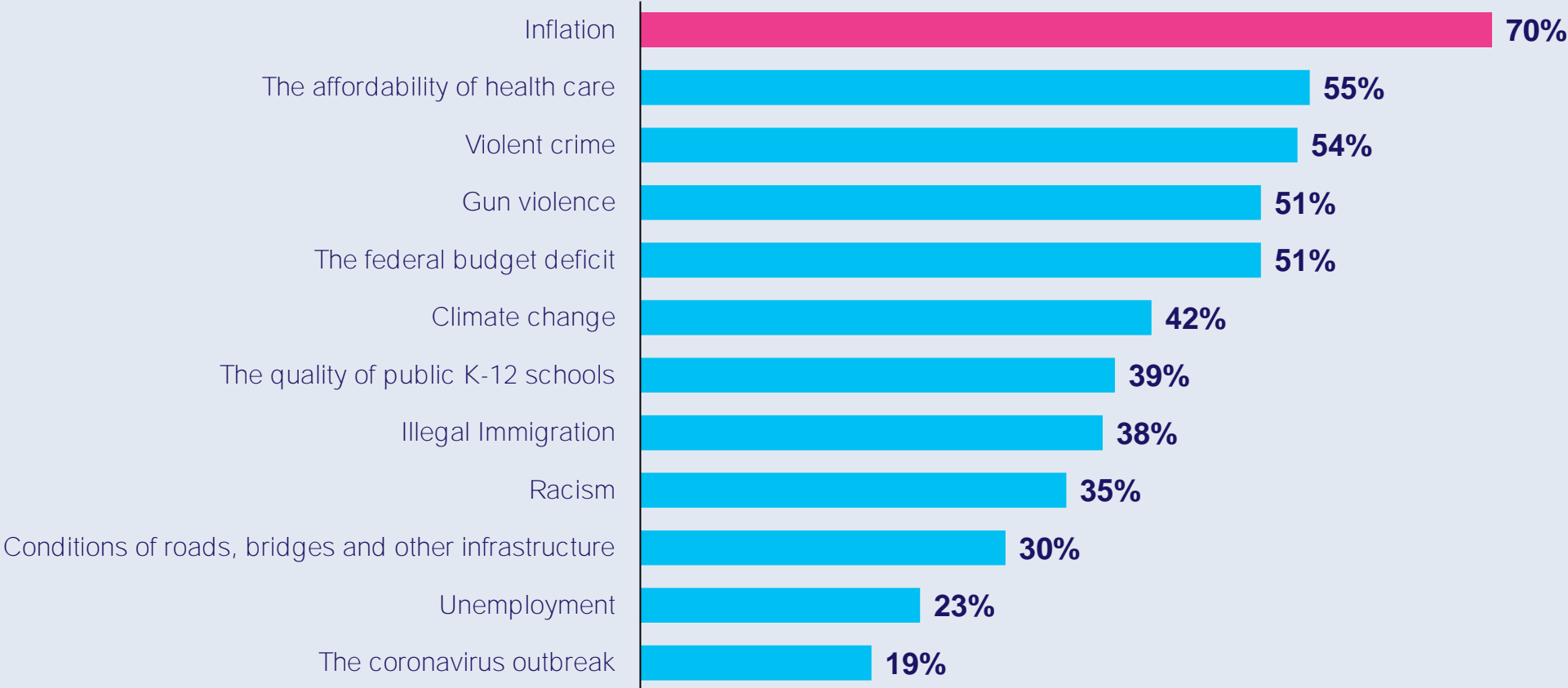
More consumers were returning to a pre-Covid 'normalcy' over the first half of the year



Source: Axios-Ipsos Coronavirus Index, 2022. Based on data from multiple survey waves conducted beginning mid-March 2020 with the recent wave (wave 70) conducted September 9-12, 2022. n=1,158, adults 18+. Q: When do you expect to be able to return to your normal, pre-COVID life? Reflects respondents who answered, "already have".

However, with Covid concerns waning, inflation has taken its place as the most pressing issue for Americans

% who say each of the following is 'a very big problem' in the country today



Source: Pew Research Center, *By a wide margin, Americans view inflation as the top problem facing the country today*, 5/12/22. Based on survey of U.S. adults conducted April 25 – May 1, 2022.

Despite inflation being a top concern, retail spend has been steadily rising as consumers return to their 'everyday' lives and activities



Estimated Monthly Retail and Food Services Sales

\$\$\$ in billions



Source: U.S. Census Bureau, Estimates of Monthly Retail and Food Services Sales by Kind of Business: 2020, 2021, 2022.

Creating and maintaining a presence is imperative for advertisers to build brand equity among consumers, especially in times of economic uncertainty when people are still spending



“In times of uncertainty, all of us are looking for stability...If consumers are feeling uncertainty, the wrong thing to do is stop talking to them.”

Kirk McDonald, CEO, GroupM North America

*‘Advertising in Uncertain Times: Adapt Your Messaging to Today’s Environment’ panel session,
Advertising Week New York, October 2022*

Looking to stand out during a challenging economic time, advertisers launched national TV campaigns to grow their awareness, build brand equity and create excitement around their brand



"Our spot [during the Super Bowl] will continue to **accelerate awareness** as we focus on **expanding Cutwater's footprint** across the nation."

Fabricio Zonzini, President, *Beyond Beer (AB InBev)*
(Forbes, 2/11/22)



"Our brand evolution demonstrates our commitment to making investments that support our long-term vision of becoming **universally recognized as the premier uniform service provider** in the industry. This multi-media brand campaign tells the story of not only **who we are**, but **why we do what we do and who we do it for.**"

David Katz, Executive Vice President
of Sales & Marketing, *UniFirst*
(UniFirst Press Release, 3/1/2022)



"We're going to the Super Bowl because **that's where our consumers are**. Any potential EV car buyer is a potential Wallbox buyer as well."

Barbara Calixto, Chief Marketing Officer, *Wallbox*
(Ad Age, 1/13/22)



"We wanted the campaign to position Sunbrella as a lifestyle brand that people proactively seek out **to ensure they enjoy their living spaces, worry-free.**"



Eric Kallman, Chief Creative Officer / Partner, *Erich and Kallman (campaign ad agency)*
(Little Black Book, 4/28/22)



"We've always focused on helping our customers design cozy, comfortable spaces that inspire enduring memories and connections. **TV allows us to share Plow & Hearth's story while highlighting the variety and quality of our offering.**"

Leslie Newton, CEO, *Plow & Hearth*
(Plow & Hearth Press Release, 4/25/22)

Several first-time national TV advertisers further stood out by launching in high-profile TV events and establishing partnerships to generate immediate brand recognition while building legitimacy for their product

Topo Chico Hard Seltzer goes national, introduces Ranch Water

January 4, 2022




Forbes Cutwater Spirits Reveals First Ever National Super Bowl Commercial

February 11, 2022




Novartis rolls first Leqvio TV ads, focusing on resilient patients—and convenient dosing

April 28, 2022




EV CHARGING BRAND WALLBOX TO AIR ITS FIRST SUPER BOWL COMMERCIAL

January 13, 2022




MediaPost Fuzzy Sends Love Letter To Pets, Pet Owners

June 17, 2022




'Take Your Shot': Puncher's Chance Bourbon Unveils 1st National Ad Campaign

April 19, 2022



ICYMI: We debuted the first-ever Tequila Komos TV commercial yesterday during the 2022 Oscars.

It premiered to over 10 million at-home viewers plus the audience attendees in the Dolby Theatre, airing just before Best Director. Watch it here: youtube.com/watch?v=zX0aNS...

#oscars2022



1:48 PM · Mar 28, 2022 · Twitter Web App

March 28, 2022




WhatsApp Warns About Message Privacy in First U.S. Campaign



The Meta-owned company promises security for app users

January 28, 2022






eToro's New TV Spot to Air in Super Bowl LVII

February 12, 2022

Plow & Hearth Celebrates the Comfort of Home on National TV

April 25, 2022

Plenity® National Media Campaign Kicking Off Today Challenges Restrictive Dieting Norms

January 31, 2022




Nike Teams Up With GenderCool Project For Trans Positivity Campaign

March 16, 2022

Leading-edge brands are using TV to engage consumers as they look for innovative ways to enjoy products and services

*Click on any logo to visit their website

'Younger-skewing' brands

Brands targeting younger audiences

Topo Chico



TEQUILA
KOMOS

QUAY

WILDER pumpkin



SAND CLOUD

Innovative products

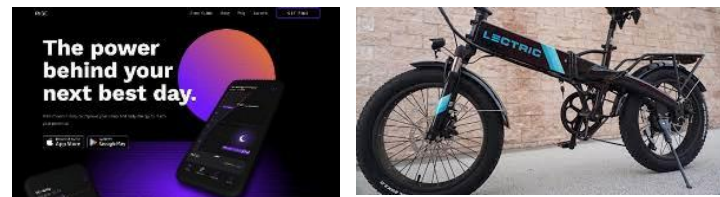
Brands using cutting-edge technology to offer inventive products / services

wallbox   **LIFEKEY™**



 **RISE**

 **LECTRIC
eBIKES**



Digital endemics

Brands specializing in digital services across a range of categories



WhatsApp



step



Copilot



Neighbor



Cash App

Source: VAB analysis of Nielsen Ad Intel data, 1/1/22-6/30/22. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100K.

Furthermore, the national TV marketplace saw a resurgence in categories that serve functional needs as consumers return to their pre-pandemic lives while facing new economic challenges fueled by rising inflation

Functional categories that are seizing opportunities through a new wave of uncertainty

Looking to stay on top of their health in order to avoid pricey treatments or doctor visits, consumers are turning to both **healthcare & pharma** brands to aid in their 'everyday concerns'

There has been an influx in spending on **insurance** across medical, life, pet and auto as consumers look for services to protect themselves during a time of economic uncertainty

With high inflation, consumers' financial future is top of mind for many, and they are looking for guidance from **financial services** related to investments, estate & financial planning and personal loans

In addition to providing people solutions to help navigate hybrid work situations, **professional services** are also aiding the workforce through freelancing opportunities

Consumers are seeking **versatile apparel** as they look for affordable options that allow them to diversify their wardrobe with a mix of active wear to casual wear and more diverse 'workplace' attire

As consumers put more focus on their holistic health while on a budget, they are turning to affordable and flexible fitness options, as well as vitamin regiments, with the help of **fitness & wellness** brands

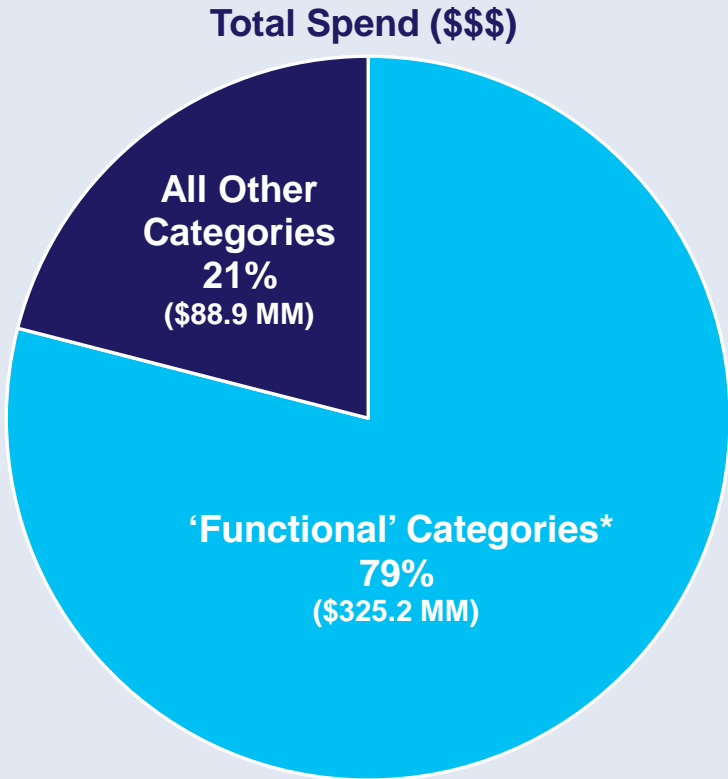
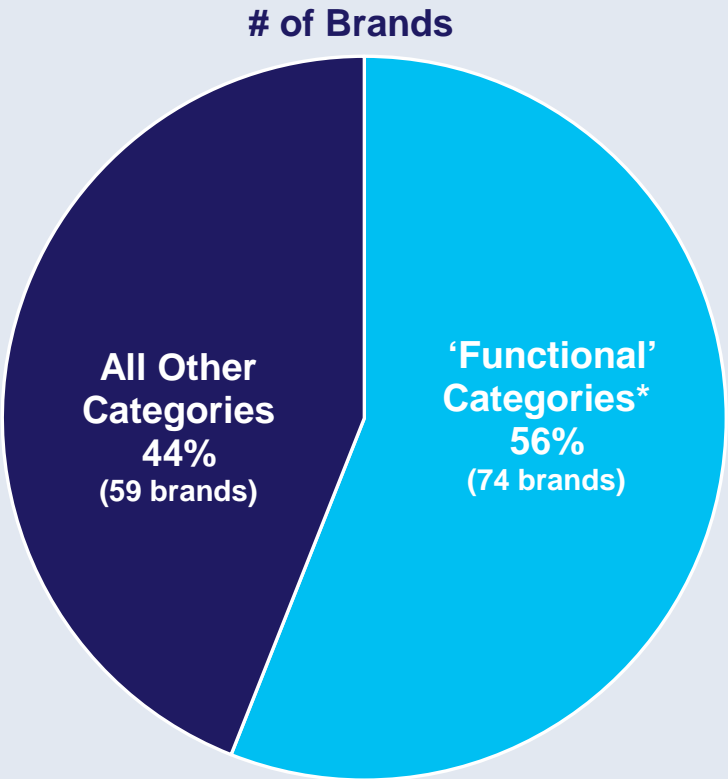
Lifestyle brands that provide 'affordable luxuries' like alcohol beverages, food and travel are supporting consumers who want to indulge in their pre-Covid activities in a relatively inexpensive way

*Click on any logo to visit their website

Source: VAB analysis of Nielsen Ad Intel data, 1/1/22-6/30/22. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100K.

The categories serving functional consumer needs through this period of economic uncertainty were a driving force behind new TV entrants, accounting for nearly 80% of new advertiser TV spend

1H '22 New National TV Advertisers



Source: VAB analysis of Nielsen Ad Intel data, 1/1/22-6/30/22. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100K. *Brands that align within at least one of the 'functional' categories (healthcare / pharma, insurance, financial services, professional services, apparel & accessories, fitness & wellness and 'lifestyle' brands that incorporate alcohol beverages, food and travel).

Many brands across categories that serve these ‘everyday’ needs, like pharma, insurance and financial services have taken on a renewed importance among consumers

1H ‘22 New National TV Advertisers: Top 15 Categories Ranked by Total Spend

Rank	Category	# of Brands	% of total brands	Category \$\$\$ (000)	% of total spend
1	Pharmaceutical	13	10%	\$182,272.1	44%
2	Insurance	7	5%	\$38,940.4	9%
3	Communications	2	2%	\$26,963.7	7%
4	Professional Services	5	4%	\$24,559.0	6%
5	Financial Services	10	8%	\$21,518.5	5%
6	Insecticides	1	1%	\$15,638.5	4%
7	Apparel	6	5%	\$12,908.2	3%
8	Alcohol Beverages	4	3%	\$12,301.9	3%
9	Beverages	1	1%	\$11,900.3	3%
10	Streaming Services	1	1%	\$9,221.7	2%
11	Automotive	2	2%	\$7,638.0	2%
12	Pet Care	4	3%	\$7,027.5	2%
13	Medical Devices	3	2%	\$4,467.2	1%
14	Vitamins & Supplements	3	2%	\$4,430.3	1%
15	Entertainment	2	2%	\$3,586.3	1%
16	Other Categories (32)	69	52%	\$30,740.6	7%
Grand Total		133		\$414,114.2	

 =categories highlighted align within at least one of the ‘functional’ categories (healthcare / pharma, insurance, financial services, professional services, apparel & accessories, fitness & wellness and ‘lifestyle’ brands that incorporate alcohol beverages, food and travel)

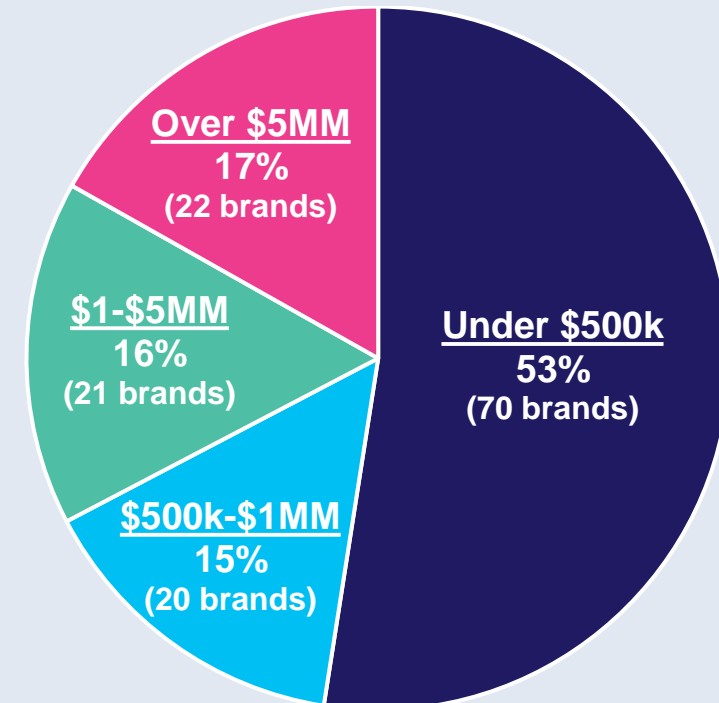
Source: VAB analysis of Nielsen Ad Intel data, 1/1/22-6/30/22. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100K.

TV investment runs the gamut between brands that are initially ‘testing’ TV and those that immediately ‘go big’ to provide the necessary support behind their product or service launches



1H '22 New National TV Advertisers by Spend Segment

% of brands within spend buckets



Source: VAB analysis of Nielsen Ad Intel data, 1/1/22-6/30/22. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100K.

First-time national TV entrants launched campaigns throughout the first half of the year with slight skews towards the months of January, March and May

1st Half 2022 New National TV Advertisers Monthly Spend

Millions

Sampling of Q1'22 brand entrants (75 in total)



\$167 MM

Sampling of Q2'22 brand entrants (58 in total)



\$247 MM

\$27.6

\$69.6

\$70.1

\$82.1

\$78.0

\$86.8

January

February

March

April

May

June

of brand launches

29

19

27

20

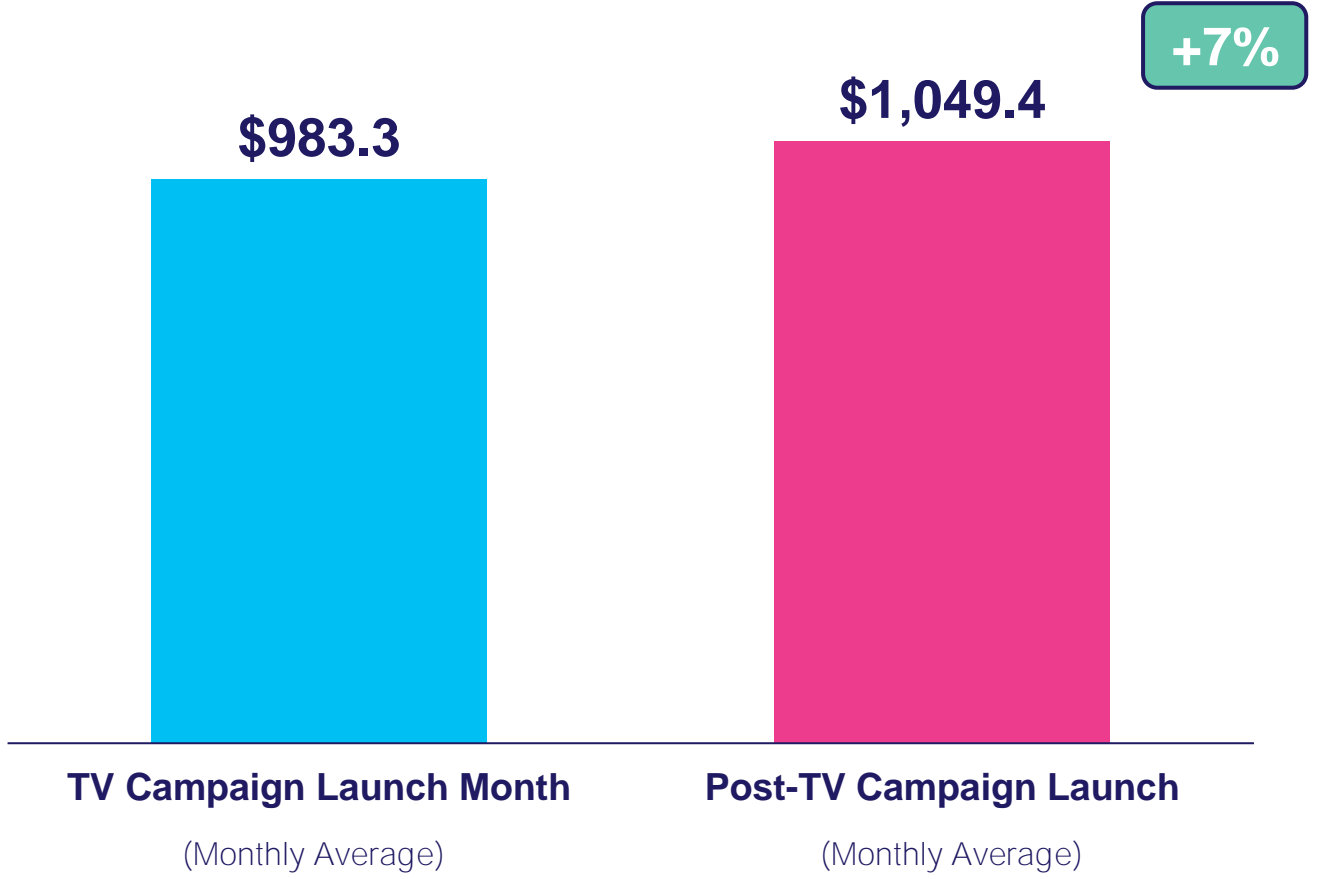
27

11

Source: VAB analysis of Nielsen Ad Intel data, Q1'22-Q2'22. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100k. MM = millions.

The success of their initial TV campaign activity led new advertisers to **increase their TV investment** as brands battle for market share during a time of economic uncertainty

1H '22 New Advertisers Average National TV Spend: Launch Month vs. Post-Launch
(\$\$\$)



Source: VAB analysis of Nielsen Ad Intel data, 1/1/22-6/30/22. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100K.

As more new advertisers look to enter the national TV marketplace, leveraging these six strategies can help brands navigate this inflationary period by building rapport and enhancing engagement with consumers

1



Continue building brand equity

2



Rethink creative with a focus on empathy

3



Leverage personalized messaging

4



Demonstrate your brand's unique value and point of differentiation

5



Prioritize customer service & experience to attract repeat business

6



Reward loyalty among new & existing customers

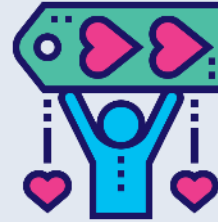
Download VAB's [Under Pressure](#) to learn how marketers can adapt their strategies to best resonate with price sensitive consumers.

Key Takeaways For Marketing Plans



It's imperative for advertisers to continue 'talking' to consumers in times of economic uncertainty

Amidst rising inflation, 1H '22 saw a resurgence in traditional categories like pharma, insurance, financial services and apparel that serve the functional needs of consumers as they look to get back to their pre-Covid lives during challenging economic conditions. Marketers that continue to 'talk' through TV campaigns can build a stronger rapport with consumers.



Advertisers are using TV to build awareness and brand equity

To gain, or maintain, market share within a challenging, but competitive, economic environment, many brands are launching their first national TV campaigns by aligning with high-profile TV events and partnerships to drive an emotional connection with consumers.



No 'one size fits all' approach for new advertisers

Depending on the business objectives and desired outcomes, different brands employ different go-to-market strategies to deliver successful results, some 'test and learn' while others immediately 'go big.'

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Click here for the full list of 1H '22 new national TV advertisers by brand spend

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Under Pressure

6 Marketing Strategies to Successfully Navigate Your Brand Through Inflation



You Oughta Know

Why All Impressions Aren't Created Equal & What It Means for Video Measurement



Keep Calm and Advertise On

How to Successfully Navigate Your Brand Through an Economic Downturn



Welcome to TV: FY 2021

Understanding the 16 Consumer Behaviors That Are Driving New Advertisers

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.

1H '22 New National TV Advertiser Lists



New Advertiser List: The national TV marketplace enabled these **133 bold new** advertisers across categories and budget levels to increase reach and relevancy

1st Half 2022 New National TV Advertisers

Brand	\$\$\$ (000)	Brand	\$\$\$ (000)	Brand	\$\$\$ (000)	Brand	\$\$\$ (000)
Medicare Advantage Advisors	\$37,004.7	Fuzzy	\$1,281.2	Pumpkin	\$369.5	BD Veritor	\$187.1
Qulipta Rx	\$34,124.1	Blair	\$1,257.0	TUDN	\$363.1	Energized Health	\$178.3
WhatsApp	\$26,273.6	WIN Reality	\$1,219.1	Facet Wealth	\$359.4	Chem-Dry	\$170.0
Leqvio Rx	\$26,206.8	Lectric eBikes	\$1,194.6	International Rescue Committee (IRC)	\$343.5	By-Pass Power Equipment	\$168.4
Opzelura Rx	\$23,138.4	Andscape	\$1,098.8	Advancing American Freedom (AAF)	\$339.3	Jackpot Party	\$165.0
Vuity Rx	\$21,507.0	Sand Cloud	\$1,063.2	Every Man Jack	\$323.7	Overholt Law Firm	\$164.7
Plenity Rx	\$16,728.2	Jinx	\$1,060.3	Step	\$309.5	First Onsite	\$158.6
Vyepi Rx	\$16,159.7	Affordable Life Insurance	\$1,058.3	Juniper	\$304.5	Lifekey	\$156.9
STEM	\$15,638.5	Bonafide	\$961.1	Cash App	\$299.7	Peachtree Orthopedics	\$156.9
Tezspire Rx	\$13,148.2	Liberty Legal	\$942.4	DIFF	\$297.1	Las Cruces City	\$156.9
eToro	\$12,611.7	Goldbelly	\$884.8	VELOCY Global	\$287.4	NULASTIN	\$156.3
Topo Chico	\$11,900.3	Vitasei	\$869.7	RISE	\$285.2	Medify	\$155.4
Miro	\$11,553.3	Quay	\$867.1	Future	\$282.2	Elevance Health	\$154.1
Cutwater	\$10,800.6	Getty Images	\$771.0	Copilot	\$276.4	Shavelogic	\$153.1
Idorsia	\$10,759.6	Free Fly	\$736.3	American Trucks	\$270.5	GenderCool	\$150.9
Vix+ Streaming	\$9,221.7	Exoticca	\$722.1	Foundation for Individual Rights and		Driver Discount Helpline	\$148.4
Grainger	\$8,873.1	Manzanilla Sophia	\$697.3	Expression (FIRE)	\$266.2	Stanton Optical	\$145.7
Cibinqo Rx	\$7,570.6	TextKiller	\$690.1	Fitbod	\$261.4	G/FORE	\$142.1
Wallbox	\$7,367.6	Slynd Rx	\$674.4	Floyd	\$257.6	Miller & Zois	\$136.8
Qelbree Rx	\$7,188.6	Intercontinental Exchange (ICE)	\$659.3	Magnolia	\$256.7	GreenPan	\$134.6
Torrid	\$5,482.7	Law Offices of Amanda Lewis, PC	\$653.7	MyStore	\$253.5	InMit	\$134.0
Unifirst	\$5,064.0	Vital Strategies	\$641.6	Wilder Games	\$246.6	Think Digital Wellbeing Summit	\$110.4
Inspire Medical Systems	\$4,175.8	Sunday	\$637.4	Strikeman	\$239.5	StoveGuard	\$107.3
RingCentral	\$3,744.4	Thuma	\$626.8	Huckberry	\$226.1	Pioneer Life Group	\$104.7
VÖOST	\$3,742.6	Neighbor	\$621.5	Saving America	\$223.8	DIO Implants	\$104.2
Argenx	\$3,452.6	Brand Power	\$589.9	Dropps	\$215.2	Bevy Long Drink	\$104.2
Upstart	\$3,412.8	Vitapod	\$553.8	Fueling American Jobs Coalition	\$213.4	Bolt	\$101.6
Emeral Queen	\$3,339.7	Plow & Hearth	\$516.0	Baby Food Heavy Metals Legal Helpline		Rimini Street	\$100.8
Corebridge Financial	\$3,292.0	Kettle & Fire	\$469.1	Referral Services	\$209.8	Sell Easy	\$100.6
Cytosport Rx	\$2,831.9	Methodist Healthcare	\$456.6	DishDirect	\$205.0	Puncher's Chance Bourbon	\$100.3
Dreams Resorts	\$1,999.5	USFL	\$431.9	Road Scholar	\$203.7	BD Veritor	\$187.1
Wild Earth	\$1,854.2	ExtraHop	\$412.4	The Gori Law Firm	\$198.6	Energized Health	\$178.3
Moderna	\$1,614.0	Boneless	\$387.9	PIMCO	\$196.1	Chem-Dry	\$170.0
Sunbrella	\$1,590.5	Aprende	\$385.9	Brillia	\$194.7	By-Pass Power Equipment	\$168.4
Komos	\$1,296.7	Better Not Younger	\$377.1	Ready Rocker	\$187.4	Jackpot Party	\$165.0

To click through to a brand's website, view in 'slide show' and click on the respective link.

Source: VAB analysis of Nielsen Ad Intel data, 1/1/22-6/30/22. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100K. The above chart represents the full list of new advertisers, including direct-to-consumer brands.

The **direct-to-consumer segment** continues to be a force, turning to TV for their data-driven goals, as **56 brands across 29 categories** entered the national TV marketplace, spending **over \$84 million** during 1H '22

1st Half 2022 New National TV DTC Advertisers

Brand	Category	\$\$\$ (000)
eToro	Financial Services	\$12,611.7
Miro	Professional Services	\$11,553.3
Vix+ Streaming	Streaming Services	\$9,221.7
Wallbox	Automotive	\$7,367.6
Torrid	Apparel	\$5,482.7
Inspire Medical Systems	Medical Devices	\$4,175.8
RingCentral	Professional Services	\$3,744.4
Upstart	Financial Services	\$3,412.8
Wild Earth	Pet Care	\$1,854.2
Sunbrella	Home Furnishing	\$1,590.5
Fuzzy	Pet Care	\$1,281.2
Blair	Apparel	\$1,257.0
WIN Reality	Fitness	\$1,219.1
Lectric eBikes	Fitness	\$1,194.6
Andscape	Media	\$1,098.8
Sand Cloud	Towels	\$1,063.2
Jinx	Pet Care	\$1,060.3
Bonafide	Personal Care	\$961.1
Goldbelly	Online Food Delivery Service	\$884.8
Quay	Eyewear	\$867.1
Free Fly	Apparel	\$736.3

Brand	Category	\$\$\$ (000)
Exoticca	Travel	\$722.1
TextKiller	Communications	\$690.1
Sunday	Home Improvement	\$637.4
Thuma	Home Furnishing	\$626.8
Neighbor	Storage	\$621.5
Vitapod	Vitamins & Supplements	\$553.8
Plow & Hearth	Home Furnishing	\$516.0
Kettle & Fire	Food	\$469.1
ExtraHop	Cybersecurity	\$412.4
Aprende	Online Education	\$385.9
Better Not Younger	Personal Care	\$377.1
Pumpkin	Insurance	\$369.5
TUDN	Media	\$363.1
Facet Wealth	Financial Services	\$359.4
Every Man Jack	Personal Care	\$323.7
Step	Financial Services	\$309.5
Cash App	Financial Services	\$299.7
DIFF	Eyewear	\$297.1
Velocity Global	Professional Services	\$287.4
RISE	Health & Wellness	\$285.2
Future	Fitness	\$282.2

Brand	Category	\$\$\$ (000)
Copilot	Financial Services	\$276.4
Fitbod	Fitness	\$261.4
Floyd	Home Furnishing	\$257.6
Wilder Games	Entertainment	\$246.6
Strikeman	Shooting Training	\$239.5
Huckberry	Apparel	\$226.1
Dropps	Home	\$215.2
Road Scholar	Educational Travel	\$203.7
Lifekey	Wearable Devices	\$156.9
NULASTIN	Personal Care	\$156.3
Medify	Home	\$155.4
Shavelogic	Personal Care	\$153.1
GreenPan	Home	\$134.6
Bolt	Financial Services	\$101.6



DTC brands accounted for **42%** of total new TV advertisers and **20%** of total TV spend

Logos represent a sampling of new national TV DTC advertisers

Source: VAB analysis of Nielsen Ad Intel data, 1/1/22-6/30/22. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100K.