

2021

Welcome to TV

Meet the New Advertisers and See How Categories Are Evolving Due to Consumer Demand

1st Half of 2021

What You'll Learn...

As we entered the first half of 2021, COVID-19 continued to accelerate the adoption of many consumer behaviors, some of which were already beginning pre-pandemic.

In this guide, we provide the detail behind the advertisers who entered the national TV marketplace to capitalize on this growth:

- ▶ **Following Evolving Consumer Behaviors:** What are the ten key changing consumer behaviors and who are the brands that have been newly leveraging multiscreen TV to capitalize on these shifts?
- ▶ **Where are the Opportunities – or the Competition?** Which categories saw increased competition from new entrants? How many brands entered and how much did they spend?
- ▶ **Year Two of the Pandemic:** How much of this new TV ad spend continues to be driven by brands tied to the conditions of COVID vs. those that are unrelated? How does this compare to the same time period last year?

As of July 2021, 52% of people believed we were still in the middle of the pandemic, underscoring the impact COVID has on advertising

Therefore, similar to our full-year 2020 analysis, we continue to allocate each new national TV advertiser into one of three segments:

‘COVID-Endemic’ Brands:
 brands in categories that serve consumer needs directly associated with COVID
 (i.e., hand sanitizers, telemedicine, at-home medical testing)

Sampling of ‘COVID-endemic’ brands

‘COVID-Related’ Brands:
 brands in categories that serve evolving consumer behaviors driven by COVID
 (i.e., contactless solutions - online delivery, online banking; lifestyle / behavioral changes – home improvement, exercise equipment; health & wellness assistance - vitamins & supplements, health insurance)

Sampling of ‘COVID-related’ brands

‘non-COVID’ Brands:
 brands in categories not related to the pandemic that most likely would have advertised regardless
 (i.e., streaming services, pharmaceuticals unrelated to COVID, skincare & beauty)

Sampling of ‘non-COVID’ brands

Source: Angus Reid’s *Tracking Pandemic Recovery*, July 2021. VAB analysis of Nielsen Ad Intel data, 1/1/21-6/30/21. 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.

After seeing the positive momentum a national TV campaign generated for their competitors, 162 brands, **52 more brands than 2020**, entered the national TV landscape during the first half of 2021

New National TV Advertisers
1H '20 vs. 1H '21 Comparison



Year	# of Brands	# of Categories	New TV \$\$\$ (MM)
1H '20	110	59	\$459.3
1H '21	162	52	\$465.4
# YoY Diff	+52	-7	+\$6.1
% YoY Diff	+47%	-12%	+1%

For a full list of the 162 brands with spend [click here](#)

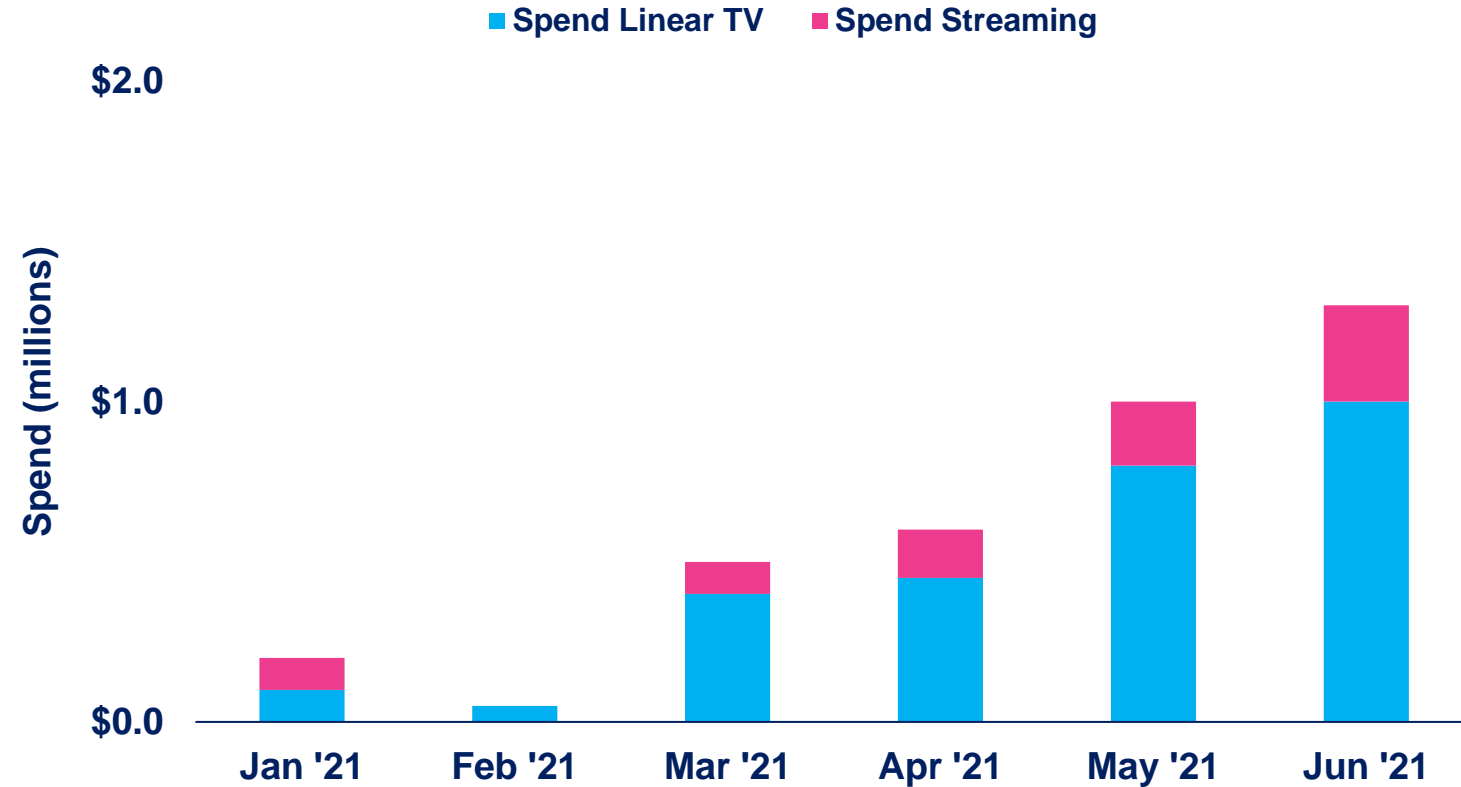
Source: VAB analysis of Nielsen Ad Intel data, 1/1/20-6/30/20 vs. 1/1/21-6/30/21. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100K. MM = millions.

TV Driving Outcomes

According to a recent analysis by Tatari*, first-time 2021 TV advertisers are rapidly reinvesting in TV, quickly moving beyond a testing phase as they see quantifiable proof of performance and return.

*based on data from Tatari – a data & analytics company focused on buying and measuring ads across linear and streaming TV – who recently conducted a spending analysis of clients that launched their first TV campaign in the first half of 2021.

Tatari: 'New to TV' Advertisers in 1H 2021



Source: Tatari, internal tracking data, as of October 2021.

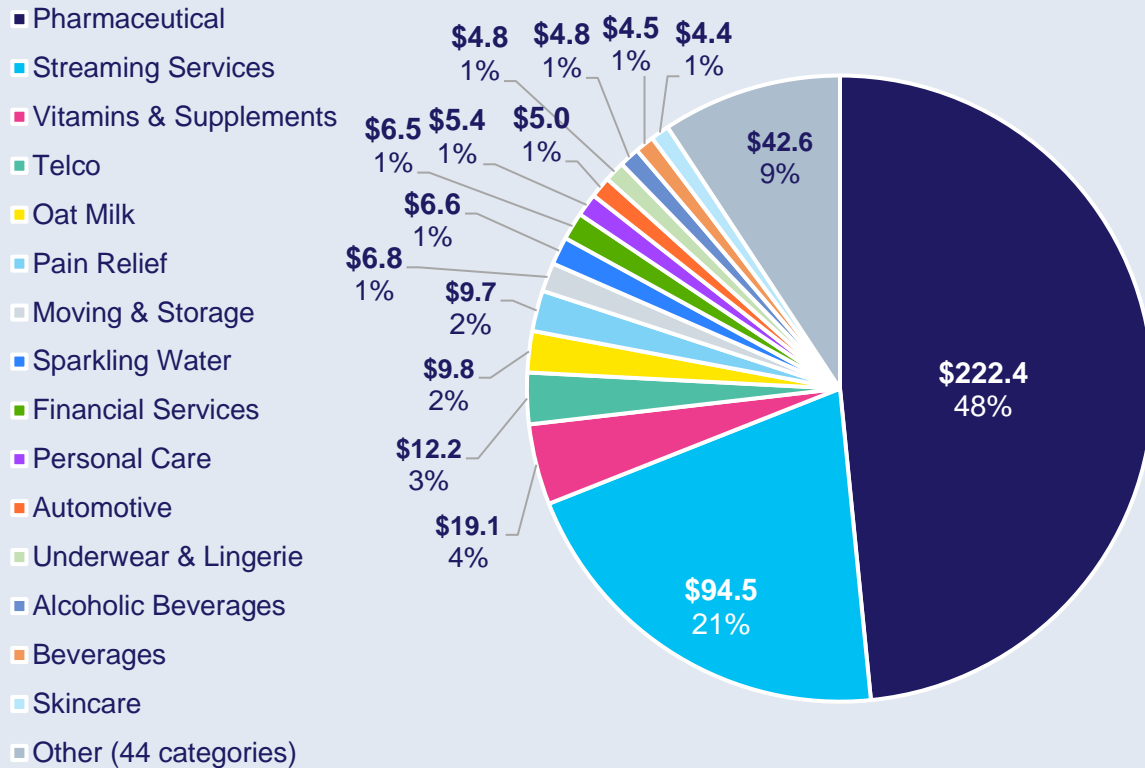


Pharma and streaming continue to be the two largest categories even as pharma scaled back due to a lower average spend by brand launch

- ▶ Several other categories ticked up this year primarily based on spending from a dominant newcomer brand, such as graphic design (Canva, \$21.2MM), apparel & accessories (Allbirds, \$18.4 MM) and health & wellness (Oura, \$16.1MM)

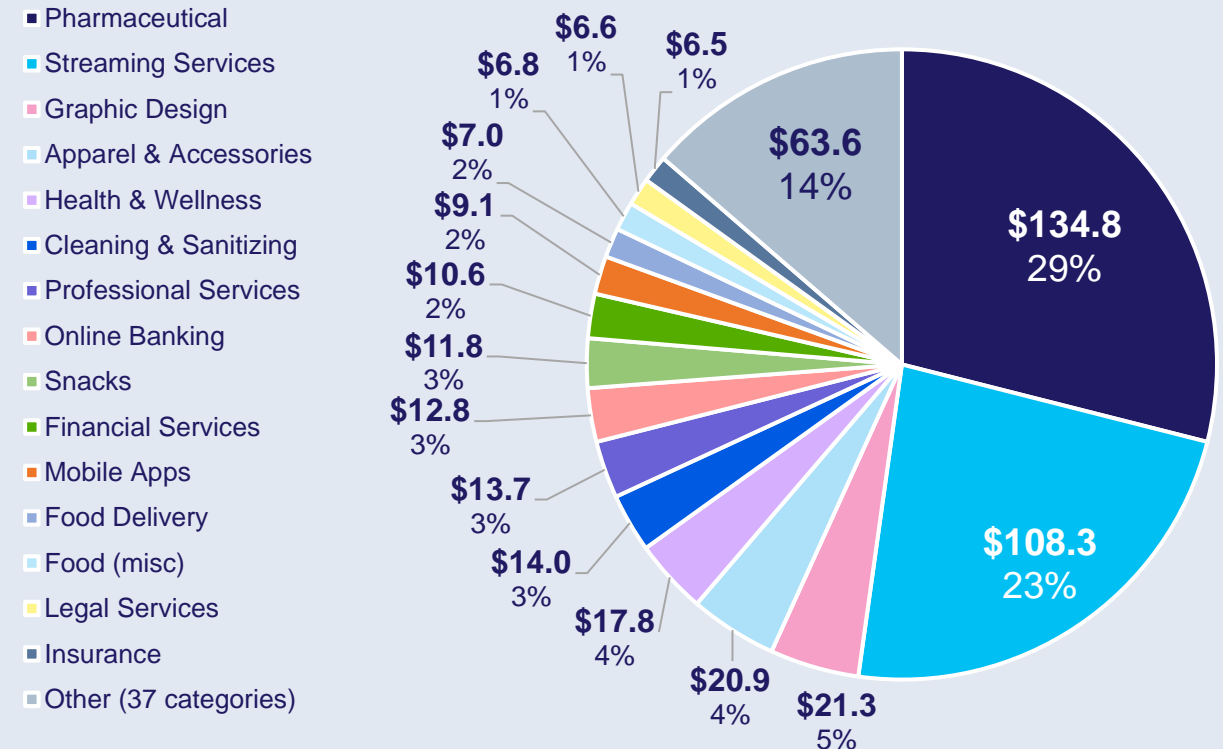
1H '20 Top 15 Categories Ranked by New TV Advertiser \$\$\$ by Category

% share of total new national TV advertiser spend (in millions)



1H '21 Top 15 Categories Ranked by New TV Advertiser \$\$\$ by Category

% share of total new national TV advertiser spend (in millions)

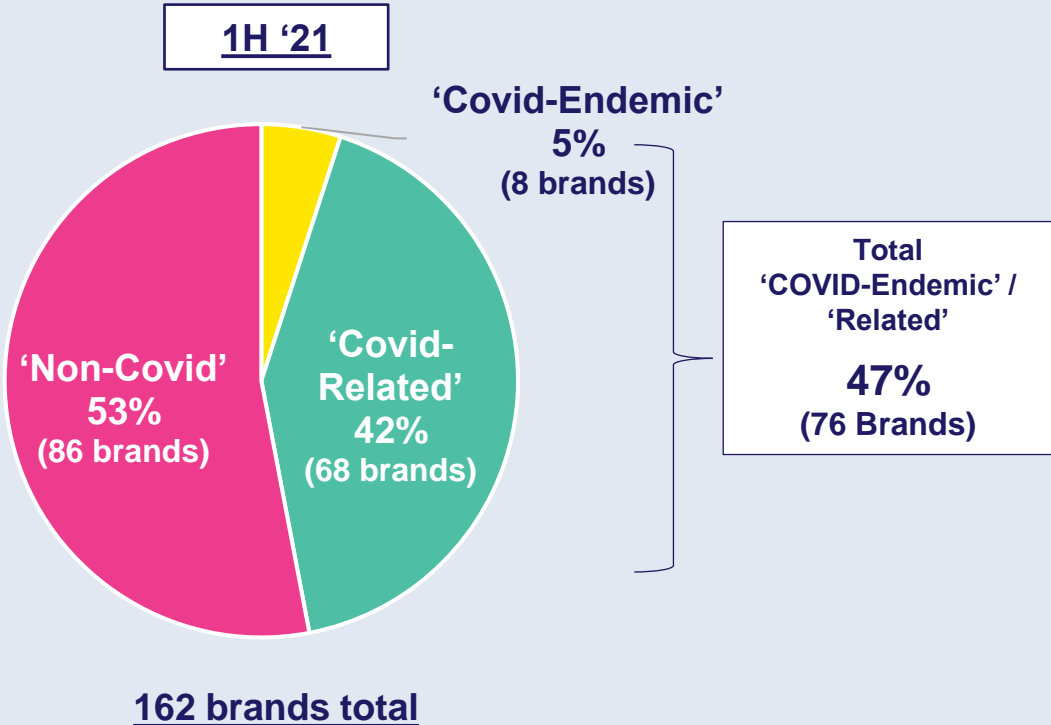
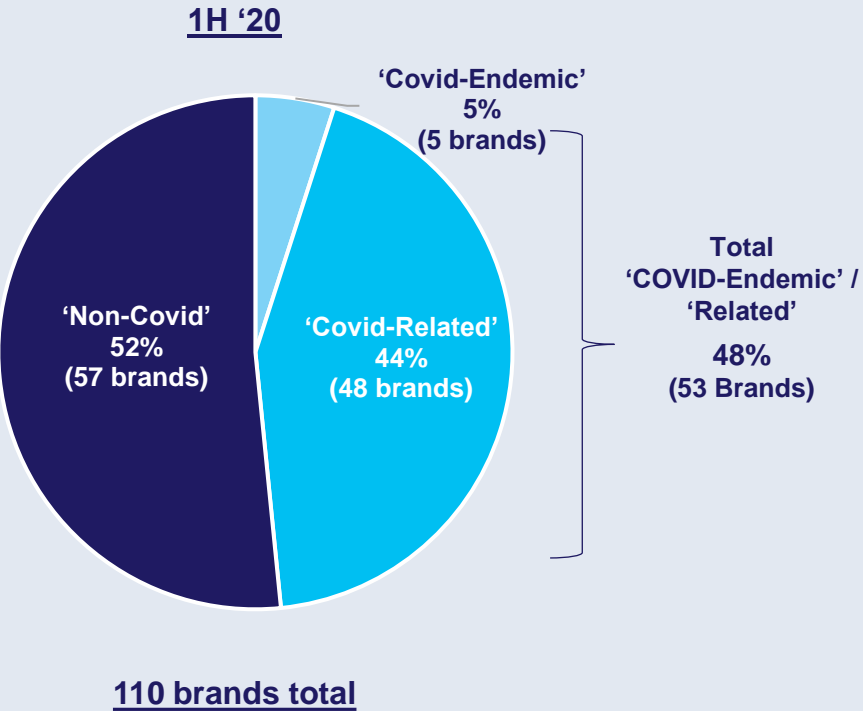


Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-6/30/21. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100K. Percentages may not add up to 100% due to rounding.

Similar to 2020, the influx of new advertisers during the first half of 2021 was driven equally by both 'COVID' and 'non-COVID' brands

YOY New National TV Advertisers: 'COVID-Endemic' / 'Related' vs. 'Non-COVID' Brands

% of 'COVID Endemic' / 'Related' vs. 'Non-COVID' Brands

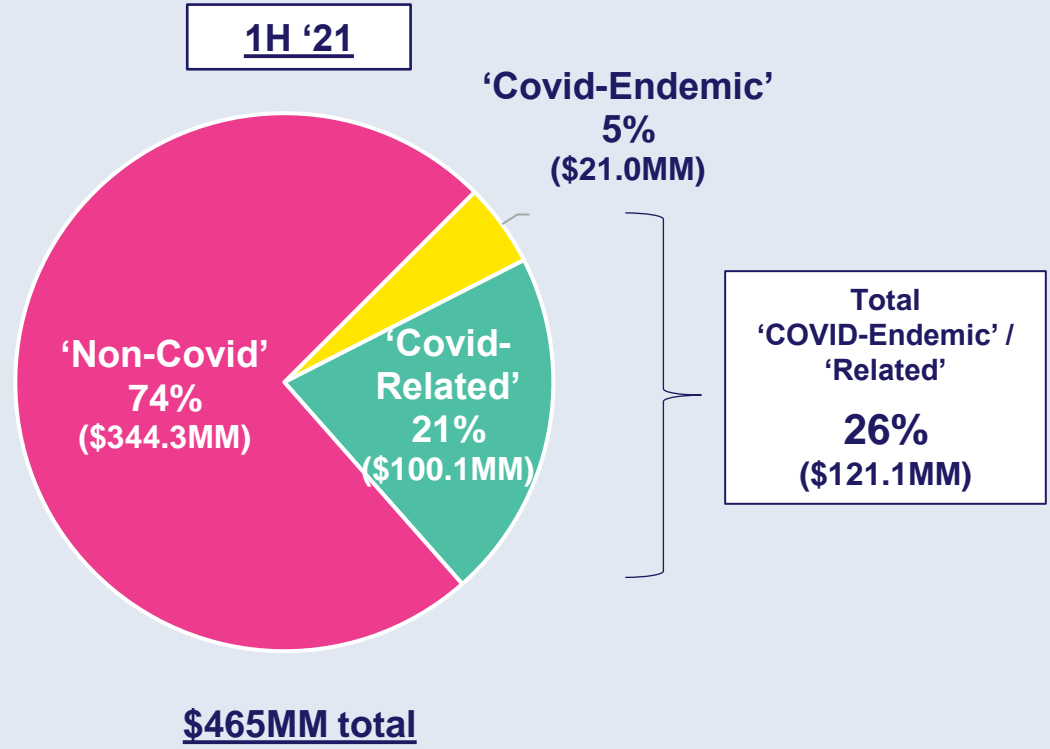
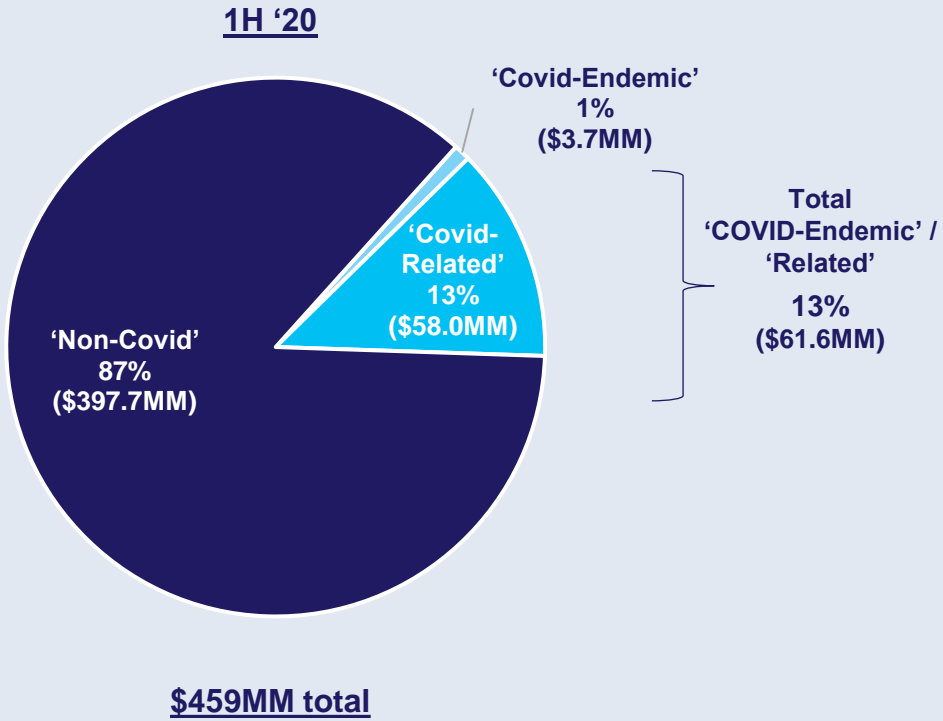


Source: VAB analysis of Nielsen Ad Intel data, 1/1/20-6/30/20 vs. 1/1/21-6/30/21. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100K. Percentages may not add up to 100% due to rounding.

'COVID-endemic / related' advertisers nearly doubled their share of spend as brands sought to capitalize on the changing consumer behaviors that were becoming permanent

YOY New National TV Advertisers: 'COVID-Endemic' / 'Related' vs. 'Non-COVID' Brands

Total \$\$\$ of 'COVID Endemic' / 'Related' vs. 'Non-COVID' Brands



Source: VAB analysis of Nielsen Ad Intel data, 1/1/20-6/30/20 vs. 1/1/21-6/30/21. 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. Percentages may not add up to 100% due to rounding.

Looking to capture new customers, advertisers across a variety of rapidly expanding consumer categories launched TV campaigns to capitalize on 10 key evolving behaviors

10 Key Evolving Consumer Behaviors

*Click on any logo to visit their website

As people spend much of their time at home, **home improvement** has become even more relevant and important.

Cleaning and sanitation are now a staple among households and workplaces.

There is a demand for **health and wellness** brands across categories like telemedicine, exercise, plant-based food & more.

Online delivery makes services more convenient and accessible to consumers who prefer less direct in-person contact.

Brands that offer **professional services**, in-house or remotely, are capitalizing on the need for workplace solutions.



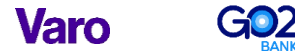
Major media companies continue to launch their direct-to-consumer **video streaming platforms** as audiences' appetite for streamed content grows.

As restrictions ease and vaccination counts rise, **outdoor recreation and in-country travel** have become popular leisure time activities.

More **financial services / online banking solutions** are launching in the marketplace to satisfy consumers' need for easier access to their finances.

'**Buy now & pay later**' brands are capitalizing on the trend of providing consumers with online financing and flexible payment options.

Organizations (mindful brands) are investing at a time when consumers are passionate about brands that promote social change.



Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-6/30/21. 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. DTC brands are active across these categories. Click on any brand logo above to visit their URL.

Advertisers launched national TV campaigns so they could reach a bigger, previously untapped, audience to drive awareness and build excitement around their brand



“We as a brand were very excited to **share with more consumers via our TV campaigns** what supplements can do for their pets and pet ownership.”

Yvethe Tyszka, VP of Marketing, *Zesty Paws*
(Brand Innovators, 1/12/21)



Tattooed Chef

“Launching a commercial is the natural next step to **drive more awareness and excitement** around the brand and products as we continue to gain distribution nationwide.”

Sarah Galletti, Founder & Chief Creative Officer, *Tattooed Chef*
(Tattooed Chef Press Release, 4/5/21)



“We decided to **use TV** the night before launch to **make a big statement and build excitement** around Cacti's launch.”

Lana Buchanan, VP of Marketing,
AB InBev's Beyond Beer Division
(Ad Age, 3/15/21)



“We're excited to bring Stuffed Puffs to a **bigger audience** this season in collaboration with our partner Marshmello. We can't wait to watch this campaign help people discover Stuffed Puffs and have the best s'more of their life.”

Michael Tierney, CEO and Founder, *Stuffed Puffs*
(Stuffed Puffs Press Release, 5/17/21)



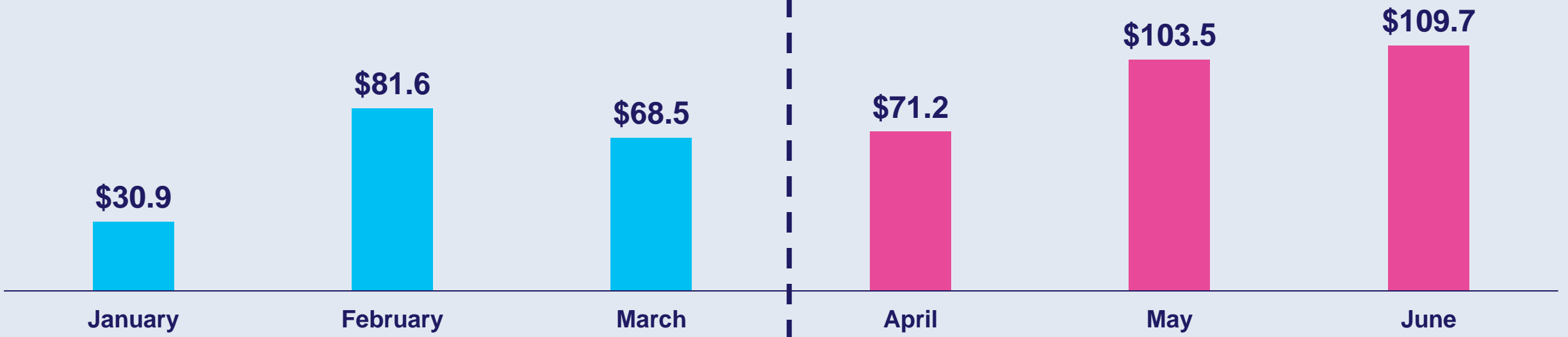
“Broadcast gives us the **ability to introduce this brand in really a powerful way**... We're **reaching a bigger audience** [than we would have before] because of the fact that women have started gravitating back to some of the more traditional ways.”

Russ Barrans, Chief Commercial Officer, *Evoform Biosciences*
(manufacturer of Phexxi)
(Fierce Pharma, 2/22/21)

First-time advertisers launched throughout the first half of the year, aligning with impactful sports and entertainment programming to differentiate their brands from competitors

1st Half 2021 New Nat'l TV Advertisers Monthly Spend

Millions



Source: VAB analysis of Nielsen Ad Intel data, Q1'21-Q2'21. 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.

Several first-time national TV advertisers made a splash by launching during high-profile TV events and creating partnerships with iconic personalities to generate immediate brand recognition and build legitimacy



Evoform debuts TV ads for new-style birth control, encouraging millennials to 'Get Phexxi'

February 22, 2021



Varo

Varo Launches Advertising Campaign with NBA Icon and Philanthropist Russell Westbrook

After investing in the groundbreaking digital bank, Westbrook is championing Varo's mission to eradicate financial inequality in a new TV and social campaign from Serviceplan New York.

May 12, 2021

THE WALL STREET JOURNAL.

Ad During the Golden Globes to Show Turmoil of Postpartum and Breast-Feeding Moms

The TV ad from Frida, a company that sells products for babies and new moms, tackles postpartum emotions and shows women struggling while breast-feeding and pumping

frida

February 26, 2021

AdAge

OATLY APPEARS TO BE JOINING THE FIRST-TIMERS CLUB WITH A SUPER BOWL COMMERCIAL

February 7, 2021



ADWEEK

Impossible Foods Declares 'We Are Meat' in First National Ad Campaign From Wieden+Kennedy

April 6, 2021

IMPOSSIBLE

AdAge

SPIKE LEE DIRECTS CELEBRITY CAMPAIGN FOR INTERNATIONAL WELL BUILDING INSTITUTE

The institute's first national campaign promotes the WELL Health-Safety Rating Seal



January 25, 2021



Novartis' first Kesimpta ad push offers break from relapsing MS 'drama'

February 24, 2021



AdAge

ANHEUSER-BUSCH INBEV AND TRAVIS SCOTT DEBUT AD FOR CACTI HARD SELTZER DURING THE GRAMMYS

The brewer co-created the agave-infused drink with the rapper and fashion mogul



March 15, 2021



Willi Hahn Corporation USA Announces Launch of Commercial Campaign For 11inOne SoftFinish Multi-Driver

May 3, 2021



AstraZeneca's first Breztri ad uses an animated fantasyland to get real about COPD flare-ups

February 18, 2021



Stuffed Puffs Launches First National TV Campaign

May 18, 2021



Jazz launches new wave of marketing for Sunosi with TV ad and 50 new sales reps



January 8, 2021



BBQGuys Extends Relationships With NFL Legends Archie and Eli Manning as Brand Ambassadors to Launch First National Marketing Campaign

The leading e-commerce retailer for premium grills and outdoor living products will feature the Mannings in a yearlong series of marketing initiatives to drive brand awareness and customer acquisition

March 30, 2021





Summary: 1st Half 2021's New TV Advertisers

- ▶ **The mix of new advertisers shows that COVID still had a significant impact on advertising through the first half of this year which created intensified competition as more brand launches were concentrated in fewer categories compared to the same period last year**
- ▶ **Looking to capture new customers, advertisers across a wide variety of expanding categories launched TV campaigns to capitalize on evolving behaviors, which have been accelerated by the continued pandemic**
- ▶ **With increased competition, many advertisers launched their TV campaigns during high-profile entertainment and sports TV events and through celebrity partnerships to legitimize their product or service, garnering immediate brand recognition and creating excitement around their brand by aligning with pop culture moments and icons**

‘Non-COVID’ advertisers capitalized on evolving behaviors with mature brands entering TV to defend their market share



Notably, with more people routinely eating at home, there has been an uptick in food & snack advertisers launching new campaigns including more health-conscious, plant-based food brands

YOY New National TV 'non-COVID' Advertiser Categories Ranked by Total Spend

1H '20

Rank	Category	# of Brands	% of Brands	Total \$\$\$	% of \$\$\$
1	Pharmaceutical	7	12.3%	\$222.4MM	55.9%
2	Streaming Services	8	14.0%	\$94.5MM	23.8%
3	Vitamins & Supplements	3	5.3%	\$13.1MM	3.3%
4	Telco	1	1.8%	\$12.2MM	3.1%
5	Oat Milk	1	1.8%	\$9.8MM	2.5%
6	Pain Relief	1	1.8%	\$9.7MM	2.4%
7	Sparkling Water	1	1.8%	\$6.6MM	1.7%
8	Beverages	2	3.5%	\$4.5MM	1.1%
9	Personal Care	1	1.8%	\$3.6MM	0.9%
10	Alcoholic Beverages	1	1.8%	\$3.4MM	0.8%
11	Medical Equipment	2	3.5%	\$2.7MM	0.7%
12	Financial Services	3	5.3%	\$2.0MM	0.5%
13	Insurance	3	5.3%	\$1.5MM	0.4%
14	Hearing Aids	1	1.8%	\$1.5MM	0.4%
15	Snacks	1	1.8%	\$1.2MM	0.3%
N/A	17 Additional Categories	21	36.8%	\$8.9MM	2.2%
Total		57	100%	\$397.7MM	100%

1H '21

Rank	Category	# of Brands	% of Brands	Total \$\$\$	% of \$\$\$
1	Pharmaceutical	8	9.3%	\$134.8MM	39.1%
2	Streaming Services	3	3.5%	\$108.3MM	31.4%
3	Graphic Design	1	1.2%	\$21.3MM	6.2%
4	Snacks	3	3.5%	\$11.8MM	3.4%
5	Mobile Apps	4	4.7%	\$9.1MM	2.6%
6	Food (misc)	4	4.7%	\$6.8MM	2.0%
7	Beverages	2	2.3%	\$6.3MM	1.8%
8	Plant-Based Food	2	2.3%	\$6.2MM	1.8%
9	Vitamins & Supplements	1	1.2%	\$5.1MM	1.5%
10	Cybersecurity	2	2.3%	\$5.1MM	1.5%
11	Legal Services	4	4.7%	\$4.4MM	1.3%
12	Insurance	4	4.7%	\$4.1MM	1.2%
13	Personal Care	5	5.8%	\$3.9MM	1.1%
14	Organizations	5	5.8%	\$3.3MM	1.0%
15	Alcoholic Beverages	5	5.8%	\$1.8MM	0.5%
N/A	17 Additional Categories	33	38.4%	\$12.0MM	3.5%
Total		86	100%	\$344.3MM	100%

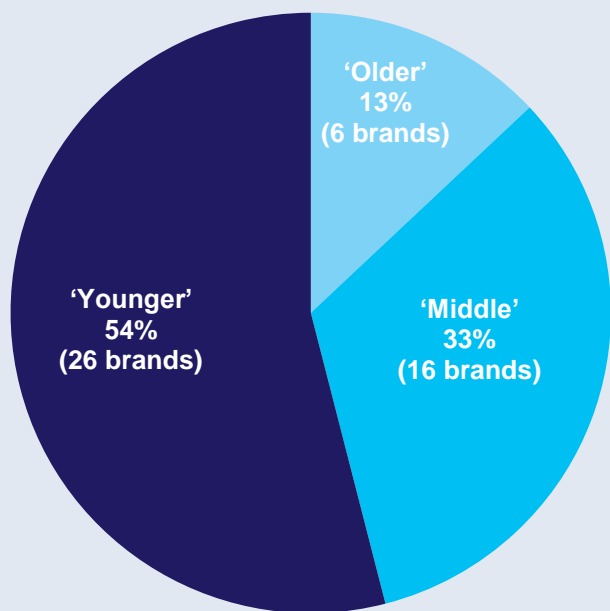
*Click [here](#) to see the full list of categories

Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-6/30/21. 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.

Compared to last year, new 'non-COVID' advertisers skewed older as more mature brands were motivated to begin investing in national TV to defend their category share of voice against younger challengers

YOY New National TV 'Non-COVID' Advertisers by Life Stage

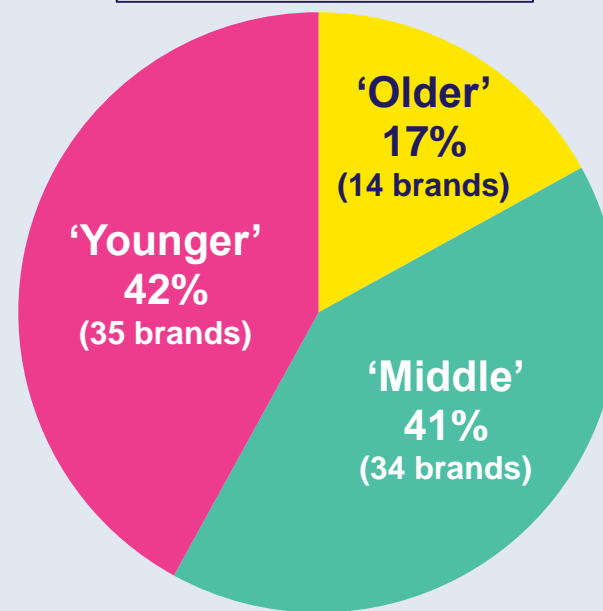
1H '20
% of Brands by Life Stage



Average brand age: **11** years old



1H '21
% of Brands by Life Stage



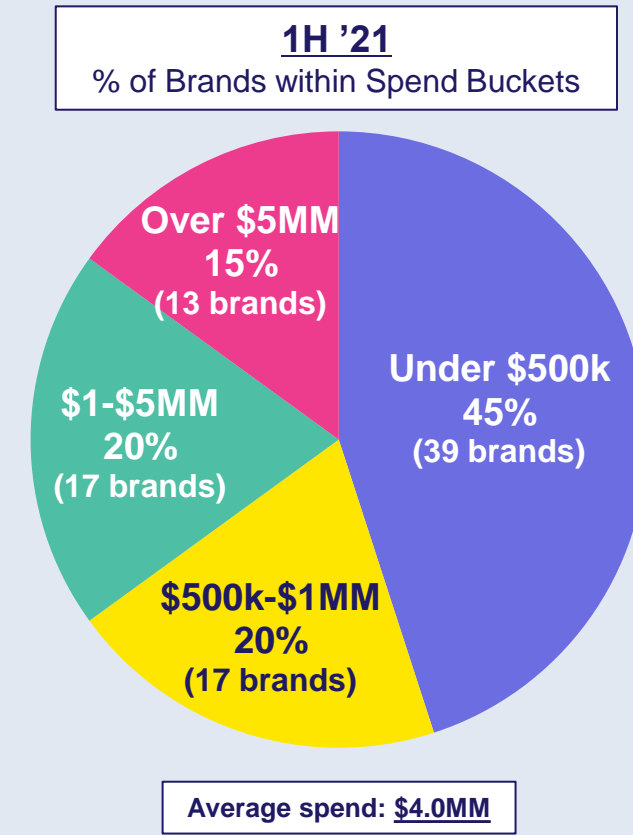
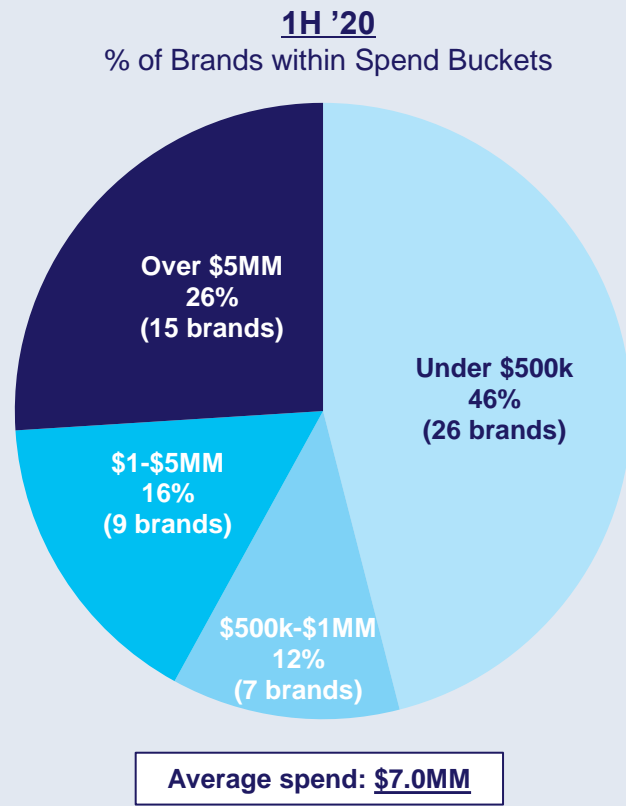
Average brand age: **16** years old



Source: VAB analysis of Nielsen Ad Intel data, 1/1/20-6/30/20 vs. 1/1/21-6/30/21. 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. Excludes brands where the exact year founded was undetermined, therefore the above charts reflect 48 total 'non-COVID' brands in 1H '20 (\$392.5 MM); 83 total 'non-COVID' brands in 1H '21 (\$342.7 MM). 'Younger' represents brands that were founded under five years ago. 'Middle' represents brands that were founded 5 – 20 years ago. 'Older' represents brands that were founded in 2000 or prior.

Across 'non-COVID' brands, investment continues to run 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

YOY New National TV 'Non-COVID' Advertisers by Spend Segment



Source: VAB analysis of Nielsen Ad Intel data, 1/1/20-6/30/20 vs. 1/1/21-6/30/21. 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. 57 total 'non-COVID' brands in 1H '20; 86 total 'non-COVID' brands in 1H '21 (\$342.7 MM).

‘COVID’-segment advertisers capitalized on evolving behaviors with younger brands looking to gain market share



'COVID'-segment brands continue to be driven by lasting behavioral changes that were fueled by the pandemic across categories like casual wear, health & wellness, cleaning & sanitization and business & financial solutions

YOY New National TV 'COVID-Endemic' & 'COVID-Related' Advertiser Categories Ranked by Total Spend

1H '20

Rank	Category	# of Brands	% of Brands	Total \$\$\$	% of \$\$\$
1	Moving & Storage	3	5.7%	\$6.8MM	11.1%
2	Vitamins & Supplements	3	5.7%	\$6.1MM	9.9%
3	Automotive	1	1.9%	\$5.0MM	8.1%
4	Underwear & Lingerie	1	1.9%	\$4.8MM	7.9%
5	Financial Services	4	7.5%	\$4.5MM	7.3%
6	Skincare	1	1.9%	\$4.0MM	6.4%
7	Education	1	1.9%	\$3.3MM	5.3%
8	Women's Healthcare	1	1.9%	\$3.1MM	5.0%
9	Professional Services	4	7.5%	\$2.6MM	4.2%
10	Social Networking	1	1.9%	\$2.0MM	3.2%
11	Personal Care	2	3.8%	\$1.8MM	2.9%
12	Direct Response	1	1.9%	\$1.7MM	2.8%
13	Cleaning Products	1	1.9%	\$1.7MM	2.8%
14	Alcoholic Beverages	1	1.9%	\$1.4MM	2.3%
15	Real Estate	2	3.8%	\$1.3MM	2.1%
N/A	20 Additional Categories	26	49.1%	\$11.5MM	18.6%
Total		53	100%	\$61.6MM	100%

1H '21

Rank	Category	# of Brands	% of Brands	Total \$\$\$	% of \$\$\$
1	Apparel & Accessories	3	3.9%	\$19.5MM	16.1%
2	Health & Wellness	5	6.6%	\$17.8MM	14.7%
3	Cleaning & Sanitizing	5	6.6%	\$14.0MM	11.5%
4	Online Banking	4	5.3%	\$12.8MM	10.6%
5	Professional Services	5	6.6%	\$12.1MM	10.0%
6	Financial Services	7	9.2%	\$10.4MM	8.6%
7	Food Delivery	2	2.6%	\$7.0MM	5.8%
8	Real Estate	2	2.6%	\$5.2MM	4.3%
9	At-Home Testing	3	3.9%	\$3.9MM	3.2%
10	Telemedicine	1	1.3%	\$3.4MM	2.8%
11	Insurance	6	7.9%	\$2.3MM	1.9%
12	Home	4	5.3%	\$2.3MM	1.9%
13	Legal Services	3	3.9%	\$2.2MM	1.8%
14	Fitness	3	3.9%	\$2.1MM	1.7%
15	Home Furnishing	4	5.3%	\$1.1MM	0.9%
N/A	14 Additional Categories	19	25.0%	\$5.1MM	4.2%
Total		76	100%	\$121.1MM	100%

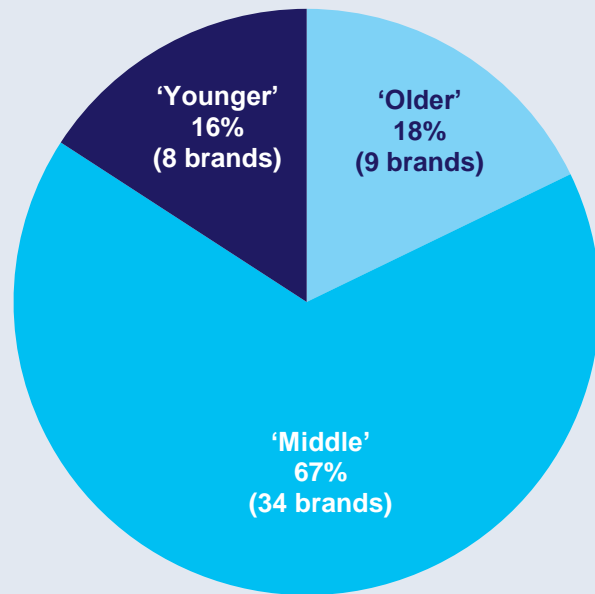
**Click [here](#) to see the full list of categories*

Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-6/30/21. 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.

In contrast to 'non-COVID' brands, a higher share of newer brands within the 'COVID'-segment are entering the marketplace to capitalize on changing consumer behaviors

YOY New National TV 'COVID-Endemic' & 'COVID-Related' Advertisers by Life Stage

1H '20
% of Brands by Life Stage



Average brand age: **15** years old

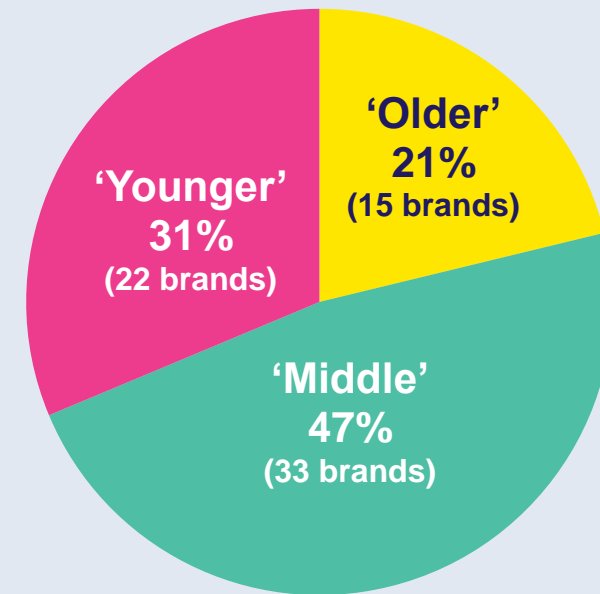
% of total \$\$\$

31%

52%

18%

1H '21
% of Brands by Life Stage



Average brand age: **14** years old

% of total \$\$\$

11%

55%

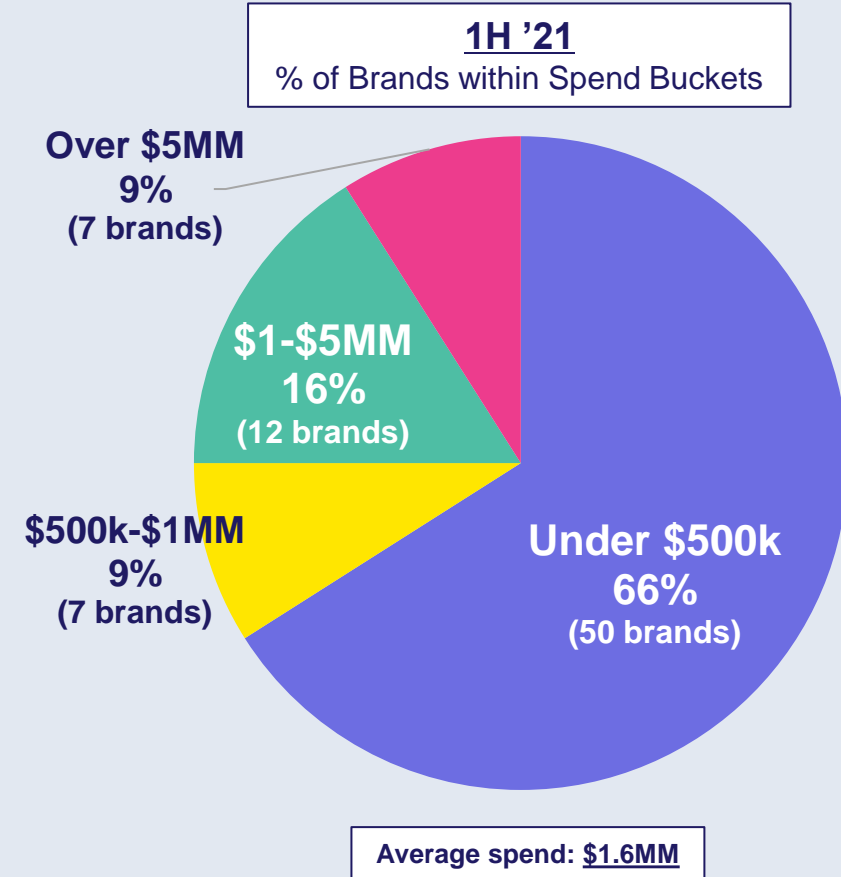
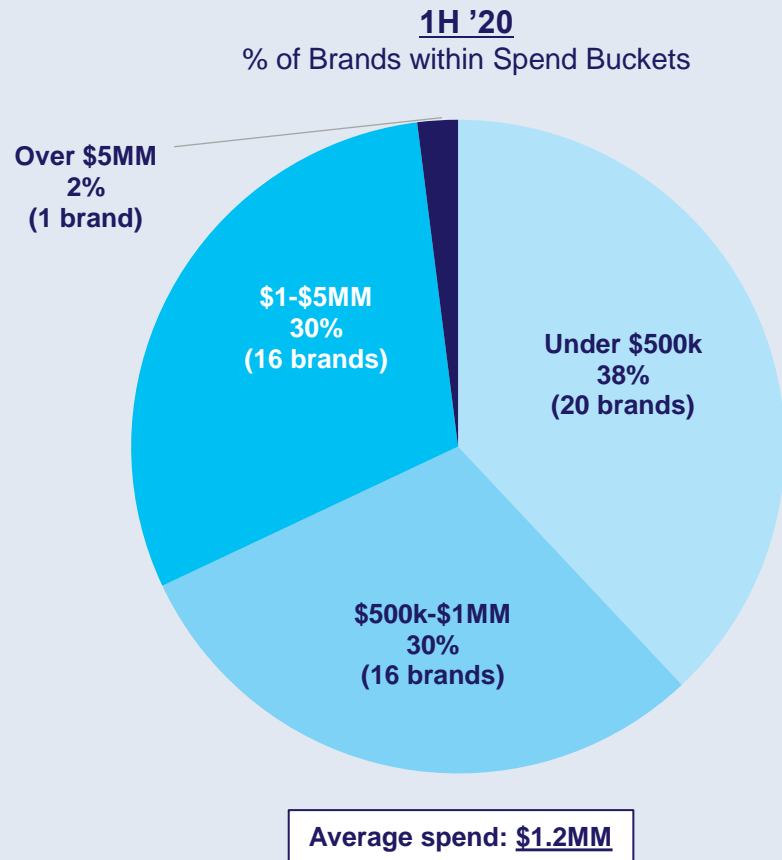
34%

Source: VAB analysis of Nielsen Ad Intel data, 1/1/20-6/30/20 vs. 1/1/21-6/30/21. 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. Excludes brands where the exact year founded was undetermined, therefore the above charts reflect 51 total 'COVID'-segment brands in 1H '20 (\$56.0 MM); 70 total 'COVID'-segment brands in 1H '21 (\$120.1 MM).

'Younger' represents brands that were founded under five years ago. 'Middle' represents brands that were founded 5 – 20 years ago. 'Older' represents brands that were founded in 2000 or prior.

From a spending perspective, many of the 'COVID'-segment newcomers are either currently 'testing' TV or concentrating on targeted flighting

YOY New National TV 'COVID-Endemic' & 'COVID-Related' Advertisers by Spend Segment



Source: VAB analysis of Nielsen Ad Intel data, 1/1/20-6/30/20 vs. 1/1/21-6/30/21. 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. Percentages may not add up to 100% due to rounding. 53 total 'COVID'-segment brands in 1H '20; 76 total 'COVID'-segment brands in 1H '21.



Summary: ‘Non-COVID’ Brands & ‘COVID’-Segment Brands

- ▶ ‘Non-COVID’ brands got older compared to last year as more mature brands were motivated to defend their category share of voice against recent challengers, while younger ‘COVID’-segment brands grew in response to changing consumer behaviors and needs
- ▶ The average ‘non-COVID’ advertiser invested over double the average ‘COVID’-segment advertiser in national TV even as more ‘non-COVID’ brands test TV in comparison to last year and as spend by ‘COVID’-segment brands grow

Key Takeaways For Marketing Plans



Brands Turn to TV to Meet Evolving Consumer Behaviors

During year two of the ongoing pandemic, opportunistic advertisers lined up to invest in national TV for the first time, looking to capitalize on changing consumer behaviors. Since many of these newfound consumer needs involved online behaviors, brands were turning to TV to drive digital actions.



Advertisers Are Using TV to Drive Awareness & Recognition

In line with their business objectives and a desire to make a big splash among audiences, many brands are launching their first national TV campaigns by aligning with high-profile TV events and celebrity partnerships to reach big audiences that will drive immediate recognition and create consumer excitement.



TV is Viable to Brands Across Lifestages

Advertisers from different life stages and budget sizes are investing in national TV to defend their share of voice from upstart challengers or quickly establish themselves in growing categories, while driving business outcomes. Both young and established brands from all walks of life are investing for the first time to disrupt highly competitive categories and drive awareness.



No 'One Size Fits All' Approach for New Advertisers

Similar to 2020, depending on the business objectives and desired outcomes, different brands employ different go-to-market strategies to deliver successful results – some utilize a 'test and learn' approach for their first campaign while others immediately 'go big' in support of major product or service launches.

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national TV advertisers by **brand spend****

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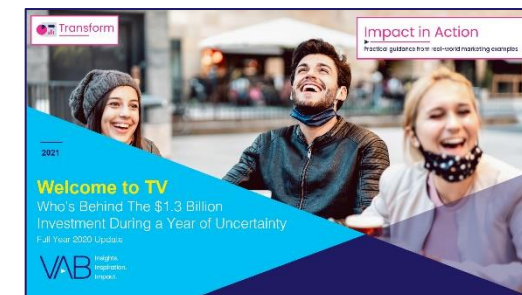
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Examining The Winning Marketing Strategy
That's Fueling High-Growth DTC Brands



Meeting Industry Challenges
Guidance and Inspiration to Embracing an
Audience-First TV Buying Approach



**Proven Strategies & Tactics In
Audience-Based TV Buying**
Success Stories Highlighted Through
Real-World Case Studies



Welcome to TV
Who's Behind The \$1.3 Billion
Investment During a Year of Uncertainty

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.

Simplify

We save you time by bringing you the latest data & actionable takeaways you can use to inform your marketing plans.

Discover

We keep you one step ahead with the latest thinking so you can create innovative, forward-looking strategies.

Transform

We help you build your brand by focusing on core marketing principles that will help drive tangible business outcomes.

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.

1st Half 2021 New TV Advertiser Lists



New Advertiser List: The national TV marketplace enabled these **162 bold new** advertisers across categories and budget levels to increase reach and relevancy

1st Half 2021 New National TV Advertisers

Brand	\$\$\$ (000)	Brand	\$\$\$ (000)	Brand	\$\$\$ (000)	Brand	\$\$\$ (000)	Brand	\$\$\$ (000)
Paramount+ Streaming	\$76,907.3	Tattooed Chef	\$1,945.3	Lucyd	\$527.7	Alvin Ailey American Dance Theater	\$228.3	Roccat	\$132.8
Sunosi RX	\$42,811.5	Stuffed Puffs	\$1,843.5	Stage 6 Films	\$522.8	Horizon Pharma	\$228.3	Aptive	\$130.8
Prende Streaming	\$30,764.5	Trust & Will	\$1,829.8	D&D Moving	\$501.9	Intelliloan	\$224.1	Life Care Insurance	\$130.4
Breztri RX	\$27,961.8	Disability Help Today	\$1,803.0	Working For Women	\$477.3	Gorjana	\$223.7	All-Pro Passer	\$127.7
Kesimpta RX	\$25,554.5	Horizon Fitness	\$1,718.5	UrbanStems	\$435.7	MYXfitness	\$219.8	mdINR	\$120.5
Canva	\$21,315.8	Worthy	\$1,632.7	Cointreau	\$428.0	Wiha Tools	\$207.5	Fair Harbor	\$119.6
Allbirds	\$18,405.4	BBQGuys	\$1,600.9	Hive	\$423.1	Top Eleven App	\$206.9	Vertex	\$119.5
Oura	\$16,062.7	Compeed	\$1,484.1	AllTrails	\$392.5	Legacy Quote Insurance	\$206.8	Pixels	\$116.7
Ingrezza RX	\$15,519.9	Victims Justice Group	\$1,396.2	Calibrate	\$382.3	Lume	\$201.3	Jet Academy	\$116.7
Austedo RX	\$12,392.7	Dairyland Insurance	\$1,366.0	Ox Car Care	\$381.1	Steven Singer Jewelry	\$200.3	Posh Virtual Receptionist	\$113.5
9 Elements	\$10,773.4	Flamingo	\$1,187.9	Ten-X	\$378.9	Molekule	\$198.7	SwitchUp	\$112.5
GO2bank	\$8,970.2	EveryPlate	\$1,137.6	Simplehuman	\$376.3	Malwarebytes	\$197.1	True Hardwoods	\$112.4
International Well Building	\$8,712.2	Open Farm	\$1,036.1	Womply	\$370.0	Sentry Legal	\$192.5	Carequiz	\$112.0
Shift4Shop	\$6,369.0	ClearMatch	\$1,005.3	Blossom	\$368.3	Pipette Health	\$192.4	ABM Industries	\$109.9
Phexxi	\$6,188.6	Therabody	\$989.6	AnyTask	\$364.6	Angelinos Coffee	\$191.9	Weslend	\$109.5
Talentl	\$5,880.0	Olukai	\$970.9	The Inside	\$355.9	Vincero	\$190.5	American Financing Mortgage	\$108.9
Slice App	\$5,877.4	Make Golf Your Thing	\$970.1	Pixicade	\$338.3	One Medical	\$189.4	Undeafated	\$107.9
Oatly	\$5,500.0	Cacti Hard Seltzer	\$919.2	Pegsystems	\$336.7	Instant Beauty 60	\$176.5	Chroma Gro	\$107.4
Colliders Pudding	\$5,389.1	Smith Law Firm	\$912.5	Outer	\$330.9	Origin In-home Test	\$176.0	Epilog AI	\$106.3
Nervive	\$5,127.4	BYJU'S	\$840.5	Augustinus Bader	\$328.5	EY-Parthenon	\$175.1	Childress Vineyards	\$105.3
Sophos	\$4,891.1	Tracksmith	\$813.6	Resistance C Vitamins	\$318.1	Hotel Spa	\$173.9	Hip Optical	\$103.8
LoopNet	\$4,848.8	Fridababy	\$809.0	Quiver Distribution	\$307.4	White Heart Legal	\$171.4	Tickpick	\$100.2
Cape Cod Chips	\$4,614.7	Voss	\$753.4	247Sports	\$293.1	Bob Hurley RV Dealership	\$168.1		
Impossible Meat	\$4,281.5	Picnic Tax	\$718.1	Sofa City	\$282.9	SurelyWell	\$166.3		
Imbruvica RX	\$4,144.9	Afterpay	\$695.5	Zebit	\$271.5	Glossier	\$164.5		
BinaxNOW In-home Test	\$3,553.6	Waystar	\$659.6	Everythingbreaks	\$263.9	NakedWines	\$162.4		
Varo	\$3,394.4	Anheo Insurance	\$645.3	ITA Restructuring	\$255.8	Osprey Funds	\$161.4		
Cerebral	\$3,385.5	Swift Premium Meats	\$642.9	Skims	\$254.9	Milk Bar	\$158.1		
Applaydu App	\$2,971.5	American Edge Project	\$626.2	Harvest Hosts	\$246.0	Standard Process Nutrition	\$156.3		
Deloitte US Open AR App	\$2,865.0	Good Sports	\$622.7	Oxygen	\$245.0	PeopleReady	\$145.0		
Bingo Blitz App	\$2,855.4	Zesty Paws	\$601.5	SmartMatch	\$244.1	Sera Labs	\$141.9		
Workhuman	\$2,715.2	Climate Power	\$599.7	MoneyLion	\$238.5	Pair Eyewear	\$140.0		
Mrs. Meyer's	\$2,713.7	Aon Consulting	\$587.0	Red Volcano	\$236.7	Josh Cellars Wine	\$138.5		
WorldRemit	\$2,249.9	ALLBLK Streaming	\$578.4	Birthdate	\$232.8	Laird Superfood	\$137.6		
Biberk Insurance	\$2,135.3	Hot Shot	\$554.2	Acre Mezcal	\$231.2	AAPC	\$133.5		

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, 1/1/21-6/30/21. 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 data-driven, performance-obsessed **direct-to-consumer segment** continues to be a force as **61 brands** across **31 categories** entered the national TV marketplace, spending **nearly \$221 million** during 1H '21

1st Half 2021 New National TV DTC Advertisers

Brand	Category	\$\$\$ (000)
Paramount+ Streaming	Streaming Services	\$76,907.3
Prende Streaming	Streaming Services	\$30,764.5
Canva	Graphic Design	\$21,315.8
Allbirds	Apparel & Accessories	\$18,405.4
Oura	Health & Wellness	\$16,062.7
GO2bank	Online Banking	\$8,970.2
Slice App	Food Delivery	\$5,877.4
BinaxNOW In-Home Test	At-Home Testing	\$3,553.6
Varo	Online Banking	\$3,394.4
Cerebral	Telemedicine	\$3,385.5
Applaydu App	Mobile Apps	\$2,971.5
Deloitte US Open AR App	Mobile Apps	\$2,865.0
Bingo Blitz App	Mobile Apps	\$2,855.4
Mrs. Meyer's	Cleaning & Sanitizing	\$2,713.7
WorldRemit	Financial Services	\$2,249.9
Worthy	Marketplace	\$1,632.7
Flamingo	Personal Care	\$1,187.9
EveryPlate	Food Delivery	\$1,137.6
Therabody	Health & Wellness	\$989.6
Olukai	Apparel & Accessories	\$970.9
BYJU'S	Online Education	\$840.5

Brand	Category	\$\$\$ (000)
Tracksmith	Apparel & Accessories	\$813.6
Fridababy	Personal Care	\$809.0
Picnic Tax	Tax Services	\$718.1
Afterpay	Financial Services	\$695.5
Waystar	Financial Services	\$659.6
ALLBLK Streaming	Streaming Services	\$578.4
Lucyd	Eyewear	\$527.7
UrbanStems	Flower Delivery	\$435.7
Hive	Online Delivery	\$423.1
AllTrails	Outdoor Recreation	\$392.5
Blossom	Mobile Apps	\$368.3
AnyTask	Professional Services	\$364.6
The Inside	Home Furnishing	\$355.9
Zebit	Marketplace	\$271.5
Skims	Apparel & Accessories	\$254.9
Oxygen	Online Banking	\$245.0
MoneyLion	Online Banking	\$238.5
Birthdate	Gifts	\$232.8
Gorjana	Jewelry	\$223.7
MYXfitness	Fitness	\$219.8
Top Eleven App	Gaming	\$206.9

Brand	Category	\$\$\$ (000)
Lume	Personal Care	\$201.3
Molekule	Cleaning & Sanitizing	\$198.7
Pipette Health	Personal Care	\$192.4
Angelinos Coffee	Beverages	\$191.9
Vincero	Apparel & Accessories	\$190.5
Origin In-Home Test	At-Home Testing	\$176.0
SurelyWell	Cleaning & Sanitizing	\$166.3
Glossier	Skincare & Beauty	\$164.5
NakedWines	Alcohol Delivery	\$162.4
Pair Eyewear	Eyewear	\$140.0
Laird Superfood	Food (misc)	\$137.6
mdINR	At-Home Testing	\$120.5
Fair Harbor	Apparel & Accessories	\$119.6
Pixels	Home Furnishing	\$116.7
Jet Academy	Fitness	\$116.7
SwitchUp	Online Education	\$112.5
Chroma Gro	Plant Care	\$107.4
Hip Optical	Eyewear	\$103.8
Tickpick	Mobile Tickets	\$100.2



DTC brands accounted for **37%** of total new TV advertisers and **47%** of total TV spend

Logos represent a sampling of new national TV DTC advertisers

Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-6/30/21. 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.

'Non-COVID' Segment: Major categories are highly competitive and include new entrants across subcategories like Spanish-language service within streaming and chronic sleep disorder treatments and hormone-free birth control within pharma

1st Half 2021 New National TV 'non-COVID' Advertisers

Brand	Category	\$\$\$ (000)	Brand	Category	\$\$\$ (000)	Brand	Category	\$\$\$ (000)
Paramount+ Streaming	Streaming Services	\$76,907.3	Open Farm	Pet Care	\$1,036.1	ITA Restructuring	Legal Services	\$255.8
Sunosi RX	Pharmaceutical	\$42,811.5	Olukai	Apparel & Accessories	\$970.9	Red Volcano	Direct Response	\$236.7
Prende Streaming	Streaming Services	\$30,764.5	Make Golf Your Thing	Organizations	\$970.1	Birthdate	Gifts	\$232.8
Breztri RX	Pharmaceutical	\$27,961.8	Cacti Hard Seltzer	Alcoholic Beverages	\$919.2	Acre Mezcal	Alcoholic Beverages	\$231.2
Kesimpta RX	Pharmaceutical	\$25,554.5	Smith Law Firm	Legal Services	\$912.5	Alvin Ailey American Dance Theater	Entertainment	\$228.3
Canva	Graphic Design	\$21,315.8	Fridababy	Personal Care	\$809.0	Horizon Pharma	Pharmaceutical	\$228.3
Ingrezza RX	Pharmaceutical	\$15,519.9	Voss	Beverages	\$753.4	Gorjana	Jewelry	\$223.7
Austedo RX	Pharmaceutical	\$12,392.7	Picnic Tax	Tax Services	\$718.1	Lume	Personal Care	\$201.3
Phexxi	Pharmaceutical	\$6,188.6	Swift Premium Meats	Food (misc)	\$642.9	Steven Singer Jewelry	Jewelry	\$200.3
Talenti	Food (misc)	\$5,880.0	American Edge Project	Organizations	\$626.2	Malwarebytes	Cybersecurity	\$197.1
Oatly	Beverages	\$5,500.0	Good Sports	Organizations	\$622.7	Pipette	Personal Care	\$192.4
Colliders Pudding	Snacks	\$5,389.1	Zesty Paws	Pet Care	\$601.5	Vincero	Apparel & Accessories	\$190.5
Nervive	Vitamins & Supplements	\$5,127.4	Climate Power	Organizations	\$599.7	Instant Beauty 60	Skincare & Beauty	\$176.5
Sophos	Cybersecurity	\$4,891.1	Aon Consulting	Professional Services	\$587.0	EY-Parthenon	Professional Services	\$175.1
Cape Cod Chips	Snacks	\$4,614.7	ALLBLK Streaming	Streaming Services	\$578.4	Glossier	Skincare & Beauty	\$164.5
Impossible Meat	Plant-Based Food	\$4,281.5	Hot Shot	Pest Control	\$554.2	Osprey Funds	Financial Services	\$161.4
Imbruvica RX	Pharmaceutical	\$4,144.9	Lucyd	Eyewear	\$527.7	Milk Bar	Food (misc)	\$158.1
Appplaydu App	Mobile Apps	\$2,971.5	Stage 6 Films	Film Production	\$522.8	Josh Cellars Wine	Alcoholic Beverages	\$138.5
Deloitte US Open AR App	Mobile Apps	\$2,865.0	Working For Women	Organizations	\$477.3	Laird Superfood	Food (misc)	\$137.6
Bingo Blitz App	Mobile Apps	\$2,855.4	Cointreau	Alcoholic Beverages	\$428.0	Aptive	Pest Control	\$130.8
Biberk Insurance	Insurance	\$2,135.3	Ox Car Care	Insurance	\$381.1	All-Pro Passer	Direct Response	\$127.7
Tattooed Chef	Plant-Based Food	\$1,945.3	Womply	Professional Services	\$370.0	Fair Harbor	Apparel & Accessories	\$119.6
Stuffed Puffs	Snacks	\$1,843.5	Blossom	Mobile Apps	\$368.3	Vertex	Tax Services	\$119.5
Disability Help Today	Legal Services	\$1,803.0	Pixicade	Direct Response	\$338.3	Posh Virtual Receptionist	Professional Services	\$113.5
Worthy	Marketplace	\$1,632.7	Pegasystems	Professional Services	\$336.7	Undefeated	Apparel & Accessories	\$107.9
Compeed	Personal Care	\$1,484.1	Augustinus Bader	Skincare & Beauty	\$328.5	Epilog AI	Artificial Intelligence	\$106.3
Victims Justice Group	Legal Services	\$1,396.2	Quiver Distribution	Film Production	\$307.4	Childress Vineyards	Alcoholic Beverages	\$105.3
Dairyland Insurance	Insurance	\$1,366.0	247Sports	Sports Media	\$293.1	Tickpick	Mobile Tickets	\$100.2
Flamingo	Personal Care	\$1,187.9	Everythingbreaks	Insurance	\$263.9			



Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-6/30/21. 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.

'COVID'-segment brands are capitalizing on evolving consumer needs by offering easy online solutions and shopping across a host of categories

1st Half 2021 New National TV 'COVID-Endemic' & 'COVID-Related' Advertisers

Brand	Category	\$\$\$ (000)	Brand	Category	\$\$\$ (000)	Brand	Category	\$\$\$ (000)
Allbirds	Apparel & Accessories	\$18,405.4	UrbanStems	Flower Delivery	\$435.7	Origin In-home Test	At-Home Testing	\$176.0
Oura	Health & Wellness	\$16,062.7	Hive	Online Delivery	\$423.1	Hotel Spa	Home	\$173.9
9 Elements	Cleaning & Sanitizing	\$10,773.4	AllTrails	Outdoor Recreation	\$392.5	White Heart Legal	Legal Services	\$171.4
GO2bank	Online Banking	\$8,970.2	Calibrate	Health & Wellness	\$382.3	Bob Hurley RV Dealership	Travel	\$168.1
International Well Building	Professional Services	\$8,712.2	Ten-X	Real Estate	\$378.9	SurelyWell	Cleaning & Sanitizing	\$166.3
Shift4Shop	Financial Services	\$6,369.0	Simplehuman	Home	\$376.3	NakedWines	Alcohol Delivery	\$162.4
Slice App	Food Delivery	\$5,877.4	AnyTask	Professional Services	\$364.6	Standard Process Nutrition	Vitamins & Supplements	\$156.3
LoopNet	Real Estate	\$4,848.8	The Inside	Home Furnishing	\$355.9	PeopleReady	Professional Services	\$145.0
BinaxNOW In-Home Test	At-Home Testing	\$3,553.6	Outer	Home Furnishing	\$330.9	Sera Labs	Health & Wellness	\$141.9
Varo	Online Banking	\$3,394.4	Resistance C Vitamins	Vitamins & Supplements	\$318.1	Pair Eyewear	Eyewear	\$140.0
Cerebral	Telemedicine	\$3,385.5	Sofa City	Home Furnishing	\$282.9	AAPC	Professional Services	\$133.5
Workhuman	Professional Services	\$2,715.2	Zebit	Marketplace	\$271.5	Roccat	Gaming	\$132.8
Mrs. Meyer's	Cleaning & Sanitizing	\$2,713.7	Skims	Apparel & Accessories	\$254.9	Life Care Insurance	Insurance	\$130.4
WorldRemit	Financial Services	\$2,249.9	Harvest Hosts	Travel	\$246.0	mdINR	At-Home Testing	\$120.5
Trust & Will	Legal Services	\$1,829.8	Oxygen	Online Banking	\$245.0	Pixels	Home Furnishing	\$116.7
Horizon Fitness	Fitness	\$1,718.5	SmartMatch	Insurance	\$244.1	Jet Academy	Fitness	\$116.7
BBQGuys	Home	\$1,600.9	MoneyLion	Online Banking	\$238.5	SwitchUp	Online Education	\$112.5
EveryPlate	Food Delivery	\$1,137.6	Intelliloan	Financial Services	\$224.1	True Hardwoods	Home	\$112.4
ClearMatch	Insurance	\$1,005.3	MYXfitness	Fitness	\$219.8	Carequiz	Insurance	\$112.0
Therabody	Health & Wellness	\$989.6	Wiha Tools	Tools	\$207.5	ABM Industries	Cleaning & Sanitizing	\$109.9
BYJU'S	Online Education	\$840.5	Top Eleven App	Gaming	\$206.9	Weslend	Financial Services	\$109.5
Tracksmith	Apparel & Accessories	\$813.6	Legacy Quote Insurance	Insurance	\$206.8	American Financing Mortgage	Financial Services	\$108.9
Afterpay	Financial Services	\$695.5	Molekule	Cleaning & Sanitizing	\$198.7	Chroma Gro	Plant Care	\$107.4
Waystar	Financial Services	\$659.6	Sentry Legal	Legal Services	\$192.5	Hip Optical	Eyewear	\$103.8
Anheo Insurance	Insurance	\$645.3	Angelinos Coffee	Beverages	\$191.9			
D&D Moving	Moving & Storage	\$501.9	One Medical	Health & Wellness	\$189.4			



Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-6/30/21. 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.

Appendix



'Non-COVID' Segment: YOY New National TV Advertiser Categories Ranked by Total Spend (full list)

1H '20

Rank	Category	# of Brands	% of Brands	Total \$\$\$	% of \$\$\$
1	Pharmaceutical	7	12.3%	\$222.4MM	55.9%
2	Streaming Services	8	14.0%	\$94.5MM	23.8%
3	Vitamins & Supplements	3	5.3%	\$13.1MM	3.3%
4	Telco	1	1.8%	\$12.2MM	3.1%
5	Oat Milk	1	1.8%	\$9.8MM	2.5%
6	Pain Relief	1	1.8%	\$9.7MM	2.4%
7	Sparkling Water	1	1.8%	\$6.6MM	1.7%
8	Beverages	2	3.5%	\$4.5MM	1.1%
9	Personal Care	1	1.8%	\$3.6MM	0.9%
10	Alcoholic Beverages	1	1.8%	\$3.4MM	0.8%
11	Medical Equipment	2	3.5%	\$2.7MM	0.7%
12	Financial Services	3	5.3%	\$2.0MM	0.5%
13	Insurance	3	5.3%	\$1.5MM	0.4%
14	Hearing Aids	1	1.8%	\$1.5MM	0.4%
15	Snacks	1	1.8%	\$1.2MM	0.3%
16	Pet Care	2	3.5%	\$1.1MM	0.3%
17	Freight Services	1	1.8%	\$1.0MM	0.2%
18	Legal Financing	1	1.8%	\$1.0MM	0.2%
19	Phone Accessories	1	1.8%	\$0.8MM	0.2%
20	Mobile App	3	5.3%	\$0.8MM	0.2%
21	Law Firm	1	1.8%	\$0.7MM	0.2%
22	Home Furnishing	1	1.8%	\$0.6MM	0.1%
23	Skincare	2	3.5%	\$0.5MM	0.1%
24	Waste Management	1	1.8%	\$0.4MM	0.1%
25	Wallets	1	1.8%	\$0.4MM	0.1%
26	Laser Therapy	1	1.8%	\$0.4MM	0.1%
27	Oral Care	1	1.8%	\$0.3MM	0.1%
28	Children's Toys	1	1.8%	\$0.2MM	0.1%
29	Wigs	1	1.8%	\$0.2MM	0.1%
30	Laser Hair Removal	1	1.8%	\$0.2MM	0.1%
31	Jewelry	1	1.8%	\$0.1MM	0.0%
32	Phone Captioning	1	1.8%	\$0.1MM	0.0%

1H '21

Rank	Category	# of Brands	% of Brands	Total \$\$\$	% of \$\$\$
1	Pharmaceutical	8	9.3%	\$134.8MM	39.1%
2	Streaming Services	3	3.5%	\$108.3MM	31.4%
3	Graphic Design	1	1.2%	\$21.3MM	6.2%
4	Snacks	3	3.5%	\$11.8MM	3.4%
5	Mobile Apps	4	4.7%	\$9.1MM	2.6%
6	Food (misc)	4	4.7%	\$6.8MM	2.0%
7	Beverages	2	2.3%	\$6.3MM	1.8%
8	Plant-Based Food	2	2.3%	\$6.2MM	1.8%
9	Vitamins & Supplements	1	1.2%	\$5.1MM	1.5%
10	Cybersecurity	2	2.3%	\$5.1MM	1.5%
11	Legal Services	4	4.7%	\$4.4MM	1.3%
12	Insurance	4	4.7%	\$4.1MM	1.2%
13	Personal Care	5	5.8%	\$3.9MM	1.1%
14	Organizations	5	5.8%	\$3.3MM	1.0%
15	Alcoholic Beverages	5	5.8%	\$1.8MM	0.5%
16	Pet Care	2	2.3%	\$1.6MM	0.5%
17	Marketplace	1	1.2%	\$1.6MM	0.5%
18	Professional Services	5	5.8%	\$1.6MM	0.5%
19	Apparel & Accessories	4	4.7%	\$1.4MM	0.4%
20	Tax Services	2	2.3%	\$0.8MM	0.2%
21	Film Production	2	2.3%	\$0.8MM	0.2%
22	Direct Response	3	3.5%	\$0.7MM	0.2%
23	Pest Control	2	2.3%	\$0.7MM	0.2%
24	Skincare & Beauty	3	3.5%	\$0.7MM	0.2%
25	Eyewear	1	1.2%	\$0.5MM	0.2%
26	Jewelry	2	2.3%	\$0.4MM	0.1%
27	Sports Media	1	1.2%	\$0.3MM	0.1%
28	Gifts	1	1.2%	\$0.2MM	0.1%
29	Entertainment	1	1.2%	\$0.2MM	0.1%
30	Financial Services	1	1.2%	\$0.2MM	0.05%
31	Artificial Intelligence	1	1.2%	\$0.1MM	0.03%
32	Mobile Tickets	1	1.2%	\$0.1MM	0.03%

Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-6/30/21. 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.

'COVID'-Segment: YOY New National TV 'COVID-Endemic' & 'COVID-Related' Advertiser Categories Ranked by Total Spend (full list)

1H '20

Rank	Category	# of Brands	% of Brands	Total \$\$\$	% of \$\$\$
1	Moving & Storage	3	5.7%	\$6.8MM	11.1%
2	Vitamins & Supplements	3	5.7%	\$6.1MM	9.9%
3	Automotive	1	1.9%	\$5.0MM	8.1%
4	Underwear & Lingerie	1	1.9%	\$4.8MM	7.9%
5	Financial Services	4	7.5%	\$4.5MM	7.3%
6	Skincare	1	1.9%	\$4.0MM	6.4%
7	Education	1	1.9%	\$3.3MM	5.3%
8	Women's Healthcare	1	1.9%	\$3.1MM	5.0%
9	Professional Services	4	7.5%	\$2.6MM	4.2%
10	Social Networking	1	1.9%	\$2.0MM	3.2%
11	Personal Care	2	3.8%	\$1.8MM	2.9%
12	Direct Response	1	1.9%	\$1.7MM	2.8%
13	Cleaning Products	1	1.9%	\$1.7MM	2.8%
14	Alcoholic Beverages	1	1.9%	\$1.4MM	2.3%
15	Real Estate	2	3.8%	\$1.3MM	2.1%
16	Online Printing	1	1.9%	\$1.1MM	1.8%
17	Home Furnishing	1	1.9%	\$1.1MM	1.8%
18	E-Commerce	2	3.8%	\$1.0MM	1.7%
19	Wine Club	1	1.9%	\$0.9MM	1.5%
20	Medical Apparel	1	1.9%	\$0.9MM	1.4%
21	Computer Software	2	3.8%	\$0.9MM	1.4%
22	Online Dating	2	3.8%	\$0.8MM	1.3%
23	Medical Equipment	1	1.9%	\$0.8MM	1.3%
24	Telemedicine	2	3.8%	\$0.8MM	1.2%
25	Wellness & Fitness	2	3.8%	\$0.6MM	1.0%
26	Eyewear	1	1.9%	\$0.6MM	1.0%
27	Children's Book Club Subscription Service	1	1.9%	\$0.5MM	0.9%
28	Apparel	2	3.8%	\$0.3MM	0.5%
29	At-Home Medical Testing	1	1.9%	\$0.3MM	0.5%
30	Shoes	1	1.9%	\$0.2MM	0.4%
31	Online Banking	1	1.9%	\$0.1MM	0.2%
32	Medical Service	1	1.9%	\$0.1MM	0.2%
33	Online Education	1	1.9%	\$0.1MM	0.2%
34	Phone Accessories	1	1.9%	\$0.1MM	0.2%
35	Golf Equipment	1	1.9%	\$0.1MM	0.2%

1H '21

Rank	Category	# of Brands	% of Brands	Total \$\$\$	% of \$\$\$
1	Apparel & Accessories	3	3.9%	\$19.5MM	16.1%
2	Health & Wellness	5	6.6%	\$17.8MM	14.7%
3	Cleaning & Sanitizing	5	6.6%	\$14.0MM	11.5%
4	Online Banking	4	5.3%	\$12.8MM	10.6%
5	Professional Services	5	6.6%	\$12.1MM	10.0%
6	Financial Services	7	9.2%	\$10.4MM	8.6%
7	Food Delivery	2	2.6%	\$7.0MM	5.8%
8	Real Estate	2	2.6%	\$5.2MM	4.3%
9	At-Home Testing	3	3.9%	\$3.9MM	3.2%
10	Telemedicine	1	1.3%	\$3.4MM	2.8%
11	Insurance	6	7.9%	\$2.3MM	1.9%
12	Home	4	5.3%	\$2.3MM	1.9%
13	Legal Services	3	3.9%	\$2.2MM	1.8%
14	Fitness	3	3.9%	\$2.1MM	1.7%
15	Home Furnishing	4	5.3%	\$1.1MM	0.9%
16	Online Education	2	2.6%	\$1.0MM	0.8%
17	Moving & Storage	1	1.3%	\$0.5MM	0.4%
18	Vitamins & Supplements	2	2.6%	\$0.5MM	0.4%
19	Flower Delivery	1	1.3%	\$0.4MM	0.4%
20	Online Delivery	1	1.3%	\$0.4MM	0.3%
21	Travel	2	2.6%	\$0.4MM	0.3%
22	Outdoor Recreation	1	1.3%	\$0.4MM	0.3%
23	Gaming	2	2.6%	\$0.3MM	0.3%
24	Marketplace	1	1.3%	\$0.3MM	0.2%
25	Eyewear	2	2.6%	\$0.2MM	0.2%
26	Tools	1	1.3%	\$0.2MM	0.2%
27	Beverages	1	1.3%	\$0.2MM	0.2%
28	Alcohol Delivery	1	1.3%	\$0.2MM	0.1%
29	Plant Care	1	1.3%	\$0.1MM	0.1%

Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-6/30/21. 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.