

2022

Welcome to TV

Understanding the 16 Consumer Behaviors That Are Driving New Advertisers

Full Year 2021 Update

Since We Last Spoke...

Over the last two editions of VAB's bi-annual series, *Welcome to TV*, we saw a burst of new advertisers enter the national TV marketplace across a variety of emerging categories that were either driven by, or accelerated due to, pandemic influences.

Since then, a lot has changed and **consumer optimism** on economic recovery grew in the second half of 2021. Even though the number of new entrants was propped up by an influx of COVID-related advertisers during the height of the pandemic, the national TV marketplace welcomed even more brands and spend in 2021 despite its shift away from COVID-related categories as **competition increased across traditional categories** that may have pulled back investment at the start of the pandemic.

With **the marketplace shifting towards a post-pandemic world**, TV is a valuable platform for brands from all walks of life to tap into new audiences on a larger scale and drive awareness.

New TV Advertisers

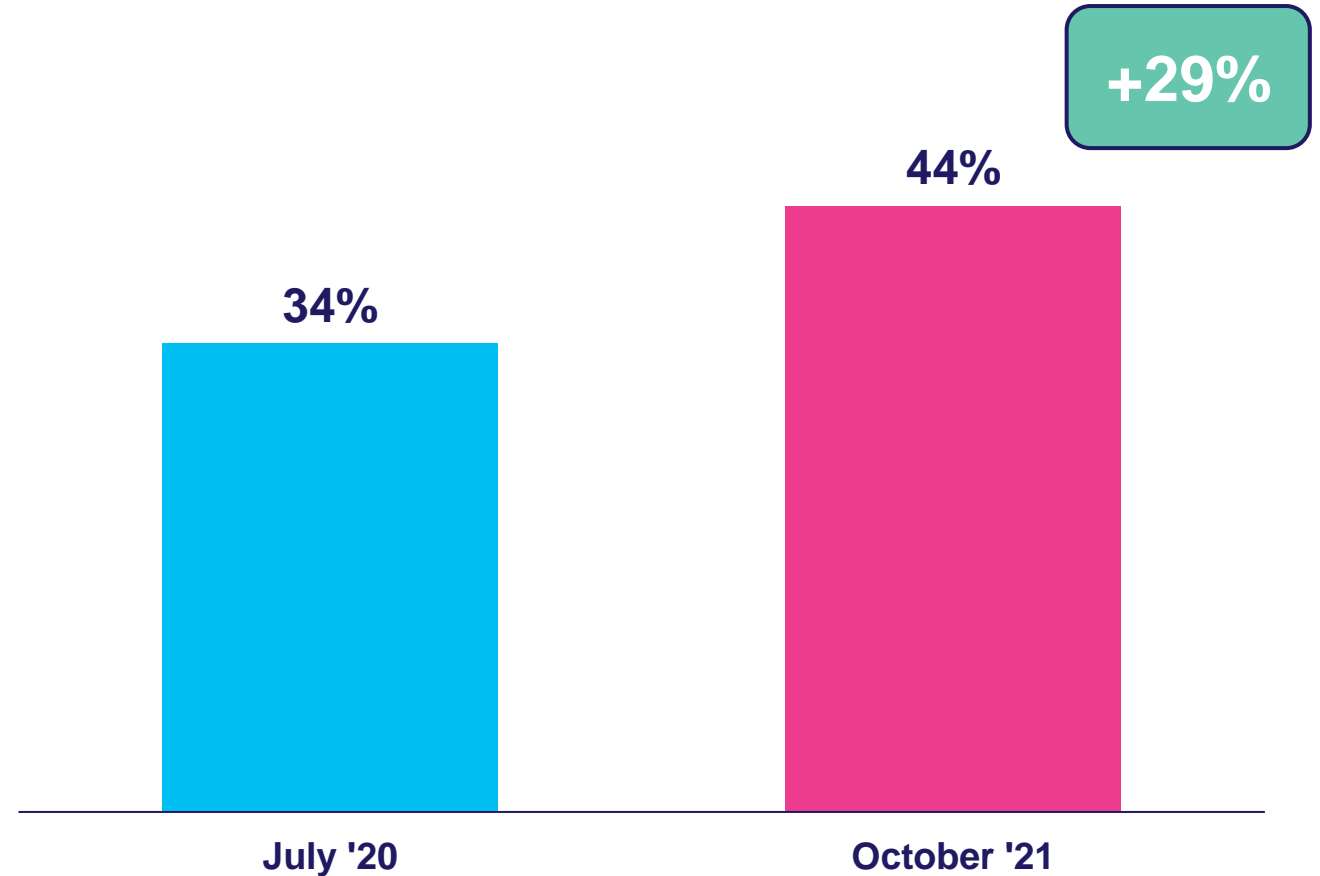
	Full-Year 2020		1 st Half of 2021		2 nd Half of 2021	
	#	%	#	%	#	%
COVID-related brands	140	49%	76	47%	4	3%
Non-COVID related brands	143	51%	86	53%	149	97%
Total # of brands	283		162		153	

Source: VAB analysis of Nielsen Ad Intel data, 1/1/20-12/31/21. 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-related' includes brands in categories that serve consumer needs directly associated with the pandemic like hand sanitizers and telemedicine (endemic) or driven by the pandemic like online delivery, home improvement and health (COVID-related). 'non-COVID' related include brands in categories not related to the pandemic that most likely would've expanded and advertised regardless of the pandemic like streaming services, crypto and pharmaceuticals.

As consumer optimism in U.S. economic recovery grew, marketers were given the encouragement needed to invest in their brands after a period of unprecedented uncertainty

Confidence in U.S. Economic Recovery After COVID-19

% of U.S. respondents who feel optimistic*



*Optimistic: The economy will rebound within 2-3 months and become just as strong as it was before COVID-19 or stronger

Source: McKinsey & Company, *US Consumer sentiment and behaviors during the coronavirus crisis*, December 14, 2021.

Emboldened by this shift in both consumer and marketer mindsets, **315 advertisers** across **74 categories** invested **over \$1.3 billion** in national TV advertising for the first time, resulting in a higher total spend and more new advertisers vs. the year prior



Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-12/31/21. 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.

Categories born out of COVID-related needs declined in relevance and, as a result, disappeared from the landscape. However, there was a surge in brands from both new and traditional categories.

New National TV Advertisers
2020 vs. 2021 Comparison



Year	# of Brands	# of Categories	New TV \$\$\$ (MM)
2020	283	95	\$1,279.1
2021	315	74	\$1,320.2
# YoY Diff	+32	-21	+\$41.2
% YoY Diff	+11%	-22%	+3%

The increase in brands is attributable to entrants in newer categories like cryptocurrency and greater competition within traditional categories like home, apparel & accessories and personal care.

For a full list of the 315 brands with spend [click here](#)

Source: VAB analysis of Nielsen Ad Intel data, 1/1/20-12/31/20 vs. 1/1/21-12/31/21. 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.

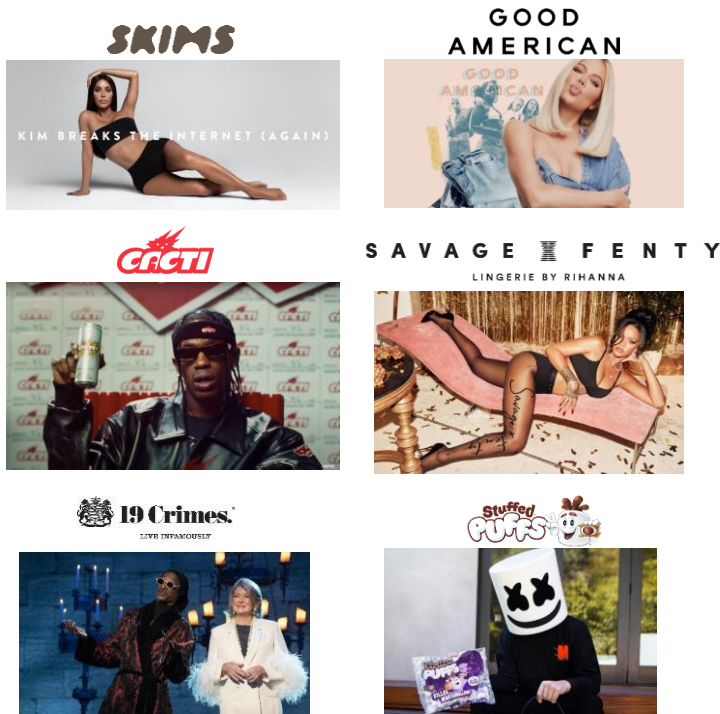
Fueled by post-Covid optimism and energy, brands used TV to shift their tone, taking risks and pushing boundaries to disrupt the norms

Sampling of New 'Disruptor' National TV Advertisers

*Click on any logo to visit their website

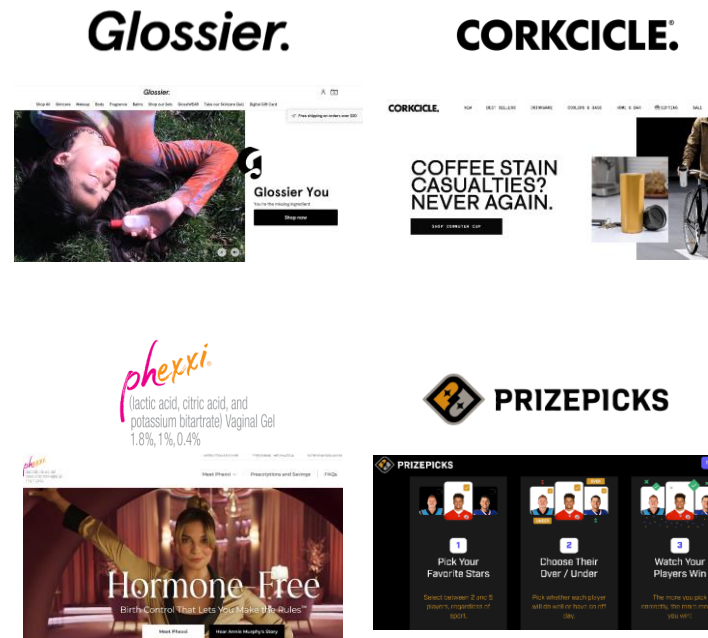
'Celebrity' brands

Brands owned by or partnering with celebrities



'Younger-skewing' brands

Brands that are targeting younger audiences

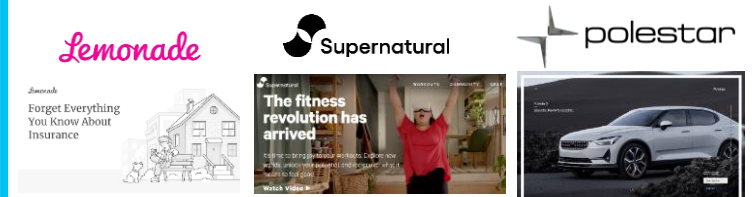


'Newer' brands

Brands across newer categories and unique / disruptor brands across traditional categories



Several brands are disrupting traditional categories like insurance, fitness and auto. For example, Lemonade claims to "reverse the traditional insurance model," offering transparency and donating to charitable causes.



Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-12/31/21. 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.

Looking for revenue growth, these younger-skewing, disruptor brands use TV to attract new customers and create excitement



“This is the **introduction of our brand to the world**. We just want to **raise awareness** and show folks what we stand for.”

Steven Kalifowitz, CMO, *Crypto.com*
(Ad Age, 10/28/21)



“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)



“This work is all about **investing in the growth of our customer base**.”

Geoff Seeley, Global CMO, *Afterpay*
(Ad Age, 5/21/21)

BESPOKE POST

“It's about **scale and the halo effect television offers**.... As we try to **expose our brand to a larger audience** and get that reach, you can really see the sound and sight of TV being able to do that.”

Alvaro De La Rocha, CMO, *Bespoke Post*
(Digiday, 9/30/21)



“We're excited to bring Stuffed Puffs to a **bigger audience** this season in collaboration with our partner Marshmello.”

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].”

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



“Launching a commercial is the natural next step to **drive more awareness and excitement** around the brand and products.”

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



“Our mission is to say, hey, our product is for every person, so we want to **reach really broad audiences**.”


Manbir Sodhia, VP of Growth, *Oura*
(AdExchanger, 3/30/22)



“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.”

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

To generate wide-scale instant legitimacy, many new advertisers launched their first national TV campaign during high profile events and/or through partnerships with iconic personalities, creating a positive halo effect on their brand



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

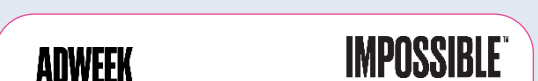
February 22, 2021



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



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

April 6, 2021



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

February 7, 2021



AdAge TOM BRADY AND GISELE BUNDCHEN BUILD A CRYPTO TRADING POSSE IN FIRST ADS FOR FTX

September 9, 2021



Instacart cooks up mealtime family bonding in first brand campaign

November 15, 2021



AdAge afterpay AFTERPAY CHASES MARKET SHARE WITH ITS BIGGEST CAMPAIGN YET

Payment brand rolls out push with Rebel Wilson

May 21, 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

February 26, 2021



AdAge MATT DAMON STARS IN CRYPTO.COM AD—THE LATEST CELEBRITY TO ENDORSE CRYPTOCURRENCY

The campaign will debut tonight during 'Thursday Night Football' on Fox


October 28, 2021



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




DIGIDAY BESPOKE POST 'A return to the basics': Why a subscription box DTC brand is leveraging TV advertising for the first time

July 12, 2021



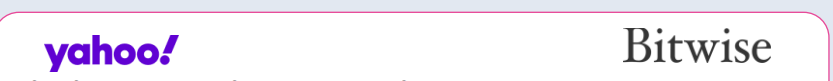
AstraZeneca's first Breztri ad uses an animated fantasyland to get real about COPD flare-ups

February 18, 2021




Snoop Dogg partners with Treasury's 19 Crimes on debut TV campaign

July 12, 2021



yahoo! Bitwise Debuts First-Ever National TV Ad, Part of New 2022 Awareness Campaign

November 28, 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

As COVID concerns waned and consumer optimism grew, new national TV investment was driven by a series of evolving consumer behaviors and category pivots

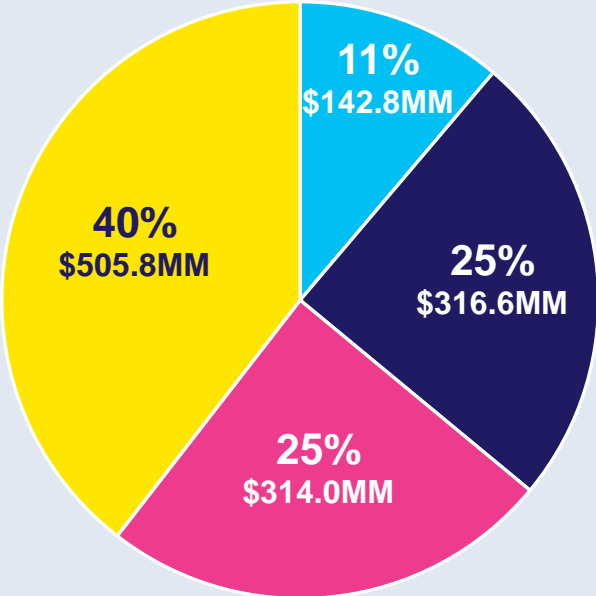


Consumer optimism over the vaccine rollout and economic recovery drove increases in new advertiser TV investment in 1Q and 4Q, respectively

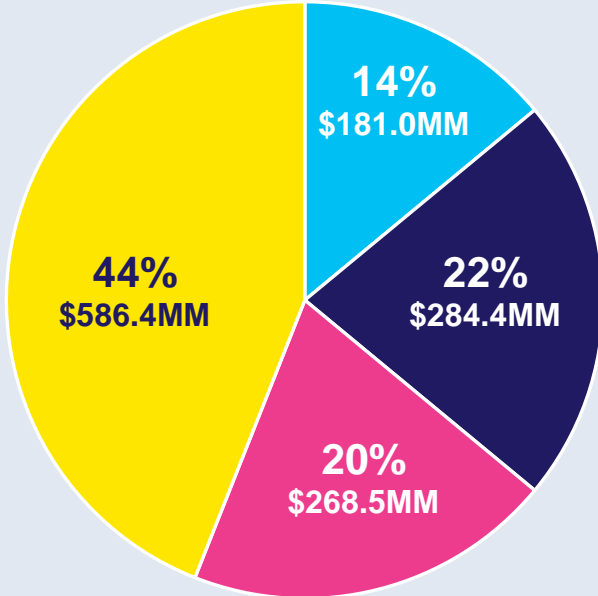
New National TV Advertisers

Quarterly spend (MM)

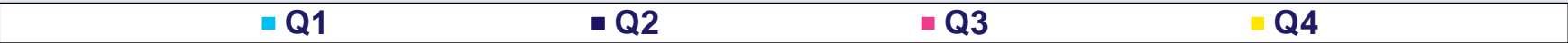
2020
Total \$\$\$: \$1,279.1 MM



2021
Total \$\$\$: \$1,320.2 MM



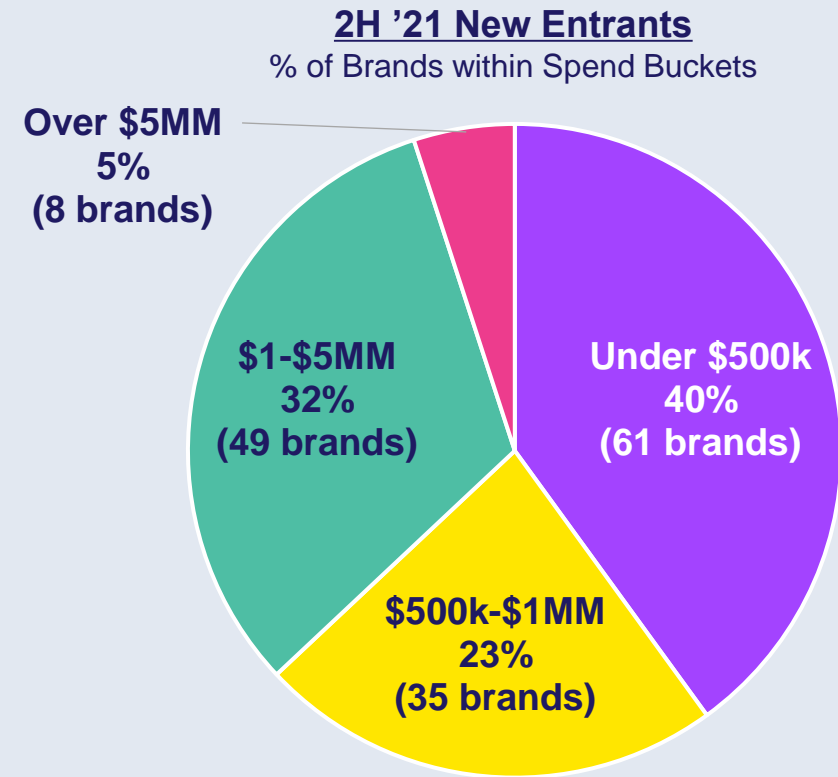
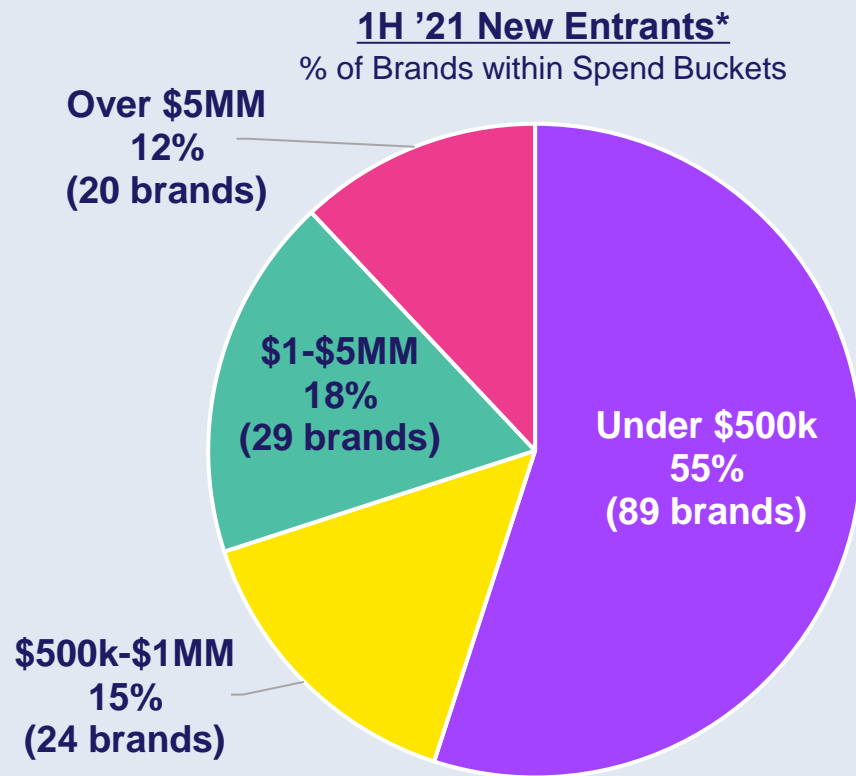
Quarter	% difference in spend YOY
Q1	+27%
Q2	-10%
Q3	-14%
Q4	+16%



Source: VAB analysis of Nielsen Ad Intel data, 1/1/20-12/31/21. 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. MM=millions.

As optimism grew in the second half of 2021, more advertisers invested over \$500k into their first campaign as competition to connect with consumers intensified

1H vs. 2H '21 New National TV Advertisers by Spend Segment



Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-12/31/21. 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. **'New entrants' refers to advertisers that launched a national TV campaign for the first time during a specific time period (i.e., 1H vs. 2H).** *1H '21 new advertiser spend buckets aren't inclusive of their spend invested in 2H. MM=millions.

To best gauge the impact of the pandemic on new advertisers, we continued to segment the brands into COVID-related and non-COVID

'COVID-Related' Brands*:

brands in categories that serve consumer needs that were either *driven by or directly associated with COVID* (i.e., lifestyle / behavioral changes – home improvement, exercise equipment; hand sanitizers; contactless solutions – online delivery, online banking)

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' related brands



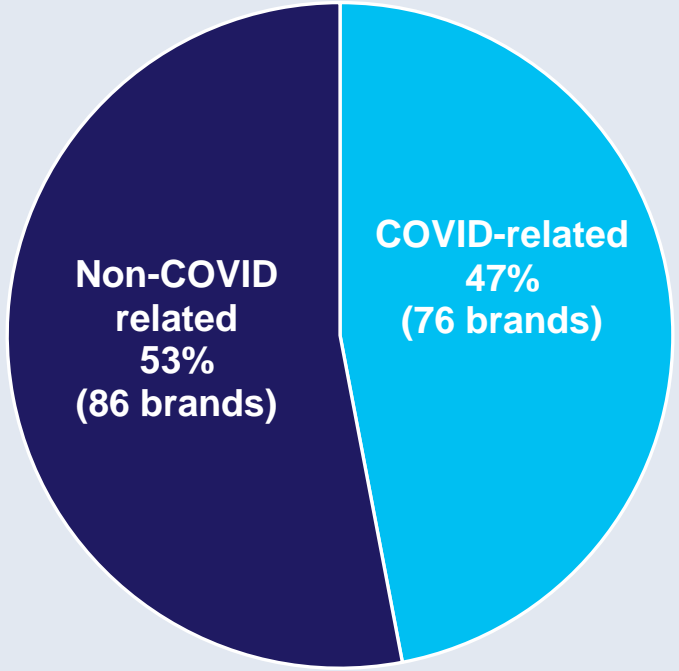
Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-12/31/21. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100K. *'COVID-related' brands includes 'COVID-endemic' brands, which are in categories that serve consumer needs directly associated with COVID (i.e., hand sanitizers, telemedicine, at-home medical testing).

While new entrants in 1H '21 were almost evenly split between COVID and non-COVID related brands, nearly all the brands to emerge in 2H '21 sought to capitalize on a renewed sense of consumer optimism

New National TV Advertisers COVID vs. non-COVID comparison

1H '21

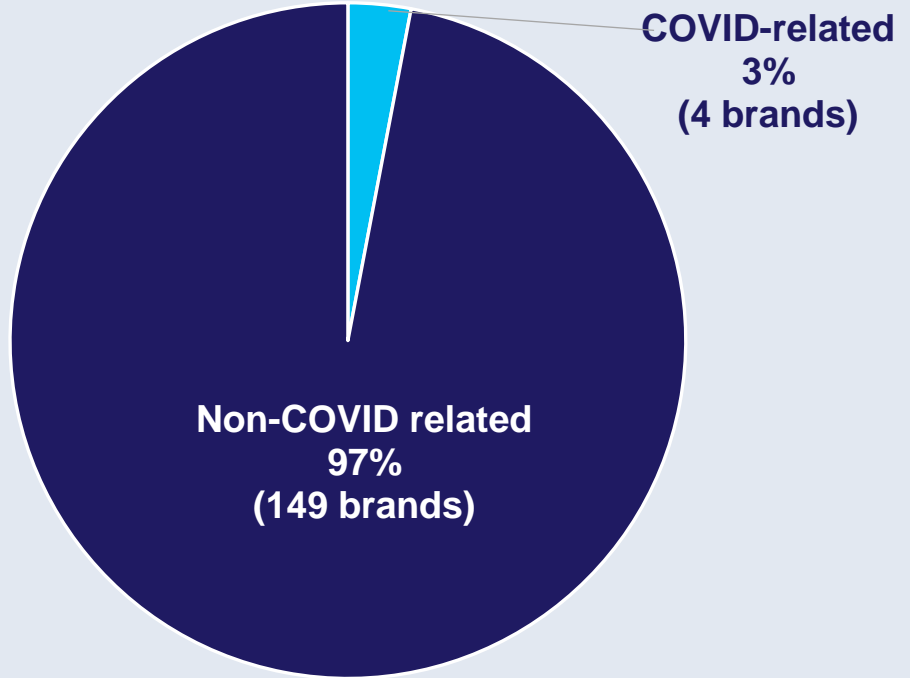
1st Half '21 New Entrants
% (# of brands - total spend)



162 Brands

2H '21

2nd Half '21 New Entrants
% (# of brands - total spend)



153 Brands

Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-12/31/21. 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.

As the marketplace shifts away from a divide of COVID vs. non-COVID brands, which pandemic-influenced consumer behaviors spurred new category entrants?



New advertisers launched TV campaigns to meet the needs of several lasting consumer behaviors that accelerated, or emerged, during the pandemic and which are now evolving towards a post-pandemic society

8 Key Evolving COVID-related Consumer Behaviors

*Click on any logo to visit their website

Even as people spent more time at home earlier in the pandemic, **home improvement** has continued to be relevant and important as homeowners are inspired to renovate



Cleaning and sanitation are now a staple among households and workplaces even as the second half saw fewer entrants



Consumers who may have paid more attention to their **healthcare** during the height of the pandemic turned to brands that provide at-home testing, telemedicine, and guidance around health insurance benefits



Those spending more time indoors turned to **wellness and fitness** brands that offer exercise equipment and vitamins & supplements



Online delivery services made ordering products more accessible for consumers who preferred less direct in-person contact, and the convenience factor has stuck even as society opened back up



Brands that offer **professional services**, in-house or remotely, are capitalizing on the need for workplace solutions as professionals go back to the office and companies look for ways to improve performance



As vaccinations rose and restrictions eased, **outdoor recreation / in-country travel** became a popular leisure time activity, a behavior likely to continue as a cost-friendly vacation alternative during this inflationary time



'Buy now & pay later' brands are capitalizing on the trend of providing consumers with online financing and flexible payment options, which represents another offering that's useful during an inflationary period



Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-12/31/21. 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. Brands are a sampling across categories affected by evolving consumer behaviors.

Beyond the direct effects of COVID, what other behaviors emerged that inspired new advertisers?



Eight additional evolving consumer behaviors across categories like entertainment, finance, fashion and health and wellness inspired new entrants to enter the marketplace

8 Key Evolving non-COVID-related Consumer Behaviors

*Click on any logo to visit their website

Several **crypto** brands have launched campaigns as digital currency has entered the mainstream and become a popular way to make transactions



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



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



Brands across **fashion & beauty** such as apparel, personal care and skincare & beauty are re-emerging now that social distancing practices have been relaxed



The desire to connect with '**celebrity brands**' has become popular as famous entrepreneurs have launched or partnered with brands across a variety of categories like alcoholic beverages, snacks and apparel



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



Organic & plant-based foods have emerged as people become more conscious about what they eat and the source of ingredients in their food



Gaming, including esports, continues to grow in popularity as an interactive entertainment alternative to other video platforms



Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-12/31/21. 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. Brands are a sampling across categories affected by evolving consumer behaviors.

Even brands that had pivoted to focus on products influenced by the pandemic re-shifted to promote more of their broad-based products

Examples include:

The **apparel & accessories** category, which saw many brands pivot to comfortable attire or facemasks during the pandemic, has seen advertisers return to promoting their full line of products suited to a more social lifestyle

allbirds **SKIMS**

Cleaning and sanitation brands advertising hand sanitizers and air filters that could eliminate COVID germs have shifted to be more focused on the general cleaning properties of their products

Mrs. **MEYER'S**
CLEAN DAY **MOLEKULE**

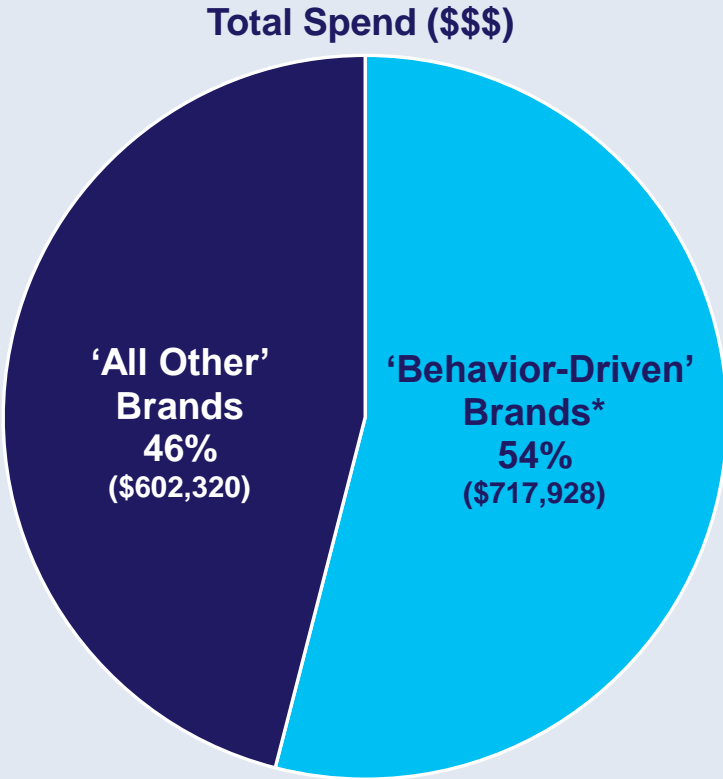
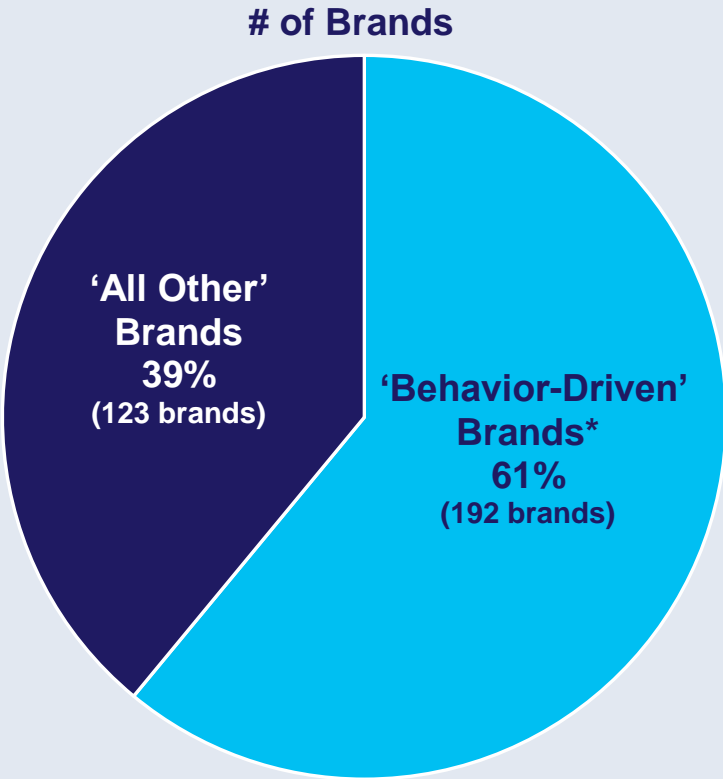
Health & wellness brands that highlighted how their products could alleviate stress caused by the pandemic or even diagnose symptoms of COVID have since re-adopted their pre-pandemic messaging

SeraLabs® **OURA**

Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-12/31/21. 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.](#)

In total, the 16 consumer behaviors identified were a driving force behind new TV entrants, accounting for 61% of new advertisers in 2021

2021 New National TV Advertisers



*'Behavior-Driven' brands = brands that align, and are serving, at least one of the 16 consumer behaviors outlined previously

Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-12/31/21. 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.

Signifying their importance, the key consumer behaviors fueled brand campaign launches across 21 of the top 30 categories

2021 New National TV Advertisers: Top 30 Categories Ranked by # of Brands (including spend)

Rank	Category	# of Brands	% of total brands	Category \$\$\$ (000)	% of total spend
1	Financial Services	21	7%	\$30,029.2	2%
2	Apparel & Accessories	19	6%	\$41,635.6	3%
3	Professional Services	15	5%	\$19,186.3	1%
4	Insurance	15	5%	\$87,377.4	7%
5	Skincare & Beauty	14	4%	\$17,055.0	1%
6	Pharmaceutical	11	3%	\$331,010.8	25%
7	Legal Services	11	3%	\$20,329.2	2%
8	Home	11	3%	\$12,667.6	1%
9	Personal Care	10	3%	\$18,922.5	1%
10	Alcoholic Beverages	10	3%	\$11,541.8	1%
11	Health & Wellness	9	3%	\$50,566.6	4%
12	Mobile Apps	8	3%	\$18,761.6	1%
13	Crypto	7	2%	\$79,446.8	6%
14	Food (misc)	7	2%	\$16,996.6	1%
15	Vitamins & Supplements	7	2%	\$21,688.5	2%

Rank	Category	# of Brands	% of total brands	Category \$\$\$ (000)	% of total spend
16	Gaming	6	2%	\$9,694.9	1%
17	Fitness	6	2%	\$4,718.1	0%
18	Home Furnishing	6	2%	\$5,638.5	0%
19	Pet Care	5	2%	\$7,670.9	1%
20	Cybersecurity	5	2%	\$11,531.9	1%
21	Cleaning & Sanitizing	5	2%	\$25,825.8	2%
22	Beverages	5	2%	\$12,038.9	1%
23	Organizations	5	2%	\$9,060.3	1%
24	Jewelry	5	2%	\$952.2	0%
25	Online Banking	4	1%	\$19,466.1	1%
26	Snacks	4	1%	\$13,721.1	1%
27	Online Education	4	1%	\$2,507.5	0%
28	Food Delivery	4	1%	\$26,760.5	2%
29	Streaming Services	4	1%	\$265,929.0	20%
30	Home Improvement	4	1%	\$2,034.4	0%
30 Category Total		247	78%	\$1,194.8 MM	90%

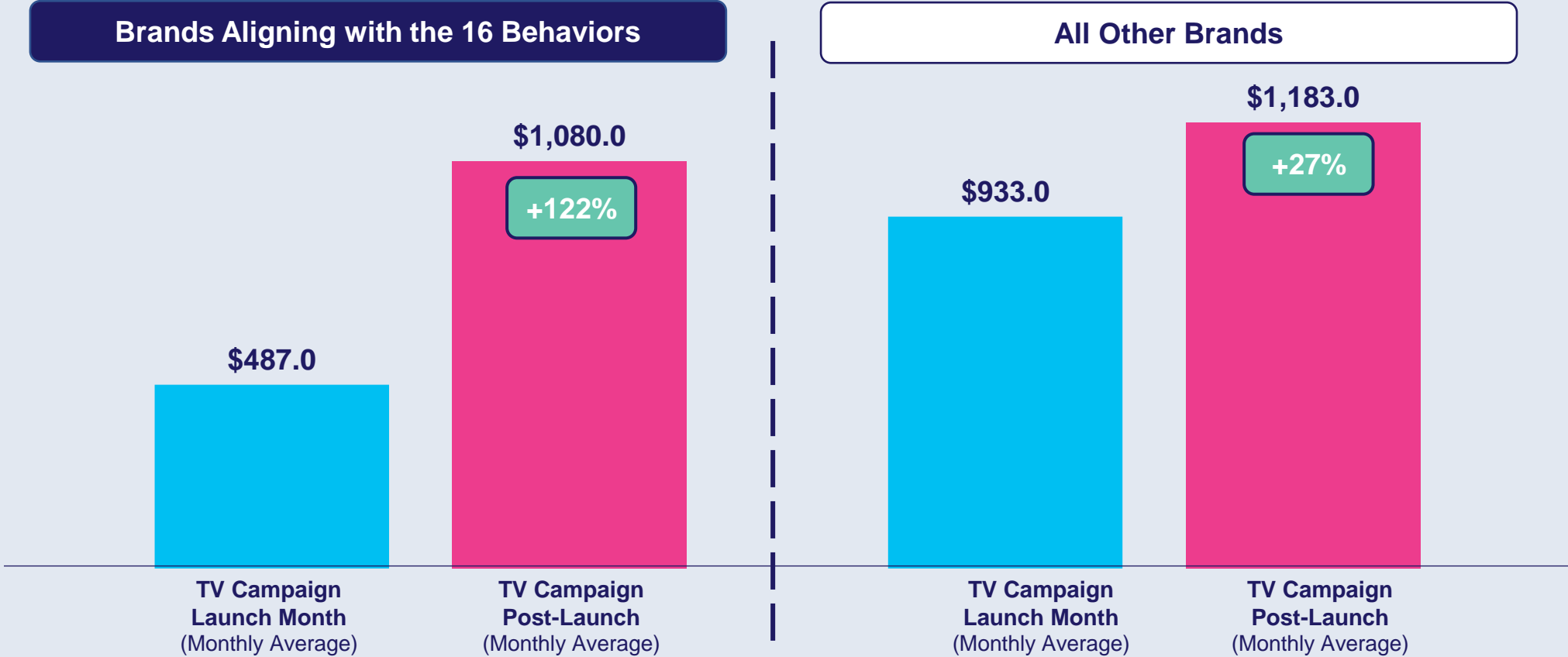
 =categories highlighted align, and are serving, at least one of the 16 consumer behaviors outlined previously

Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-12/31/21. 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. 21 out of the 30 top categories align with the 16 evolving consumer behaviors, accounting for 71% of brands and 58% of spend within those categories.

The 'behavior'-driven brands increased their investment dramatically following their TV launch after seeing positive outcomes and the opportunity to further grow their customer base and market share

2021 New Advertisers Average National TV Spend: Launch Month vs. Post-Launch Month

Monthly Average (000)



Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-12/31/21. 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.

Key Takeaways For Marketing Plans



The lingering effects of COVID influence consumer behavior

These changed behaviors have resulted in new products and categories entering the marketplace, along with a swell of new advertising spend.



Advertisers Are Using TV to Drive Awareness & Recognition

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 a Valuable Platform for Brands of All Kinds

Looking to introduce their brand to the world, a wide swath of unique categories with different brand personalities, business models and life stages across a variety of consumer audiences have turned to TV to grow.



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.'

Jason Wiese

SVP, Director of Strategic Insights
jasonw@thevab.com

Leah Montner-Dixon

Associate Insights Director
leahm@thevab.com

Karolina Guillen

Insights Manager
karolinag@thevab.com

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[Click here for the full list](#) of 2021 new national TV advertisers by brand spend

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The Secret of My Success
Examining The Winning Marketing Strategy That's Fueling High-Growth DTC Brands



Welcome to TV: 1H '21
Meet the New Advertisers and See How Categories Are Evolving Due To Consumer Demand



Welcome to TV: FY 2020
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.



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.**

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2021 New National TV Advertiser Lists



New Advertiser List: The national TV marketplace enabled these 315 bold new advertisers across categories and budget levels to increase reach and relevancy

2021 New National TV Advertisers

Brands	\$\$\$ (000)	Brands	\$\$\$ (000)	Brands	\$\$\$ (000)	Brands	\$\$\$ (000)	Brands	\$\$\$ (000)	Brands	\$\$\$ (000)	Brands	\$\$\$ (000)
Paramount+ Streaming	\$178,920.3	Colliders Pudding	\$5,389.1	OppLoans	\$2,310.4	Clime	\$1,312.9	Owning	\$738.8	Women at Large	\$447.6	ITA Restructuring	\$255.8
Prende Streaming	\$84,665.4	Make Golf Your Thing	\$4,968.6	WorldRemit	\$2,249.9	Mass General Brigham	\$1,244.9	Uncommon Goods	\$733.7	Brigit	\$443.1	Favor	\$247.3
Anhelio Insurance	\$57,554.0	Sophos	\$4,891.1	Tattooed Chef	\$2,167.7	19 Crimes	\$1,239.0	Underdog Fantasy	\$726.3	MoneyLion	\$431.4	Harvest Hosts	\$246.0
Ingrezza RX	\$57,119.5	Fundrise	\$4,736.2	IdentityIQ	\$2,144.0	Red Pocket	\$1,218.6	Picnic Tax	\$718.1	Cointreau	\$428.0	Oxygen	\$245.0
Breztri RX	\$50,818.1	Cape Cod Chips	\$4,615.4	Ruggable	\$2,120.5	Capsule	\$1,203.2	Zebit	\$709.0	Omigo	\$427.7	SmartMatch	\$244.1
Kesimpta RX	\$49,560.9	Josh Cellars Wine	\$4,608.6	Cashman Casino	\$2,114.5	M1 Finance	\$1,182.9	Afterpay	\$695.5	Motorsport Games	\$419.6	Owlet	\$241.9
Crypto.com	\$46,856.0	Worthy	\$4,605.3	Paw.com	\$2,054.8	Ergatta	\$1,163.6	JD Sports	\$694.9	Skylar	\$408.4	Watch Gang	\$241.2
Sunosi RX	\$45,024.5	Zoa Energy	\$4,576.7	Merge Mansion	\$2,052.7	Pretzel Crisps	\$1,143.9	Carewell	\$683.6	Blossom	\$406.2	Posh Virtual Receptionist	\$240.7
Austedo RX	\$39,764.9	Impossible Meat	\$4,281.5	EveryPlate	\$1,993.9	Climate Power	\$1,143.7	HolaDoctor	\$682.8	Sera Labs	\$397.0	Picsart	\$239.9
Canva	\$34,871.5	Workhuman	\$4,217.1	Send A Cake	\$1,929.8	MYXfitness	\$1,088.2	Ezra Brooks	\$672.7	AllTrails	\$392.5	Cozy Earth Bedding	\$236.0
Cabenuva	\$33,346.8	Lighthouse Life	\$4,124.6	PMD Beauty	\$1,885.8	WOW Skin	\$1,054.2	SRS Distribution	\$666.0	Arculus	\$386.6	Biz2Credit	\$234.3
FTX	\$31,026.6	Pixicade	\$4,121.1	Everythingbreaks	\$1,882.7	Capital	\$1,047.0	TripAmigo	\$650.7	Simplehuman	\$376.3	Acce Mezcacal	\$232.4
Oura	\$30,462.0	Ox Car Care	\$3,965.1	True Classic	\$1,860.2	Open Farm	\$1,036.1	iTrustCapital	\$633.4	PeopleSmart	\$375.1	Chroma Gro	\$232.3
Allbirds	\$24,857.5	Bespoke Post	\$3,926.8	American Edge Project	\$1,847.9	JES Home	\$1,036.1	Good Sports	\$622.7	Womply	\$370.0	Intelliloan	\$224.1
9 Elements	\$18,954.6	Solo Stove	\$3,859.9	Zeposia	\$1,806.7	Instant Beauty 60	\$1,026.8	Bartesian	\$620.4	AnyTask	\$364.6	Gorjana	\$223.7
Imbruvica RX	\$18,426.9	House of Fun	\$3,845.6	Aon Consulting	\$1,795.9	Hammacher Schlemmer	\$1,018.7	Pureboost	\$612.5	Pair Eyewear	\$362.5	Algorand	\$219.4
Instacart	\$16,959.4	BBQGuys	\$3,812.2	Ripple Foods	\$1,783.6	Swift Premium Meats	\$993.1	Good American	\$609.4	Global Medical Response	\$359.1	Yumi	\$215.8
Vazalore	\$14,844.0	GEHA	\$3,792.0	Smith Law Firm	\$1,727.9	Voss	\$976.2	Zesty Paws	\$601.5	Tickpick	\$358.2	ILIA	\$211.1
Lume	\$13,245.6	Disability Help Today	\$3,579.9	Frank	\$1,722.2	Zhou Nutrition	\$962.2	Hot Shot	\$598.3	ABM Industries	\$353.7	Wiha Tools	\$207.5
GO2bank	\$12,547.9	BinaxNOW In-home Test	\$3,553.6	Horizon Fitness	\$1,718.5	Viktor&Rolf	\$958.2	Gourmia	\$587.7	Gallagher Law Group	\$345.3	Top Eleven App	\$206.9
Nervive	\$11,819.8	Thayers	\$3,468.7	Waystar	\$1,714.4	CNN+	\$940.2	Wondrium	\$585.0	Savage X Fenty	\$338.8	Criquet	\$201.3
LoopNet	\$11,555.3	Embark	\$3,456.7	Glossier	\$1,694.7	Cacti Hard Seltzer	\$919.2	Vault	\$580.2	Pegasystems	\$336.7	EY-Parthenon	\$200.8
Phexxi	\$10,893.8	DermaGEEK	\$3,358.9	Charlotte Tilbury	\$1,658.9	Udemy	\$918.2	BOOM! by Cindy Joseph	\$561.3	Augustinus Bader	\$328.5	Steven Singer Jewelry	\$200.3
International Well Building	\$10,192.6	Trust & Will	\$3,313.5	Pendulum	\$1,505.7	American Financing Mortgage	\$885.1	Life Care Insurance	\$531.7	Public Rec	\$321.5	Fancy Sprinkles	\$199.7
Cerebral	\$10,028.5	EverMerge	\$3,096.4	Cue Health	\$1,501.7	BYJU'S	\$883.3	Upgrade	\$523.5	Altervy	\$319.3	Coin Cloud	\$195.2
Horizon Pharma	\$9,404.7	ClearMatch	\$3,075.0	Bumper	\$1,487.5	Lucyvd	\$877.0	Stage 6 Films	\$522.8	CrossCountry Mortgage	\$318.2	Pipette Health	\$192.4
Talenti	\$8,973.2	TransPerfect	\$3,011.4	Birthdate	\$1,485.7	Yasso	\$864.5	Halo Pets	\$521.8	Resistance C Vitamins	\$318.1	Angelinos Coffee	\$191.9
Calibrate	\$8,573.4	Applaydu App	\$2,971.5	Compeed	\$1,484.1	Tracksmith	\$841.6	Vincero	\$515.2	Quiver Distribution	\$307.9	One Medical	\$189.4
Upsie	\$8,083.9	Cybereason	\$2,969.8	Flamingo	\$1,459.0	Keen	\$822.7	Sentry Legal	\$514.0	Belpointe Oz	\$307.0	AAPC	\$188.8
OLukai	\$7,429.0	Magic Spoon	\$2,913.9	Social Media Victims Law Center	\$1,443.0	Skims	\$819.4	BlendJet	\$513.8	mdINR	\$296.2	Laird Superfood	\$185.8
Therabody	\$6,886.3	Lone River Beverage Company	\$2,866.1	UrbanStems	\$1,432.3	Insurify	\$816.2	Molekule	\$512.0	Cookie Run: Kingdom	\$293.2	Supernatural	\$183.6
Bingo Blitz App	\$6,774.9	Deloitte US Open AR App	\$2,865.0	Hotel Spa	\$1,431.7	Fridababy	\$809.0	D&D Moving	\$503.8	247Sports	\$293.1	LiquidAgents Healthcare	\$179.6
Shift4Shop	\$6,369.0	Milk Bar	\$2,850.2	Outer	\$1,411.5	Cirkul	\$794.1	Sofia & Grace	\$501.2	Osprey Funds	\$291.8	StaffDNA	\$179.6
Athletic Greens	\$6,314.0	Lemonade Insurance	\$2,833.3	ALLBLK Streaming	\$1,403.1	Cosori	\$788.0	Rue La La	\$497.0	Red Volcano	\$287.2	Origin In-home Test	\$176.0
Varo	\$6,241.8	PrizePicks	\$2,790.4	Malwarebytes	\$1,385.8	Sheertex	\$782.1	Working For Women	\$477.3	Hibbett	\$287.2	GETTR	\$171.5
Victims Justice Group	\$6,087.0	White Heart Legal	\$2,770.0	Deuda Cero	\$1,381.8	Great American Home Store	\$762.9	Inside Furniture	\$466.2	Jambys	\$281.0	Corkcicle	\$169.9
Slice App	\$5,877.4	Pikmin	\$2,730.5	All-Pro Passer	\$1,377.0	Southwind Carpet	\$761.3	Nitya Capital	\$459.0	Alvin Ailey American Dance Theater	\$279.5	Nice & Bella	\$169.1
Polestar	\$5,876.1	Stuffed Puffs	\$2,572.8	Hive	\$1,367.9	Sofa City	\$760.7	Lovepop	\$455.3	Cincoro	\$277.4	Chapter Medicare	\$169.0
Mrs. Meyer's	\$5,839.2	Senior Angel	\$2,553.7	Dairyland Insurance	\$1,366.0	True Botanicals	\$759.0	Legacy Quote Insurance	\$455.1	Nexans	\$263.3	M. Asam	\$168.2
Oatly	\$5,500.0	Biberk Insurance	\$2,456.3	Ten-X	\$1,350.7	Olive & June	\$751.1	Hip Optical	\$448.8	DailyPav	\$258.3	Bob Hurley RV Dealership	\$168.1

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, 1/1/21-12/31/21. 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 DTC segment continues to drive new entrants with 132 brands across 52 categories, spending over \$570 million

2021 New National TV DTC Advertisers

Brands	Categories	\$\$\$ (000)	Brands	Categories	\$\$\$ (000)	Brands	Categories	\$\$\$ (000)	Brands	Categories	\$\$\$ (000)
Paramount+ Streaming	Streaming Services	\$178,920.3	Lemonade Insurance	Insurance	\$2,833.3	Insurify	Insurance	\$816.2	Tickpick	Mobile Tickets	\$358.2
Crypto.com	Crypto	\$46,856.0	PrizePicks	Online Betting	\$2,790.4	Fridababy	Personal Care	\$809.0	Savage X Fenty	Apparel & Accessories	\$338.8
Canva	Graphic Design	\$34,871.5	Pikmin	Gaming	\$2,730.5	Sheertex	Apparel & Accessories	\$782.1	Pegasystems	Professional Services	\$336.7
FTX	Crypto	\$31,026.6	WorldRemit	Financial Services	\$2,249.9	Owning	Financial Services	\$738.8	Alteryx	Computer Software	\$319.3
Allbirds	Apparel & Accessories	\$24,857.5	IdentityIQ	Cybersecurity	\$2,144.0	Uncommon Goods	Gifts	\$733.7	Quiver Distribution	Film Production	\$307.9
Instacart	Food Delivery	\$16,959.4	Ruggable	Home Furnishing	\$2,120.5	Underdog Fantasy	Gaming	\$726.3	Cookie Run: Kingdom	Mobile Apps	\$293.2
Lume	Personal Care	\$13,245.6	Cashman Casino	Mobile Apps	\$2,114.5	Zebit	Marketplace	\$709.0	Osprey Funds	Financial Services	\$291.8
GO2bank	Online Banking	\$12,547.9	Merge Mansion	Gaming	\$2,052.7	Afterpay	Financial Services	\$695.5	Favor	Personal Care	\$247.3
Nervive	Vitamins & Supplements	\$11,819.8	EveryPlate	Food Delivery	\$1,993.9	Carewell	Personal Care	\$683.6	SmartMatch	Insurance	\$244.1
Cerebral	Telemedicine	\$10,028.5	Send A Cake	Food Delivery	\$1,929.8	TripAmigo	Travel	\$650.7	Owlet	Health & Wellness	\$241.9
Talent	Food (misc)	\$8,973.2	True Classic	Apparel & Accessories	\$1,860.2	iTrustCapital	Crypto	\$633.4	Picsart	Mobile Apps	\$239.9
Upsie	Insurance	\$8,083.9	Frank	Social Network	\$1,722.2	Bartesian	Home	\$620.4	Biz2Credit	Financial Services	\$234.3
Therabody	Health & Wellness	\$6,886.3	Waystar	Financial Services	\$1,714.4	Good American	Apparel & Accessories	\$609.4	Chroma Gro	Plant Care	\$232.3
Bingo Blitz App	Mobile Apps	\$6,774.9	Glossier	Skincare & Beauty	\$1,694.7	Zesty Paws	Pet Care	\$601.5	Gorjana	Jewelry	\$223.7
Athletic Greens	Vitamins & Supplements	\$6,314.0	Pendulum	Vitamins & Supplements	\$1,505.7	Wondrium	Online Education	\$585.0	Algorand	Crypto	\$219.4
Varo	Online Banking	\$6,241.8	Cue Health	At-Home Testing	\$1,501.7	Vault	Health & Wellness	\$580.2	Top Eleven App	Gaming	\$206.9
Slice App	Food Delivery	\$5,877.4	Bumper	Automotive	\$1,487.5	Upgrade	Financial Services	\$523.5	Coin Cloud	Crypto	\$195.2
Mrs. Meyer's	Cleaning & Sanitizing	\$5,839.2	Birthdate	Gifts	\$1,485.7	Vincero	Apparel & Accessories	\$515.2	Pipette Health	Personal Care	\$192.4
Make Golf Your Thing	Organizations	\$4,968.6	Flamingo	Personal Care	\$1,459.0	Sofia & Grace	Personal Care	\$501.2	Angelinos Coffee	Beverages	\$191.9
Fundrise	Financial Services	\$4,736.2	UrbanStems	Flower Delivery	\$1,432.3	Rue La La	Apparel & Accessories	\$497.0	One Medical	Health & Wellness	\$189.4
Josh Cellars Wine	Alcoholic Beverages	\$4,608.6	Outer	Home Furnishing	\$1,411.5	Lovepop	Gifts	\$455.3	Supernatural	Fitness	\$183.6
Worthy	Marketplace	\$4,605.3	ALLBLK Streaming	Streaming Services	\$1,403.1	Legacy Quote Insurance	Insurance	\$455.1	StaffDNA	Professional Services	\$179.6
Pixicade	Direct Response	\$4,121.1	Hive	Online Delivery	\$1,367.9	Hip Optical	Eyewear	\$448.8	GETTR	Social Network	\$171.5
Bespoke Post	Online Subscription Service	\$3,926.8	Clime	Weather	\$1,312.9	Brigit	Financial Services	\$443.1	Corkcicle	Drinkware	\$169.9
House of Fun	Gaming	\$3,845.6	Capsule	Online Delivery	\$1,203.2	MoneyLion	Online Banking	\$431.4	NakedWines	Alcohol Delivery	\$162.4
BinaxNOW In-home Test	At-Home Testing	\$3,553.6	MYXfitness	Fitness	\$1,088.2	Omigo	Home	\$427.7	Confide	Cybersecurity	\$141.1
Embark	Pet Care	\$3,456.7	Instant Beauty 60	Skincare & Beauty	\$1,026.8	Motorsport Games	Esports	\$419.6	Hello Bag	Home	\$137.4
EverMerge	Mobile Apps	\$3,096.4	Swift Premium Meats	Food (misc)	\$993.1	Skylar	Fragrances	\$408.4	Bitwise Investments	Crypto	\$129.6
Applaydu App	Mobile Apps	\$2,971.5	CNN+	Streaming Services	\$940.2	Blossom	Mobile Apps	\$406.2	Fair Harbor	Apparel & Accessories	\$119.6
Cybereason	Cybersecurity	\$2,969.8	Udemy	Online Education	\$918.2	AllTrails	Outdoor Recreation	\$392.5	Wolf & Badger	Jewelry	\$117.9
Magic Spoon	Food (misc)	\$2,913.9	BYJU'S	Online Education	\$883.3	Arculus	Crypto	\$386.6	Pixels	Home Furnishing	\$116.7
Deloitte US Open AR App	Mobile Apps	\$2,865.0	Tracksmith	Apparel & Accessories	\$841.6	AnyTask	Professional Services	\$364.6	Cuts Clothing	Apparel & Accessories	\$113.9
Milk Bar	Food (misc)	\$2,850.2	Keen	Psychic Readings	\$822.7	Pair Eyewear	Eyewear	\$362.5	Stir	Online Dating	\$101.9



DTC brands accounted for 42% of total new TV advertisers and 43% of total TV spend (vs. 2020: 42% of advertisers; 36% of spend)

Logos represent a sampling of new national TV DTC advertisers

Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-12/31/21. 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-related brands

2021 New National TV COVID-Related Advertisers

Brands	Category	Total Spend \$\$\$ (000)	Brands	Category	Total S\$\$ (000)	Brands	Category	Total Spend \$\$\$ (000)
Anhelo Insurance	Insurance	\$57,554.0	Outer	Home Furnishing	\$1,411.5	Resistance C Vitamins	Vitamins & Supplements	\$318.1
Oura	Health & Wellness	\$30,462.0	Hive	Online Delivery	\$1,367.9	mdINR	At-Home Testing	\$296.2
Allbirds	Apparel & Accessories	\$24,857.5	Ten-X	Real Estate	\$1,350.7	Harvest Hosts	Travel	\$246.0
9 Elements	Cleaning & Sanitizing	\$18,954.6	Mass General Brigham	Hospitals	\$1,244.9	Oxygen	Online Banking	\$245.0
GO2bank	Online Banking	\$12,547.9	MYXfitness	Fitness	\$1,088.2	SmartMatch	Insurance	\$244.1
LoopNet	Real Estate	\$11,555.3	American Financing Mortgage	Financial Services	\$885.1	Chroma Gro	Plant Care	\$232.3
International Well Building	Professional Services	\$10,192.6	BYJU'S	Online Education	\$883.3	Intelliloan	Financial Services	\$224.1
Cerebral	Telemedicine	\$10,028.5	Tracksmith	Apparel & Accessories	\$841.6	Wiha Tools	Tools	\$207.5
Calibrate	Health & Wellness	\$8,573.4	Skims	Apparel & Accessories	\$819.4	Top Eleven App	Gaming	\$206.9
Therabody	Health & Wellness	\$6,886.3	Sofa City	Home Furnishing	\$760.7	Angelinos Coffee	Beverages	\$191.9
Shift4Shop	Financial Services	\$6,369.0	Zebit	Marketplace	\$709.0	One Medical	Health & Wellness	\$189.4
Varo	Online Banking	\$6,241.8	Afterpay	Financial Services	\$695.5	AAPC	Professional Services	\$188.8
Slice App	Food Delivery	\$5,877.4	Vault	Health & Wellness	\$580.2	StaffDNA	Professional Services	\$179.6
Mrs. Meyer's	Cleaning & Sanitizing	\$5,839.2	Life Care Insurance	Insurance	\$531.7	Origin In-home Test	At-Home Testing	\$176.0
Workhuman	Professional Services	\$4,217.1	Sentry Legal	Legal Services	\$514.0	Bob Hurley RV Dealership	Travel	\$168.1
BBQGuys	Home	\$3,812.2	Molekule	Cleaning & Sanitizing	\$512.0	SurelyWell	Cleaning & Sanitizing	\$166.3
BinaxNOW In-home Test	At-Home Testing	\$3,553.6	D&D Moving	Moving & Storage	\$503.8	NakedWines	Alcohol Delivery	\$162.4
Trust & Will	Legal Services	\$3,313.5	Inside Furniture	Home Furnishing	\$466.2	Standard Process Nutrition	Vitamins & Supplements	\$156.3
ClearMatch	Insurance	\$3,075.0	Legacy Quote Insurance	Insurance	\$455.1	Carequiz	Insurance	\$152.9
White Heart Legal	Legal Services	\$2,770.0	Hip Optical	Eyewear	\$448.8	PeopleReady	Professional Services	\$145.0
WorldRemit	Financial Services	\$2,249.9	MoneyLion	Online Banking	\$431.4	Roccat	Gaming	\$132.8
EveryPlate	Food Delivery	\$1,993.9	Sera Labs	Health & Wellness	\$397.0	SwitchUp	Online Education	\$121.0
Horizon Fitness	Fitness	\$1,718.5	AllTrails	Outdoor Recreation	\$392.5	Pixels	Home Furnishing	\$116.7
Waystar	Financial Services	\$1,714.4	Simplehuman	Home	\$376.3	Jet Academy	Fitness	\$116.7
Cue Health	At-Home Testing	\$1,501.7	AnyTask	Professional Services	\$364.6	True Hardwoods	Home	\$112.4
UrbanStems	Flower Delivery	\$1,432.3	Pair Eyewear	Eyewear	\$362.5	Weslend	Financial Services	\$109.5
Hotel Spa	Home	\$1,431.7	ABM Industries	Cleaning & Sanitizing	\$353.7			

Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-12/31/21. 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 related brands

2021 New National TV Non-COVID Related Advertisers

Brands	Category	Total Spend \$\$\$ (000)	Brands	Category	Total Spend \$\$\$ (000)	Brands	Category	Total Spend \$\$\$ (000)	Brands	Category	Total Spend \$\$\$ (000)
Paramount+ Streaming	Streaming Services	\$178,920.3	Worthy	Marketplace	\$4,605.3	Cashman Casino	Mobile Apps	\$2,114.5	Pretzel Crisps	Snacks	\$1,143.9
Prende Streaming	Streaming Services	\$84,665.4	Zoa Energy	Beverages	\$4,576.7	Paw.com	Pet Care	\$2,054.8	Climate Power	Organizations	\$1,143.7
Ingrezza RX	Pharmaceutical	\$57,119.5	Impossible Meat	Plant-Based Food	\$4,281.5	Merge Mansion	Gaming	\$2,052.7	WOW Skin	Skincare & Beauty	\$1,054.2
Breztri RX	Pharmaceutical	\$50,818.1	Lighthouse Life	Financial Services	\$4,124.6	Send A Cake	Food Delivery	\$1,929.8	ICapital	Financial Services	\$1,047.0
Kesimpta RX	Pharmaceutical	\$49,560.9	Pixicade	Direct Response	\$4,121.1	PMD Beauty	Skincare & Beauty	\$1,885.8	Open Farm	Pet Care	\$1,036.1
Crypto.com	Crypto	\$46,856.0	Ox Car Care	Insurance	\$3,965.1	Everythingbreaks	Insurance	\$1,882.7	JES Home	Home Improvement	\$1,036.1
Sunosi RX	Pharmaceutical	\$45,024.5	Bespoke Post	Online Subscription Service	\$3,926.8	True Classic	Apparel & Accessories	\$1,860.2	Instant Beauty 60	Skincare & Beauty	\$1,026.8
Austedo RX	Pharmaceutical	\$39,764.9	Solo Stove	Home	\$3,859.9	American Edge Project	Organizations	\$1,847.9	Hammacher Schlemmer	Marketplace	\$1,018.7
Canva	Graphic Design	\$34,871.5	House of Fun	Gaming	\$3,845.6	Zeposia	Pharmaceutical	\$1,806.7	Swift Premium Meats	Food (misc)	\$993.1
Cabenuva	Pharmaceutical	\$33,346.8	GEHA	Insurance	\$3,792.0	Aon Consulting	Professional Services	\$1,795.9	Voss	Beverages	\$976.2
FTX	Crypto	\$31,026.6	Disability Help Today	Legal Services	\$3,579.9	Ripple Foods	Plant-Based Food	\$1,783.6	Zhou Nutrition	Vitamins & Supplements	\$962.2
Imbruvica RX	Pharmaceutical	\$18,426.9	Thayers	Skincare & Beauty	\$3,468.7	Smith Law Firm	Legal Services	\$1,727.9	Viktor&Rolf	Apparel & Accessories	\$958.2
Instacart	Food Delivery	\$16,959.4	Embark	Pet Care	\$3,456.7	Frank	Social Network	\$1,722.2	CNN+	Streaming Services	\$940.2
Vazalore	Pharmaceutical	\$14,844.0	DermaGEEK	Skincare & Beauty	\$3,358.9	Glossier	Skincare & Beauty	\$1,694.7	Cacti Hard Seltzer	Alcoholic Beverages	\$919.2
Lume	Personal Care	\$13,245.6	EverMerge	Mobile Apps	\$3,096.4	Charlotte Tilbury	Skincare & Beauty	\$1,658.9	Udemy	Online Education	\$918.2
Nervive	Vitamins & Supplements	\$11,819.8	TransPerfect	Translation Services	\$3,011.4	Pendulum	Vitamins & Supplements	\$1,505.7	Lucyd	Eyewear	\$877.0
Phexxi	Pharmaceutical	\$10,893.8	Applaydu App	Mobile Apps	\$2,971.5	Bumper	Automotive	\$1,487.5	Yasso	Food (misc)	\$864.5
Horizon Pharma	Pharmaceutical	\$9,404.7	Cyberreason	Cybersecurity	\$2,969.8	Birthdate	Gifts	\$1,485.7	Keen	Psychic Readings	\$822.7
Talenti	Food (misc)	\$8,973.2	Magic Spoon	Food (misc)	\$2,913.9	Compeed	Personal Care	\$1,484.1	Insurify	Insurance	\$816.2
Upsie	Insurance	\$8,083.9	Lone River Beverage Company	Alcoholic Beverages	\$2,866.1	Flamingo	Personal Care	\$1,459.0	Fridababy	Personal Care	\$809.0
Olukai	Apparel & Accessories	\$7,429.0	Deloitte US Open AR App	Mobile Apps	\$2,865.0	Social Media Victims Law Center	Legal Services	\$1,443.0	Cirkul	Beverages	\$794.1
Bingo Blitz App	Mobile Apps	\$6,774.9	Milk Bar	Food (misc)	\$2,850.2	ALLBLK Streaming	Streaming Services	\$1,403.1	Cosori	Home	\$788.0
Athletic Greens	Vitamins & Supplements	\$6,314.0	Lemonade Insurance	Insurance	\$2,833.3	Malwarebytes	Cybersecurity	\$1,385.8	Sheertex	Apparel & Accessories	\$782.1
Victims Justice Group	Legal Services	\$6,087.0	PrizePicks	Online Betting	\$2,790.4	Deuda Cero	Financial Services	\$1,381.8	Great American Home Store	Home Furnishing	\$762.9
Polestar	Automotive	\$5,876.1	Pikmin	Gaming	\$2,730.5	All-Pro Passer	Direct Response	\$1,377.0	Southwind Carpet	Home Improvement	\$761.3
Oatly	Beverages	\$5,500.0	Stuffed Puffs	Snacks	\$2,572.8	Dairyland Insurance	Insurance	\$1,366.0	True Botanicals	Skincare & Beauty	\$759.0
Colliders Pudding	Snacks	\$5,389.1	Senior Angel	Health & Wellness	\$2,553.7	Clime	Weather	\$1,312.9	Olive & June	Skincare & Beauty	\$751.1
Make Golf Your Thing	Organizations	\$4,968.6	Biberk Insurance	Insurance	\$2,456.3	19 Crimes	Alcoholic Beverages	\$1,239.0	Owning	Financial Services	\$738.8
Sophos	Cybersecurity	\$4,891.1	OppLoans	Financial Services	\$2,310.4	Red Pocket	Telecommunications	\$1,218.6	Uncommon Goods	Gifts	\$733.7
Fundrise	Financial Services	\$4,736.2	Tattooed Chef	Plant-Based Food	\$2,167.7	Capsule	Online Delivery	\$1,203.2	Underdog Fantasy	Gaming	\$726.3
Cape Cod Chips	Snacks	\$4,615.4	IdentityIQ	Cybersecurity	\$2,144.0	M1 Finance	Financial Services	\$1,182.9	Picnic Tax	Tax Services	\$718.1
Josh Cellars Wine	Alcoholic Beverages	\$4,608.6	Ruggable	Home Furnishing	\$2,120.5	Ergatta	Fitness	\$1,163.6	JD Sports	Apparel & Accessories	\$694.9

Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-12/31/21. 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 related brands *continued*

2021 New National TV Non-COVID Related Advertisers

Brands	Category	Total Spend \$\$\$ (000)	Brands	Category	Total Spend \$\$\$ (000)	Brands	Category	Total Spend \$\$\$ (000)	Brands	Category	Total Spend \$\$\$ (000)
Carewell	Personal Care	\$683.6	Arculus	Crypto	\$386.6	Acre Mezcal	Alcoholic Beverages	\$232.4	Bitwise Investments	Crypto	\$129.6
HolaDoctor	Health & Wellness	\$682.8	PeopleSmart	Professional Services	\$375.1	Gorjana	Jewelry	\$223.7	Glamnetic	Skincare & Beauty	\$127.8
Ezra Brooks	Alcoholic Beverages	\$672.7	Womply	Professional Services	\$370.0	Algorand	Crypto	\$219.4	Vertex	Tax Services	\$123.5
SRS Distribution	Contractor (B2B)	\$666.0	Global Medical Response	Medical Transportation	\$359.1	Yumi	Food (misc)	\$215.8	Fair Harbor	Apparel & Accessories	\$119.6
TripAmigo	Travel	\$650.7	Tickpick	Mobile Tickets	\$358.2	ILIA	Skincare & Beauty	\$211.1	Wolf & Badger	Jewelry	\$117.9
iTrustCapital	Crypto	\$633.4	Gallagher Law Group	Legal Services	\$345.3	Criquet	Apparel & Accessories	\$201.3	Cuts Clothing	Apparel & Accessories	\$113.9
Good Sports	Organizations	\$622.7	Savage X Fenty	Apparel & Accessories	\$338.8	EY-Parthenon	Professional Services	\$200.8	Undefeated	Apparel & Accessories	\$107.9
Bartesian	Home	\$620.4	Pegasystems	Professional Services	\$336.7	Steven Singer Jewelry	Jewelry	\$200.3	Epilog AI	Artificial Intelligence	\$106.3
Pureboost	Vitamins & Supplements	\$612.5	Augustinus Bader	Skincare & Beauty	\$328.5	Fancy Sprinkles	Sprinkles	\$199.7	Uleva	CBD Products	\$105.8
Good American	Apparel & Accessories	\$609.4	Public Rec	Apparel & Accessories	\$321.5	Coin Cloud	Crypto	\$195.2	Los Andes Homes	Home Improvement	\$104.3
Zesty Paws	Pet Care	\$601.5	Alteryx	Computer Software	\$319.3	Pipette Health	Personal Care	\$192.4	Stir	Online Dating	\$101.9
Hot Shot	Pest Control	\$598.3	CrossCountry Mortgage	Financial Services	\$318.2	Laird Superfood	Food (misc)	\$185.8			
Gourmia	Home	\$587.7	Quiver Distribution	Film Production	\$307.9	Supernatural	Fitness	\$183.6			
Wondrium	Online Education	\$585.0	Belpointe Oz	Financial Services	\$307.0	LiquidAgents Healthcare	Professional Services	\$179.6			
BOOM! by Cindy Joseph	Skincare & Beauty	\$561.3	Cookie Run: Kingdom	Mobile Apps	\$293.2	GETTR	Social Network	\$171.5			
Upgrade	Financial Services	\$523.5	247Sports	Sports Media	\$293.1	Corkcicle	Drinkware	\$169.9			
Stage 6 Films	Film Production	\$522.8	Osprey Funds	Financial Services	\$291.8	Nice & Bella	Jewelry	\$169.1			
Halo Pets	Pet Care	\$521.8	Red Volcano	Direct Response	\$287.2	Chapter Medicare	Insurance	\$169.0			
Vincero	Apparel & Accessories	\$515.2	Hibbett	Apparel & Accessories	\$287.2	M. Asam	Skincare & Beauty	\$168.2			
BlendJet	Home	\$513.8	Jambys	Apparel & Accessories	\$281.0	Scotch Porter	Personal Care	\$164.8			
Sofia & Grace	Personal Care	\$501.2	Alvin Ailey American Dance Theater	Entertainment	\$279.5	The Sexton Single Malt	Alcoholic Beverages	\$155.4			
Rue La La	Apparel & Accessories	\$497.0	Cincoro	Alcoholic Beverages	\$277.4	Weitzman & Powers	Legal Services	\$146.8			
Working For Women	Organizations	\$477.3	Nexans	Energy	\$263.3	Robin Law Firm	Legal Services	\$146.1			
Nitya Capital	Real Estate	\$459.0	DailyPay	Professional Services	\$258.3	Childress Vineyards	Alcoholic Beverages	\$143.2			
Lovepop	Gifts	\$455.3	ITA Restructuring	Legal Services	\$255.8	EasyKnock	Financial Services	\$142.2			
Women at Large	Fitness	\$447.6	Favor	Personal Care	\$247.3	TreviPay	Professional Services	\$141.5			
Brigit	Financial Services	\$443.1	Owlet	Health & Wellness	\$241.9	Confide	Cybersecurity	\$141.1			
Cointreau	Alcoholic Beverages	\$428.0	Watch Gang	Jewelry	\$241.2	Hello Bag	Home	\$137.4			
Omigo	Home	\$427.7	Posh Virtual Receptionist	Professional Services	\$240.7	Defy	Entertainment	\$136.9			
Motorsport Games	Esports	\$419.6	Picsart	Mobile Apps	\$239.9	Shapiro MD	Personal Care	\$135.6			
Skylar	Fragrances	\$408.4	Cozy Earth Bedding	Bedding	\$236.0	Pacific Bath	Home Improvement	\$132.8			
Blossom	Mobile Apps	\$406.2	Biz2Credit	Financial Services	\$234.3	Aptive	Pest Control	\$130.8			

Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-12/31/21. 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.

Full Year 2020 vs. 2021 New National TV Advertiser Categories: # of Brands & Ranked by Total \$\$\$

2020

Rank	Categories	# of Brands	Total Spend \$\$\$ (000)	Rank	Categories	# of Brands	Total Spend \$\$\$ (000)
1	Pharmaceutical	12	\$542,526.4	30	Kitchen	4	\$3,953.4
2	Streaming Service	9	\$249,776.9	31	Education	3	\$3,911.0
3	Vitamins & Supplements	12	\$39,610.5	32	Wallets	1	\$3,759.5
4	Beverages	6	\$38,172.0	33	At-Home Medical Testing	2	\$3,706.7
5	Skincare & Beauty	12	\$33,240.7	34	Legal Services	5	\$3,692.9
6	Financial Services	18	\$30,870.8	35	Real Estate	3	\$3,533.0
7	Pain Relief	3	\$30,678.9	36	Hearing Aids	1	\$3,244.4
8	Alcoholic Beverages	7	\$20,160.9	37	Technology	4	\$2,983.6
9	Apparel	9	\$20,118.7	38	Computer Software	7	\$2,763.2
10	Home Furnishing	8	\$19,727.5	39	Social Networking	1	\$2,608.3
11	Food	8	\$15,455.5	40	Pet Care	3	\$2,501.9
12	Moving & Storage	3	\$15,324.3	41	CBD Products	2	\$2,329.6
13	Insurance	9	\$14,414.7	42	Book Subscription	1	\$2,281.4
14	Medical Equipment	7	\$14,069.6	43	Cleaning Products	2	\$2,264.9
15	Telco	1	\$13,150.9	44	Transportation	3	\$2,233.4
16	Automotive	2	\$12,756.2	45	Golf	4	\$2,116.2
17	COVID-19 Related	11	\$12,353.2	46	Nutrition	4	\$1,966.4
18	Personal Care	13	\$12,171.4	47	Delivery	2	\$1,724.2
19	Business Services	13	\$11,966.9	48	Online Education	5	\$1,642.1
20	Fitness	8	\$11,405.5	49	Gifts	1	\$1,124.0
21	Healthcare	8	\$11,330.7	50	Online Dating	2	\$1,080.8
22	Jewelry	4	\$8,566.5	51	Fragrances	2	\$869.0
23	Security	3	\$7,596.0	52	Video Games	1	\$757.1
24	E-Commerce	2	\$6,387.4	53	Restaurant	3	\$577.0
25	Mobile App	9	\$6,091.4	54	Economic Development	1	\$484.2
26	Phone Accessories	2	\$6,028.5	55	Waste Management	1	\$447.5
27	Online Printing	1	\$5,493.9	56	Resorts	2	\$406.4
28	Sports Media	1	\$5,224.5	57	Online Gambling	1	\$337.6
29	Direct Response	8	\$4,581.9	58	Gold / Silver	2	\$312.8
Total		283	\$1,279,108.8				

2021

Rank	Category	# of Brands	Total Spend \$\$\$ (000)	Rank	Category	# of Brands	Total Spend \$\$\$ (000)
1	Pharmaceutical	11	\$331,010.8	38	Online Betting	1	\$2,790.4
2	Streaming Services	4	\$265,929.0	39	Gifts	3	\$2,674.7
3	Insurance	15	\$87,377.4	40	Online Delivery	2	\$2,571.1
4	Crypto	7	\$79,446.8	41	Online Education	4	\$2,507.5
5	Health & Wellness	9	\$50,566.6	42	Home Improvement	4	\$2,034.4
6	Apparel & Accessories	19	\$41,635.6	43	Social Network	2	\$1,893.7
7	Graphic Design	1	\$34,871.5	44	Eyewear	3	\$1,688.2
8	Financial Services	21	\$30,029.2	45	Flower Delivery	1	\$1,432.3
9	Food Delivery	4	\$26,760.5	46	Weather	1	\$1,312.9
10	Cleaning & Sanitizing	5	\$25,825.8	47	Hospitals	1	\$1,244.9
11	Vitamins & Supplements	7	\$21,688.5	48	Telecommunications	1	\$1,218.6
12	Legal Services	11	\$20,329.2	49	Travel	3	\$1,064.7
13	Online Banking	4	\$19,466.1	50	Jewelry	5	\$952.2
14	Professional Services	15	\$19,186.3	51	Tax Services	2	\$841.6
15	Personal Care	10	\$18,922.5	52	Film Production	2	\$830.7
16	Mobile Apps	8	\$18,761.6	53	Psychic Readings	1	\$822.7
17	Skincare & Beauty	14	\$17,055.0	54	Pest Control	2	\$729.1
18	Food (misc)	7	\$16,996.6	55	Contractor (B2B)	1	\$666.0
19	Snacks	4	\$13,721.1	56	Moving & Storage	1	\$503.8
20	Real Estate	3	\$13,365.0	57	Esports	1	\$419.6
21	Home	11	\$12,667.6	58	Entertainment	2	\$416.4
22	Beverages	5	\$12,038.9	59	Fragrances	1	\$408.4
23	Alcoholic Beverages	10	\$11,541.8	60	Outdoor Recreation	1	\$392.5
24	Cybersecurity	5	\$11,531.9	61	Medical Transportation	1	\$359.1
25	Telemedicine	1	\$10,028.5	62	Mobile Tickets	1	\$358.2
26	Gaming	6	\$9,694.9	63	Computer Software	1	\$319.3
27	Organizations	5	\$9,060.3	64	Sports Media	1	\$293.1
28	Plant-Based Food	3	\$8,232.8	65	Energy	1	\$263.3
29	Pet Care	5	\$7,670.9	66	Bedding	1	\$236.0
30	Automotive	2	\$7,363.6	67	Plant Care	1	\$232.3
31	Marketplace	3	\$6,333.1	68	Tools	1	\$207.5
32	Direct Response	3	\$5,785.2	69	Sprinkles	1	\$199.7
33	Home Furnishing	6	\$5,638.5	70	Drinkware	1	\$169.9
34	At-Home Testing	4	\$5,527.5	71	Alcohol Delivery	1	\$162.4
35	Fitness	6	\$4,718.1	72	Artificial Intelligence	1	\$106.3
36	Online Subscription Service	1	\$3,926.8	73	CBD Products	1	\$105.8
37	Translation Services	1	\$3,011.4	74	Online Dating	1	\$101.9
Total		315	\$1,320,247.9				

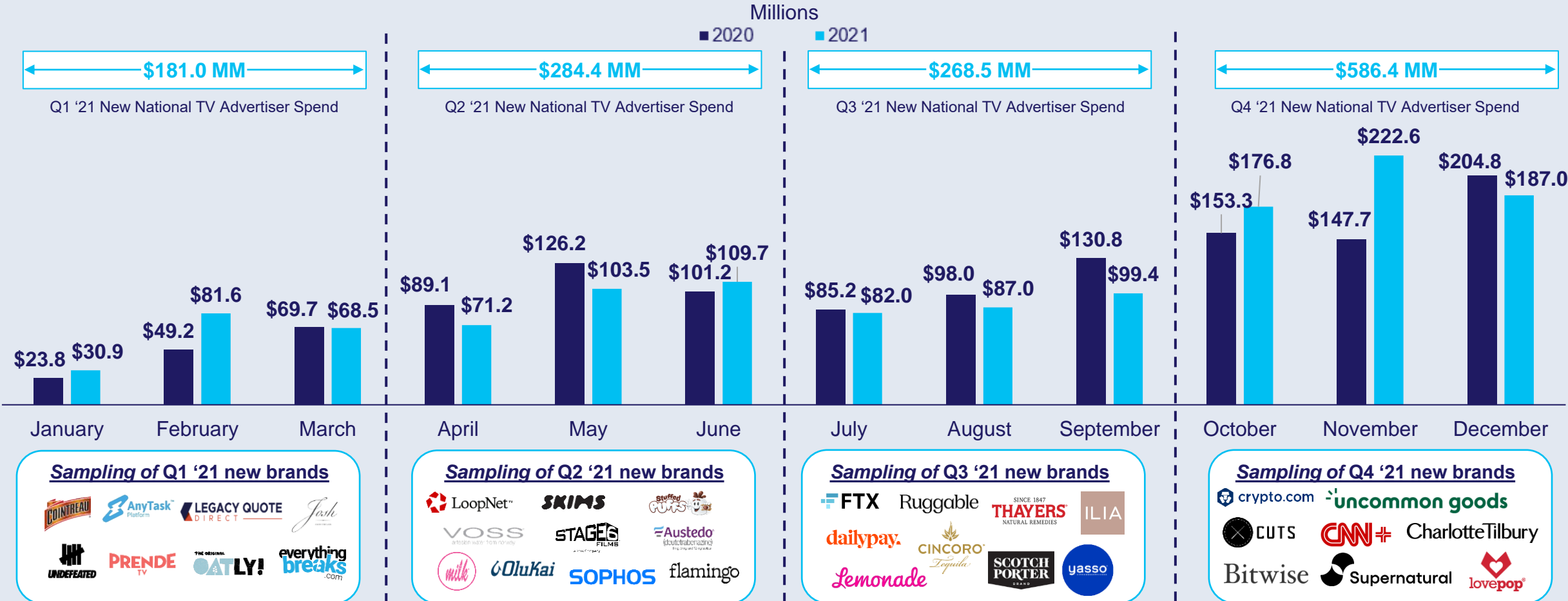
Source: VAB analysis of Nielsen Ad Intel data, 1/1/21-12/31/21. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100K. The above chart represents the full list of new advertisers, including direct-to-consumer brands.

Appendix



National TV spend was particularly heavy during November as advertisers connected with consumers who were looking forward to celebrating the holidays again with friends and family

2020 vs. 2021 New National TV Advertisers Monthly Spend



Source: VAB analysis of Nielsen Ad Intel data, 1/1/20-12/31/20 vs. 1/1/21-12/31/21. 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.