

## Fast Facts



What you need to know about new & emerging trends, platforms or technology

# Welcome to TV

Meet the New Advertisers Investing in Outcomes Amidst Economic Uncertainty

Full Year 2022 Update





## Despite a new wave of economic uncertainty in 2022, Television was resilient.

Under the threat of recession, first-time TV advertisers collectively invested **more** in the platform last year than any other time since we began this analysis four-years ago.

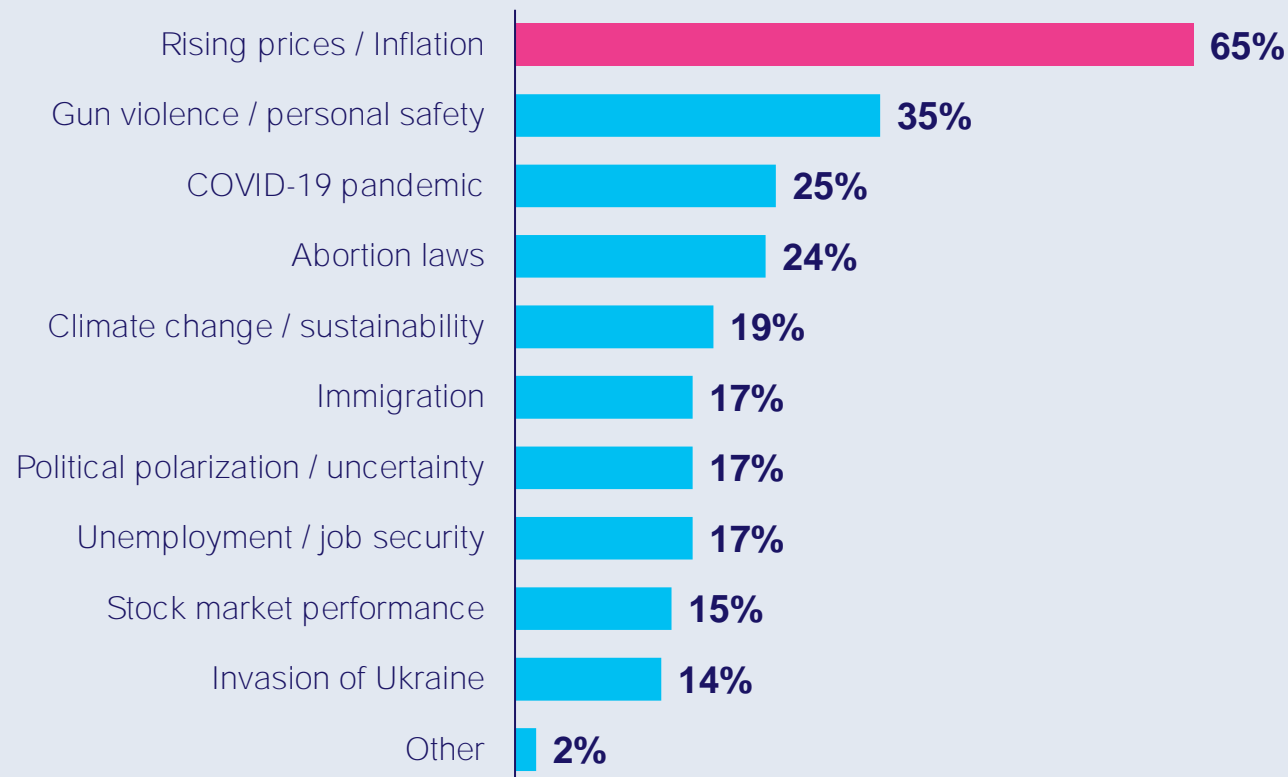
**Why are they turning to TV?** New advertisers are employing TV campaigns to deliver on an array of brand KPIs - from igniting awareness and establishing brand legitimacy to taking market share from category competitors.

**Who are the new spenders?** Due to inflationary pressures, most new advertisers are from categories that serve functional needs – pharma, financial, apparel, wellness, insurance – however, the variety of brands, including innovative leaders and digital-natives, shows the versatility of TV as an advertising platform.

1

# Inflation continued to be the top concern for consumers through 2022 - ranking above gun violence, the pandemic and abortion laws

## Top concerns for U.S. consumers\*

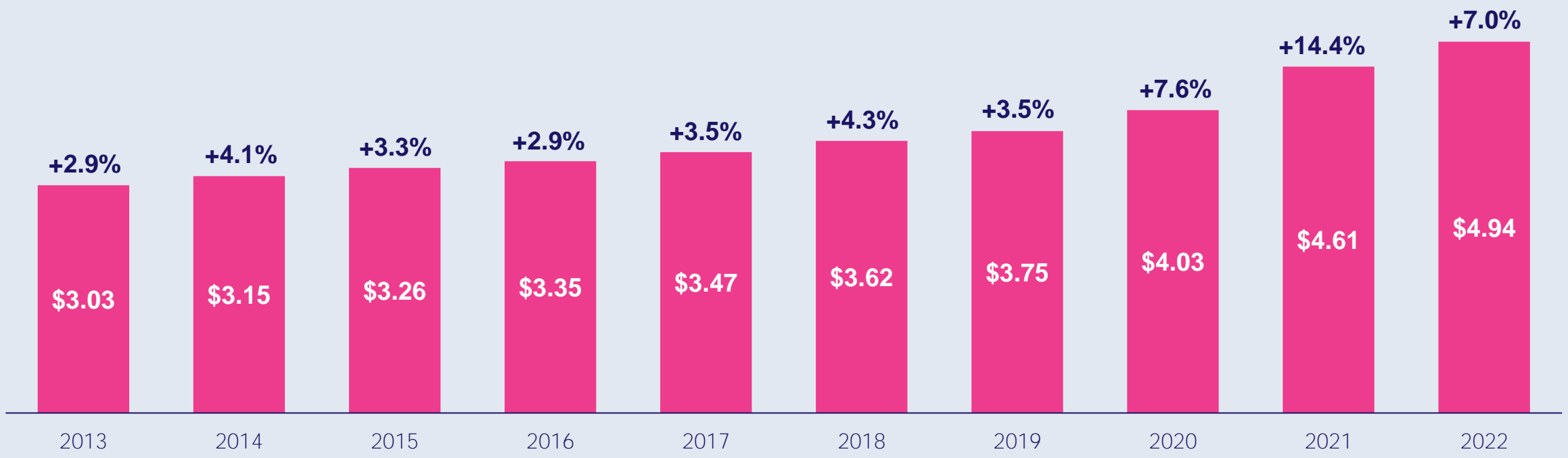


Source: McKinsey US Consumer Pulse survey. July 6-10, 2022; n=4,009, sampled and weighed to match the US general population 18+ years. \*Question: 'What are the greatest source(s) of concern for you right now? (choose as many as 3 from provided list of options).

# 2

## Despite inflation being a top concern, retail spend continues to increase as more consumers return to their pre-COVID lives and activities

Annual Retail Sales & YoY Growth  
Spend in Trillions



Source: National Retail Federation, *NRF Forecasts 2023 Retail Sales to Grow Between 4% and 6%*, March 29, 2023. 2013 – 2022 reflects NRF's analysis of U.S. Census data.

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



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

Kirk McDonald, CEO, GroupM North America

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



# 4

## Looking to stand out in a challenging economy, brands launched TV campaigns to grow awareness, build brand equity and excite consumers



“Now that the brand is more established, our goal is to reach a broader audience to showcase the benefits of Arlo’s smarter security solutions.”

Lily Knowles, Senior Vice President of Sales and Marketing, *Arlo*  
(MediaPost, 8/1/22)



“It’s important for us to find different channels to build brand awareness in a mass way... TV allows for us to get on the radar of those who may have not been familiar with our digital presence, especially as it gives us access to several different audiences and demographics.”

Nick Guillen, Co-Founder and Co-CEO, *Truff*  
(Ad Age, 9/30/22)



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

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



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

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



“This is our opportunity to share this amazing American brand with millions which has been rooted in our New England heritage and real-life versatility... and we’re excited for new customers to discover us.”

Bobby Ferrario, General Manager and CMO, *Orchard Brands*  
(Business Wire, 9/13/22)



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

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

# 5

## Several first-time advertisers also launched in high-profile TV events and created partnerships to generate brand recognition and legitimacy

**MediaPost**  
**Synergy HomeCare Launches First Effort Under New CMO**  
 Synergy HomeCare, a fast-growing national home care franchisor, is launching its first-ever TV campaign and the first effort under its new CMO.  
 August 3, 2022

**RESTAURANT BUSINESS**  
**Crumbl Cookies brings in Michael Buffer for its first broadcast campaign**  
 The cookie chain, facing a growing number of competitors, has released an ad featuring the famed announcer saying, "Let's get ready to Crumbl!"  
 October 17, 2022

**AdAge**  
**TRUFF**  
**HOT SAUCE BRAND TRUFF DEBUTS FIRST TV AD AFTER SOCIAL MEDIA SUCCESS**  
 The brand's first national ad seeks to introduce grocery shoppers not familiar with its digital story.  
 September 30, 2022

**AdAge**  
**wallbox**  
**EV CHARGING BRAND WALLBOX TO AIR ITS FIRST SUPER BOWL COMMERCIAL**  
 January 13, 2022

**FIERCE Pharma**  
**QUVIVIQ**  
**Idorsia taps more star power, enlisting actor Taye Diggs to pitch newly launched insomnia drug Quviviq**  
 May 27, 2022

**ad exchanger**  
**LIQUIDIV.**  
**Unilever Brand Liquid I.V. Takes Its First Steps Into TV, OTT, OOH And MMM**  
 August 3, 2022

**Forbes**  
**CUTWATER SPIRITS**  
**Cutwater Spirits Reveals First Ever National Super Bowl Commercial**  
 February 11, 2022

**Little Black Book Celebrating Creativity**  
**NORTHERN TOOL + EQUIPMENT**  
**Northern Tool Is a Problem Solvers Paradise in First US Campaign**  
 Northern Tool + Equipment, one of the US's leading retailers of high-quality tools and equipment, launches its first national campaign.  
 August 23, 2022

**Beer & Beyond**  
**Topo Chico**  
**Topo Chico Hard Seltzer goes national, introduces Ranch Water**  
 January 4, 2022

**MediaPost**  
**Gender Cool Project**  
**Nike Teams Up With GenderCool Project For Trans Positivity Campaign**  
 March 16, 2022

**Pet Business**  
**Stella & Chewy's**  
**Stella & Chewy's Launches National Campaign on Growth and Consumer Trends**  
 The new campaign embodies the raw, unfiltered love pet parents have for their pets, and how food, especially raw and natural food, plays a role in how pet parents show their love.  
 August 25, 2022

**Windpress**  
**APPLESEED'S**  
**Appleseed's Debuts in homes across the country with the first Television Campaign in the Brand's Over 75 Year History**  
 September 13, 2022

**AdAge**  
**WhatsApp**  
**WHATSAPP WARNS ABOUT MESSAGE PRIVACY IN FIRST U.S. CAMPAIGN**  
 The Meta-owned company promises security for app users.  
 January 28, 2022

**AutoRental NEWS**  
**SIXT**  
**Sixt Launches First National Marketing Campaign in U.S.**  
 December 7, 2022

**BOARDROOM**  
**NFL ALL DAY**  
**Patrick Mahomes-led Media Campaign Takes NFL All Day Worldwide**  
 August 18, 2022

# 6

## Leading-edge brands and digital-native companies are using TV to engage consumers and ignite trial of their products or services

*\*Click on any logo to visit their website*

### 'Younger-skewing' brands

Brands targeting younger audiences



### Innovative products

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



### Digital endemics

Brands specializing in digital services across a range of categories



Source: VAB analysis of Nielsen Ad Intel data as of 2/16/23, 1/1/22-12/31/22. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100K.

# 7

## New advertisers in functional categories that serve ‘everyday’ needs also seized opportunities to engage with inflation-wary consumers

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

Staying on top of their health in order to avoid pricier treatments, consumers are turning to both **healthcare & pharma** brands to aid in their ‘everyday concerns’



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



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



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



As economic challenges continue for consumers, more **organizations** focused on the advancements of energy resources, farming and employment are advertising on TV for the first time



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



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



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

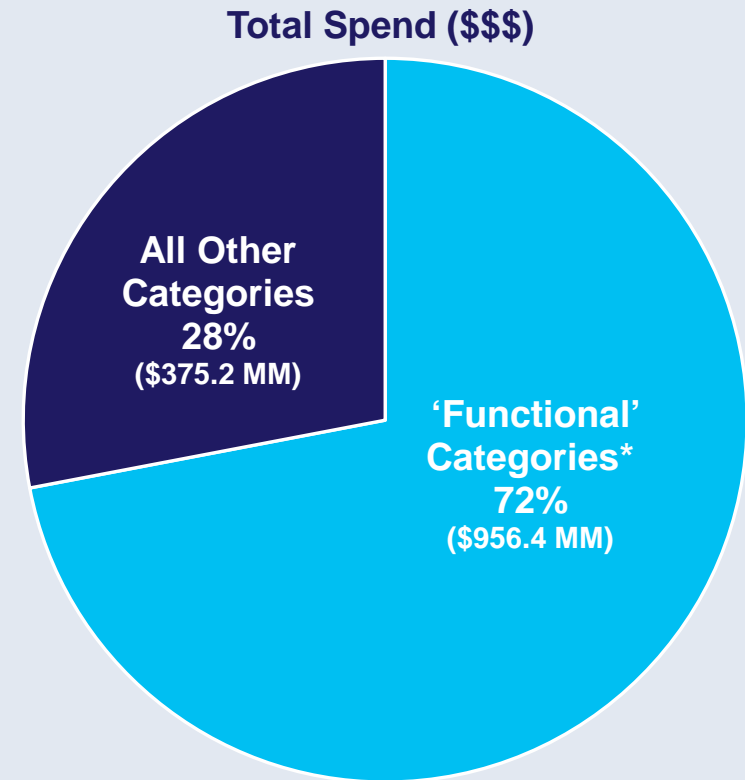
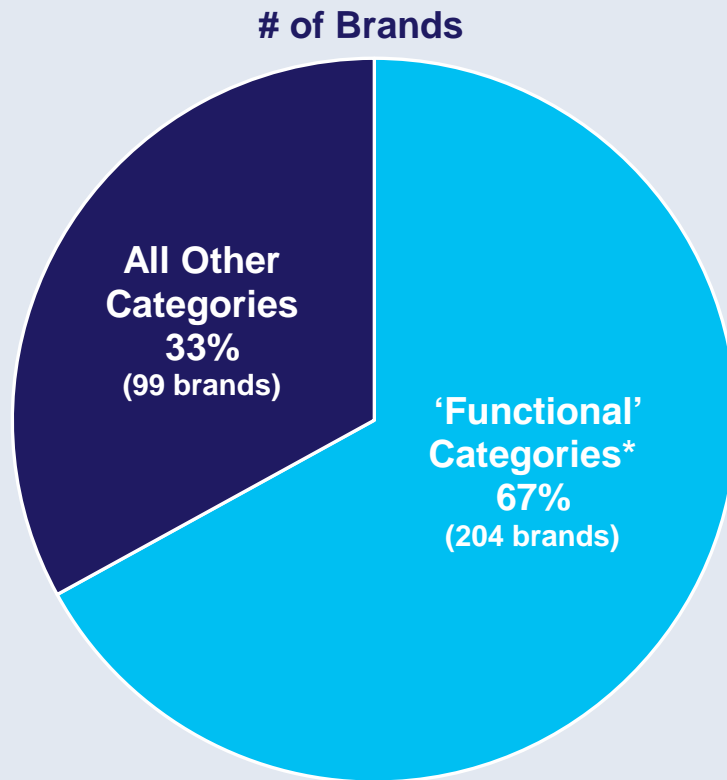


\*Click on any logo to visit their website

Source: VAB analysis of Nielsen Ad Intel data as of 2/16/23, 1/1/22-12/31/22. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100K.

# These functional categories were a driving force behind new entrants, accounting for almost \$1 billion of first-time TV advertiser investments

## 2022 New National TV Advertisers



Source: VAB analysis of Nielsen Ad Intel data as of 2/16/23, 1/1/22-12/31/22. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100K. \*Brands that align within at least one of the 'functional' categories (healthcare / pharma, insurance, financial services, professional services, organizations, apparel & accessories, fitness & wellness and 'lifestyle' brands that incorporate home furnishing, home improvement, education, alcohol beverages, food and travel).


# 9

## Overall, categories that serve ‘everyday’ needs for consumers took on a renewed importance in an uncertain economy with high inflation

2022 New National TV Advertisers: Top 20 Categories Ranked by Total Spend (including brands)

Rank	Category	# of Brands	% of total brands	Category \$\$\$ (000)	% of total spend
1	Pharmaceutical	24	14%	\$479,694.7	40%
2	Streaming Services	4	2%	\$140,767.3	12%
3	Insurance	9	5%	\$115,270.8	10%
4	Communications	2	1%	\$65,411.9	5%
5	Professional Services	9	5%	\$60,047.3	5%
6	Financial Services	19	11%	\$57,379.2	5%
7	Apparel & Accessories	17	10%	\$45,228.2	4%
8	Health & Wellness	10	6%	\$34,664.1	3%
9	Legal Services	17	10%	\$28,356.4	2%
10	Home Furnishing	8	5%	\$24,632.9	2%

Rank	Category	# of Brands	% of total brands	Category \$\$\$ (000)	% of total spend
11	Insecticides	1	1%	\$21,890.2	2%
12	Pet Care	5	3%	\$21,480.3	2%
13	Alcoholic Beverages	9	5%	\$16,646.3	1%
14	Beverages	1	1%	\$15,560.8	1%
15	Gaming	2	1%	\$15,440.9	1%
16	Medical Devices	6	4%	\$14,946.0	1%
17	Home	10	6%	\$13,965.5	1%
18	Fitness	5	3%	\$13,846.1	1%
19	Car Rental	1	1%	\$12,923.4	1%
20	Vitamins & Supplements	8	5%	\$12,715.1	1%
<b>Category Total</b>		<b>167</b>	<b>55%</b>	<b>\$1,210,867.1</b>	<b>91%</b>

 = categories highlighted align, and are serving, at least one of the functional behaviors (healthcare / pharma, insurance, financial services, professional services, organizations, apparel & accessories, fitness & wellness and 'lifestyle' brands that incorporate home furnishing, home improvement, education, alcohol beverages, food and travel).

Source: VAB analysis of Nielsen Ad Intel data as of 2/16/23, 1/1/22-12/31/22. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100K.

# 10

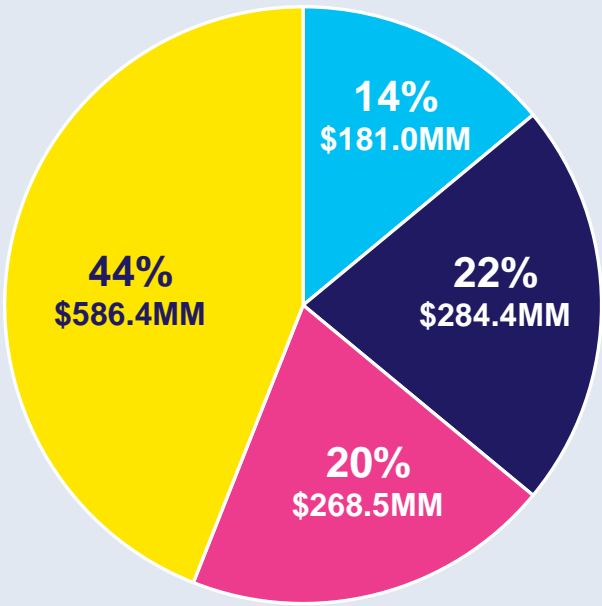
## Consumer optimism about heading ‘back to school,’ ‘back to work’ and early holiday planning drove a large increase in Q3 TV investment

▶ In 2022, over half (56%) of U.S. consumers were intending to start their holiday shopping in October (vs. 45% in 2021)\*

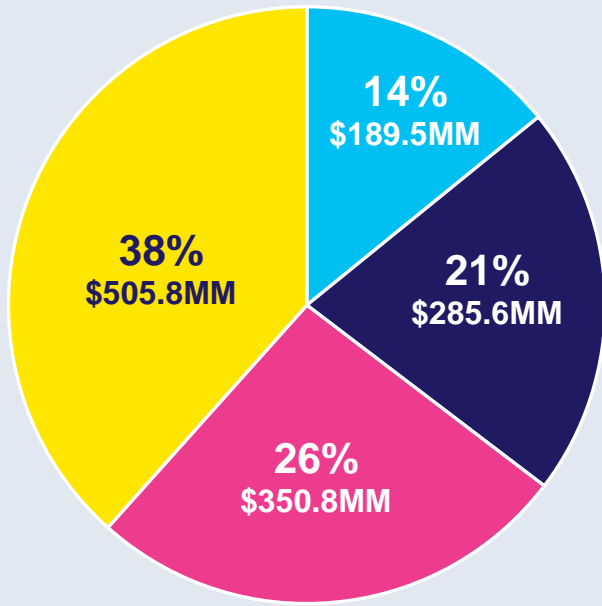
### New National TV Advertisers

Quarterly spend (MM)

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



**2022**  
Total \$\$\$: \$1,331.6 MM



Quarter	% difference in spend YOY
Q1	+5%
Q2	flat
Q3	+31%
Q4	-14%



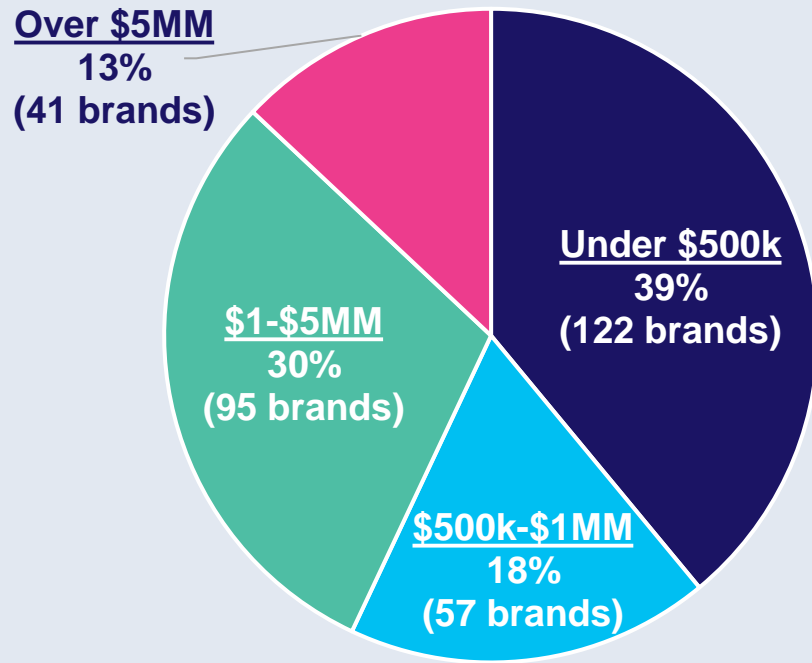
Source: VAB analysis of Nielsen Ad Intel data as of 2/16/23, 1/1/22-12/31/22. 2021 data based on VAB analysis of Nielsen Ad Intel Data, 1/1/21-12/31/21. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100K. \*Statista, Intended Holiday Shopping Timeline of U.S. Consumers, 1/12/23. Survey was fielded October 9-15, 2022, n=1,073 U.S. respondents.

# While some brands immediately ‘go big’ to support their products, more brands also began ‘testing’ TV to achieve their business KPIs

## New National TV Advertisers by Spend Segment

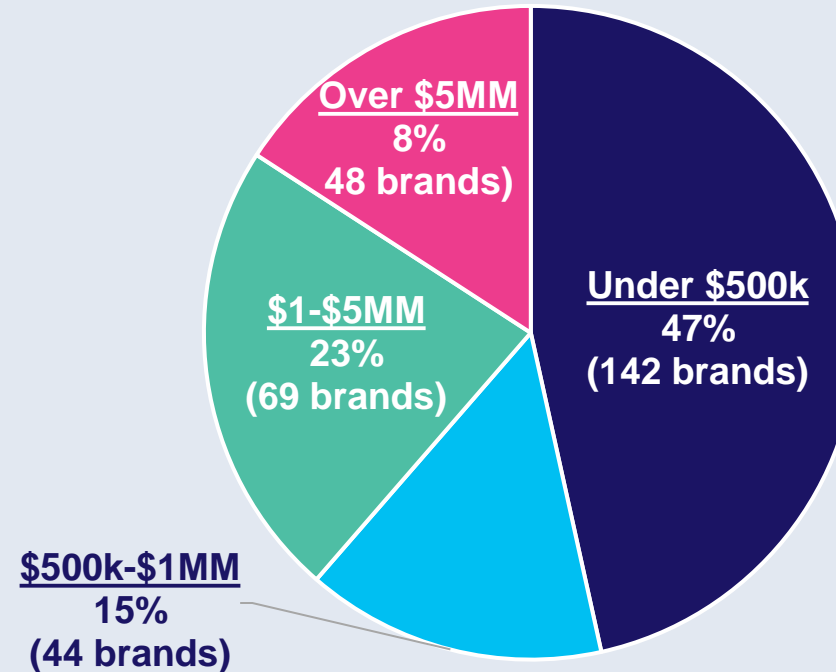
### 2021 New Entrants

% of Brands within Spend Buckets



### 2022 New Entrants

% of Brands within Spend Buckets



Source: VAB analysis of Nielsen Ad Intel data as of 2/16/23, 1/1/22-12/31/22. 2021 data based on 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.

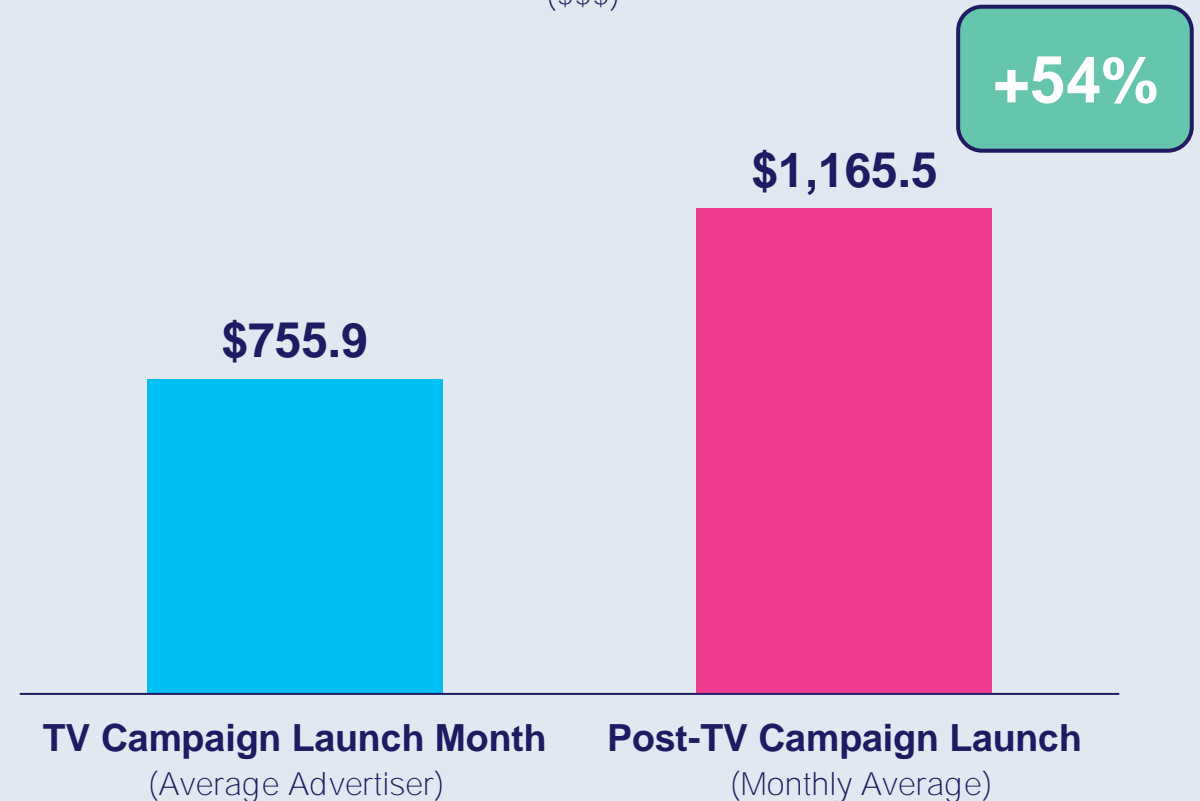
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# The success of their initial TV campaign activity leads new advertisers to increase their investment as brands battle for market share



## 2022 New Advertisers Average National TV Spend

Launch Month vs. Post-Launch  
(\$\$\$)



Source: VAB analysis of Nielsen Ad Intel data as of 2/16/23, 1/1/22-12/31/22. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100K.

# Key Marketer Takeaways

- ▶ The need for brands to maintain a relationship with its consumers is heightened in periods of economic uncertainty.
- ▶ Brands of all types – from digital innovators to those serving more functional consumer needs – create a competitive advantage for themselves by launching TV, using it to ignite awareness and build brand equity, recognition, legitimacy, excitement and trial.
- ▶ Brands are also aligning with high-profile TV events and creating partnerships to further stand out, drive greater relevancy and emotional engagement.
- ▶ The versatility of TV is a benefit to brands who find they can employ different go-to-market strategies depending upon their objectives and KPIs - **some ‘test and learn’ while others immediately ‘go big.’**
- ▶ Evidenced by their significant post-launch investment increase, many brands are seeing the early success of their campaigns.

# Creators

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Check out this related VAB content

**Through Upfront season, marketers are making important decisions about their video investment strategy.**

**We're here to help.**

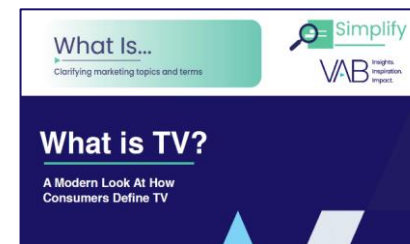
Visit our [Upfront Planning Resource Center](#) for a curated a list of resources filled with the data, analysis and insights needed to make informed investment decisions.



**25 Ways TV Grows Brands**  
Powering Performance Through Full-Funnel Business Outcomes



**You Oughta Know**  
Why All Impressions Aren't Created Equal & What it Means for Video Measurement



**What is TV?**  
A Modern Look At How Consumers Define TV



**Let's Get Down to Business**  
How Brand-Building Drives Outcomes for Innovative B2B Advertisers



**Under Pressure**  
6 marketing strategies to successfully navigate your brand through inflation



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Meet the Advertisers Seizing Opportunities During a New Wave of Uncertainty

**VAB Members, brand marketers and agencies get free and immediate access to VAB's content library. Get access at [theVAB.com](https://thevab.com)**

# About VAB

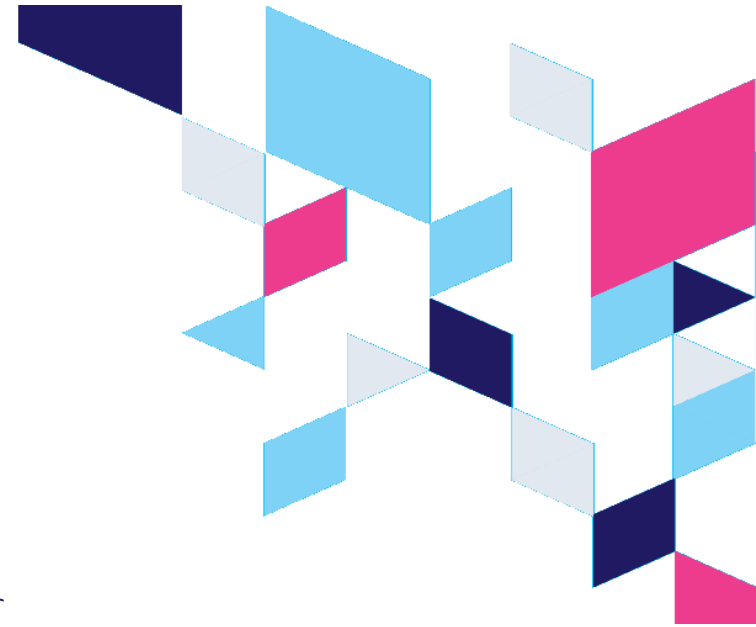
VAB is an insights-driven organization that inspires marketers to reimagine their media strategies resulting in fully informed decisions.

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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# 2022 New National TV Advertiser Lists



# New Advertiser List: The national TV marketplace enabled these **303 bold new** advertisers across categories and budget levels to increase reach and relevancy

## 2022 New National TV Advertisers

Brands	\$\$\$ (000)	Brands	\$\$\$ (000)	Brands	\$\$\$ (000)	Brands	\$\$\$ (000)	Brands	\$\$\$ (000)	Brands	\$\$\$ (000)	Brands	\$\$\$ (000)	Brands	\$\$\$ (000)
Medicare Advantage Advisors	\$102,610.0	<a href="#">OUTENZA Rx</a>	\$6,443.9	<a href="#">USFL</a>	\$2,193.5	<a href="#">Baker Tilly</a>	\$953.6	<a href="#">Coterie</a>	\$509.2	<a href="#">Future</a>	\$282.2	Employee Retention Credit Hotline	\$196.1	<a href="#">Gold Alliance</a>	\$142.8
<a href="#">Cibingo Rx</a>	\$69,328.2	<a href="#">Wild Earth</a>	\$5,864.2	<a href="#">Plow &amp; Hearth</a>	\$2,184.9	<a href="#">Redecor</a>	\$950.8	<a href="#">Velocity Global</a>	\$497.7	<a href="#">Road Scholar</a>	\$280.6	<a href="#">Full Swing</a>	\$195.8	<a href="#">SENEDIA</a>	\$142.4
<a href="#">Vix+ Streaming</a>	\$65,716.4	<a href="#">Torrid</a>	\$5,730.5	<a href="#">Sunbrella</a>	\$1,997.6	<a href="#">Biosil</a>	\$942.2	<a href="#">Juniper</a>	\$487.9	<a href="#">Copilot</a>	\$276.5	<a href="#">Inspired Interiors</a>	\$195.5	<a href="#">Oil Spots Gone</a>	\$140.7
<a href="#">WhatsApp</a>	\$64,428.2	<a href="#">WIN Realty</a>	\$5,689.9	<a href="#">Valley Credit Union</a>	\$1,898.2	<a href="#">Vitasei</a>	\$887.2	<a href="#">Energized Health</a>	\$486.2	<a href="#">Chem-Dry</a>	\$273.3	<a href="#">Founders Brewing Co.</a>	\$189.9	<a href="#">Goof Off</a>	\$139.8
<a href="#">Oulipta Rx</a>	\$62,150.4	<a href="#">Walden University</a>	\$5,426.8	<a href="#">Bite</a>	\$1,876.8	<a href="#">Alden Trucks</a>	\$869.1	<a href="#">Methodist Healthcare</a>	\$456.6	<a href="#">Grandover</a>	\$272.0	<a href="#">Miller &amp; Zois</a>	\$187.4	<a href="#">Linville Law</a>	\$139.4
<a href="#">Leqvio Rx</a>	\$58,475.9	<a href="#">Aro</a>	\$5,300.6	<a href="#">Exoticca</a>	\$1,790.0	<a href="#">Boneless</a>	\$862.6	<a href="#">SYNERGY HomeCare</a>	\$442.2	<a href="#">Registry Hotels</a>	\$272.0	<a href="#">Small Business Assistance Corporation</a>	\$187.3	<a href="#">GreenPan</a>	\$134.6
<a href="#">NFL+ streaming service</a>	\$57,148.7	<a href="#">Floyd</a>	\$5,243.1	<a href="#">VYPER</a>	\$1,717.5	<a href="#">Ross-Simons</a>	\$853.4	<a href="#">Circulon</a>	\$434.2	<a href="#">CCW Safe</a>	\$271.9	<a href="#">Trustworthy</a>	\$186.4	<a href="#">AES</a>	\$134.6
<a href="#">Opzelura Rx</a>	\$50,656.4	<a href="#">Unifirst</a>	\$5,064.0	<a href="#">Delimex</a>	\$1,700.3	<a href="#">Elevance Health</a>	\$786.7	<a href="#">TRUFF</a>	\$433.0	<a href="#">Windsor Health Insurance</a>	\$270.9	<a href="#">SprayEZ</a>	\$184.0	<a href="#">Heroes Vacation Club</a>	\$133.4
<a href="#">QUVIVO Rx</a>	\$28,650.5	<a href="#">Sell Easy</a>	\$4,858.4	<a href="#">DeLonghi</a>	\$1,678.9	<a href="#">Strikeman</a>	\$775.7	<a href="#">Princess Hotels &amp; Resorts</a>	\$431.6	<a href="#">Magnolia</a>	\$256.7	<a href="#">Pittsburgh Pirates</a>	\$180.9	<a href="#">Northern Sky Brite</a>	\$129.4
<a href="#">Tezspire Rx</a>	\$27,344.7	<a href="#">BlackRock</a>	\$4,827.1	<a href="#">Crumb! Cookies</a>	\$1,674.5	<a href="#">Amp streaming service</a>	\$763.2	<a href="#">Yieldstreet</a>	\$430.1	<a href="#">Medify</a>	\$255.2	<a href="#">Wise App</a>	\$178.4	<a href="#">Novant Health</a>	\$124.9
<a href="#">Astepro Allergy</a>	\$27,055.0	<a href="#">Free Fly</a>	\$4,798.6	<a href="#">Sutton Gates</a>	\$1,572.8	<a href="#">TUDN</a>	\$758.6	<a href="#">Minnesota Corn Growers Association</a>	\$424.2	<a href="#">Drain Weasel</a>	\$254.3	<a href="#">Stanton Optical</a>	\$178.2	<a href="#">Effortless Bedding</a>	\$121.0
<a href="#">Vyepii Rx</a>	\$25,312.7	<a href="#">Huckleberry</a>	\$4,703.9	<a href="#">Ready Rocker</a>	\$1,551.9	<a href="#">nate app</a>	\$742.8	<a href="#">Pinterest</a>	\$421.8	<a href="#">Renuity</a>	\$253.4	<a href="#">Stoko</a>	\$177.0	<a href="#">Ropin' Rascals</a>	\$116.7
<a href="#">Upstart</a>	\$25,008.2	<a href="#">Dreams Resorts</a>	\$4,561.0	<a href="#">Tru Earth</a>	\$1,539.2	<a href="#">Livongo</a>	\$735.9	<a href="#">ExtraHop</a>	\$412.4	<a href="#">DishDirect</a>	\$250.3	<a href="#">ICM Resources</a>	\$175.9	<a href="#">TABLO</a>	\$114.4
<a href="#">Grainger</a>	\$24,980.3	<a href="#">Northern Tool</a>	\$4,498.5	<a href="#">Fuzzy</a>	\$1,536.7	<a href="#">Eco Punch</a>	\$699.0	<a href="#">Sutton Tractor &amp; Equipment</a>	\$410.2	<a href="#">Saving America</a>	\$247.3	<a href="#">SunPower</a>	\$175.3	<a href="#">Monge &amp; Associates</a>	\$113.3
<a href="#">Vuity Rx</a>	\$22,277.7	<a href="#">Every Man Jack</a>	\$4,281.7	<a href="#">Appleseed's</a>	\$1,533.5	<a href="#">MUNICIPAL</a>	\$686.2	<a href="#">Homeaglow</a>	\$404.5	<a href="#">Wildier Games</a>	\$246.6	<a href="#">Muddy Mat</a>	\$172.7	<a href="#">eSure.AI</a>	\$111.7
<a href="#">STEM</a>	\$21,890.2	<a href="#">CERAKOTE</a>	\$4,171.3	<a href="#">Zegerid OTC</a>	\$1,503.9	<a href="#">Slynd Rx</a>	\$674.4	<a href="#">Aprende</a>	\$388.0	<a href="#">PenFed Credit Union</a>	\$242.9	<a href="#">Kikoff</a>	\$170.7	Think Digital Wellbeing Summit	\$110.4
<a href="#">Apretude Rx</a>	\$21,586.4	<a href="#">Kettle &amp; Fire</a>	\$4,075.4	<a href="#">Manzanilla Sophia</a>	\$1,499.7	<a href="#">My Eyelab</a>	\$657.4	<a href="#">Xiandi Rx</a>	\$376.7	<a href="#">The Daily Mile Foundation</a>	\$240.4	<a href="#">Duradry</a>	\$168.1	Guaranteed Acceptance Life Insurance	\$110.3
<a href="#">Myfembree Rx</a>	\$20,716.9	<a href="#">Fiture</a>	\$3,795.3	<a href="#">Jackpot Party</a>	\$1,499.0	<a href="#">Simply Spiked</a>	\$650.4	<a href="#">Inscents</a>	\$375.4	Driver Discount Helpline	\$233.6	<a href="#">Tour Quality Golf</a>	\$164.4	<a href="#">MOWI</a>	\$105.6
<a href="#">Miro</a>	\$18,127.5	<a href="#">RingCentral</a>	\$3,744.4	<a href="#">Greenbaum's Pharmacy</a>	\$1,385.3	<a href="#">Vital Strategies</a>	\$641.6	<a href="#">Kidsguide</a>	\$329.9	<a href="#">Roll by APP App</a>	\$229.9	<a href="#">InMit</a>	\$163.8	<a href="#">Pioneer Life Group</a>	\$104.7
<a href="#">Freevee</a>	\$17,139.0	<a href="#">Royal Match app</a>	\$3,739.5	<a href="#">Dayes Law Firm</a>	\$1,343.3	<a href="#">Sunday</a>	\$637.4	<a href="#">Liquid I.V.</a>	\$365.9	<a href="#">The Gori Law Firm</a>	\$229.8	<a href="#">Strava</a>	\$163.7	<a href="#">DIO Implants</a>	\$104.2
<a href="#">Idorsia</a>	\$16,789.3	<a href="#">Lectric eBikes</a>	\$3,554.6	<a href="#">Filson</a>	\$1,323.6	<a href="#">Neighbor</a>	\$636.8	<a href="#">Dropps</a>	\$364.3	<a href="#">TRuLaw</a>	\$229.3	<a href="#">TruthTeller 19839</a>	\$162.2	<a href="#">Generators Of Maine</a>	\$103.4
<a href="#">Kerendia Rx</a>	\$16,735.9	<a href="#">Corebridge Financial</a>	\$3,467.9	<a href="#">QC Kinetix</a>	\$1,316.9	<a href="#">FIS</a>	\$631.0	<a href="#">International Rescue Committee (IRC)</a>	\$347.7	<a href="#">Puncher's Chance Bourbon</a>	\$228.7	<a href="#">Arya</a>	\$161.9	<a href="#">Bevy Long Drink</a>	\$103.1
<a href="#">Plenity Rx</a>	\$16,729.7	<a href="#">Argenx</a>	\$3,453.9	<a href="#">Overland</a>	\$1,308.1	<a href="#">Me Time Wellness Spa</a>	\$611.7	<a href="#">Advancing American Freedom (AAF)</a>	\$339.3	<a href="#">BD Veritor</a>	\$228.2	<a href="#">Protaren Rx</a>	\$161.3	<a href="#">Rollt</a>	\$101.6
<a href="#">Oelbree Rx</a>	\$15,936.8	<a href="#">Cominarty Rx</a>	\$3,433.6	<a href="#">Andscape</a>	\$1,298.9	<a href="#">Truewerk</a>	\$605.1	<a href="#">WEATHER GUARD</a>	\$325.0	<a href="#">Sports Research</a>	\$228.0	Exchange Pawn Shop	\$159.9		
<a href="#">Topo Chico</a>	\$15,560.8	<a href="#">Emerald Queen</a>	\$3,339.7	<a href="#">Komos</a>	\$1,296.7	<a href="#">Amazon Fresh</a>	\$590.1	<a href="#">Buffalo Trace</a>	\$315.7	<a href="#">JAXXON</a>	\$227.2	<a href="#">Las Cruces City</a>	\$159.5		
<a href="#">KRAFTON</a>	\$14,490.1	Affordable Life Insurance	\$3,253.0	<a href="#">John R. Oishei Children's Hospital</a>	\$1,295.4	<a href="#">Better Not Younger</a>	\$589.8	<a href="#">NULASTIN</a>	\$315.1	<a href="#">Healthcare 4 All</a>	\$227.1	<a href="#">Shavelogic</a>	\$158.8		
<a href="#">eToro</a>	\$14,422.3	<a href="#">Groove Life</a>	\$3,159.5	<a href="#">Law Offices of Amanda Lewis, PC</a>	\$1,186.5	<a href="#">CR Legal Team</a>	\$575.2	<a href="#">Step</a>	\$309.5	<a href="#">Club Necaxa</a>	\$225.3	<a href="#">First Onsite</a>	\$158.6		
<a href="#">Thuma</a>	\$14,388.3	<a href="#">Jinx</a>	\$3,154.0	<a href="#">Getty Images</a>	\$1,167.4	<a href="#">Steel Man Pills</a>	\$570.2	<a href="#">Leaders Furniture</a>	\$309.4	<a href="#">PIMCO</a>	\$222.8	<a href="#">Common Goal</a>	\$157.7		
<a href="#">Inspire Medical Systems</a>	\$13,883.0	<a href="#">MyStore</a>	\$3,097.7	<a href="#">Americaneagle.com</a>	\$1,161.3	<a href="#">RISE</a>	\$565.6	<a href="#">Revela</a>	\$305.6	<a href="#">BetterSleep App</a>	\$222.7	<a href="#">Peachtree Orthopedics</a>	\$156.9		
<a href="#">Cutwater</a>	\$13,550.9	<a href="#">Pumpkin</a>	\$3,043.1	<a href="#">FIRE</a>	\$1,157.5	<a href="#">By-Pass Power Equipment</a>	\$562.1	<a href="#">DIFF</a>	\$297.1	<a href="#">Forrest McKie &amp; Company</a>	\$220.4	<a href="#">Lifekey</a>	\$156.9		
Liberty Legal	\$13,035.8	<a href="#">HexClad</a>	\$2,913.9	<a href="#">Bonafide</a>	\$1,149.8	<a href="#">IL Corn</a>	\$559.9	<a href="#">Enchant</a>	\$295.2	<a href="#">American Energy Action (AEA)</a>	\$217.9	<a href="#">Slobproof</a>	\$154.3		
<a href="#">SIXT</a>	\$12,923.4	<a href="#">NFL All Day</a>	\$2,855.8	<a href="#">Astound</a>	\$1,121.9	<a href="#">Currency</a>	\$557.0	<a href="#">NOMATIC</a>	\$293.2	<a href="#">Reigelmann's</a>	\$215.8	<a href="#">Reset Smile</a>	\$152.3		
<a href="#">Blair</a>	\$11,903.2	<a href="#">Kopiko</a>	\$2,852.1	<a href="#">Friday Plans</a>	\$1,088.7	<a href="#">Brand Power</a>	\$556.3	<a href="#">Peraton</a>	\$291.1	<a href="#">Penetrex</a>	\$213.9	<a href="#">GenderCool</a>	\$150.9		
<a href="#">Innovation Refunds</a>	\$9,771.7	<a href="#">Stella &amp; Chewy's</a>	\$2,735.4	<a href="#">The Free TV Project</a>	\$1,084.6	<a href="#">USA Veteran Law Group</a>	\$545.4	<a href="#">Pacas</a>	\$290.2	<a href="#">Fueling American Jobs Coalition</a>	\$213.4	<a href="#">Dead Scent</a>	\$150.7		
<a href="#">VOOST</a>	\$9,233.3	<a href="#">StoveGuard</a>	\$2,484.1	<a href="#">Intercontinental Exchange (ICE)</a>	\$1,067.2	<a href="#">Tint &amp; Tighten</a>	\$538.7	<a href="#">Rimini Street</a>	\$288.2	<a href="#">The Halal Guys</a>	\$213.0	<a href="#">Upward App</a>	\$148.8		
<a href="#">Wallbox</a>	\$8,329.2	<a href="#">Marine Layer</a>	\$2,480.9	<a href="#">Facet Wealth</a>	\$1,036.0	Baby Food Heavy Metals Legal Helpline Referral Services	\$526.1	<a href="#">LifeHope Labs</a>	\$287.5	<a href="#">BLALOCK LLC</a>	\$211.0	Lucky Liquors	\$148.5		
Cytopoint Rx	\$8,190.0	<a href="#">Moderna</a>	\$2,429.9	<a href="#">Quay</a>	\$1,007.8	<a href="#">Mollie's Fund</a>	\$524.5	<a href="#">Go Hearing</a>	\$285.7	<a href="#">Overholt Law Firm</a>	\$207.9	<a href="#">Next Medical</a>	\$146.8		
<a href="#">Keller Posiman</a>	\$7,836.3	<a href="#">Sand Cloud</a>	\$2,406.6	<a href="#">Vitapod</a>	\$997.8	<a href="#">Fitbod</a>	\$524.1	<a href="#">AccuQuote</a>	\$206.6	<a href="#">Affirm</a>	\$206.6	<a href="#">The Legal Team</a>	\$144.9		
<a href="#">Evenly Rx</a>	\$7,555.4	<a href="#">Cash App</a>	\$2,276.5	<a href="#">TextKiller</a>	\$983.7	<a href="#">Globant</a>	\$522.7	<a href="#">BingoPlus</a>	\$285.0	<a href="#">Earth Breeze</a>	\$204.9	<a href="#">Ansys</a>	\$143.8		

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

Source: VAB analysis of Nielsen Ad Intel data as of 2/16/23, 1/1/22-12/31/22. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100K.



# The DTC segment continues to drive new entrants with 99 brands across 37 categories, spending over \$377 million

## 2022 New National TV DTC Advertisers

Brands	Categories	\$\$\$ (000)	Brands	Categories	\$\$\$ (000)	Brands	Categories	\$\$\$ (000)
Vix+ Streaming	Streaming Services	\$65,716.4	Sunbrella	Home Furnishing	\$1,997.6	Homeaglow	Cleaning & Sanitation	\$404.5
NFL+ streaming service	Streaming Services	\$57,148.7	Valley Credit Union	Financial Services	\$1,898.2	Aprende	Online Education	\$388.0
Upstart	Financial Services	\$25,008.2	Bite	Personal Care	\$1,876.8	Droppos	Home	\$364.3
Miro	Professional Services	\$18,127.5	Exoticca	Travel	\$1,790.0	NULASTIN	Personal Care	\$315.1
Freevee	Streaming Services	\$17,139.0	YYPER	Chairs	\$1,717.5	Step	Financial Services	\$309.5
eToro	Financial Services	\$14,422.3	Fuzzy	Pet Care	\$1,536.7	DIFF	Eyewear	\$297.1
Thuma	Home Furnishing	\$14,388.3	Andscape	Media	\$1,298.9	Pacas	Apparel & Accessories	\$290.2
Inspire Medical Systems	Medical Devices	\$13,883.0	Bonafide	Personal Care	\$1,149.8	AccuQuote	Financial Services	\$285.3
Blair	Apparel & Accessories	\$11,903.2	The Free TV Project	Entertainment	\$1,084.6	CPAP.COM	Medical Devices	\$283.0
Wallbox	Automotive	\$8,329.2	Facet Wealth	Financial Services	\$1,036.0	Future	Fitness	\$282.2
Goldbelly	Online Food Delivery Service	\$7,200.3	Quay	Eyewear	\$1,007.8	Road Scholar	Educational Travel	\$280.6
Wild Earth	Pet Care	\$5,864.2	Vitapod	Vitamins & Supplements	\$997.8	Copilot	Mobile Apps	\$276.5
Torrid	Apparel & Accessories	\$5,730.5	TextKiller	Communications	\$983.7	Medify	Home	\$255.2
WIN Reality	Fitness	\$5,689.9	American Trucks	Automotive	\$869.1	Renuity	Home Improvement	\$253.4
Arlø	Home	\$5,300.6	Strikeman	Shooting Training	\$775.7	Wilder Games	Entertainment	\$246.6
Floyd	Home Furnishing	\$5,243.1	Amp streaming service	Streaming Services	\$763.2	PenFed Credit Union	Financial Services	\$242.9
BlackRock	Financial Services	\$4,827.1	TUDN	Media	\$758.6	Roll by ADP App	Financial Services	\$229.9
Free Fly	Apparel & Accessories	\$4,798.6	Livongo	Health & Wellness	\$735.9	JAXXON	Jewelry	\$227.2
Huckberry	Apparel & Accessories	\$4,703.9	MUNICIPAL	Apparel & Accessories	\$686.2	Earth Breeze	Cleaning & Sanitation	\$204.9
Every Man Jack	Personal Care	\$4,281.7	Sunday	Home Improvement	\$637.4	Full Swing	Sports Equipment	\$195.8
Kettle & Fire	Food	\$4,075.4	Neighbor	Storage	\$636.8	Small Business Assistance Corporation	Financial Services	\$187.3
Fiture	Fitness	\$3,795.3	FIS	Financial Services	\$631.0	Trustworthy	Security System	\$186.4
RingCentral	Professional Services	\$3,744.4	Truewerk	Apparel & Accessories	\$605.1	Wise App	Financial Services	\$178.4
Lectric eBikes	Fitness	\$3,554.6	Amazon Fresh	Grocery Stores	\$590.1	Stoko	Apparel & Accessories	\$177.0
Groove Life	Apparel & Accessories	\$3,159.5	Better Not Younger	Personal Care	\$589.8	Duradry	Personal Care	\$168.1
Jinx	Pet Care	\$3,154.0	RISE	Health & Wellness	\$565.6	Shavelogic	Personal Care	\$158.8
Pumpkin	Insurance	\$3,043.1	Currency	Financial Services	\$557.0	Lifekey	Wearable Devices	\$156.9
HexClad	Home	\$2,913.9	Fitbod	Fitness	\$524.1	Reset Smile	Personal Care	\$152.3
NFL All Day	Fandom / Collectibles	\$2,855.8	Coterie	Personal Care	\$509.2	Dead Scent	Cleaning & Sanitation	\$150.7
Marine Layer	Apparel & Accessories	\$2,480.9	Velocity Global	Professional Services	\$497.7	Oil Spots Gone	Home Improvement	\$140.7
Sand Cloud	Towels	\$2,406.6	TRUFF	Food	\$433.0	GreenPan	Home	\$134.6
Cash App	Financial Services	\$2,276.5	Yieldstreet	Financial Services	\$430.1	MOWI	Online Food Delivery Service	\$105.6
Plow & Hearth	Home Furnishing	\$2,184.9	ExtraHop	Cybersecurity	\$412.4	Bolt	Financial Services	\$101.6



DTC brands accounted for 33% of total new TV advertisers and 28% of total TV spend (vs. 2021: 42% of advertisers; 43% of spend)

Logos represent a sampling of new national TV DTC advertisers

Source: VAB analysis of Nielsen Ad Intel data as of 2/16/23, 1/1/22-12/31/22. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV. Brands reflect those with national TV spend over \$100K.