



# Covid-19 Impacts On DTC Television advertising

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POWERED BY **DRMETRIX**



If your company is engaged in, or interested in, direct-to-consumer (DTC) television advertising, we hope you will read and benefit from this study. It may completely change the way you think about DTC television advertising.

DRMetrix, the DTC television industry's leading research company, uses automated content recognition technology to track television ads airing across [130 national networks](#). Across the national cable and broadcast networks monitored, DRMetrix reported \$17.9 billion of national ad spending in 2019 from campaigns that ask consumers to take action, such as by visiting a website or going to an app store. For an in depth analysis of this industry sector, please reference DRMetrix's [2019 industry study](#).

In this report, we'll be studying the top 50 DTC advertisers for 2019 to see how their TV ad buys have changed in 2020 before, during, and after the national quarantine lockdown. We'll compare the top 50 web/mobile DTC advertisers to the top 50 traditional DTC advertisers.

Web/mobile DTC advertisers consist predominately of digitally native companies, using a vanity call to action, relying on traditional viewership/ratings data to manage their TV buys. In contrast, traditional DTC advertisers use differing phone, web promotion codes, or SMS variations in order to track consumer response back to specific networks, dayparts, and creatives. They use metrics such as cost-per-order, cost-per-lead, and media efficiency ratio instead of traditional ratings data to manage and optimize their TV buys.

During the quarantine period, you'll learn that the top 50 web/ mobile DTC advertisers from 2019 reduced their media expenditures by 34% while the top 50 traditional DTC advertisers increased their media expenditures by 76.6%.

More importantly, you'll learn why so many traditional DTC advertisers were successful during the Covid-19 crisis.

# Why all TV research data is not created equal

DRMetrix rankings of top DTC advertisers can differ significantly from the published rankings put out by other TV research companies. Since DRMetrix monitors [commercial grade feeds in a DPI compliant manner](#), 100% of the airings we detect and report originate from national networks. Some research companies monitor the national networks via consumer-grade feeds originating from local cable providers and/or providers such as DirecTV. Unfortunately, when TV research companies monitor via consumer-grade feeds, they face the challenge of having to distinguish between commercials running on national networks and commercials running locally, which are inserted by the TV providers. Treating local ads as national creates significant errors in research data. If one is unable to determine who inserted an ad, and how many households were reached, then a proper value can not be assigned to each ad detection. Moreover, the majority of national networks sell two different types of ad breaks. One of these ad breaks, called a DPI ad break, is discounted 80-90% and reaches a much smaller audience than a national ad break. TV research companies that are not DPI compliant are unable to determine which break type a detected ad is running in. As a result, they are unable to assign the proper value to ads running in DPI ad breaks. This can cause the spend estimates for certain brands to be inflated if they are running in national DPI ad breaks. To learn more about DPI ad breaks, [click here](#).

## How we collected and organized our data

In this report, we provide the spending data for the top 50 web/mobile DTC advertisers of 2019, and for the top 50 traditional DTC advertisers, across 130 national networks.

DRMetrix took the average weekly spend for each brand during media weeks 1-10 for 2019 and 2020. For 2020, we're calling this the "pre-quarantine" period as the [national Covid-19 emergency](#) was declared on March 13th (beginning of media week 11) and most states didn't shut down until later in March.

The data shows that during the pre-quarantine period, aggregate media expenditures for the web/mobile DTC advertisers were down 5% while the traditional DTC advertisers were up 37% over the prior year period.

Data for media weeks 11-19, which we're calling the "quarantine" period, show media expenditures for the web/mobile DTC advertisers were down 34% while the traditional DTC advertisers were up 76.6%.

Data for media weeks 20-35, which we're calling the "post quarantine" period shows the web/mobile DTC advertisers were down 47.4% while the traditional DTC advertisers were up 26.1%.

On the next pages, we present data from DRMetrix's AdSphere™ Research System which is the basis for this study.

# COVID-19 IMPACTS ON TOP 50 WEB/MOBILE DTC ADVERTISERS

Rank 2019	Advertiser Name	2019 Spend	Pre-Quarantine '20 Media Week 1 - 10		Change	Quarantine '20 Media Week 11 - 19		Change
			2019 12/31/18 - 03/10/19	2020 12/30/19 - 3/8/20		2019 3/11/19 - 5/12/19	2020 3/9/20 - 5/10/20	
1	Home Advisor	\$ 130,075,291	\$ 3,067,323	\$ 978,904	-68.1%	\$ 2,642,841	\$ 792,000	-70.0%
2	Chewy.com	\$ 125,458,601	\$ 2,413,023	\$ 2,037,659	-15.6%	\$ 2,162,187	\$ 762,055	-64.8%
3	Wayfair	\$ 110,204,846	\$ 2,560,151	\$ 2,145,287	-16.2%	\$ 2,038,109	\$ 1,890,259	-7.3%
4	Peloton	\$ 99,358,625	\$ 2,957,769	\$ 3,762,627	27.2%	\$ 1,146,314	\$ 559,514	-51.2%
5	Ancestry	\$ 98,922,640	\$ 1,722,980	\$ 2,293,965	33.1%	\$ 1,705,219	\$ 1,229,038	-27.9%
6	Booking.com	\$ 95,923,415	\$ 1,962,572	\$ 1,753,486	-10.7%	\$ 2,638,785	\$ 95	-100.0%
7	Carvana	\$ 94,573,618	\$ 1,550,413	\$ 2,294,574	48.0%	\$ 1,627,923	\$ 1,948,211	19.7%
8	Trivago	\$ 91,712,755	\$ 1,586,340	\$ 1,999,131	26.0%	\$ 1,647,346	\$ 273,782	-83.4%
9	Smile Direct Club	\$ 75,963,238	\$ 1,707,524	\$ 1,669,055	-2.3%	\$ 1,510,032	\$ 152,108	-89.9%
10	Grubhub	\$ 62,452,674	\$ 1,563,349	\$ 1,084,072	-30.7%	\$ 1,182,107	\$ 1,433,834	21.3%
11	Expedia	\$ 60,531,241	\$ 1,562,741	\$ 1,295,761	-17.1%	\$ 1,069,492	\$ 3,766	-99.6%
12	Credit Karma	\$ 55,561,676	\$ 1,697,217	\$ 941,007	-44.6%	\$ 818,464	\$ 498,986	-39.0%
13	Hotels.com	\$ 52,215,240	\$ 773,065	\$ 1,211,206	56.7%	\$ 670,896	\$ 374,994	-44.1%
14	GoodRX.com	\$ 49,816,927	\$ 870,343	\$ 1,113,603	27.9%	\$ 941,919	\$ 1,212,482	28.7%
15	Home Light	\$ 46,950,567	\$ 1,490,382	\$ 1,329,373	-10.8%	\$ 1,087,692	\$ 789,955	-27.4%
16	Stamps.com	\$ 46,530,336	\$ 570,937	\$ 1,074,637	88.2%	\$ 777,842	\$ 1,026,748	32.0%
17	Indeed	\$ 42,963,916	\$ 807,256	\$ 1,760,639	118.1%	\$ 473,565	\$ 855,017	80.5%
18	CarGurus	\$ 42,247,591	\$ 872,840	\$ 665,738	-23.7%	\$ 820,423	\$ 350,169	-57.3%
19	NerdWallet	\$ 42,182,305	\$ 1,109,849	\$ 1,134,880	2.3%	\$ 859,218	\$ 338,727	-60.6%
20	Noom	\$ 42,112,214	\$ 832,844	\$ 1,507,753	81.0%	\$ 373,017	\$ 1,572,292	321.5%
21	Car Fax	\$ 41,485,358	\$ 826,785	\$ 1,549,891	87.5%	\$ 519,272	\$ 583,788	12.4%
22	DoorDash	\$ 41,167,408	\$ 625,692	\$ 763,094	22.0%	\$ 902,774	\$ 999,855	10.8%
23	TripAdvisor	\$ 40,750,288	\$ 1,280,736	0	-100.0%	\$ 891,595	0	-100.0%
24	Rakuten	\$ 39,326,125	0	\$ 463,650	N/A	\$ 111,645	\$ 327,997	193.8%
25	Angies List	\$ 37,259,290	\$ 808,025	\$ 303,230	-62.5%	\$ 1,015,514	\$ 46,838	-95.4%

Rank 2019	Advertiser Name	2019 Spend	Pre-Quarantine '20 Media Week 1 - 10		Change	Quarantine '20 Media Week 11 - 19		Change
			2019 Avr \$ / week 12/31/18 - 03/10/19	2020 Avr \$ / week 12/30/19 - 3/8/20		2019 Avr \$ / week 3/11/19 - 5/12/19	2020 Avr \$ / week 3/9/20 - 5/10/20	
26	Zillow	\$ 36,690,081	\$ 1,066,929	\$ 768,856	-27.9%	\$ 1,136,932.00	\$ 544,355	-52.1%
27	Purple Mattress	\$ 35,283,262	\$ 467,972	\$ 877,093	87.4%	\$ 501,383.44	\$ 225,317	-55.1%
28	Audible	\$ 30,795,513	\$ 1,083,038	\$ 1,245,263	15.0%	\$ 773,737.22	\$ 485,404	-37.3%
29	CreditSesame.com	\$ 29,842,978	\$ 619,278	\$ 642,613	3.8%	\$ 186,460.33	\$ 141,391	-24.2%
30	4 imprint	\$ 29,090,843	\$ 342,881	\$ 709,085	106.8%	\$ 499,361.67	\$ 323,535	-35.2%
31	Drive Time	\$ 28,193,170	\$ 548,393	\$ 1,067,568	94.7%	\$ 578,940.22	\$ 534,823	-7.6%
32	Poshmark	\$ 27,589,788	\$ 678,345	\$ 614,893	-9.4%	\$ 599,501.11	\$ 304,497	-49.2%
33	Warby Parker	\$ 27,287,891	\$ 580,733	\$ 872,424	50.2%	\$ 379,558.67	\$ 629,086	65.7%
34	Hello Fresh	\$ 26,865,205	\$ 114,579	\$ 425,998	271.8%	\$ 585,250.33	\$ 55,475	-90.5%
35	Mirror	\$ 26,110,220	\$ 78,680	\$ 1,075,681	1267.2%	\$ 81,817.00	\$ 496,025	506.3%
36	eHarmony	\$ 25,468,147	\$ 602,429	\$ 623,130	3.4%	\$ 460,232.00	\$ 471,747	2.5%
37	E Trade	\$ 25,458,364	\$ 5,983,237	\$ 532,162	-91.1%	\$ 694,685.11	\$ 622,637	-10.4%
38	Chime	\$ 25,387,013	\$ 467,299	\$ 1,589,288	240.1%	\$ 307,876.67	\$ 739,503	140.2%
39	Touch of Modern	\$ 24,549,496	\$ 302,058	\$ 368,121	21.9%	\$ 334,285.11	\$ 343,491	2.8%
40	DealDash	\$ 23,524,402	\$ 367,971	\$ 536,946	45.9%	\$ 249,422.22	\$ 484,649	94.3%
41	VRBO	\$ 23,589,892	\$ 1,244,041	\$ 673,283	-45.9%	\$ 917,020.00	0	-100.0%
42	Apartments.com	\$ 23,523,388	\$ N/A	\$ N/A	N/A	\$ 833,287.78	\$ 1,026,685	23.2%
43	Care.com	\$ 22,945,053	\$ 510,067	\$ 581,511	14.0%	\$ 408,743.56	\$ 294,870	-27.9%
44	Sheex	\$ 22,647,547	\$ 346,909	\$ 468,766	35.1%	\$ 256,499.56	\$ 164,995	-35.7%
45	thredUP	\$ 21,567,766	\$ 125,264	\$ 882,692	604.7%	\$ 163,889.00	\$ 264,000	61.1%
46	TrueCar	\$ 20,802,547	\$ 325,887	\$ 124,039	-61.9%	\$ 294,649.44	\$ 46,496	-84.2%
47	Overstock.com	\$ 20,757,273	\$ 610,429	\$ 271,625	-55.5%	\$ 371,055.56	\$ 553,315	49.1%
48	Letgo	\$ 20,421,214	\$ 1,722,001	0	-100.0%	\$ 355,689.33	0	-100.0%
49	CasperSleep	\$ 19,311,235	\$ 292,234	\$ 404,552	38.4%	\$ 266,355.22	\$ 211,977	-20.4%
50	Etsy	\$ 19,261,537	0	\$ 348,170	N/A	\$ 191,761.78	\$ 134,868	-29.7%
Total		\$ 2,302,710,010	\$ 53,700,805	\$ 50,836,980	- 5 %	\$ 41,062,586	\$ 27,121,651	-34 %

Rank 2019	Advertiser Name	2019 Spend	Post-Quarantine '20 Media Week 20 - 35		Change
			2019 Avr \$ / week 5/13/19 - 9/1/19	2020 Avr \$ / week 5/11/20 - 8/30/20	
1	Home Advisor	\$ 130,075,291	\$ 2,940,837	\$ 1,345,190	-54.3%
2	Chewy.com	\$ 125,458,601	\$ 2,323,462	\$ 2,064,743	-11.1%
3	Wayfair	\$ 110,204,846	\$ 2,229,208	\$ 1,234,820	-44.6%
4	Peloton	\$ 99,358,625	\$ 941,968	\$ 33	-100.0%
5	Ancestry	\$ 98,922,640	\$ 1,338,324	\$ 1,094,247	-18.2%
6	Booking.com	\$ 95,923,415	\$ 2,753,832	\$ 0	-100.0%
7	Carvana	\$ 94,573,618	\$ 1,807,448	\$ 2,309,191	27.8%
8	Trivago	\$ 91,712,755	\$ 2,766,446	\$ 12,021	-99.6%
9	Smile Direct Club	\$ 75,963,238	\$ 1,386,378	\$ 367,554	-73.5%
10	Grubhub	\$ 62,452,674	\$ 1,037,368	\$ 875,788	-15.6%
11	Expedia	\$ 60,531,241	\$ 1,506,978	\$ 0	-100.0%
12	Credit Karma	\$ 55,561,676	\$ 836,492	\$ 0	-100.0%
13	Hotels.com	\$ 52,215,240	\$ 1,762,554	\$ 176,832	-90.0%
14	GoodRX.com	\$ 49,816,927	\$ 955,774	\$ 1,227,742	28.5%
15	Home Light	\$ 46,950,567	\$ 807,928	\$ 377,125	-53.3%
16	Stamps.com	\$ 46,530,336	\$ 829,838	\$ 731,181	-11.9%
17	Indeed	\$ 42,963,916	\$ 615,773	\$ 255,122	-58.6%
18	CarGurus	\$ 42,247,591	\$ 972,871	\$ 480,356	-50.6%
19	NerdWallet	\$ 42,182,305	\$ 831,100	\$ 0	-100.0%
20	Noom	\$ 42,112,214	\$ 790,675	\$ 859,599	8.7%
21	Car Fax	\$ 41,485,358	\$ 736,953	\$ 660,090	-10.4%
22	DoorDash	\$ 41,167,408	\$ 1,264,176	\$ 725,115	-42.6%
23	TripAdvisor	\$ 40,750,288	\$ 1,183,687	\$ 0	-100.0%
24	Rakuten	\$ 39,326,125	\$ 1,029,650	\$ 424,183	-58.8%
25	Angies List	\$ 37,259,290	\$ 891,267	\$ 0	-100.0%

Rank 2019	Advertiser Name	2019 Spend	Post-Quarantine '20 Media Week 20 - 35		Change
			2019 Avr \$ / week 5/13/19 - 9/1/19	2020 Avr \$ / week 5/11/20 - 8/30/20	
26	Zillow	\$ 36,690,081	\$ 635,804	\$ 116,100	-81.7%
27	Purple Mattress	\$ 35,283,262	\$ 678,771	\$ 388,278	-42.8%
28	Audible	\$ 30,795,513	\$ 410,332	\$ 242,415	-40.9%
29	CreditSesame.com	\$ 29,842,978	\$ 377,696	\$ 0	-100.0%
30	4 imprint	\$ 29,090,843	\$ 679,849	\$ 477,051	-29.8%
31	Drive Time	\$ 28,193,170	\$ 594,749	\$ 753,006	26.6%
32	Poshmark	\$ 27,589,788	\$ 459,627	\$ 201,109	-56.2%
33	Warby Parker	\$ 27,287,891	\$ 528,245	\$ 790,593	49.7%
34	Hello Fresh	\$ 26,865,205	\$ 331,981	\$ 218,188	-34.3%
35	Mirror	\$ 26,110,220	\$ 350,778	\$ 708,852	-37.8%
36	eHarmony	\$ 25,468,147	\$ 433,853	\$ 322,280	-25.7%
37	E Trade	\$ 25,458,364	\$ 407,043	\$ 349,602	-14.1%
38	Chime	\$ 25,387,013	\$ 545,825	\$ 425,394	-22.1%
39	Touch of Modern	\$ 24,549,496	\$ 486,628	\$ 361,503	-25.7%
40	DealDash	\$ 23,524,402	\$ 410,821	\$ 683,169	66.3%
41	VRBO	\$ 23,589,892	\$ 164,863	\$ 0	-100.0%
42	Apartments.com	\$ 23,523,388	\$ 996,125	\$ 867,371	-12.9%
43	Care.com	\$ 22,945,053	\$ 561,363	\$ 554,507	-1.2%
44	Sheex	\$ 22,647,547	\$ 539,604	\$ 110,963	-79.4%
45	thredUP	\$ 21,567,766	\$ 426,234	\$ 272,218	-36.1%
46	TrueCar	\$ 20,802,547	\$ 527,776	\$ 0	-100.0%
47	Overstock.com	\$ 20,757,273	\$ 532,981	\$ 34,610	-93.5%
48	Letgo	\$ 20,421,214	\$ N/A	\$ N/A	N/A
49	CasperSleep	\$ 19,311,235	\$ 419,279	\$ 346,708	-17.3%
50	Etsy	\$ 19,261,537	\$ 302,445	\$ 931,685	208.1%
Total:		\$ 2,302,710,010	\$ 46,343,659	\$ 24,376,534	-47.4%

# COVID-19 IMPACTS ON TOP 50 TRADITIONAL ADVERTISERS

Rank 2019	Advertiser Name	2019 Spend	Pre-Quarantine '20 Media Week 1 – 10		Change	Quarantine '20 Media Week 11 – 19		Change
			2019 12/31/18 – 03/10/19	2020 12/30/19 – 3/8/20		2019 3/11/19 – 5/12/19	2020 3/9/20 – 5/10/20	
1	Nutrisystem	\$ 115,664,012	\$ 4,636,012	\$ 3,689,535	-20.4%	\$ 2,675,117	\$ 1,755,307	-34.4%
2	Direct Digital (Nugenix, etc.)	\$ 94,287,880	\$ 2,075,395	\$ 2,521,839	21.5%	\$ 1,215,695	\$ 2,273,924	87.0%
3	E. Mishan & Sons	\$ 81,510,078	\$ 1,818,834	\$ 2,360,618	29.8%	\$ 1,055,894	\$ 3,813,589	261.2%
4	My Pillow	\$ 56,028,986	\$ 1,405,804	\$ 1,211,402	-13.8%	\$ 1,218,807	\$ 1,805,097	48.1%
5	CarShield	\$ 52,531,234	\$ 985,105	\$ 1,704,391	73.0%	\$ 885,745	\$ 2,151,960	143.0%
6	St. Jude Children's Hospital	\$ 51,003,209	\$ 854,096	\$ 1,080,698	26.5%	\$ 506,714	\$ 607,798	19.9%
7	Humana Insurance	\$ 46,984,545	\$ 461,480	\$ 191,594	-58.5%	\$ 287,666	\$ 147,702	-48.7%
8	Barrington Media Group	\$ 46,936,418	\$ 337,506	\$ 2,236,179	562.6%	\$ 560,742	\$ 1,596,916	184.8%
9	Colonial Penn Life Insurance	\$ 45,658,473	\$ 1,030,825	\$ 1,410,084	36.8%	\$ 710,070	\$ 1,402,541	97.5%
10	Ideavillage Products	\$ 44,131,111	\$ 859,581	\$ 1,611,969	87.5%	\$ 372,808	\$ 4,533,957	1116.2%
11	UnitedHealth	\$ 43,966,899	\$ 495,751	\$ 530,065	6.9%	\$ 519,282	\$ 411,105	-20.8%
12	ASPCA	\$ 41,902,853	\$ 1,120,087	\$ 1,271,445	13.5%	\$ 396,469	\$ 2,621,185	561.1%
13	Togetherhealth	\$ 37,290,293	\$ 286,029	\$ 1,284,090	348.9%	\$ 409,199	\$ 918,308	124.4%
14	NortonLifeLock	\$ 37,272,679	\$ 397,016	\$ 1,092,991	175.3%	\$ 606,519	\$ 1,092,859	80.2%
15	Telebrands (Bulbhead)	\$ 36,792,160	\$ 753,135	\$ 917,488	21.8%	\$ 613,156	\$ 2,138,218	248.7%
16	Soclean	\$ 34,670,152	\$ 544,728	\$ 573,690	5.3%	\$ 623,637	\$ 501,922	-19.5%
17	Jenny Craig	\$ 30,570,532	\$ 1,473,676	\$ 1,245,269	-15.5%	\$ 1,113,361	\$ 160,227	-85.6%
18	Consumer Attorney Marketing	\$ 27,236,563	\$ 327,365	\$ 324,168	-1.0%	\$ 605,234	\$ 251,913	-58.4%
19	Inogen	\$ 27,212,613	\$ 486,531	\$ 320,365	-34.2%	\$ 703,654	\$ 272,182	-61.3%
20	TZ Insurance Solutions	\$ 26,624,710	\$ 388,888	\$ 287,535	-26.1%	\$ 342,600	\$ 272,872	-20.4%
21	Shriners International	\$ 24,528,146	\$ 742,393	\$ 886,508	19.4%	\$ 358,038	\$ 396,477	10.7%
22	American Advisors	\$ 24,151,563	\$ 308,603	\$ 665,125	115.5%	\$ 466,123	\$ 432,308	-7.3%
23	eHealthInsurance Services	\$ 22,880,111	\$ 208,537	\$ 497,923	138.8%	\$ 98,444	\$ 805,602	718.3%
24	ClearChoice Management	\$ 22,845,966	\$ 406,551	\$ 602,556	48.2%	\$ 406,171	\$ 485,108	19.4%
25	Health Markets	\$ 22,491,126	\$ 84,727	\$ 208,049	145.6%	\$ 177,082	\$ 269,109	52.0%



Rank 2019	Advertiser Name	2019 Spend	Pre-Quarantine '20 Media Week 1 - 10		Change	Quarantine '20 Media Week 11 - 19		Change
			2019 12/31/18 - 03/10/19	2020 12/30/19 - 3/8/20		2019 3/11/19 - 5/12/19	2020 3/9/20 - 5/10/20	
26	Plexaderm	\$ 22,237,009	\$ 354,236	\$ 582,339	64.4%	\$ 265,666	\$ 502,295	89.1%
27	SelectQuote	\$ 21,475,850	\$ 378,734	\$ 549,326	45.0%	\$ 382,669	\$ 565,536	47.8%
28	Bosley	\$ 19,540,521	\$ 340,703	\$ 455,306	33.6%	\$ 327,091	\$ 129,931	-60.3%
29	Maune Raichle Hartley Fr & Mudd	\$ 18,837,290	\$ 361,143	\$ 726,244	101.1%	\$ 371,916	\$ 564,008	51.6%
30	American Residential Warranty	\$ 18,406,989	\$ 368,139	\$ 1,184,456	221.7%	\$ 360,439	\$ 389,907	8.2%
31	PillPack	\$ 17,145,280	\$ 321,124	\$ 409,717	27.6%	\$ 318,347	\$ 87,574	-72.5%
32	Los Defensores	\$ 17,067,980	\$ 279,017	\$ 250,527	-10.2%	\$ 341,762	\$ 208,316	-39.0%
33	Invent Help	\$ 15,755,239	\$ 170,747	\$ 611,803	258.3%	\$ 200,461	\$ 744,357	271.3%
34	Body Contour Centers	\$ 15,219,302	\$ 327,626	\$ 277,113	-15.4%	\$ 302,410	\$ 32,674	-89.2%
35	New Day USA	\$ 15,055,397	\$ 431,477	\$ 265,413	-38.5%	\$ 366,754	\$ 352,916	-3.8%
36	American Home Shield	\$ 14,470,989	\$ 196,022	\$ 216,281	10.3%	\$ 228,638	\$ 372,570	63.0%
37	Lear Capital	\$ 14,077,197	\$ 254,747	\$ 294,530	15.6%	\$ 289,378	\$ 244,663	-15.5%
38	Peachtree Financial	\$ 13,996,258	\$ 160,401	\$ 414,687	158.5%	\$ 179,182	\$ 234,912	31.1%
39	J.G. Wentworth	\$ 13,153,053	\$ 210,347	\$ 402,601	91.4%	\$ 197,798	\$ 477,632	141.5%
40	Luminess Direct	\$ 12,838,251	\$ 236,964	\$ 428,734	80.9%	\$ 180,784	\$ 452,731	150.4%
41	Church & Dwight Co	\$ 12,831,188	\$ 162,059	\$ 1,332,084	722.0%	\$ 217,650	\$ 1,426,813	555.6%
42	Safe Step Walk In Tub	\$ 12,690,080	\$ 199,026	\$ 323,340	62.5%	\$ 205,418	\$ 56,449	-72.5%
43	Distribution Bath Fitter	\$ 12,359,669	\$ 250,563	\$ 329,498	31.5%	\$ 214,678	\$ 82,975	-61.3%
44	Hearing Assist	\$ 12,328,195	\$ 506,326	\$ 200,657	-60.4%	\$ 248,886	\$ 185,190	-25.6%
45	Netspend	\$ 12,312,859	\$ 380,873	\$ 260,583	-31.6%	\$ 191,566	\$ 130,653	-31.8%
46	Sokolove Law	\$ 10,784,047	\$ 210,626	\$ 237,286	12.7%	\$ 169,259	\$ 227,250	34.3%
47	Acorn Stair Lifts	\$ 10,627,859	\$ 177,837	\$ 295,042	65.9%	\$ 217,286	\$ 74,843	-65.6%
48	Physicians Mutual Insurance	\$ 10,596,936	\$ 126,254	\$ 463,624	267.2%	\$ 153,551	\$ 201,070	30.9%
49	Optima Tax Relief	\$ 10,444,824	\$ 142,482	\$ 559,200	292.5%	\$ 165,183	\$ 272,506	65.0%
50	Allstar Products Group	\$ 10,271,357	\$ 83,098	\$ 135,593	63.2%	\$ 30,145	\$ 309,038	925.2%
Total		\$ 1,357,280,105	\$27,042,141	\$37,126,737	37 %	\$21,459,172	\$37,905,021	76.6 %



Rank 2019	Advertiser Name	2019 Spend	Post-Quarantine '20 Media Week 20 - 35		Change
			2019 Avr \$ / week 5/13/19 - 9/1/19	2020 Avr \$ / week 5/11/20 - 8/30/20	
1	Nutrisystem	\$ 115,664,012	\$ 1,743,291	\$ 1,273,782	-26.9%
2	Direct Digital (Nugenix, etc.)	\$ 94,287,880	\$ 2,010,015	\$ 1,620,235	-19.4%
3	E. Mishan & Sons	\$ 81,510,078	\$ 1,146,695	\$ 2,347,788	104.7%
4	My Pillow	\$ 56,028,986	\$ 805,084	\$ 1,820,296	126.1%
5	CarShield	\$ 52,531,234	\$ 944,372	\$ 1,740,358	84.3%
6	St. Jude Children's Hospital	\$ 51,003,209	\$ 783,136	\$ 790,213	0.9%
7	Humana Insurance	\$ 46,984,545	\$ 159,572	\$ 132,855	-16.7%
8	Barrington Media Group	\$ 46,936,418	\$ 558,425	\$ 924,069	65.5%
9	Colonial Penn Life Insurance	\$ 45,658,473	\$ 974,548	\$ 1,120,967	15.0%
10	Ideavillage Products	\$ 44,131,111	\$ 632,951	\$ 2,816,187	344.9%
11	UnitedHealth	\$ 43,966,899	\$ 380,727	\$ 298,707	-21.5%
12	ASPCA	\$ 41,902,853	\$ 705,745	\$ 1,622,775	129.9%
13	Togetherhealth	\$ 37,290,293	\$ 463,167	\$ 442,212	-4.5%
14	NortonLifeLock	\$ 37,272,679	\$ 679,474	\$ 812,946	19.6%
15	Telebrands (Bulbhead)	\$ 36,792,160	\$ 597,425	\$ 1,127,158	88.7%
16	Soclean	\$ 34,670,152	\$ 642,875	\$ 401,450	-37.6%
17	Jenny Craig	\$ 30,570,532	\$ 185,042	\$ 0	-100.0%
18	Consumer Attorney Marketing	\$ 27,236,563	\$ 710,692	\$ 453,802	-36.1%
19	Inogen	\$ 27,212,613	\$ 564,360	\$ 148,031	-73.8%
20	TZ Insurance Solutions	\$ 26,624,710	\$ 348,936	\$ 239,150	-31.5%
21	Shriners International	\$ 24,528,146	\$ 156,503	\$ 276,038	76.4%
22	American Advisors	\$ 24,151,563	\$ 534,040	\$ 816,963	53.0%
23	eHealthInsurance Services	\$ 22,880,111	\$ 239,963	\$ 340,414	41.9%
24	ClearChoice Management	\$ 22,845,966	\$ 426,521	\$ 389,128	-8.8%
25	Health Markets	\$ 22,491,126	\$ 259,506	\$ 516,344	99.0%

Rank 2019	Advertiser Name	2019 Spend	Post-Quarantine '20 Media Week 20 - 35		Change
			2019 Avr \$ / week 5/13/19 - 9/1/19	2020 Avr \$ / week 5/11/20 - 8/30/20	
26	Plexaderm	\$ 22,237,009	\$ 408,267	\$ 341,425	-16.4%
27	SelectQuote	\$ 21,475,850	\$ 393,771	\$ 517,865	31.5%
28	Bosley	\$ 19,540,521	\$ 416,991	\$ 196,150	-53.0%
29	Maune Raichle Hartley Fr & Mucid	\$ 18,837,290	\$ 448,232	\$ 286,755	-36.0%
30	American Residential Warranty	\$ 18,406,989	\$ 351,706	\$ 117,220	-66.7%
31	PillPack	\$ 17,145,280	\$ 347,709	\$ 177,742	-48.9%
32	Los Defensores	\$ 17,067,980	\$ 351,286	\$ 174,632	-50.3%
33	Invent Help	\$ 15,755,239	\$ 266,098	\$ 377,117	41.7%
34	Body Contour Centers	\$ 15,219,302	\$ 299,394	\$ 0	-100.0%
35	New Day USA	\$ 15,055,397	\$ 249,083	\$ 338,196	35.8%
36	American Home Shield	\$ 14,470,989	\$ 291,481	\$ 303,295	4.1%
37	Lear Capital	\$ 14,077,197	\$ 292,269	\$ 243,947	-16.5%
38	Peachtree Financial	\$ 13,996,258	\$ 309,556	\$ 101,365	-67.3%
39	J.G. Wentworth	\$ 13,153,053	\$ 238,781	\$ 453,697	90.0%
40	Luminess Direct	\$ 12,838,251	\$ 283,533	\$ 476,279	68.0%
41	Church & Dwight Co	\$ 12,831,188	\$ 236,598	\$ 953,714	303.1%
42	Safe Step Walk In Tub	\$ 12,690,080	\$ 245,439	\$ 120,735	-50.8%
43	Distribution Bath Fitter	\$ 12,359,669	\$ 231,766	\$ 158,086	-31.8%
44	Hearing Assist	\$ 12,328,195	\$ 191,566	\$ 200,291	4.6%
45	Netspend	\$ 12,312,859	\$ 180,970	\$ 149,985	-17.1%
46	Sokolove Law	\$ 10,784,047	\$ 190,975	\$ 165,276	-13.5%
47	Acorn Stair Lifts	\$ 10,627,859	\$ 211,202	\$ 32,311	-84.7%
48	Physicians Mutual Insurance	\$ 10,596,936	\$ 255,311	\$ 123,909	-51.5%
49	Optima Tax Relief	\$ 10,444,824	\$ 203,419	\$ 217,137	6.7%
50	Allstar Products Group	\$ 10,271,357	\$ 150,121	\$ 863,548	475.2%
	Total:	\$ 1,357,280,105	\$ 21,837,820	\$ 27,531,267	26.1%

# Who is taking advantage of high levels of TV viewership and low rates?

Six days after the Covid-19 [national emergency](#) was declared, DRMetrix launched its [online television tracker](#) to measure how different sectors of the DTC television industry were being impacted by the crisis.

What we know is that advertisers relying on faulty TV attribution models and/or audience ratings data were at a clear disadvantage in reading the consumer and media landscape. While ratings data helps advertisers understand audience, it does not measure the level at which consumers are responding to television commercials and purchasing goods and services. Traditional DTC advertisers are able to measure consumer response and purchases, often in real time, to determine how individual network buys are performing. This is especially important during periods of disruption like Covid-19. Armed with this additional intelligence, many were able to take advantage of a rare opportunity as television advertising rates were decreasing at a time when consumer viewership was substantially higher than normal. Early in the quarantine, these advertisers were able to measure how well many of their DTC campaigns were performing!

AS SEEN ON TV product advertisers are one category of traditional DTC advertiser that have been able to dramatically increase their TV buys during the quarantine. This is especially impressive considering AS SEEN ON TV product ad expenditures were down over 26% in 2019 as shown in DRMetrix's 2019 industry study. Some of these AS SEEN ON TV advertisers appear in the top 50 traditional DTC charts and show substantial increases to their year-over-year media expenditures. The most striking example being Ideavillage whose media expenditures during the quarantine period were up over 1000%!

Other big winners included traditional DTC advertisers such as My Pillow, CarShield, Colonial Penn Life Insurance, ASPCA, Norton-LifeLock, Shriners International, eHealth Insurance Services, Health Markets, Select Quote, J.G. Wentworth, Optima Tax Relief, and many others.

# What is causing some to spend more while others are pulling back?

Of the 4,778 DTC brands that provided a way for consumers to respond to their TV advertising in 2019, 37% used traditional DTC techniques which includes the use of DR Variations. This technique involves the assignment of unique response variants that allow advertisers to track consumer response back to specific networks, dayparts, programs, and creatives. The use of DR variations has been proven effective over many decades, and a variety of these methods are now used, including unique web based promotion codes, SMS codes, and differing phone numbers.

By using DR variations, advertisers are better able to track the performance of their TV campaigns in real time as well as optimize their buys to produce the highest level of return-on-investment (ROI). A major marketplace disruption such as Covid-19 can make it extremely difficult for brand advertisers to understand how their TV media is performing. Many are forced to pull off the air due to the uncertainty. This is where traditional DTC methods, like using DR Variations for TV attribution, shine in their ability to illuminate in the darkness. These are some of the key reasons why many traditional DTC Advertisers have been able to succeed despite the 2020 Covid-19 disruption. DR variations provide a superior TV attribution solution allowing advertisers to free themselves from reliance on traditional ratings. While other forms of TV attribution have burst upon the scene in recent years, they are far more expensive and far less accurate than the use of DR Variations. Next, we will explore one of the many reasons why the use of DR Variations is far superior to other expensive ad tech solutions to TV attribution that simply do not work for linear national television media.

## TV Attribution

In offline linear television, many advertisers use traditional ratings as a guide to purchase television time. For many decades, a different approach has been used by traditional DTC advertisers who engage consumers to respond to their commercials and track responses back to specific networks and dayparts.

Traditional DTC advertising agencies have long studied the correlation between consumer response, ratings data, and resulting advertising ROI. It has been proven that ratings data does not correlate and can not be used to reliably optimize a DTC campaign. Further, traditional DTC agencies have discovered that the current generation of television attribution solutions are highly inaccurate when it comes to properly attributing consumer response to specific linear television networks.

These are some of the reasons why nearly 40% of consumer-response brands continue to use DR variations as an important part of their attribution and media optimization strategy. This time proven practice has been around for decades. As an example, it has become common in television and radio to provide consumers with a promotion code to use when visiting an advertiser's website. Whether using promotion codes, differing phone, web, or SMS variants, the goal is always the same - to attribute response so that media schedules can be optimized. Some of the reasons why traditional DTC advertisers prefer to use DR variations have to do with difficult problems that only DR variations can solve for.

## The proximity of airing issue

If you have multiple national networks running commercial spots near one another, the attribution challenge becomes problematic. The problem is further compounded by time-shifted viewing made possible by digital-video-recorders. Estimates suggest that as many as 20-40% of consumers are watching popular TV shows up to 35 days beyond live.

Depending on the frequency of the problem, and the number of networks involved, the use of DR variations can be a viable solution to these difficult problems.

The chart below provides insight into the proximity of airing issue, using data from 30 of the more prominent TV campaigns not using DR variations. DRMetrix wanted to determine how often these campaigns encountered conflicts where more than one network aired within a short period of time.

We used a five and a one-minute delta for the study. The five-minute delta looks back five minutes and forward five minutes from when each spot ran to determine if there were other airings for the brand on a different network. Similarly, the one-minute study looks back one minute and forward one minute. DRMetrix did not consider airings on the same network to be in conflict. For a conflict to exist, there must be at least two airings on different networks within the allotted time frame. DRMetrix also studied how many networks on average were involved when conflicts were discovered.

In the case of Chewy.com, we analyzed 153,926 airings that AdSphere captured for 2019. Approximately 145,163 had conflicts within a 5-minute delta which is 94.31%. The average number of networks involved during each period of conflict was 5.87. Assuming Chewy.com is doing TV attribution, this would leave less than 6% of their airings unconflicted from which to build a model to accurately attribute the remaining 94.31%.

## INDUSTRY CATEGORY - SHORT FORM PRODUCTS

Brand Name	Total Airings	5 Minute Delta			1 Minute Delta		
		Airings with Network Conflicts (Within Delta)	Conflict Percentage	Number of Network Conflicts (Average)	Airings with Network Conflicts (Within Delta)	Conflict Percentage	Number of Network Conflicts (Average)
Chewy.com	153926	145163	94.31%	5.87	74852	48.63%	2.46
GoodRX.com	146663	137950	94.06%	8.7	86348	58.88%	2.75
Chime	144734	136035	93.99%	5.8	71965	49.72%	2.48
Smile Direct Club	128708	117125	91.00%	5	58966	45.81%	2.33
Home Light	126424	118857	94.01%	6.53	65347	51.69%	2.52
Touch Of Modern	111517	98685	88.49%	4.47	44804	40.18%	2.35
Home Advisor	109825	97844	89.09%	5	47394	43.15%	2.41
Peloton Cycle	106604	93519	87.73%	4.39	42040	39.44%	2.35
GrubHub.com	104643	93001	88.87%	5.43	46573	44.51%	2.45
Nerd Wallet	97961	85893	87.68%	4.96	41407	42.27%	2.43
thredUP	96164	83215	86.53%	3.96	35043	36.44%	2.28
GoDaddy	96086	80968	84.27%	3.65	31628	32.92%	2.24
Fanatics	91387	76644	83.87%	3.55	29511	32.29%	2.23
Noom	90752	76107	83.86%	4.24	34444	37.95%	2.38
Keeps	88863	75463	84.92%	3.59	29660	33.38%	2.2
Geico	81826	97516	119.17%	12.43	49979	61.08%	2.8
Purple Mattress	80897	66248	81.89%	3.66	26191	32.38%	2.26
Expedia	75325	60649	80.52%	3.43	22527	29.91%	2.21
Poshmark	73535	58426	79.45%	3.72	23522	31.99%	2.27
Golden Corral	73047	60619	82.99%	3.87	24989	34.21%	2.29
Warby Parker	72130	58580	81.21%	3.73	23995	33.27%	2.23
Carvana.com	69242	56987	82.30%	3.92	23443	33.86%	2.29
Stamps.com	68046	54084	79.48%	4.16	23890	35.11%	2.35
4 imprint	65185	52968	81.26%	4.1	23023	35.32%	2.32
Wayfair.com	62002	49634	80.05%	3.64	19662	31.71%	2.25
Progressive	61103	47987	78.53%	3.76	19454	31.84%	2.28
S. New Hampsh U.	60916	50635	83.12%	4.34	22494	36.93%	2.36
Ashley Homestore	58764	47776	81.30%	3.69	19318	32.87%	2.25
Trivago	57868	43880	75.83%	3.25	15683	27.10%	2.21
Credit Karma	57411	40525	70.59%	3.12	14151	24.65%	2.19

Traditional DTC advertisers buy fixed network dayparts at a discount where there is little control over when spots run or which programs they air in. This is an acceptable tradeoff which allows the direct-to-consumer industry to buy television time at lower rates. Because of the obvious variables involved, it is difficult to model future performance based on past airings data which further supports the use of DR variations.

In conclusion, many traditional DTC advertisers use DR variations to dramatically improve the accuracy of their attribution and it has become an important part of their overall attribution model which includes digital attribution, multi-touch, and other methodologies.

The challenges advertisers face today with linear offline media attribution are significant enough to justify employing a combination of attribution methodologies which for many include the use of DR variations.

DRMetrix has provided some click-to-watch examples of TV creatives using DR variations on the next pages.

If your company is not currently using DR variations in your television advertising, please email DRMetrix at [info@drmetrix.com](mailto:info@drmetrix.com) for a free proximity of airing report for your brand/s.

## EXAMPLES OF DR VARIATIONS IN USE



Click on images to play spots.



click to play DraftKings (60 sec)

DOWNLOAD THE DRAFTKINGS APP

PLAY FREE - \$10,000 SOC CONTEST  
USE PROMO CODE: GOAL

Screen images simulated. Appearance of device may vary.

click to play Martha & Marley Spoon (30 sec)

martha & MARLEY SPOON

3 FREE MEALS & FREE SHIPPING

CODE: TV6

marleyspoon.com

Valid for new customers only with paid subscription. \$30.75 value. Not valid with other offers. Delivery restrictions may apply.

click to play Force Factor Alpha King (60 sec)

FUEL PERFORMANCE

GET YOUR COMPLIMENTARY BOTTLE  
TEXT STEAM TO: 809809

FORCE FACTOR GNC



Click on images to play spots.

click to play Slimfast (30 sec)

TEXT "ENERGIZE" TO 44222 FOR AN EXCLUSIVE OFFER

NEW SlimFast ADVANCED ENERGY

Message and data rates may apply.

click to play SharisBerries.com (30 sec)

Valentine's Strawberries  
~~\$29.99~~  
**\$19.99** +s/h

Expires 2/14/20. While supplies last. Berries arrive fully covered. See berries.com for details.

berries.com enter code: wild  
click the mic

Sharis Berries

# Final thoughts

As web and mobile companies continue to migrate to television, they are often frustrated by the lack of measurement and accountability. The traditional DTC industry stands ready to help.

Since traditional DTC advertisers have the most accurate understanding of their television ROI, DRMetrix has worked over the past eight years to create AdSphere, the first television research system of its kind, which makes it easy for the industry to study these types of campaigns. Knowing where these types of advertisers are focusing their media dollars by network and daypart is key to maximizing success.

Traditional DTC agencies and advertisers are better positioned to optimize campaigns and allocate spending where they are measuring acceptable ROI. Traditional DTC agencies optimize campaigns down to the network, daypart, program, and even creative levels. Network dayparts and creatives that under-perform are discontinued while profitable media is expanded. Accordingly, the actionable insights gained from competitive television media research will lead many DTC advertisers to make immediate changes to their media and/or creative strategies. The positive impact of these changes can often be measured immediately.

Whether DTC advertisers use DR variations or not, many can immediately benefit from AdSphere research data to dramatically improve their key performance indicators (KPIs). See [www.drmetrix.com/knowROI](http://www.drmetrix.com/knowROI) for more information.

To learn more about the DTC television industry, visit the Performance-Driven Marketing Institute (PDMI) online at [www.thepdmi.com](http://www.thepdmi.com) Through the sharing of research data, DRMetrix is hoping more advertisers will discover the significant advantages of using time-proven TV attribution techniques including, the use of DR variations as discussed in this report. We look forward to continuing to help the industry through research and education.

If you are interested in learning more about the DTC television industry, and where ROI is being found in television advertising, please contact DRMetrix for a complimentary two-week trial of AdSphere.

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