



State of Advertising

INTRO

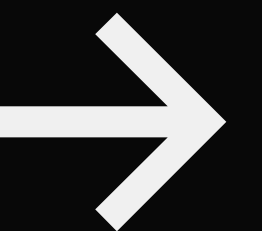
The first half of 2025 has shown us an advertising landscape of **bold bets** made in a world of **fragmented audiences** and cautious consumers. To win in this new reality, advertisers must reach target audiences with **precision and personalization**, and embrace emerging AI technologies.



Samba TV



Advertising Report 2025



EXECUTIVE SUMMARY

For the first half of 2025, advertiser confidence and spend was up. Despite economic uncertainty, **68% of the top 100 advertisers** increased their TV spend, seizing opportunities to capture market share. For example, **Tremfya’s** TV spend surged **(+190%)** post-FDA approval, **Febreze** capitalized on the "home-as-sanctuary" trend **(+137%)**, and **Amazon’s** ad spend spiked **(+2,405%)** to promote its brand and ad-supported streaming services.

A Tale of Two Cities

Brands in the same categories are taking starkly different approaches. **T-Mobile** increased ad spend **(+34%)** to build market share, while **Verizon** pulled back **(-37%)**, focusing on retention. **Starbucks** doubled down **(+88%)** to refocus on its coffee and the third place experience, while **Dunkin’** reduced TV spend **(-61%)** to prioritize digital, discounts, and a younger audience. In automotive, American brands like **Ford** and **Chevrolet** are capitalizing on the geopolitical moment, while **Toyota** and **Honda** scaled back due to tariff concerns.

Streaming Opportunity Continues to Grow

Streaming viewership continues to grow rapidly **(+46% YoY)**, accelerating from its sizable increase **(+32%)** last year. The continued shift reinforces that streaming offers a mainstream opportunity for advertisers to engage where audiences are spending time, and do so more granularly. I would bet dollars for doughnuts that your TV measurement is still too linear heavy in its methodology – give us a call so we can help you modernize your planning and measurement for the streaming-first paradigm we now live in.

Audience Precision Is Key

Half of TV households see **94%** of ads, while the other half sees just **6%**. Affluent households are under-reached by **13%**, while Hispanic and Asian audiences are underreached by even higher margins **(-23%** and **-30%** respectively), creating missed opportunities for brands. Combined with contextual signals from the web, advertisers can reach the right audience on TV and also better understand who is in-market and ready to purchase.

To succeed in the second half of 2025, marketers should:

- **Capture.** Reframe strategies around competitive share-of-voice, using our data to specify a narrow audience you can dominate
- **Commit.** Decide to lean in by using data to increase precision, but don’t be paralyzed by competitors who are blowing their budgets on wasteful old-world strategies
- **Streaming first, not linear first.** Shift strategy to prioritize streaming and its enhanced targeting, reallocating budgets based on incrementality
- **AI is your friend.** Stay ahead of the innovation, use actionable AI to discover non-obvious insights, optimize campaigns, and identify underserved, high-value audiences across channels.

We are here to be your partner at this pivotal moment for our industry,



Ashwin Navin
Samba TV Co-founder & CEO

68%

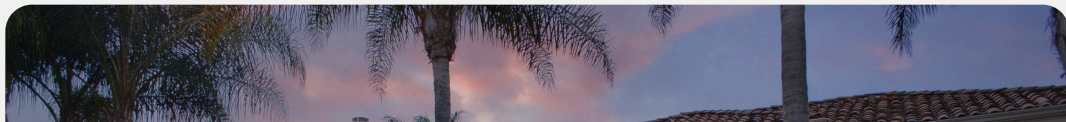
Over two-thirds of the top 100 advertisers increased TV ad impressions year-over-year

+190%

Of the top 20 advertisers, pharmaceutical brand Tremfya saw the steepest yearly increase in TV ad impressions

+46%

CTV hours viewed increased by 46% in H1 2025, up from a 34% increase last year





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[01]

Advertising Trends



HI 2025 ADVERTISING

68% of Top 100 Brands Increased TV Ad Impressions

Despite a backdrop of economic uncertainty and cautious consumer confidence, **68 of the top 100** and **75%** of the top 20 advertisers increased their TV ad impressions in H1 2025. This shows brands are doubling down on advertising as a primary weapon to seize market share from competitors.

The offensive players include **Tremfya (+190% YoY)**, which unleashed a massive campaign following new FDA approvals, and **Febreze (+137% YoY)**, which capitalized on the "home-as-sanctuary" trend. The number two brand overall, **Burger King**, also increased impressions by **34%** as part of its "Reclaim the Flame" revitalization plan, under the leadership of a new CMO.





















Some brands did pull back, including **Verizon** and **Domino's**, both of which shifted ad spend to digital and re-focused creative strategies. Verizon emphasized subscriber retention, while Domino's focused on culturally relevant campaigns. This highlights a strategic pivot across the industry, where some brands are diversifying their media mix to better reach their target audiences.



Top TV advertisers in H1 2025

Total TV ad impressions

Percent change: H1 2025 vs. H1 2024

01	12.0B	06	7.6B	11	6.3B	16	6.0B
	+1%		+34%		-11%		-16%
02	11.0B	07	6.5B	12	6.1B	17	5.8B
	+34%		-13%		+4%		+40%
03	10.7B	08	6.4B	13	6.1B	18	5.8B
	+39%		+14%		+4%		+190%
04	8.8B	09	6.4B	14	6.0B	19	5.6B
	-7%		-37%		+5%		+39%
05	8.5B	10	6.4B	15	6.0B	20	5.6B
	+41%		+37%		+19%		+137%

*Excludes TV networks



TELECOM AD WARS

T-Mobile Spends Big for New Customers While Verizon Cuts TV Ads to Focus on Retention

The divergent impression numbers in the telecom sector are the direct result of three distinct spending strategies. **T-Mobile** is in all-out growth mode (+34% YoY based on TV ad impressions), increasing its already large budget across both TV and digital to continue its run as the subscriber-growth leader, having delivered record postpaid and broadband net additions in Q1 2025.

In contrast, **Verizon** cut total TV ad impressions by 37%, investing instead in experience-based marketing (ex. Super Bowl FanFest, holiday pop-ups like the Barbie Streamhouse) that aligns with the company’s new focus on retention and reducing churn to combat several quarters of subscriber losses.



T-Mobile

YoY TV Ad Impressions **+34%**

Impressions Rank **6**



verizon

YoY TV Ad Impressions **-37%**

Impressions Rank **9**



Consumer Cellular

YoY TV Ad Impressions **-11%**

Impressions Rank **11**





FROM IMPRESSIONS TO IMPACT

Progressive, Domino's, DUPIXENT, and Purina Turned Ad Dollars Into Meaningful Connections

In H1 2025, winning in advertising meant more than just high impression volume; it required earning positive online conversation and social sentiment. **Progressive** and **Domino's** proved standouts in balancing both, ranking in the top 5 for TV ad impressions while also securing top-tier positive online sentiment. **Progressive** ran ads featuring mainstays like Flo, while also introducing new initiatives like the "Don't be Passive Progressive" campaign targeting drivers under 35. **Domino's** success was driven by value-focused campaigns like "Emergency Pizza," and culturally relevant partnerships like with Netflix's megahit Squid Game.

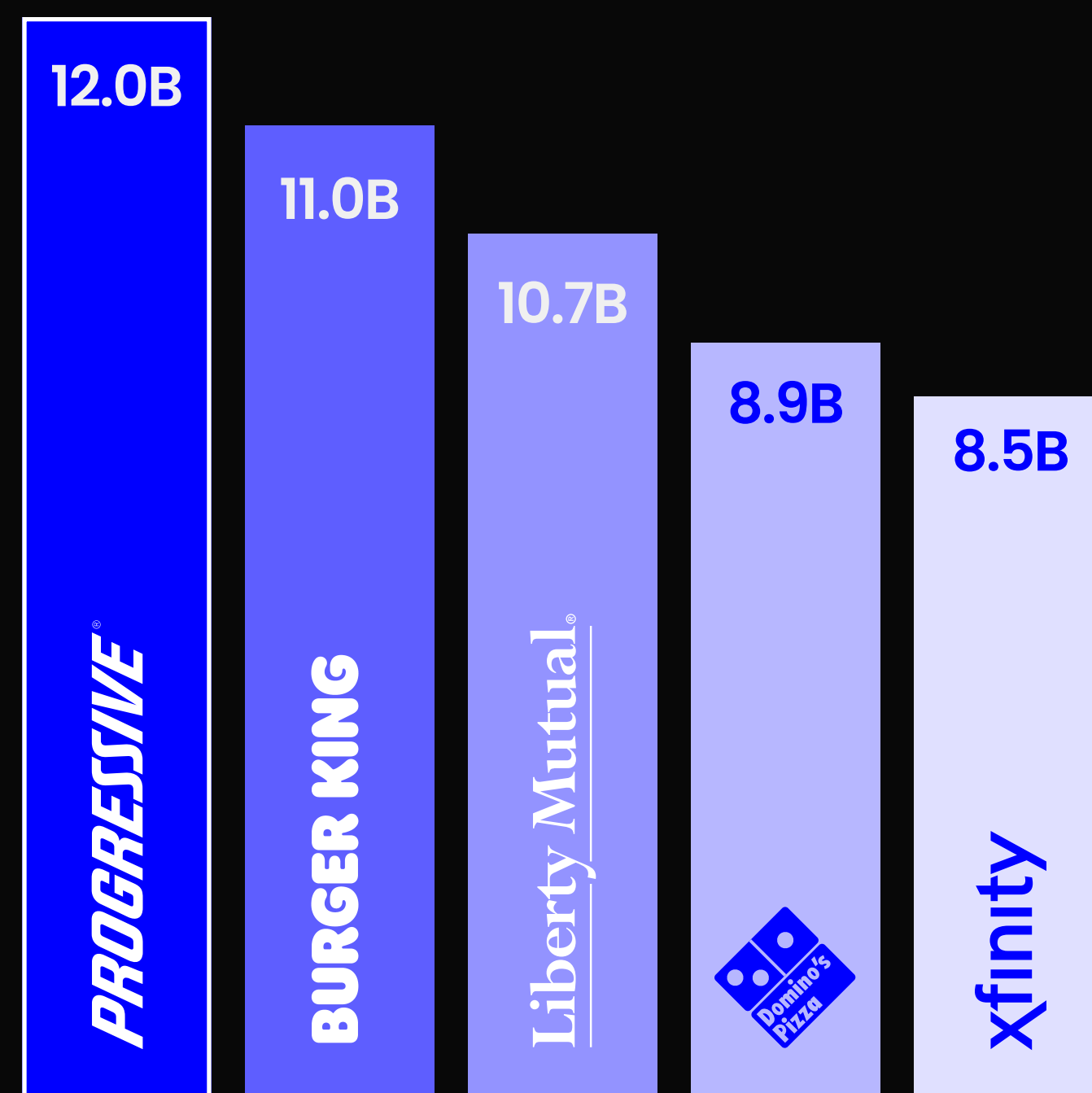
In contrast, brands such as **DUPIXENT** and **Purina** drove positive online conversations but didn't drive as high of TV impressions. **DUPIXENT** led in positive online sentiment by focusing on clinical efficacy and addressing the needs of underserved patient communities, generating trust and positive discussion. **Purina** earned the #2 spot for social sentiment through a strategy centered on community goodwill, with initiatives like "Purina Cares Day" and disaster relief donations building significant brand love.



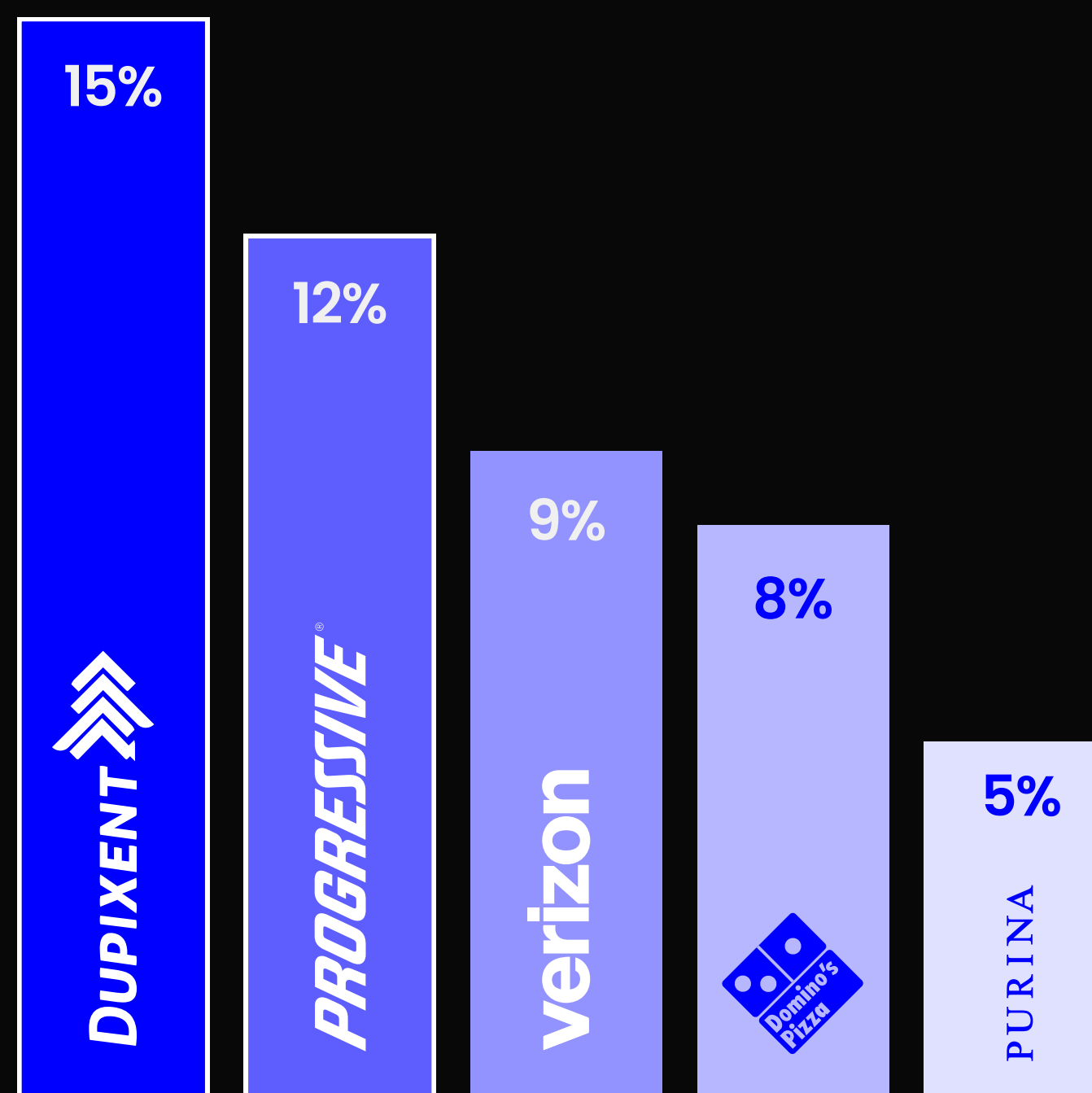
Winning brands by ad impressions, online conversation, and social sentiment

AMONG TOP 10 ADVERTISERS BASED ON TV AD IMPRESSIONS, H1 2025

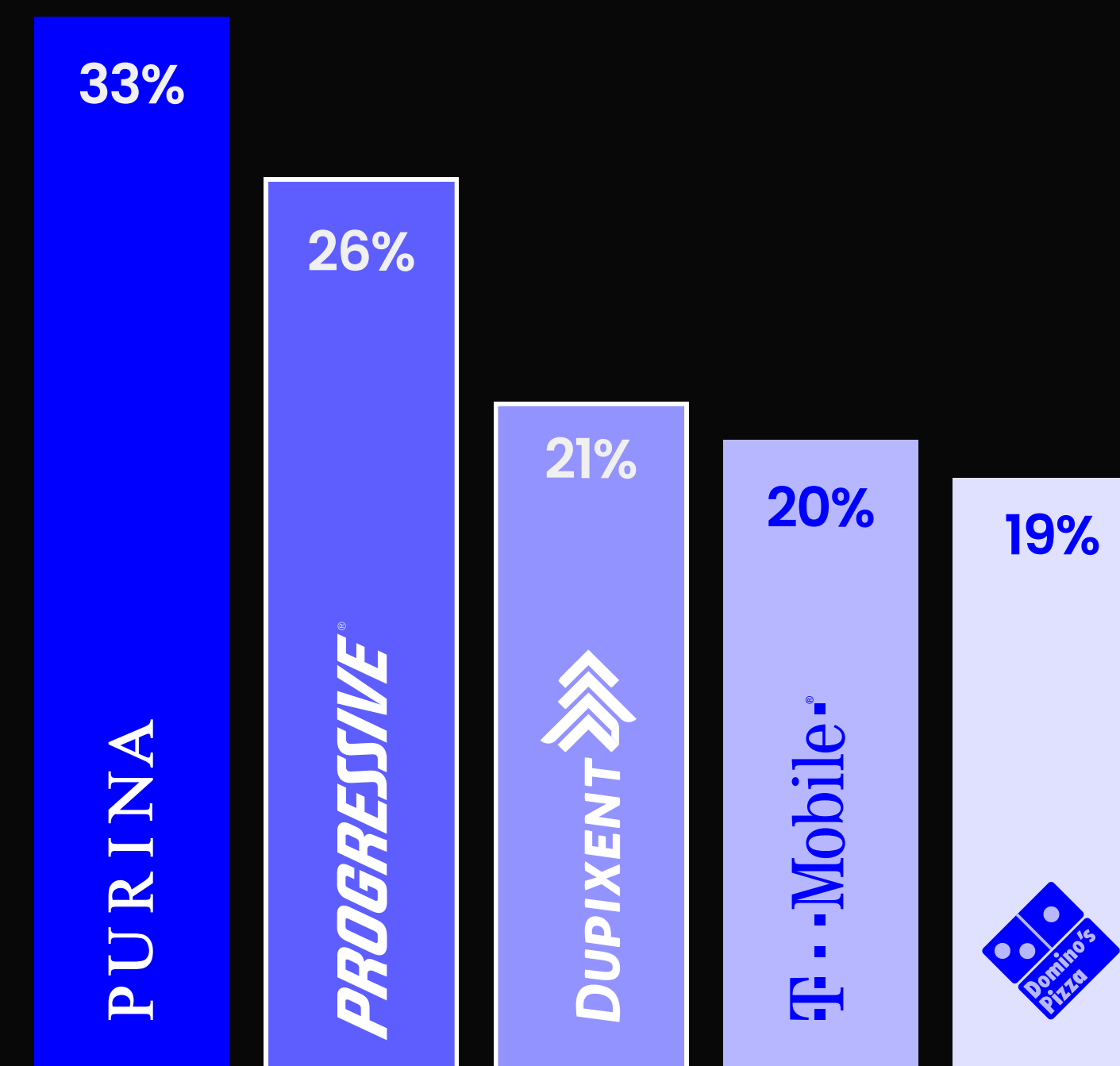
TV ad impressions



Positive online sentiment %



Positive social sentiment %



SOURCES: TV AD IMPRESSIONS AND ONLINE SENTIMENT, SAMBA TV. SOCIAL SENTIMENT, MELTWATER.



EFFICACY, SERVICE, AND STRENGTH




DUPIXENT, Progressive,
and Verizon Drove the Most
Positive Online Sentiment

In H1 2025, the brands generating the most positive online conversation did so by focusing on core pillars of trust. **DUPIXENT** led the pack by communicating tangible results, with discussions centered on its successful clinical trials and effectiveness in treating various conditions, building confidence among patients and the medical community.

Progressive earned its high sentiment by emphasizing customer-centric values, with conversations highlighting its commitment to customer service. In a hyper-competitive telecom market, **Verizon** drove positive buzz by projecting strength and reliability, focusing its messaging on its competitive advantages and commitment to customer satisfaction.



Highest positive online sentiment among top 10 advertisers

BRAND	POSITIVE SENTIMENT	NEGATIVE SENTIMENT	KEY POSITIVE THEMES
	15%	2%	<ul style="list-style-type: none">• Successful trial results• Drug’s effectiveness in treating various conditions• Strong prescription trends and growth drivers• Potential to contribute significantly to Regeneron’s revenue
	12%	3%	<ul style="list-style-type: none">• Commitment to customer service• Customer satisfaction and innovative policies
	9%	4%	<ul style="list-style-type: none">• Company’s strengths and competitive advantages• Dominance over T-Mobile• Commitment to customer satisfaction• Rebuttal of cable company virtual phone services (e.g. Xfinity Mobile)

Pharma and Health Advertisers Serve Most TV Ads as Consumers Prioritize Health Over Luxuries

The H1 2025 advertising landscape was dominated by verticals catering to a health conscious consumer. While **Entertainment** remained the top category based on impression volume (16% of all TV ad impressions), thanks to host-channel promotion, the **Pharmaceutical & Medical** sector's powerful second-place showing (12% of all impressions, up 3% from last year) is the result of direct-to-consumer campaigns for new drugs (a category resilient to economic pressures as consumers prioritize health).

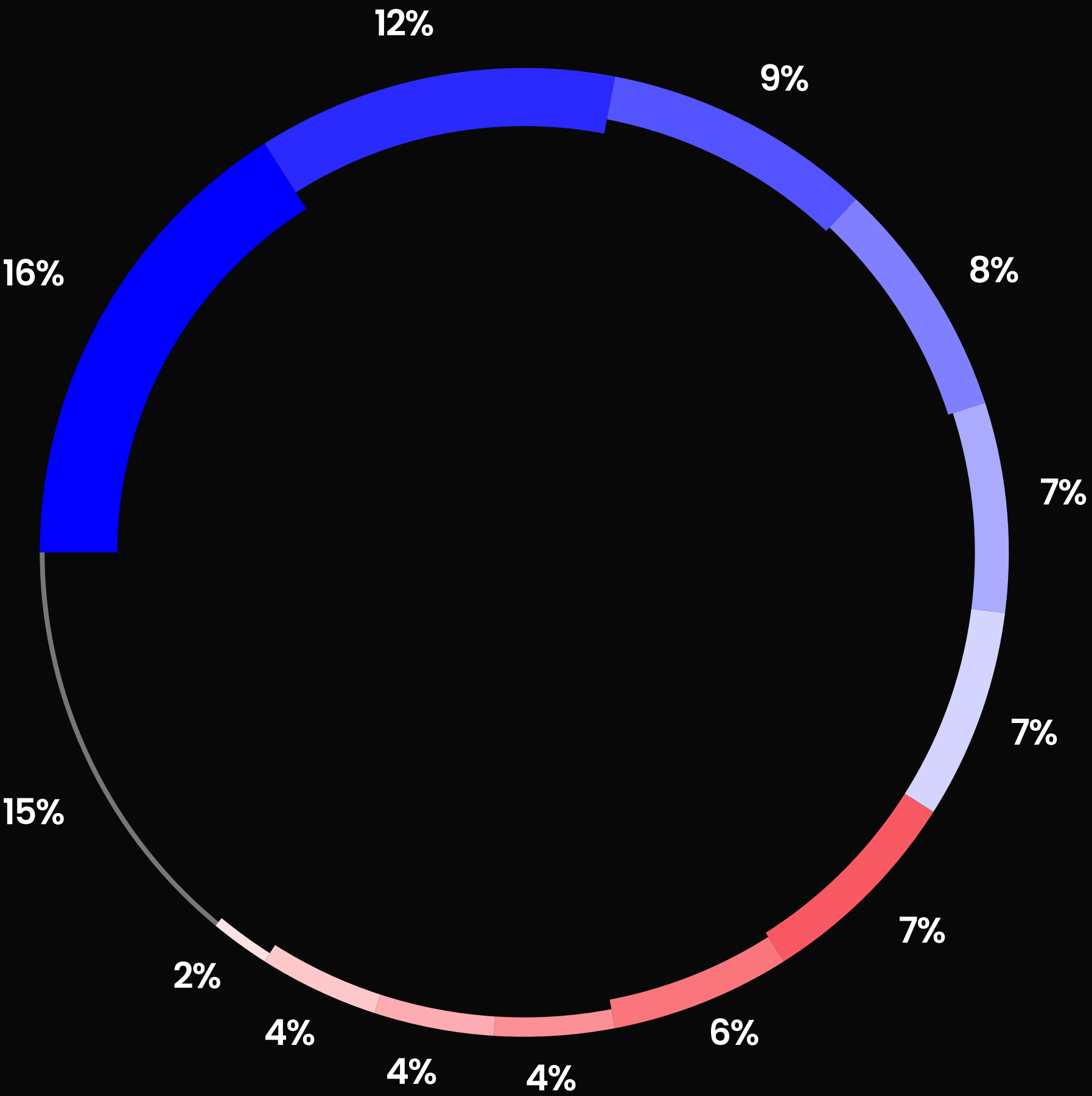
The strong performance of **Health & Beauty** and **Home & Garden** further underscores a shift toward a "home-as-sanctuary," with consumers prioritizing spending on wellness and affordable comforts during uncertain times.



Total TV ad impressions by category

H1 2025

VERTICAL	IMPRESSIONS	PERCENTAGE
Entertainment	273B	16%
Pharmaceutical & Medical	193B	12%
Health & Beauty	152B	9%
Food & Beverage	127B	8%
Home & Garden	121B	7%
Business, Finance, Legal, and Logistics	116B	7%
Retail Stores	112B	7%
Restaurants	100B	6%
Electronics & Communication	73B	4%
Vehicles Manufacturers	60B	4%
Insurance	59B	4%
Travel	35B	2%
Other	242B	15%





CONSUMER PRIORITIES SHIFT

Advertiser Spend Mirrors
Consumer Priorities:
Services & Self-Investment In,
Big-Ticket Items Out.

The shifts in ad impressions across verticals in H1 2025 paint a clear picture of advertisers reacting to a cautious consumer. Advertisers for big-ticket discretionary items pulled back, with **Automotive (-8%)** and **Travel (-4%)** cutting spend. This retreat was particularly sharp in the auto sector, where tariff concerns were expected to hike car prices and soften consumer demand. In contrast, ad spend for necessities like **Insurance (+12%)** and **Home & Garden (+12%)** grew.

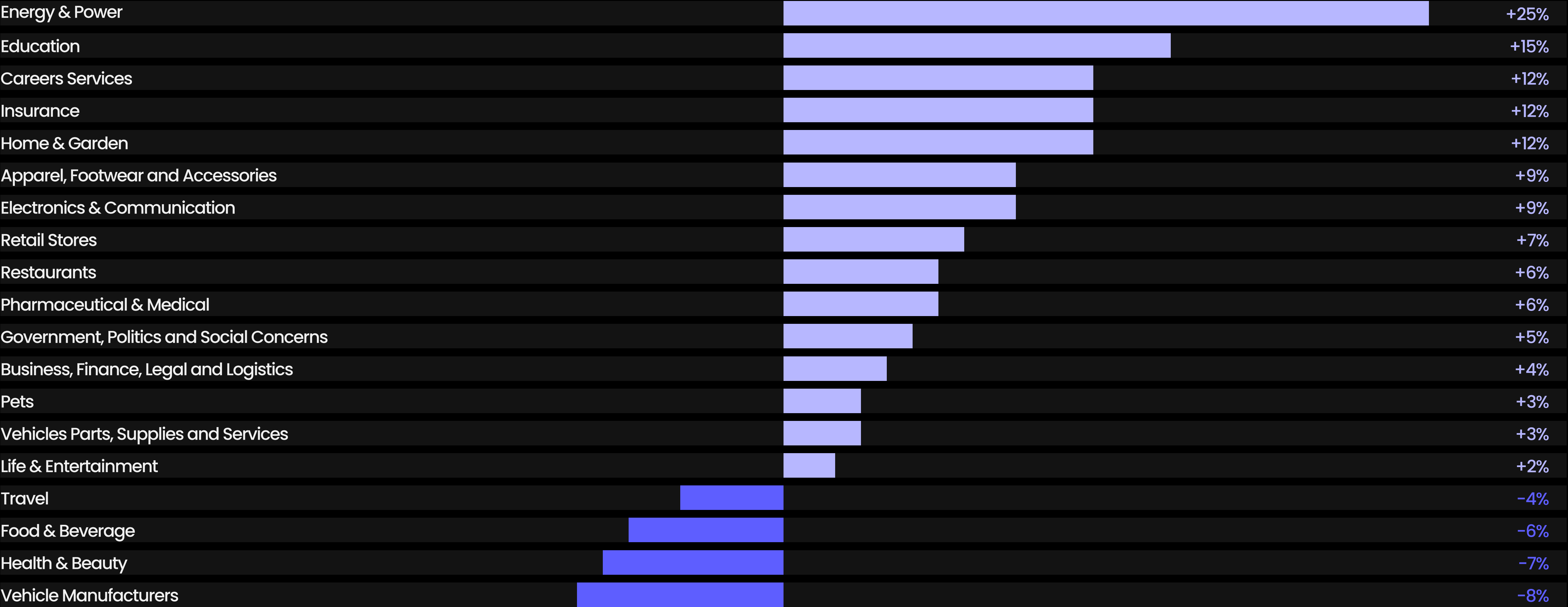
A contrast emerged in food-related advertising. While ad impressions for **Food & Beverage** fell (-6%), **Restaurant** advertisers launched an offensive, increasing impressions by 6%. This suggests an effort to lure diners back, with restaurants considered to be an accessible luxury. This strategy aligns with consumer sentiment data from McKinsey, which found that restaurants were the top category where people planned to treat themselves, giving advertisers a clear opening.

Perhaps most telling is where advertisers see new growth opportunities: personal development. Ad impressions for **Education (+15%)** and **Career Services (+12%)** saw notable increases. In an uncertain economic climate, advertisers are clearly tapping into a consumer mindset that is more receptive to messages about investing in personal and professional futures.



Change in TV ad impressions by category

H1 2025 VS. H1 2024





CPG Giants and Smaller Brands See Biggest Ad Growth, Not Traditional Big Spenders

The list of fastest-growing advertisers in H1 2025 is not dominated by the usual mega-brands, but by a mix of challenger brands and established players making massive, targeted investments. This reflects a "barbell" economy where ad spend is surging at two poles: essential at-home goods and high-stakes service sectors.

For example, **General Mills'** astronomical **46,471% growth in ad impressions** reflects a huge bet on capturing the at-home, value-seeking consumer with new campaigns focused on driving attention to the umbrella brand rather than individual products. At the same time, **Amazon's 2,405% increase** signals a major strategic offensive to promote its ad-supported streaming and AI advertising tools.

In the service sector, **Rocket Mortgage's 531% growth** in a stagnant housing market corresponded with the announcement of its acquisition of Redfin. These brands are aggressively advertising to capture specific consumer segments in a market where broad-based growth is scarce.

TOP 20 ADVERTISERS BASED ON YEAR-OVER-YEAR GROWTH IN TV AD IMPRESSIONS

AMONG TOP 500 ADVERTISERS		H1 2025 VS H1 2024
1	General Mills	46,471%
2	Dream Games	5,589%
3	Amazon	2,405%
4	Insurify	1,894%
5	Harbor Freight	1,254%
6	Affordable Dentures & Implants	981%
7	Ethos	837%
8	Iberogast	664%
9	No Time To Wait	627%
10	Rocket Mortgage	531%
11	Factor 75	486%
12	Repatha	394%
13	Hers	336%
14	Persil	331%
15	Bausch + Lomb	297%
16	Particle	291%
17	Smalls	256%
18	Redfin	256%
19	Tovala	249%
20	Pillsbury	242%






GENERAL MILLS' NEW PLAYBOOK

General Mills Shifts from Individual Product Ads to Multi-Product Umbrella Brand Campaigns

The massive **46,471% year-over-year growth** in impressions for the **General Mills** corporate brand signals a major strategic shift. Rather than relying solely on individual product ads, the company is now executing large-scale "umbrella brand" campaigns that unite multiple products under a single, powerful theme, like with their “Game Day” campaign featuring the Kelce and Watt families. This approach is designed to build equity in the corporate name and create a halo effect across its entire portfolio, connecting with consumers who are seeking value and trusted household names, particularly following the company’s quarterly sales declines of around 3-5%.

While key brands like **Pillsbury (+242%)** and **Cheerios (+48%)** still receive significant investment, the massive corporate-level push allows General Mills to create broad, culturally relevant moments that efficiently lift multiple brands at once.

ADVERTISER NAME		H1 2025 TV AD IMPRESSIONS	YEAR-OVER-YEAR
Blue Buffalo		2.9B	-5%
Cheerios		2.4B	+48%
Pillsbury		1.4B	+242%
General Mills		1.4B	+46,471%
Nature Valley		1.1B	-18%
Haagen-Dazs		216M	-52%

Auto, Home Services, and Some Restaurant Brands Cut Ad Spending the Most

The advertisers who pulled back most significantly in H1 2025 were making calculated retreats in response to specific market pressures. Automakers like **Honda** and **Volkswagen** cut back as consumers delayed big-ticket purchases amid economic uncertainty and tariff fears. In the QSR space, **Dunkin's 61% decrease in TV ad impressions** reflects a shift to focus on social ads and demonstrates the intense competition for a share of tightening discretionary wallets (with **Starbucks** gladly filling the gap).

Angi saw the biggest decline of any advertiser, as its parent company, IAC, spun off ownership to shareholders. The company reduced overall OpEx spend and ad spend leading up to this change and prioritized customer experience, launching a new matching model to allow homeowners to choose professionals they want to connect with. Other major declines also represent deliberate strategic pivots, such as with companies like **Verizon** which are trading broad, expensive TV impressions for more targeted, efficient digital spending aimed at customer retention.



DUNKIN'



YOY IMPRESSIONS

-61%

BOTTOM 20 ADVERTISERS BASED ON YEAR-OVER-YEAR GROWTH IN TV AD IMPRESSIONS

AMONG TOP 500 ADVERTISERS

H1 2025 VS H1 2024

1	Angi	-68%
2	Dunkin'	-61%
3	Balance of Nature	-60%
4	Otezla	-55%
5	Nurtec ODT	-54%
6	Horizon	-54%
7	NexGard	-54%
8	All	-51%
9	Hilton	-48%
10	GoDaddy	-45%
11	Honda	-45%
12	Walgreens	-44%
13	Arby's	-43%
14	Volkswagen	-42%
15	Zevo	-41%
16	Ro	-40%
17	Lumify	-40%
18	Pepsi	-39%
19	BREZTRI	-39%
20	Whole Foods Market	-38%





COFFEE CLASH

Starbucks Increases TV Ads to Build Premium Brand While Dunkin' Cuts TV for Digital

Starbucks and Dunkin' took dramatically different paths in H1 2025. Starbucks massively increased its ad impressions (+88%) with its "Back to Starbucks" strategy, a brand-building effort to re-establish its premium "third place" identity through campaigns like "Hello Again." This reflects a strategic shift away from discounts and toward marketing that tells a story of quality coffee and personal connection.

In stark contrast, Dunkin' slashed its broad-reach impressions by 61%, focusing instead on culturally resonant, viral campaigns, as well as social and digital channels.. By partnering with celebrities like Espresso chart-topper Sabrina Carpenter for its "Shake That Ess" promotion and offering clear value with its "\$6 Meal Deal," Dunkin' targeted a younger, price-conscious audience on social media.





PRIMETIME'S POWER PLAY

TV Networks Use Their Own Primetime Ad Slots to Promote Their Streaming Services

Primetime broadcast television remains a critical battleground for brands with massive budgets, but the most strategic players are the networks themselves. As viewership migrates from linear to streaming, networks are using their most valuable ad real estate (primetime) to funnel their massive, loyal broadcast audience directly to their own streaming platforms. This synergistic marketing is a crucial tactic to manage the industry's transition, ensuring they retain viewers within their cross-platform ecosystem. By advertising services like **Paramount+** and **Hulu** during their own top-rated shows, broadcast networks are using the unparalleled reach of linear TV to build their digital subscriber base and secure their future.

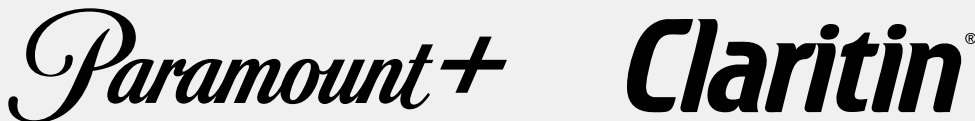
TOP PRIMETIME ADVERTISERS BY NETWORK

H1 2025, BASED ON AD IMPRESSIONS SERVED DURING PRIMETIME

ABC



CBS



NBC



FOX





KEY TAKEAWAYS ON ADVERTISING TRENDS

Investing Through Uncertainty

The majority of top advertisers increased ad impressions, leaning in to win market share in a slow-growth economy.

Rise of the Challengers

The fastest-growing advertisers are a mix of CPG giants and niche brands using massive campaigns to capture specific consumer segments.

Telecom's Divergent Strategies

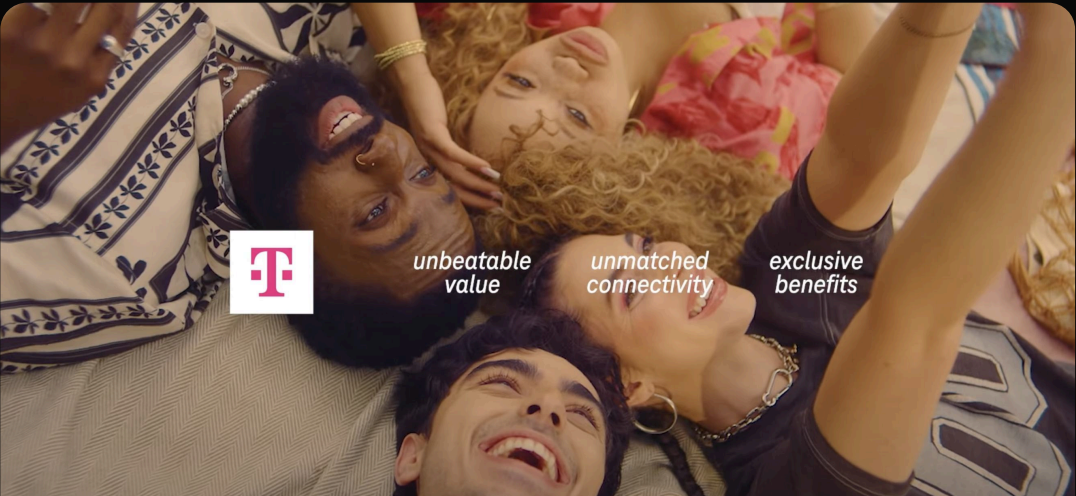
T-Mobile is spending heavily across all channels for subscriber growth, while Verizon is cutting back on TV to fund a massive digital push focused on customer retention.

Networks Fuel Their Own Future

Broadcast networks are strategically using their valuable primetime ad slots to funnel their massive linear audience directly to their own streaming services.

Earning Sentiment

Winning online conversation doesn't always require the highest ad spend. Brands like DUPIXENT and Purina earned top sentiment through campaigns focused on efficacy and community goodwill.





HOW SAMBA CAN HELP

Connect TV Attention and Online Attention

By understanding what your audience is watching on TV and where they are spending time online, Samba TV can activate campaigns that help you nurture users at precise moments of the marketing funnel. Driving consideration is critical. Customers who are stuck mid-funnel are killing your bottom line.

Conquest New Audiences

Ensure your media mix is diversified, and measure what’s working with Samba’s True Reach and Frequency measurement solutions.

Invest in a Holistic Media Mix Across TV and Digital

Ensure your media mix is targeted, but diversified, to reach your audience where they are viewing, using granular, show level streaming insights as well as halo analysis of TV show viewership to see which other shows viewers of specific shows are watching to continue engagement.

Target with Precision

Use Samba first-party viewership data to build custom audience segments (e.g., "at-home value seekers") for efficient and relevant targeting.

Get Competitive Intelligence

Discover which networks and programs your competition is advertising on and conquest their attention. Target these shows, or other programming these customers are also watching.

Measure Entertainment Outcomes

Platforms can track how many households saw a promo for a streaming service on a broadcast channel and subsequently watched that service, proving the ROI of the strategy.



[03]

Who's Seeing Ads?



Streaming TV Viewership Grew 46%, While Linear Viewership Stayed Flat

The H1 2025 data shows the migration to CTV is accelerating. CTV viewership experienced explosive **year-over-year growth of 46% in Q2** (April to June), a significant increase from the **32% growth** seen in the same period last year. This migration is driven by viewers, particularly younger demographics, trading traditional cable for the vast, on-demand content libraries of streaming services. As consumers seek more control and value, the convenience of OTT and the rise of FAST channels are cementing streaming's dominance, forcing the entire industry to follow the audience and invest heavily in capturing this rapidly expanding viewership.





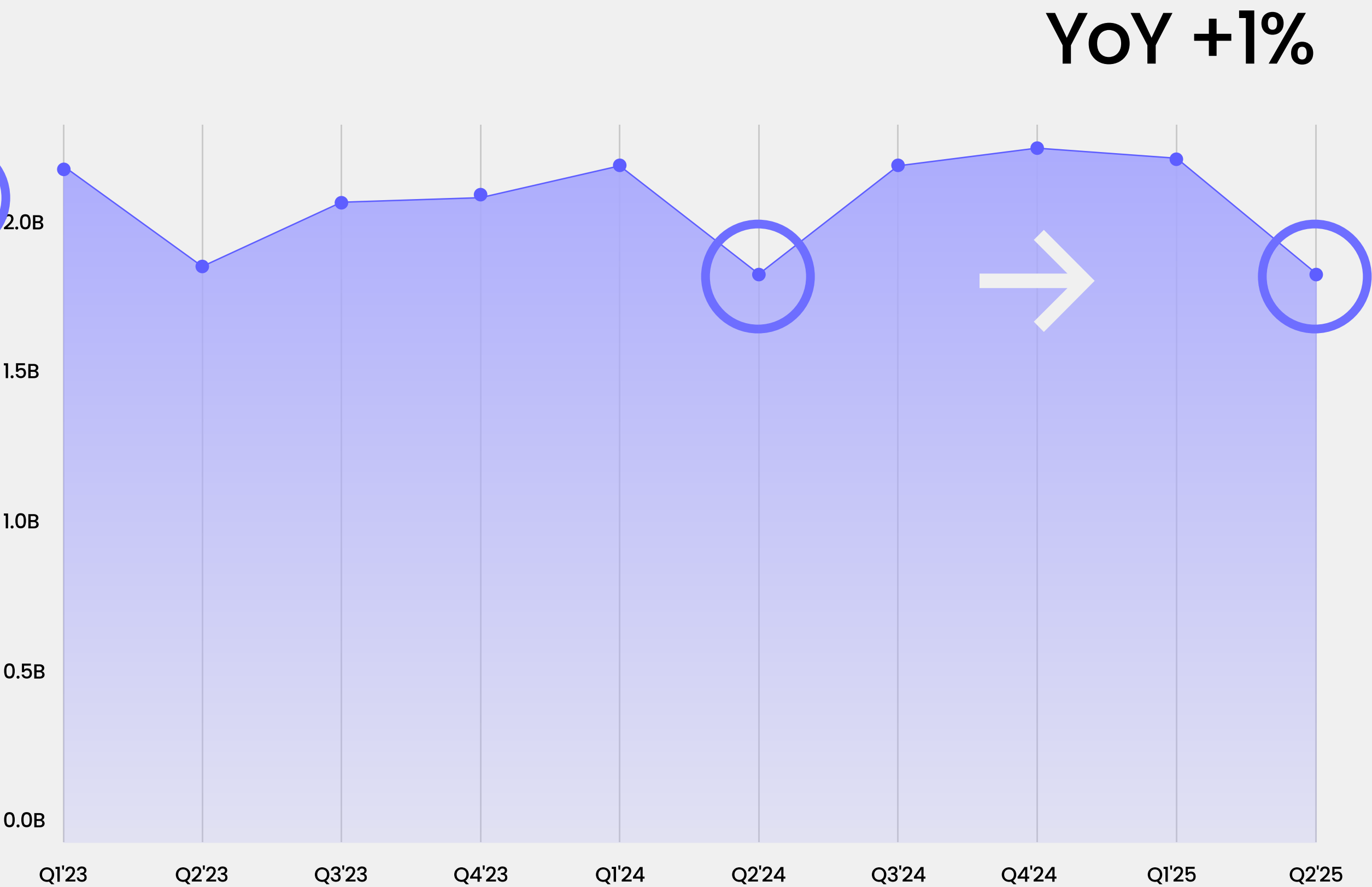
Total CTV hours watched

Q1 2023 - Q2 2025



Total linear TV hours watched

Q1 2023 - Q2 2025





AD OVERLOAD

TV Ads Are Oversaturated
For Many Consumers.
94% of Ads Go to Only
50% of Households

The distribution of TV advertising remains heavily unbalanced, creating a significant challenge and opportunity for brands. In H1 2025, **the top 50% of linear TV households were bombarded with an average of 150 ads per day**, accounting for a staggering **94%** of all TV ad impressions. This extreme over-exposure creates a high risk of ad fatigue and creative burnout, diminishing the impact of campaign spending.

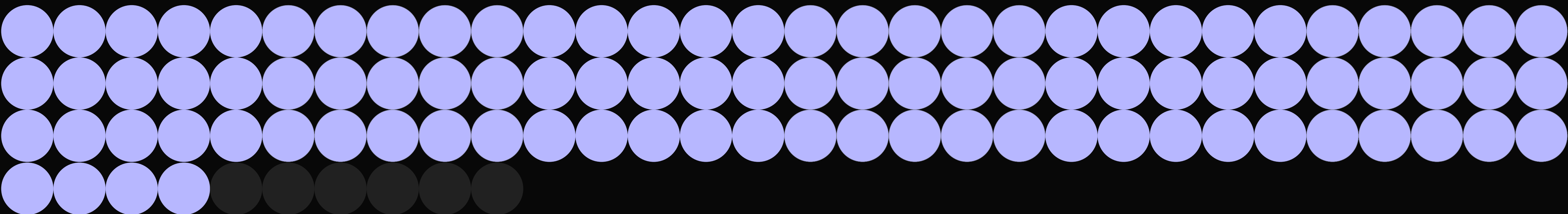
Conversely, **the bottom 50% of households** (a massive and largely untapped audience) **saw just 9 ads per day**. This highlights a major efficiency gap in traditional TV advertising, where a huge portion of the budget is spent **over-saturating** one group while missing the other almost entirely.



Top 50% of linear TV households

94% of TV ad impressions reached

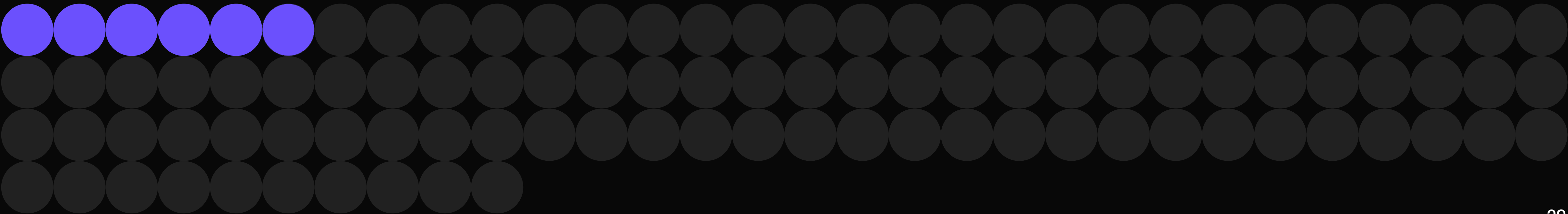
150 Average number of TV ads seen per day



Bottom 50% of linear TV households

6% of TV ad impressions reached

9 Average number of TV ads seen





TV Ads Reach Too Many Older Viewers and Miss Hispanic and Asian Audiences

An analysis of H1 2025 ad delivery reveals significant imbalances, with advertisers heavily **over-serving older audiences** while failing to reach key diverse demographics proportionally. Impressions are disproportionately concentrated among viewers aged 55 and older, creating potential **over-saturation** and missing reach among younger groups like Gen Z and millennials when compared to their proportion of the U.S. census .

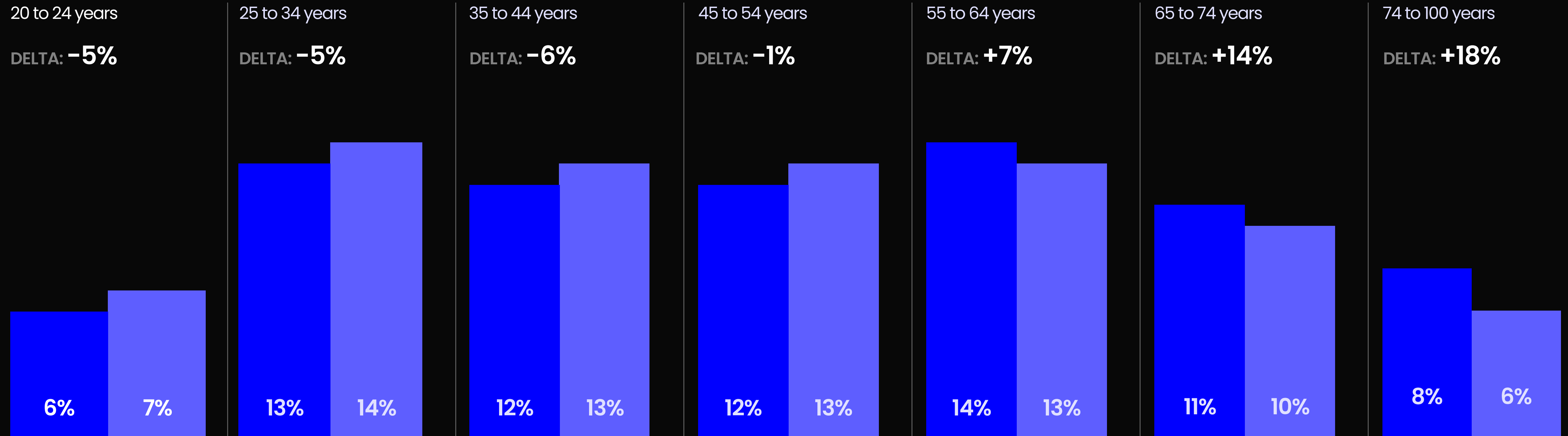
At the same time, there is a substantial reach gap for Hispanic and Asian audiences, two of the fastest-growing consumer segments in the country. This data indicates that current media buying strategies are **not keeping pace with the nation's changing demographics**, presenting both a challenge and a major opportunity for brands to connect with underserved viewers.



TV ad impressions by age shows older audiences are over-served

H1 2025

 % OF AD IMPRESSIONS SERVED  % OF POPULATION



TV ad impressions underserve Hispanic and Asian audiences

H1 2025

 % OF AD IMPRESSIONS SERVED  % OF POPULATION

White

DELTA: **+9%**

63%

58%

Black

DELTA: **-8%**

13%

14%

Hispanic

DELTA: **-23%**

15%

20%

Asian

DELTA: **-30%**

4%

6%

Other

DELTA: **+114%**

4%

2%



THE AFFLUENT AD GAP

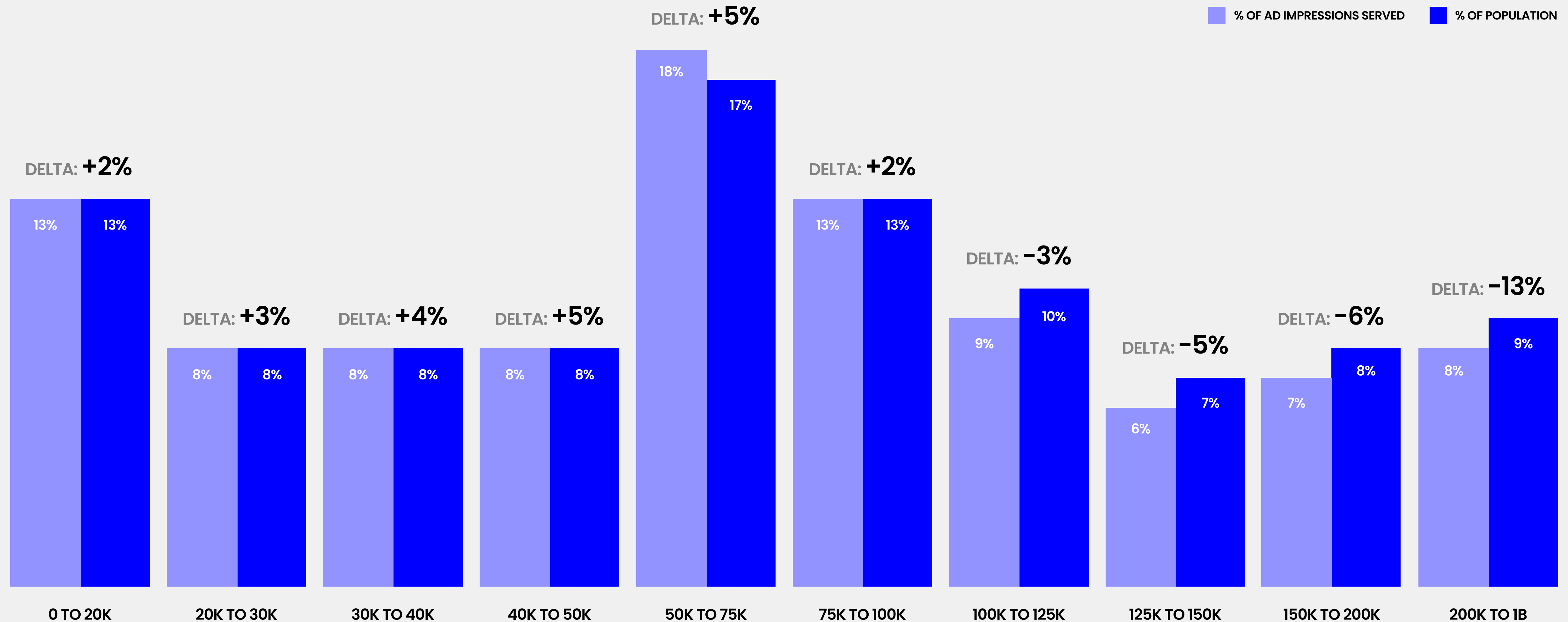
TV Ads Miss Wealthy Households Who Have More Money to Spend

In H1 2025, TV ad impressions **consistently failed to reach higher-income consumers** in proportion to their share of the population. This gap widens as income rises, indicating that TV ad strategies are not effectively reaching the most affluent audiences. For brands marketing premium goods and services, from luxury cars to financial products, this represents **a critical missed opportunity** and suggests that a significant portion of ad spend is not reaching consumers with the highest disposable income.

To close this gap, advertisers can leverage **precise, advanced targeting solutions** that move beyond broad demographics to reach specific, high-value households, ensuring media spend is focused on viewers who are most likely to purchase.



TV ad impressions miss high income audiences; overserve audiences making less than \$100k

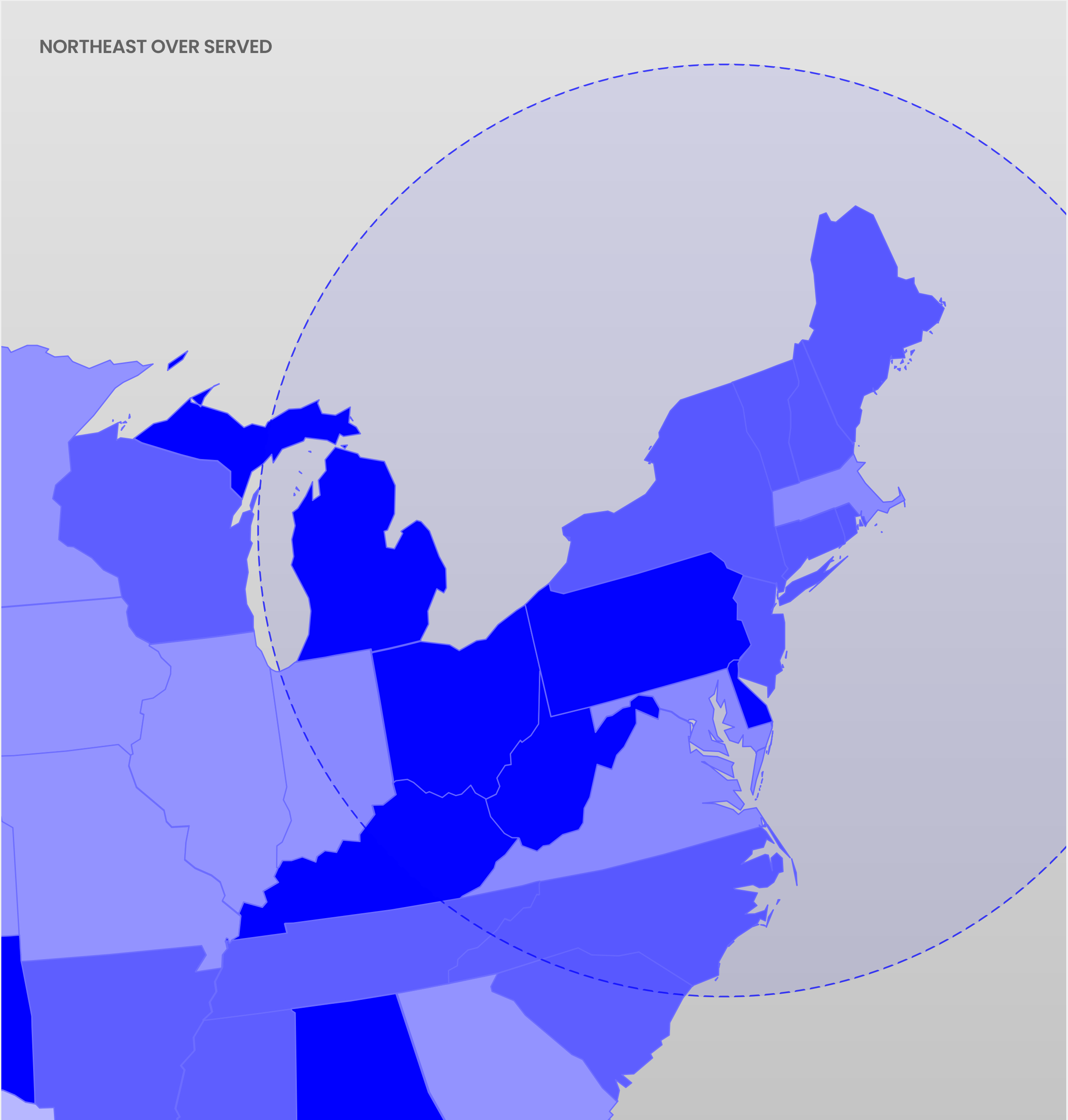




REGIONAL AD IMBALANCE

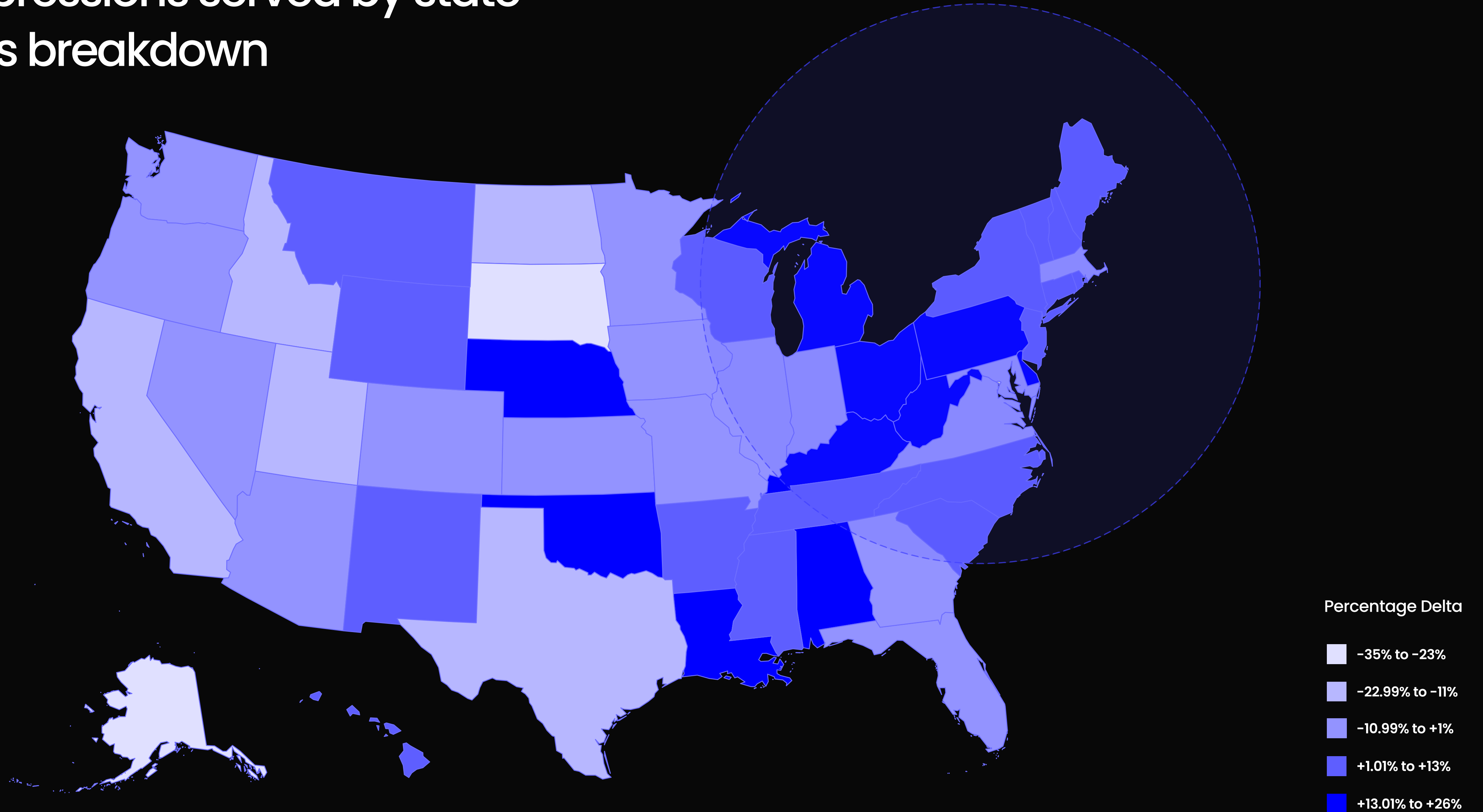
TV Ads Reach Too Many Northeast Viewers and Miss Western and Southern States

Ad delivery in H1 2025 was far from uniform, revealing a significant geographic imbalance where **ad impressions are not keeping pace with population shifts**. The data shows a clear pattern of over-delivery in the Northeast and parts of the Midwest and South, while **Western states are significantly under-served**. This suggests that many ad strategies are still weighted toward legacy media markets with more established, traditional TV audiences, while failing to effectively reach consumers in high-growth states like Texas and dense ones like California, where populations are larger and media consumption habits may be more fragmented.



TV ad impressions served by state vs. census breakdown

HI 2025



REACHING STREAMING FANS

Show level streaming data shows tech and auto brands are reaching viewers of popular streaming shows

Tech giants like **Apple** and **Xfinity** demonstrate massive cross-platform success, reaching the fanbases of nearly every top show. The data also reveals distinct audience profiles: viewers of **Max's The Last of Us** are **heavily exposed to ads from luxury auto and fintech brands**, while the audience for **Disney+'s Andor** is effectively reached by family-friendly QSR and CPG brands like **Starbucks** and **Olive Garden**. This shows how savvy advertisers are using audience data to find and engage specific fan groups across the entire media landscape.



Top advertisers among viewers of top streaming show by platform

BASED ON PERCENTAGE OF H1 2025 IMPRESSIONS SERVED TO SHOW VIEWERS



Advertisers

- Rocket Money
- LEXUS
- xfinity
- instacart
- chime



Advertisers

- xfinity
- Apple
- VW
- SAMSUNG
- RAM



Advertisers

- GEICO
- Apple
- airbnb
- State Farm
- xfinity



Advertisers

- Apple
- Booking.com
- amazon
- NUTRAFOL
- xfinity



Advertisers

- STARBUCKS
- Apple
- NATIVE
- Ford
- Olive Garden

*Excludes TV networks



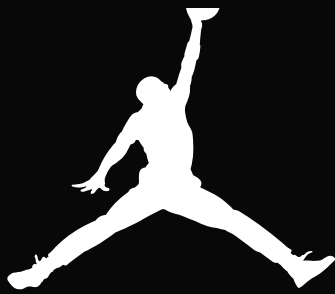


QUANTIFYING SPONSORSHIP

Nike's Logos Appeared Over 2 Million Times During One NBA Finals Game

The value of sports sponsorships extends far beyond traditional ads, and **Samba AI technology** enables us to quantify the impact of logos appearing on-screen. This analysis of NBA Finals Game 5 showcases how **Nike** asserted its dominance through a powerful two-brand strategy, with both the swoosh logo and **Jordan** logo. This dual approach allows Nike to capture different facets of the basketball audience, from broad athletic performance to the deep cultural legacy of the Jordan brand, providing a holistic understanding of their sponsorship ROI.





Intervals

56

Intervals

24

Instances

129

Instances

79

Impressions

1.5M

Impressions

625K

Average Frequency

47.4

Average Frequency

20.4



CTV's Growth is Accelerating

The migration to CTV is speeding up, with viewership hours soaring 46% YoY—a significant acceleration from 32% growth in the prior year—while linear TV stagnates.

Geographic Misalignment

Ad delivery is geographically imbalanced, over-serving legacy markets in the Northeast while failing to keep pace with population growth in the Sunbelt and Southeast.

Extreme Ad Overload

TV ad delivery is incredibly unbalanced. The top 50% of TV households see 94% of all ad impressions, while the bottom 50% see just 6%.

The Affluent Ad Gap

A major reach gap exists for high-income households, with the most affluent group (earning >\$200k) being under-served by 13%, a missed opportunity for automotive, retail and luxury advertisers

Demographic Imbalances

Ad delivery skews heavily toward older audiences (55+) while significantly under-serving younger viewers and key diverse groups like Hispanic and Asian audiences, who have a combined spending power of \$4.7 trillion.

Sponsorship's Hidden Value

On-screen logo placements during live events like the NBA Finals provide immense, often unmeasured, value, with Nike's brands generating over 2.1 million logo impressions in a single game.

Optimize Reach & Frequency

Use Samba True Reach and Frequency measurement to identify over-exposed households and reallocate spend to the under-exposed half, eliminating waste.

Align Spend with Population Growth

Use granular geographic targeting to right-size investment in under-served, high-growth regions and align your media strategy with current population trends.

Achieve Audience Diversity

Target precise demographics to correct imbalances and incrementally reach younger, diverse viewers missed by traditional buys.

Quantify Sponsorship ROI

Detect and measure every on-screen logo placement during sponsorships, quantifying the full earned media value of your campaign

Reach the Streaming Majority

Access a direct path to the rapidly expanding ad-supported streaming audience with advanced CTV targeting and measurement at the show level.

Close the Affluent Ad Gap

Leverage advanced audience targeting based on verified household income data to efficiently reach your high-income consumers.





[03]

Vertical Deep Dives



AUTOMOTIVE DEEP-DIVE

**American Car Brands
Increased Ad Spending While
Japanese Brands Cut Back
Amid Q1 Tariff Fears**

Overall spend among automotive advertisers was down **8%** in the H1 2025 with half of the top automotive brands reducing their spend in the face of tariffs and economic uncertainty. Consumers accelerated purchases in the short term to get ahead of increased prices, but automotive brands expressed concerns for the full year. This caution is reflected in the significant ad impression declines from major Japanese automakers like Toyota, Lexus, and Subaru.






However, American brands saw this as an opportunity to go on the offensive. **Ford (+9%), Chevrolet (+7%), and GMC (+9%)** all increased their ad volume, aggressively fighting to capture market share from their retreating competitors. **Ford**, for example, launched its "From America, For America" campaign, a direct appeal to consumers with straightforward value offers during an uneasy time.



TOP AUTOMOTIVE ADVERTISERS BY AD IMPRESSIONS: H1 2025 VS. H1 2024

01	Hyundai			+19%	6.0B
02	Toyota	-17%			5.4B
03	Chevrolet			+7%	4.3B
04	Nissan		-4%		4.3B
05	GMC			+9%	4.2B
06	Ford			+9%	4.2B
07	KIA			+8%	4.1B
08	Lexus	-17%			3.9B
09	Jeep		-7%		3.3B
10	Subaru	-18%			2.5B

GROWING BRANDS AMONG TOP 500 ADVERTISERS

	+71%
	+19%
	+18%
	+9%
	+9%

TOP INDEXING TV

AMONG NAPA AUTO PARTS, O'REILLY AUTO PARTS, ADVANCE AUTO PARTS, CARPARTS.COM, DISCOUNT AUTO PARTS, AND CARQUEST AUTO PARTS PURCHASERS

TOP LINEAR CHANNELS



TOP STREAMING PROGRAMS





TRAVEL DEEP-DIVE

Declining U.S. tourism and travel concerns reflected in 4% decline in Travel ads

-4%

Travel ad impressions decreased by 4% year-over-year in H1 2025

With tourist visits to the US projected to decline by 8% this year, the travel ad market fractured in H1 2025 as brands placed opposing bets on consumers navigating global conflict as well as travel advisories from and the U.S. Destination-focused brands went all-in to capture discretionary spending, led by a massive 384% impression surge from Universal Orlando Resort.

A clear strategic divide also emerged among booking platforms. **Expedia Group** was on the offensive, with both **Expedia** (+12%) and its subsidiary **Vrbo** (+24%) increasing their ad volume to win market share. This contrasts sharply with competitors like **Airbnb** (-19%) and **Booking.com** (-17%), who pulled back. The divergence between **Vrbo** and **Airbnb** may signal a battle for the valuable vacation rental customer, an audience that over-indexes on critically acclaimed streaming shows like **Hulu's** *The Bear* and **Max's** travel-oriented *The White Lotus*.



TOP TRAVEL ADVERTISERS BY AD IMPRESSIONS: H1 2025 VS. H1 2024

01	Trivago		+3%	3.0B
02	Universal Orlando Resort		+384%	2.2B
03	Booking.com	-17%		2.1B
04	Walt Disney World		+14%	1.7B
05	Vrbo		+24%	1.4B
06	Celebrity Cruises		+16%	1.2B
07	Expedia		+12%	1.2B
08	Choice Hotels	-28%		1.2B
09	Sandals Resorts	-16%		1.2B
10	Airbnb	-19%		1.1B

GROWING BRANDS AMONG TOP 500 ADVERTISERS

	+384%
	+24%
	+16%
	+14%
	+12%

TOP INDEXING TV

AMONG TRIVAGO, BOOKING.COM, EXPEDIA PURCHASERS

TOP LINEAR CHANNELS



TOP STREAMING PROGRAMS





TELECOM’S GREAT DIVIDE

T-Mobile and AT&T Increased Ad Spending for New Customers While Verizon Cut Back on TV

The telecommunications ad market is a story of opposing strategies. Major carriers like **T-Mobile (+34%)** and **AT&T (+29%)** are in all-out growth mode, aggressively increasing ad impressions to capture new subscribers in a hyper-competitive market. In stark contrast, **Verizon** executed a substantial pullback (**-37%**), signaling a deliberate strategic pivot away from mass-market TV advertising to focus on retaining its existing customers, part of the company’s clear anti-churn strategy. Meanwhile, the most explosive growth is coming from value-focused MVNOs (Mobile Virtual Network Operators) like **Total Wireless (+1,261%)** and **Mint Mobile (+114%)**, which are challenging the major carriers by appealing to price-conscious consumers.

+9%






Electronics & Communications ad impressions increased by 9% year-over-year in H1 2025



TOP TELECOM ADVERTISERS BY AD IMPRESSIONS: H1 2025 VS. H1 2024

01	Xfinity		+41%	8.5B
02	T-Mobile		+34%	7.6B
03	Verizon	-37%		6.4B
04	Consumer Cellular	-11%		6.3B
05	AT&T		+29%	4.1B
06	Spectrum		+6%	4.0B
07	Comcast Business		+6%	2.3B
08	DIRECTV		+9%	1.9B
09	Metro by T-Mobile	-17%		1.8B
10	Straigh tTalk Wireless	-14%		1.5B

GROWING BRANDS AMONG TOP 500 ADVERTISERS

	+1,261%
	+114%
	+41%
	+35%
	+34%

TOP INDEXING TV

AMONG T-MOBILE, XFINITY, VERIZON, AND AT&T PURCHASERS

TOP LINEAR CHANNELS



TOP STREAMING PROGRAMS





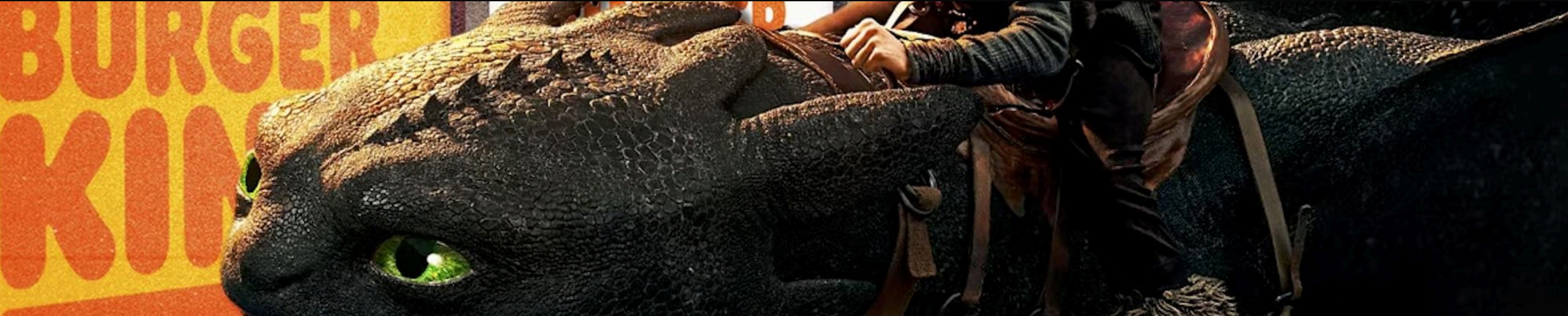
RESTAURANTS DEEP DIVE

Most Top Restaurant and QSR Brands Increased TV Ad Impressions as Americans Keep Eating Out

Despite a cautious economic climate, **70%** of the top QSR and restaurant brands increased their ad impressions in H1 2025, signaling a strong bet on the consumer's continued desire to dine out. This ad spend surge is led by premium fast-casual and coffee brands like **Chick-fil-A** and **Starbucks**, which are investing heavily in experience-driven marketing. While some legacy brands like **Wendy's** and **Subway** pulled back, others like **Burger King** continued their aggressive revitalization campaigns. This suggests brands are fighting hard for their share of a resilient market, targeting a consumer who clearly loves food-related content, as evidenced by the high index for networks like the COOKING channel.

+6%

Restaurant ad impressions increased by 6% year-over-year in H1 2025



TOP RESTAURANT ADVERTISERS BY AD IMPRESSIONS: H1 2025 VS. H1 2024

01	Burger King		+34%	11.0B
02	Domino's	-7%		8.8B
03	Wendy's	-16%		6.0B
04	Subway	-11%		5.3B
05	McDonald's		+11%	4.8B
06	Chipotle Mexican Grill		+23%	4.2B
07	Starbucks		+88%	4.0B
08	Chick-fil-A		+77%	3.9B
09	Papa John's		+10%	3.7B
10	Panera Bread		+46%	3.7B

GROWING BRANDS AMONG TOP 500 ADVERTISERS

 STARBUCKS	+88%
	+77%
	+56%
	+46%
BURGER KING	+34%

TOP INDEXING TV

AMONG DOMINO'S, BURGER KING, WENDY'S, CHIC-FIL-A, MCDONALD'S, SUBWAY PURCHASERS

TOP LINEAR CHANNELS



TOP STREAMING PROGRAMS





RETAIL DEEP-DIVE

Home Improvement and Discount Retailers Increased Ad Spending the Most

The retail advertising landscape in H1 2025 was defined by two powerful consumer trends: a continued focus on the home and a relentless hunt for value. Home improvement giants like The Home Depot (+29%) and department stores like Kohl's (+22%) invested heavily to capture dollars. At the same time, the most explosive growth came from value-focused players.

Harbor Freight saw a massive 1,254% increase in impressions, while off-price retailer Ross Dress for Less also grew significantly (+72%), signaling that the budget-conscious consumer is prioritizing deals and discounts. For advertisers looking to connect with this diverse group of shoppers, the data shows they heavily over-index on Spanish-language networks like Universo and Galavision.

+7%

Retail ad impressions increased by 7% year-over-year in H1 2025



TOP RETAIL ADVERTISERS BY AD IMPRESSIONS: H1 2025 VS. H1 2024

01	The Home Depot		+29%	5.4B
02	Kohl's		+22%	5.3B
03	Skechers		+55%	5.1B
04	Lowe's	-4%		4.3B
05	Macy's		+17%	4.2B
06	Grainger		+18%	3.7B
07	Ashley Furniture Homestore	-1%		3.7B
08	Walmart		+5%	3.6B
09	Wayfair	-9%		3.0B
10	Harbor Freight		+1,254%	2.9B

GROWING BRANDS AMONG TOP 500 ADVERTISERS

amazon	+2,405%
HARBOR FREIGHT	+1,254%
Wawa	+131%
saatva	+91%
ROSS DRESS FOR LESS	+72%

TOP INDEXING TV

AMONG MACY'S, KOHL'S, WALMART, TARGET, HOME DEPOT, AND SEPHORA PURCHASERS

TOP LINEAR CHANNELS



TOP STREAMING PROGRAMS





INSURANCE DEEP-DIVE

New Insurance Companies Spent Big on Ads While Established Brands Fought Back

The insurance ad landscape was reshaped in H1 2025 by a surge from challenger brands and divergent strategies among legacy players. Disruptors like **Ethos** (+837%) and **Endurance** (+150%) invested heavily to capture market share with distinct, modern campaigns. **Ethos** targeted the digital-savvy consumer with its "So Easy It Feels Like Magic" ads, emphasizing speed and simplicity, while **Endurance** launched its celebrity-led "Driven to Perform" campaign with Ludacris and Danica Patrick. Established leaders Liberty Mutual (+39%) and USAA (+113%) also increased their ad volume, with the latter's new CEO stepping into the role mid-quarter.

+12%





Insurance ad impressions increased by 12% year-over-year in H1 2025



TOP INSURANCE ADVERTISERS BY AD IMPRESSIONS: H1 2025 VS. H1 2024

01	Progressive		+1%	12.0B
02	Liberty Mutual		+39%	10.7B
03	Allstate		+5%	6.0B
04	USAA		+113%	3.5B
05	GEICO	-28%		2.8B
06	State Farm	-15%		2.6B
07	AARP		+28%	2.4B
08	Colonial Penn	-26%		2.0B
09	Ethos		+837%	2.0B
10	Endurance		+150%	1.7B

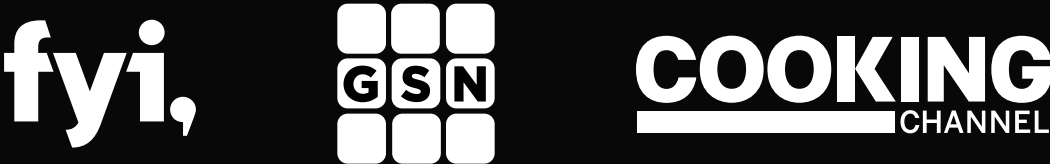
GROWING BRANDS AMONG TOP 500 ADVERTISERS

ETHOS	+837%
ENDURANCE 	+150%
 USAA®	+113%
 HomeServe®	+111%
 Liberty Mutual INSURANCE	+39%

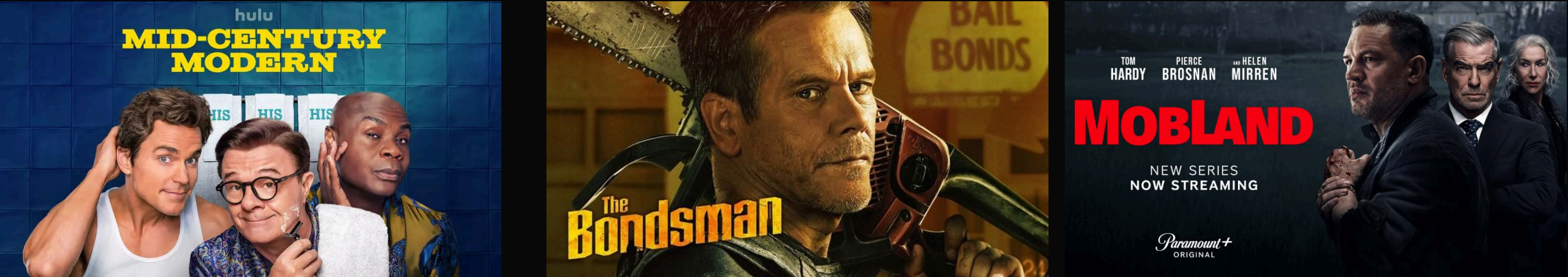
TOP INDEXING TV

AMONG PROGRESSIVE, LIBERTY MUTUAL, ALLSTATE, STATE FARM, GEICO, AND USAA PURCHASERS

TOP LINEAR CHANNELS



TOP STREAMING PROGRAMS





PHARMA DEEP-DIVE

9 of 10 Top Pharmaceutical Companies Increased Ad Spending

+6%

Pharmaceutical & Medical ad impressions increased by 6% year-over-year in H1 2025

The pharmaceutical industry continued to see significant increase in TV spend, with 90% of the top advertisers increasing their TV presence. This widespread investment underscores the resilience of healthcare as a non-discretionary spending category. Rather than pulling back, brands are engaged in competition to capture patient attention.

For example, following FDA approval, Tremfya massively increased spend (+190%) to capture consumer interest, which Bausch + Lomb (+297%) launched a "Eyes Tell the Story" campaign featuring real patient stories to educate consumers on dry eye disease. The explosive growth of direct-to-consumer brands like Hers (+336%) further fueled the sector's ad volume, proving that health and wellness continue to remain a top priority for both consumers and advertisers.





PHARMA DEEP-DIVE

TOP PHARMACEUTICAL & MEDICAL ADVERTISERS BY AD IMPRESSIONS: H1 2025 VS. H1 2024

01	Dupixent		+14%	6.4B
02	Skyrizi		+4%	6.1B
03	Tremfya		+190%	5.8B
04	Rinvoq		+4%	5.3B
05	Rexulti		+21%	3.8B
06	Mucinex		+28%	3.6B
07	Advil		+32%	3.0B
08	Bausch + Lomb		+297%	3.0B
09	Vicks	-24%		2.8B
10	Claritin		+11%	2.8B

GROWING BRANDS AMONG TOP 500 ADVERTISERS

Iberogast®	+664%
NOTIME TOWAIT	+627%
Repatha (evolocumab)	+394%
hers	+336%
BAUSCH + LOMB	+297%



METHODOLOGY

Samba TV gathers viewership data via its proprietary Automatic Content Recognition (ACR) technology from tens of millions of opted-in Smart TVs. Samba TV is a global leader in AI-driven media intelligence powered by first-party data from millions of opted-in connected televisions and billions of web signals across more than 50 countries. Our independent, cross-platform measurement provides advertisers and media companies a unified view of the entire consumer journey. Samba TV gathers viewership data via its proprietary Automatic Content Recognition (ACR) technology from tens of millions of opted-in Smart TVs.

Samba TV’s ACR is integrated at the chipset level across 24 of the top Smart TVs sold in more than 100 countries globally and captures content that crosses the TV screen, regardless of source. As is standard industry practice, Samba TV analyzes the large proprietary dataset to project household-level TV viewership utilizing its research panel of more than 3M smart TVs, balanced and weighted to the U.S. Census across age, gender, ethnicity, and household income. By contrast, Samba TV’s panel is nearly 80x larger than the legacy industry model and is aligned to the U.S. census by 0.03%.

Samba TV does not estimate viewership on non-TV devices such as mobile phones. Samba TV measures at the household level, and does not extrapolate to the individual viewer. In certain areas throughout the report Samba first-party data is supplemented with third-party sources, such as Meltwater for social sentiment data.



For more information about Samba TV and our viewership and advertising insights, visit [Samba.tv](https://samba.tv), where you can subscribe to Samba Insights or schedule a meeting.