

Q3 2025 Marketplace Outlook

June 2025

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Key Factors to be aware of in the Q3 Marketplace

1

Uncertainty surrounding tariffs remains. While some advertisers who have upfront dollars have not taken as many options (canceled media), many advertisers have reduced planned budgets or delayed spending. There is still pressure on National inventory as ratings are also down. Anticipate tight inventory in some local markets as mayoral races will heat up. It is important to stay flexible.

2

OTT/CTV inventory remains strong, and pricing is slightly down; inventory continues to grow.

3

Still demand for Upper Funnel/Reach tactics in Social like Takeovers in Streaming and Top View in TikTok; be prepared for CPMs to increase in the summer months.

4

Expect to see more influencer/live content via Google's BrandConnect and Insights Finder offerings.

5

Sports, Sports, Sports - still a hot ticket item across all channels (Live Sports is fueling CTV growth and Audio is getting more access to Sports coverage).

The Upfront presentations did not address the economic market head-on; the focus was on live content, and innovations were the stand-out

Live (sports) is King

NBC will have ~45% of this years live events – return of NBA, Super Bowl, Winter Olympics, FIFA World Cups, WNBA, SNF, Thanksgiving Day Parade

Amazon signed 11-year deal with NBA/WNBA, NWSL, NASCAR and NFL

Netflix will have 2 NFL Christmas Day games, WWE and the rematch of Katie Taylor vs. Amanda Serrano

Disney touted most live sports across its many platforms

WBD promoted their diverse slate of sports across Roland Garros, Big 12, NHL, March Madness

Fox leaned into NFL, MLB, NASCAR, College Football and FIFA while also celebrating Fox News for their high ratings and live nature



Innovation

Amazon: contextually relevant pause ads, more enhanced interactive shoppable ads with real time Amazon shopping signals

Disney: launch of “ESPN” which will focus on personalization with embedded sports betting, commerce and control from your phone

Disney announced Experience Composer, an ad tech to “ test and refine creative using real time insights”

WBD introduced NEO which gives direct access to WBD's entire video inventory across streaming, FAST and linear through one interface

Fox introduced Fox One which will give access to live streaming and on demand access to the full portfolio of FOX brands within one bundle

NBC announced the NBA experience on Peacock which will give new viewing features

Netflix announced a new modular framework for ad formats that leverages AI to marry ads with content. And in 2026, Interactive midroll and pause ads that build custom creative with added overlays, call to action, second screen buttons and more

Creating Connections & Access

WBD announced DemoDirect, a linear solution designed to simplify demo-based buying across the portfolio

WBD announced Storyverse, leveraging WBDs film and series to help brands emotionally connect with audiences using IP

Netflix pushed for more partnerships, putting brands at the center of attention

NBC announced many experiences for brands to get in front of live fans like NBC's 100th anniversary, BravoCon or Wicked for Good specials

2025 – Year to Date



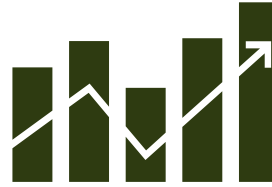
2025 Media Trends Summary



Categories & Advertisers

Pharmaceuticals & Financial/Insurance categories lead in offline spend, with Shopping & Consumer Packaged Goods yielding the highest online spend in 2025.

The Number of advertisers in Linear TV is leveling off YOY although still up by 2%. Despite the number of advertisers being down 8% YOY; online spending continues to increase.



CPMs & Response Rates

Linear TV CPMs are up 10% YoY although improving, with April CPMs -19% compared to January. Online CPMs remain relatively flat.

Linear TV response rate index is improving +3% YOY with average spend index up +5%.



Channel Level Insights

Linear TV 2025 HHLD cable viewership was down 13% YoY with average cost per spot also lower.

Facebook & Instagram had the highest spends across online channels in 2025, while OTT spend is growing (+16% YoY).

2025 Marketplace spend down 5% YOY; Financial and Pharma remain top spenders

INDUSTRY GROUP	1Q 2024	1Q 2025	1Q'24 vs 1Q '25	April 2024	April 2025	April '24 vs April '25	Jan- April '24	Jan- April '25	YOY Variance	% Spend
Financial and Insurance	\$1,634,761	\$1,731,363	6%	\$450,407	\$454,800	1%	\$2,085,167	\$2,186,163	5%	13%
Pharmaceuticals	\$1,633,179	\$1,661,908	2%	\$509,454	\$502,233	-1%	\$2,142,633	\$2,164,140	1%	13%
Food and Beverage	\$1,103,761	\$1,038,159	-6%	\$313,856	\$303,796	-3%	\$1,417,617	\$1,341,955	-5%	8%
Restaurants	\$996,702	\$1,000,111	0%	\$263,150	\$250,184	-5%	\$1,259,852	\$1,250,295	-1%	7%
Automotive	\$845,170	\$774,095	-8%	\$236,581	\$212,103	-10%	\$1,081,751	\$986,198	-9%	6%
Retail	\$761,175	\$682,464	-10%	\$253,617	\$272,545	7%	\$1,014,792	\$955,009	-6%	6%
Telecommunications	\$826,963	\$759,357	-8%	\$197,521	\$189,668	-4%	\$1,024,484	\$949,025	-7%	6%
Media	\$856,163	\$734,742	-14%	\$204,418	\$174,346	-15%	\$1,060,581	\$909,088	-14%	5%
Local Services	\$671,691	\$622,215	-7%	\$203,281	\$165,227	-19%	\$874,973	\$787,442	-10%	5%
Non-Rx Remedies	\$710,888	\$621,015	-13%	\$168,837	\$164,629	-2%	\$879,726	\$785,644	-11%	5%
Personal Care Products	\$668,089	\$586,338	-12%	\$236,687	\$196,991	-17%	\$904,776	\$783,329	-13%	5%
Travel and Tourism	\$567,723	\$544,003	-4%	\$166,925	\$161,533	-3%	\$734,649	\$705,536	-4%	4%
Apparel	\$332,826	\$374,357	12%	\$131,213	\$106,986	-18%	\$464,039	\$481,343	4%	3%
HH Supplies and Cleaners	\$331,105	\$346,943	5%	\$102,587	\$126,293	23%	\$433,692	\$473,236	9%	3%
Government and Organizations	\$396,147	\$300,461	-24%	\$107,671	\$96,760	-10%	\$503,818	\$397,221	-21%	2%
Medical Services and Equipment	\$262,108	\$252,875	-4%	\$76,578	\$67,234	-12%	\$338,686	\$320,109	-5%	2%
Electronics	\$259,923	\$238,700	-8%	\$52,653	\$59,968	14%	\$312,576	\$298,668	-4%	2%
Games, Toys and Sporting Goods	\$281,602	\$232,787	-17%	\$57,440	\$63,987	11%	\$339,042	\$296,774	-12%	2%
Pets	\$221,947	\$213,245	-4%	\$85,494	\$77,576	-9%	\$307,442	\$290,821	-5%	2%
HH Appliances, Furnishings and Paint	\$175,090	\$215,147	23%	\$69,631	\$67,710	-3%	\$244,722	\$282,858	16%	2%
Miscellaneous	\$246,888	\$173,568	-30%	\$104,130	\$75,678	-27%	\$351,017	\$249,246	-29%	1%
Education	\$90,888	\$101,094	11%	\$30,358	\$27,925	-8%	\$121,246	\$129,019	6%	1%
HH Building Materials and Fixtures	\$81,254	\$70,511	-13%	\$34,511	\$30,670	-11%	\$115,765	\$101,181	-13%	1%
Office Equipment and Manufacturing	\$61,055	\$47,748	-22%	\$13,955	\$12,914	-7%	\$75,010	\$60,662	-19%	0%
Energy	\$5,039	\$7,014	39%	\$3,380	\$2,779	-18%	\$8,419	\$9,793	16%	0%
GRAND TOTAL	\$14,022,136	\$13,330,218	-5%	\$4,074,337	\$3,864,536	-5%	\$18,096,474	\$17,194,754	-5%	100%

Source: MediaRadar (formerly Vivvix/Kantar), Spend in (000s)

Offline includes: TV, Radio & Print

Date Range: May 2023 – April 2025



Online spend up 6% YOY; Financial Services Showing Strong YOY Growth

Category	1Q 2024	1Q 2025	1Q '24 vs 1Q '25	April 2024	April 2025	April '24 vs April '25	Jan-April '24	Jan - April '25	YOY Variance	% Spend
Shopping	\$4,964,715	\$4,870,750	-2%	\$1,798,270	\$1,699,205	-6%	\$6,762,985	\$6,569,955	-3%	22%
Consumer Packaged Goods	\$2,719,192	\$2,638,340	-3%	\$1,028,454	\$922,204	-10%	\$3,747,647	\$3,560,545	-5%	12%
Media & Entertainment	\$2,508,356	\$2,534,579	1%	\$798,058	\$820,250	3%	\$3,306,414	\$3,354,829	1%	11%
Financial Services	\$1,694,867	\$2,425,090	43%	\$649,686	\$838,053	29%	\$2,344,553	\$3,263,144	39%	11%
Health & Wellness	\$1,981,959	\$2,183,861	10%	\$621,889	\$682,575	10%	\$2,603,848	\$2,866,436	10%	9%
Food & Dining Services	\$1,330,308	\$1,440,064	8%	\$434,926	\$496,941	14%	\$1,765,234	\$1,937,005	10%	6%
Gaming	\$889,256	\$951,233	7%	\$259,786	\$292,827	13%	\$1,149,043	\$1,244,060	8%	4%
Travel & Tourism	\$803,153	\$895,987	12%	\$274,139	\$284,527	4%	\$1,077,293	\$1,180,514	10%	4%
Auto	\$835,360	\$837,816	0%	\$313,538	\$295,655	-6%	\$1,148,898	\$1,133,471	-1%	4%
Software	\$748,535	\$776,327	4%	\$238,149	\$288,034	21%	\$986,684	\$1,064,361	8%	4%
Jobs & Education	\$670,848	\$658,544	-2%	\$204,736	\$215,094	5%	\$875,583	\$873,638	0%	3%
Telecom	\$493,407	\$656,388	33%	\$149,411	\$172,225	15%	\$642,818	\$828,613	29%	3%
All Categories	\$243,316	\$423,822	74%	\$77,589	\$222,542	187%	\$320,905	\$646,364	101%	2%
Non-profit	\$187,976	\$243,949	30%	\$70,183	\$76,067	8%	\$258,160	\$320,016	24%	1%
Law & Government	\$267,201	\$238,989	-11%	\$96,636	\$75,219	-22%	\$363,837	\$314,208	-14%	1%
Business & Industrials	\$244,579	\$222,851	-9%	\$88,358	\$85,398	-3%	\$332,937	\$308,249	-7%	1%
Lifestyle & Services	\$210,668	\$195,444	-7%	\$85,647	\$75,657	-12%	\$296,315	\$271,101	-9%	1%
Advertising & Marketing	\$144,244	\$132,247	-8%	\$48,598	\$43,543	-10%	\$192,842	\$175,791	-9%	1%
Real Estate	\$94,516	\$105,570	12%	\$40,592	\$44,524	10%	\$135,108	\$150,093	11%	0%
Religion & Spirituality	\$85,226	\$81,154	-5%	\$26,770	\$24,057	-10%	\$111,996	\$105,210	-6%	0%
Political	\$68,178	\$49,665	-27%	\$21,515	\$13,582	-37%	\$89,694	\$63,247	-29%	0%
Deceptive Advertising	\$23,142	\$19,211	-17%	\$7,795	\$6,127	-21%	\$30,937	\$25,338	-18%	0%
Adult Entertainment	\$4,635	\$3,799	-18%	\$1,088	\$1,039	-4%	\$5,723	\$4,839	-15%	0%
Grand Total	\$21,213,637	\$22,585,681	6%	\$7,335,815	\$7,675,345	5%	\$28,549,453	\$30,261,025	6%	100%

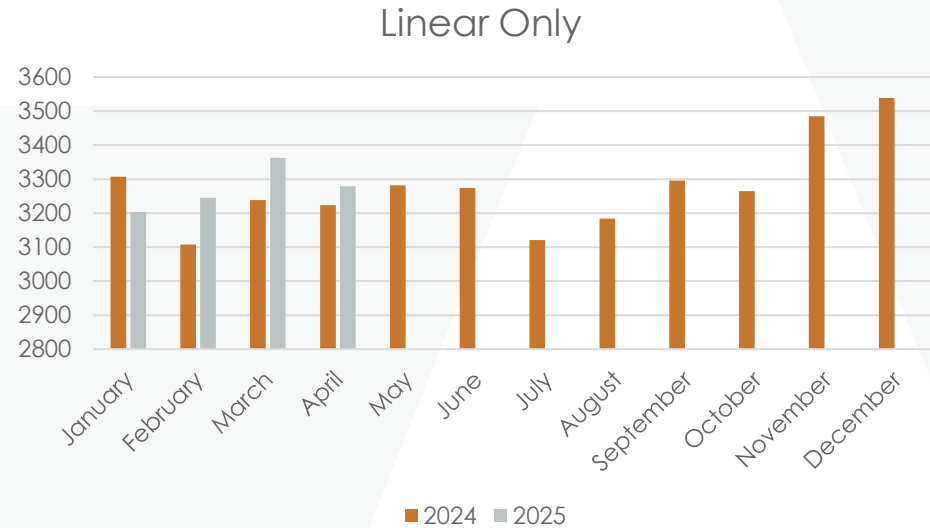
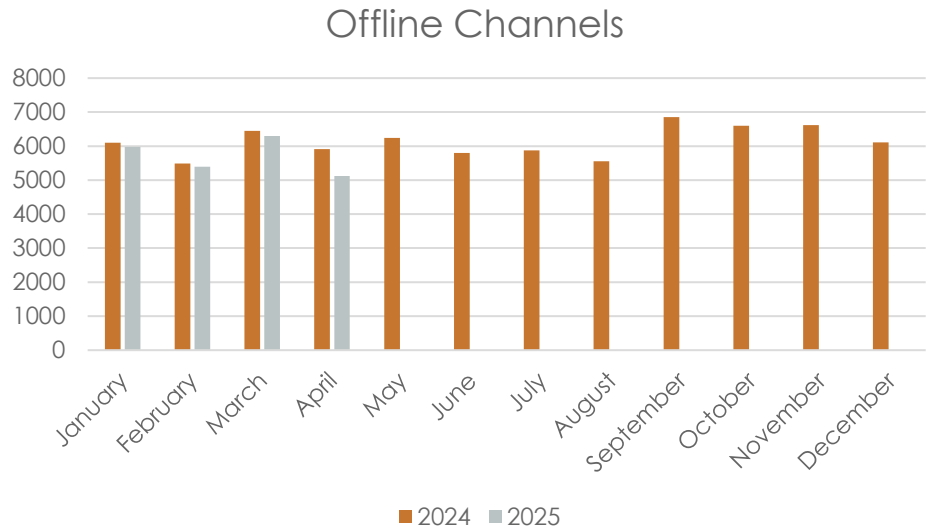
Source: Pathmatics (Spend in 000s)

Online includes: Facebook, Instagram, TikTok, Snapchat, X/Twitter, OTT, YouTube, Desktop Video, Desktop Display & Mobile Display

Date Range: January 2024 – April 2025



of Monthly Advertisers across Offline Channels is -5% YoY; Linear TV up +2% YOY

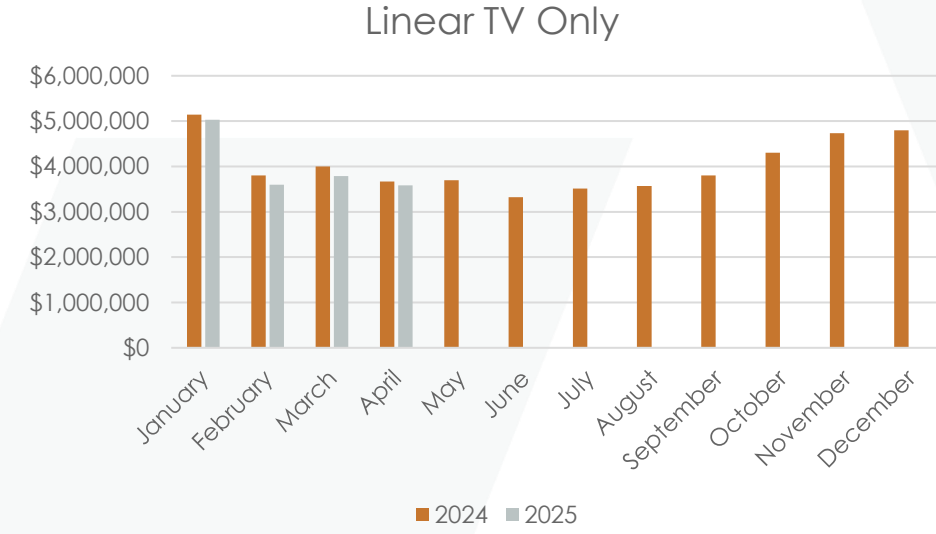
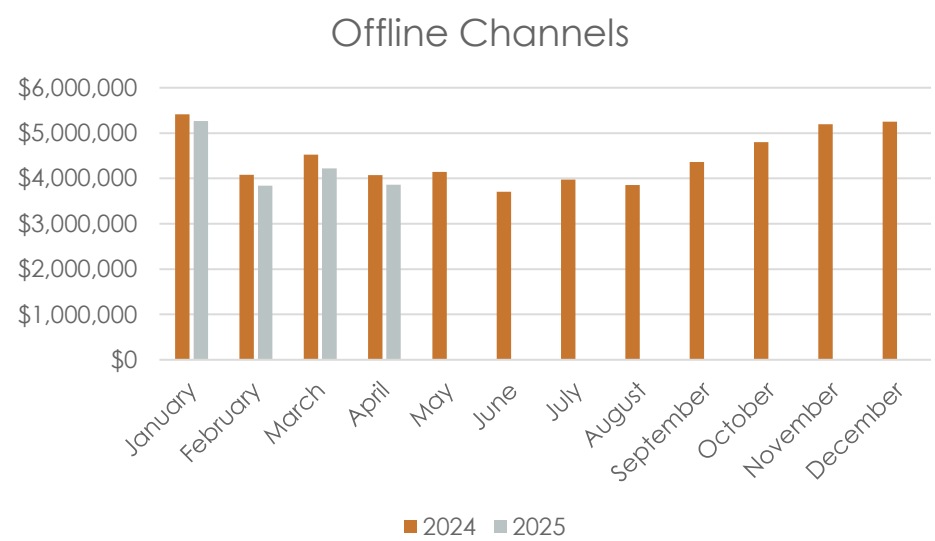


- New advertisers in 2025 include Iveric Bio, PayPal, Total Wireless, Harbor Freight Tool Store.

Source: Media Radar(Formerly Vivvix/Kantar)
Offline includes: TV, Radio & Print
Date Range: January 2024 – April 2025



Offline Ad Spend -5% YOY; Linear TV Spend down -4% YOY

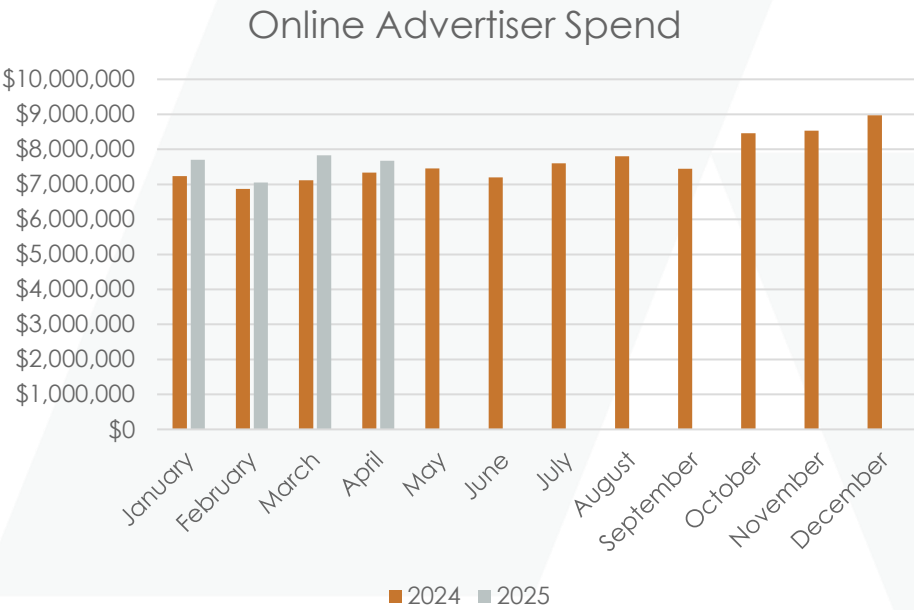
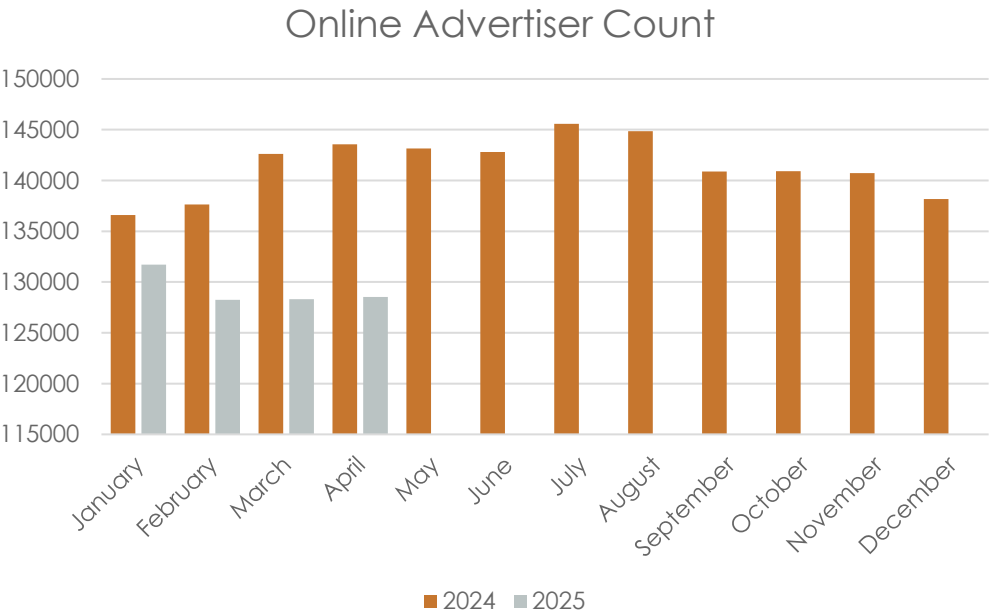


- Abbvie and Progressive continue to have top ad spend in market, with spend remaining flat YOY.
- Other top 10 advertisers in 2024 seeing significant decrease in spend for 2025.

Source: MediaRadar (formerly Vivvix/Kantar), Spend in (000s)
Offline includes: TV, Radio & Print
Date Range: January 2024 – April 2025



With Fewer Advertisers in Market, Online Spend Continues to Increase



- Number of online advertisers down average 8% YOY with flat MOM growth
- Online advertising spend up 6% YOY with a spending spike in March. April spend down 2% Month over Month

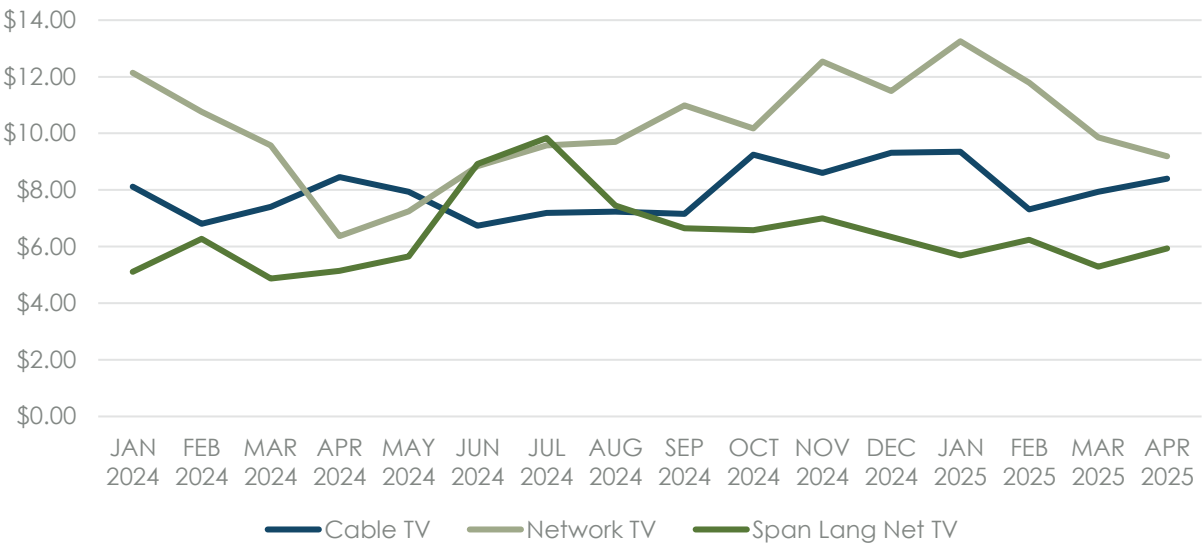
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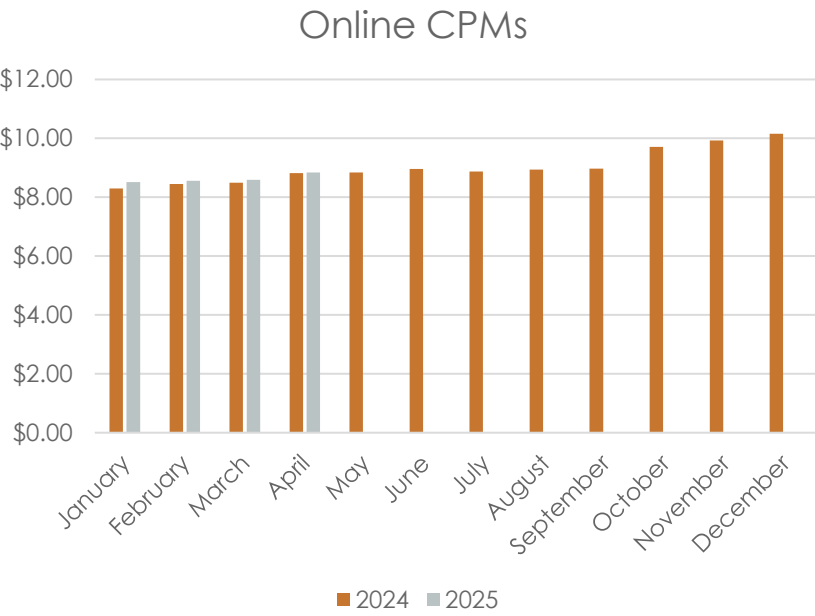
P18+ CPMs +10% higher YOY; April 2025 CPMs down 19% compared to January 2025



	JAN 2024	FEB 2024	MAR 2024	APR 2024	MAY 2024	JUN 2024	JUL 2024	AUG 2024	SEP 2024	OCT 2024	NOV 2024	DEC 2024	JAN 2025	FEB 2025	MAR 2025	APR 2025
Cable TV	\$8.12	\$6.80	\$7.40	\$8.46	\$7.94	\$6.74	\$7.19	\$7.23	\$7.16	\$9.24	\$8.60	\$9.31	\$9.35	\$7.31	\$7.94	\$8.40
Network TV	\$12.14	\$10.76	\$9.58	\$6.37	\$7.24	\$8.84	\$9.57	\$9.70	\$10.98	\$10.18	\$12.54	\$11.49	\$13.25	\$11.79	\$9.86	\$9.19
Span Lang Net TV	\$5.11	\$6.27	\$4.87	\$5.14	\$5.65	\$8.92	\$9.84	\$7.45	\$6.64	\$6.58	\$7.00	\$6.35	\$5.68	\$6.24	\$5.29	\$5.93
Grand Total	\$9.34	\$7.98	\$7.92	\$7.70	\$7.62	\$7.45	\$8.04	\$8.01	\$8.49	\$9.46	\$10.06	\$9.97	\$10.52	\$8.70	\$8.40	\$8.50



Digital CPMs Relatively Flat YOY; Facebook/X CPMs down average 6%

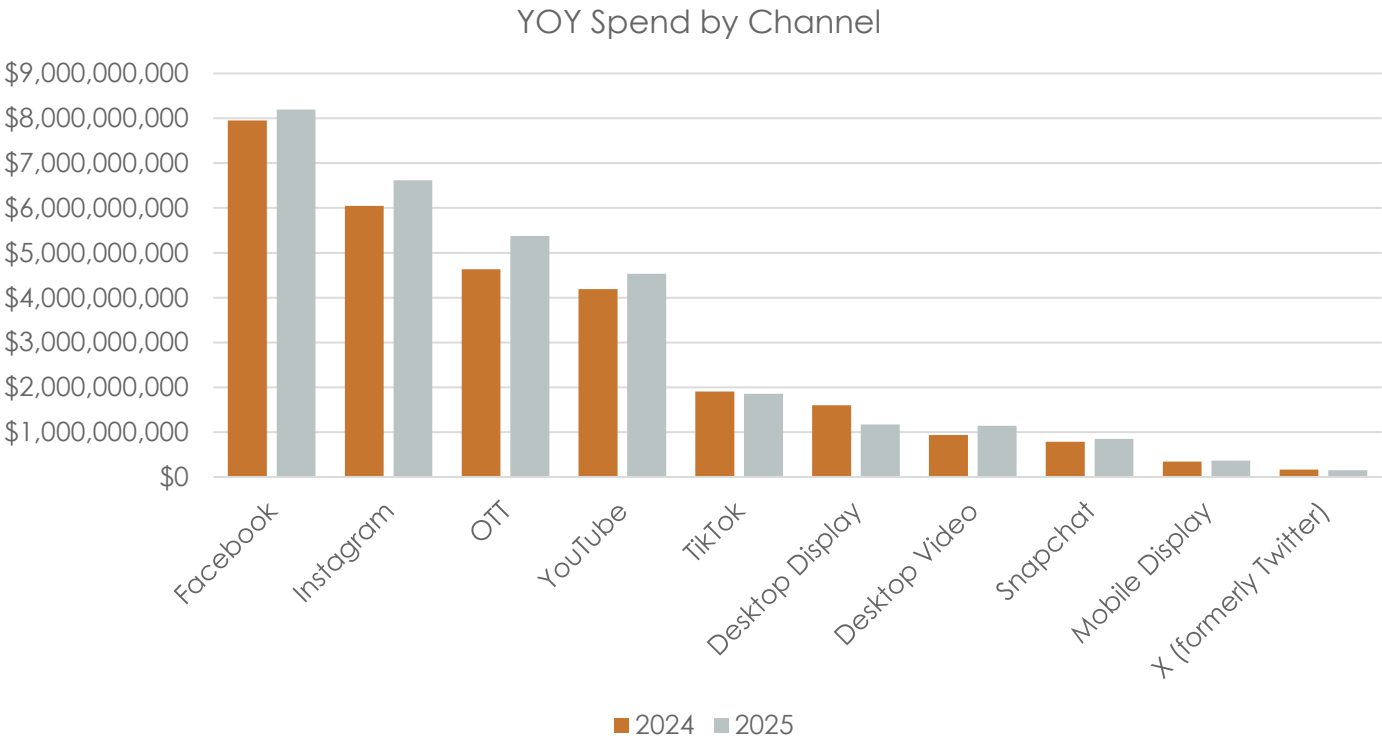
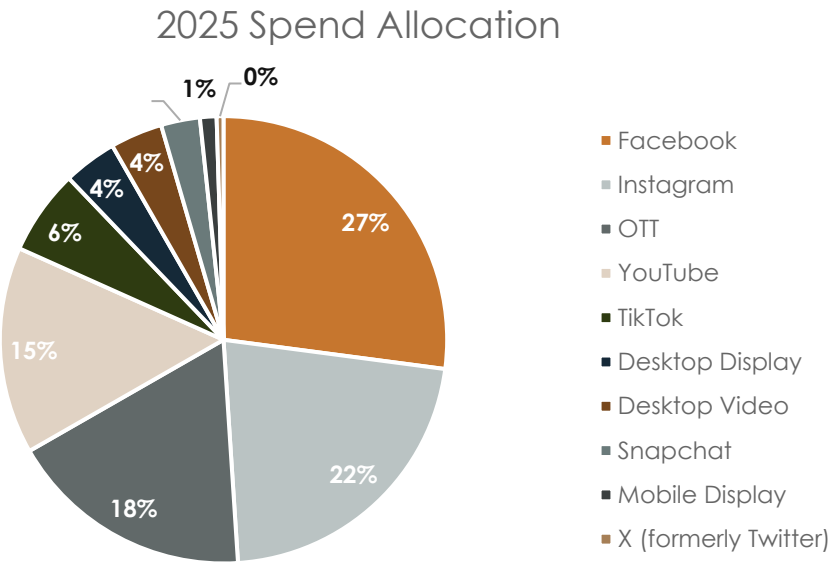


Channel	Desktop Display	Desktop Video	Facebook	Instagram	Mobile Display	OTT	Snapchat	TikTok	X (formerly Twitter)	YouTube	Grand Total
January 2024	\$5.70	\$18.70	\$6.97	\$6.86	\$5.04	\$27.31	\$5.34	\$9.95	\$2.50	\$9.97	\$8.30
February 2024	\$6.35	\$19.68	\$6.97	\$6.86	\$5.13	\$27.30	\$5.34	\$9.95	\$2.50	\$10.40	\$8.45
March 2024	\$5.90	\$19.92	\$6.97	\$6.86	\$4.85	\$27.31	\$5.34	\$9.95	\$2.50	\$10.52	\$8.49
April 2024	\$5.96	\$19.34	\$7.49	\$7.09	\$4.75	\$27.51	\$5.45	\$9.94	\$2.46	\$10.90	\$8.82
May 2024	\$6.15	\$18.59	\$7.49	\$7.09	\$5.09	\$27.51	\$5.45	\$9.94	\$2.46	\$10.94	\$8.84
June 2024	\$6.30	\$19.60	\$7.49	\$7.09	\$5.48	\$27.54	\$5.45	\$9.95	\$2.46	\$11.23	\$8.96
July 2024	\$6.03	\$19.54	\$7.25	\$7.39	\$5.33	\$28.22	\$5.69	\$10.20	\$2.51	\$10.17	\$8.87
August 2024	\$6.06	\$19.82	\$7.25	\$7.39	\$5.54	\$28.28	\$5.69	\$10.20	\$2.51	\$10.58	\$8.94
September 2024	\$6.15	\$20.23	\$7.25	\$7.39	\$5.81	\$28.40	\$5.69	\$10.20	\$2.51	\$10.88	\$8.97
October 2024	\$6.40	\$20.50	\$7.74	\$8.74	\$6.13	\$29.19	\$6.09	\$11.24	\$2.49	\$10.89	\$9.71
November 2024	\$6.97	\$20.62	\$7.90	\$8.92	\$5.64	\$30.13	\$6.22	\$11.46	\$2.54	\$10.95	\$9.93
December 2024	\$6.79	\$20.65	\$8.06	\$9.09	\$5.84	\$31.15	\$6.34	\$11.69	\$2.59	\$11.27	\$10.16
January 2025	\$6.02	\$18.69	\$6.66	\$7.10	\$5.58	\$27.38	\$5.30	\$10.10	\$2.29	\$9.98	\$8.52
February 2025	\$6.18	\$19.17	\$6.66	\$7.10	\$5.27	\$27.46	\$5.30	\$10.10	\$2.29	\$10.07	\$8.56
March 2025	\$6.06	\$19.18	\$6.66	\$7.10	\$5.29	\$27.45	\$5.30	\$10.10	\$2.29	\$10.44	\$8.59
April 2025	\$6.08	\$19.44	\$6.66	\$7.59	\$5.03	\$28.46	\$5.44	\$10.91	\$2.48	\$10.47	\$8.85
Grand Total	\$6.17	\$19.63	\$7.21	\$7.49	\$5.35	\$28.19	\$5.59	\$10.37	\$2.46	\$10.60	\$8.94
2024 Avg (Jan-April)	\$5.98	\$19.41	\$7.10	\$6.92	\$4.94	\$27.36	\$5.37	\$9.95	\$2.49	\$10.45	
2025 Avg (Jan-April)	\$6.09	\$19.12	\$6.66	\$7.22	\$5.29	\$27.69	\$5.34	\$10.30	\$2.34	\$10.24	
	2%	-1%	-6%	4%	7%	1%	-1%	4%	-6%	-2%	

Source: Pathmatics
Online includes: Facebook, Instagram, TikTok, Snapchat, X/Twitter, OTT, YouTube, Desktop Video, Desktop Display & Mobile Display
Date Range: January 2024 – April 2025



Facebook top spending channel; OTT Up 16%



Source: Pathmatics

Online includes: Facebook, Instagram, TikTok, Snapchat, X/Twitter, OTT, YouTube, Desktop Video, Desktop Display & Mobile Display

Date Range: January 2024 – April 2025





2025 Marketplace Trends

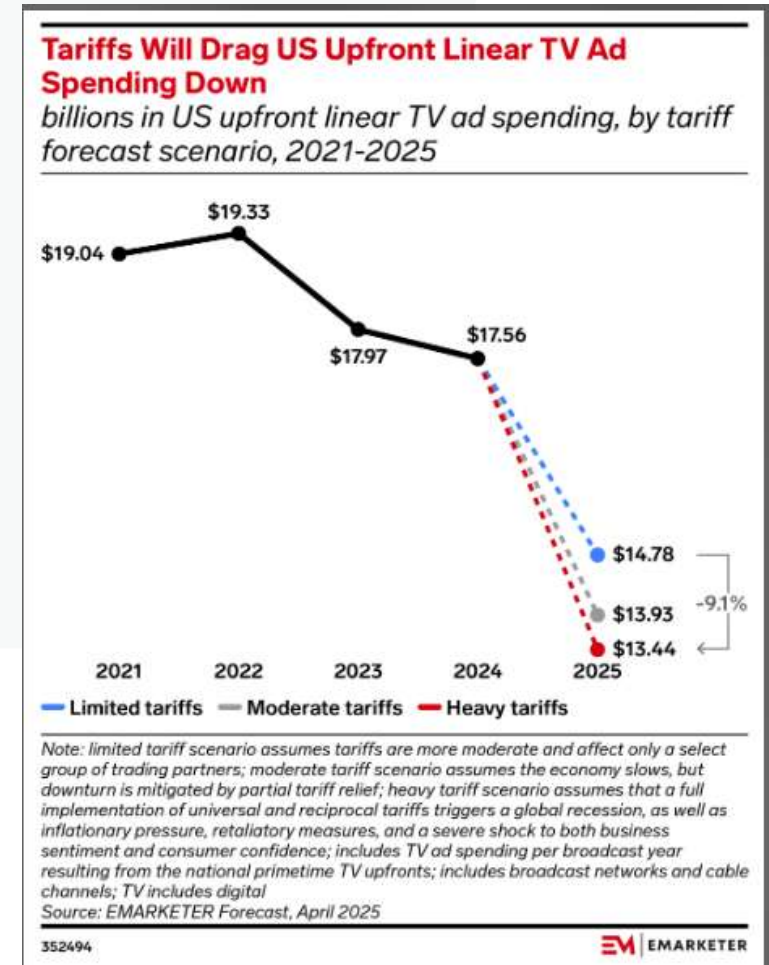
Upfront Spending will be affected by severity of tariffs

US linear TV upfront ad spending will take a hit this year. It will decline between \$2.78 billion and \$4.12 billion, depending on tariff severity.

CTV upfront ad spending will be more stable. In the worst-case scenario, upfront CTV ad spending will be flat this year. But in most scenarios, we expect growth of at least \$1 billion.

Marketers will seek flexibility. Ad buyers will have leverage to negotiate favorable cancellation terms.

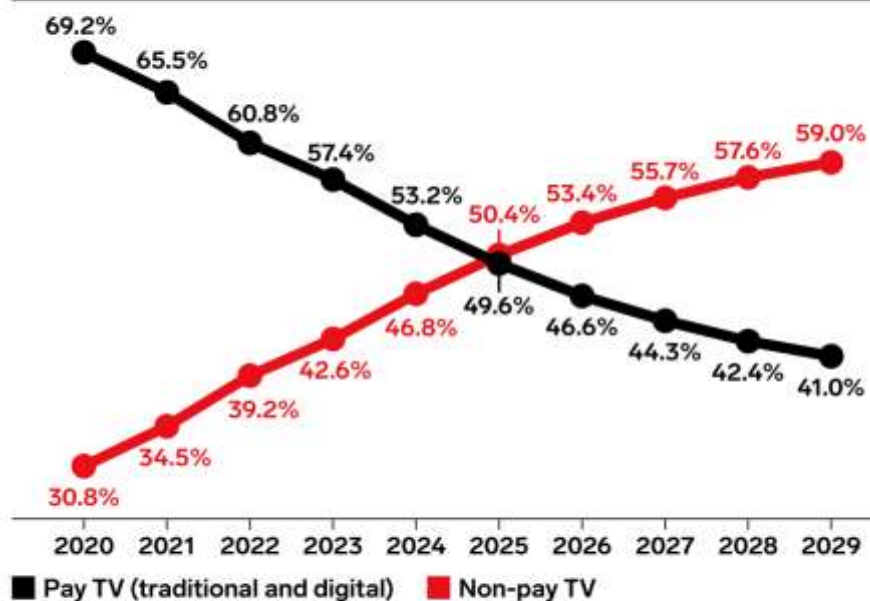
Ad prices will likely fall. With reduced demand from advertisers, CPMs are poised to decline, apart from live sports.



Most households won't have pay TV by 2025. In contrast, FAST viewership is expected to surpass 120 million next year

The Majority of US Households Will Have No Form of Pay TV as of This Year

% of US pay TV vs. non-pay TV households, 2020-2029



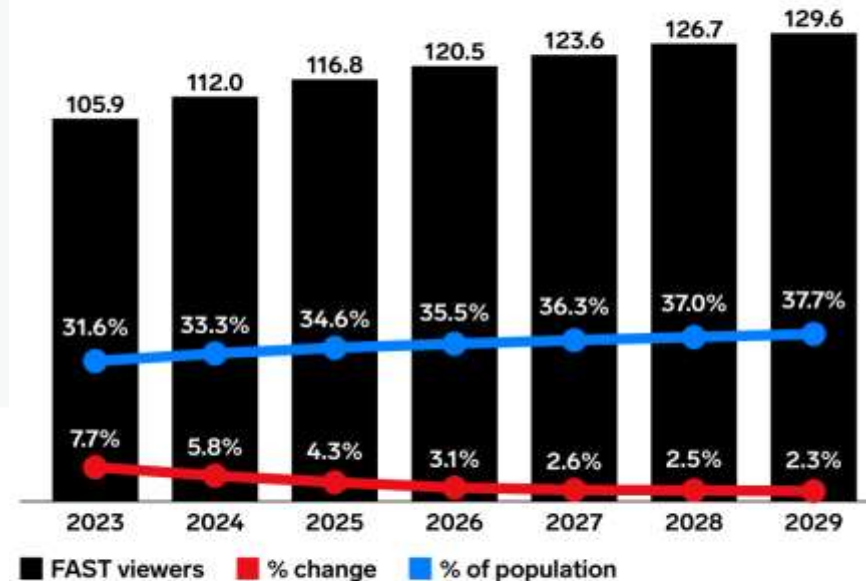
Note: pay TV households are households with a subscription to a traditional or digital (vMVPD) pay TV service; non-pay TV households are households without a subscription to either a traditional or digital (vMVPD) pay TV service
Source: EMARKETER Forecast, March 2025

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EM EMARKETER

Over a Third of the Population Will Be Watching FAST This Year

millions in US free ad-supported streaming TV (FAST) viewers, % change, and % of population, 2023-2029



Note: individuals of any age who watch videos or stream TV via app or website at least once per month on a free-to-access ad-supported platform that primarily offers professionally produced content; examples include Pluto TV, The Roku Channel, and Tubi; excludes all subscription OTT services, Twitch, and YouTube
Source: EMARKETER Forecast, March 2025

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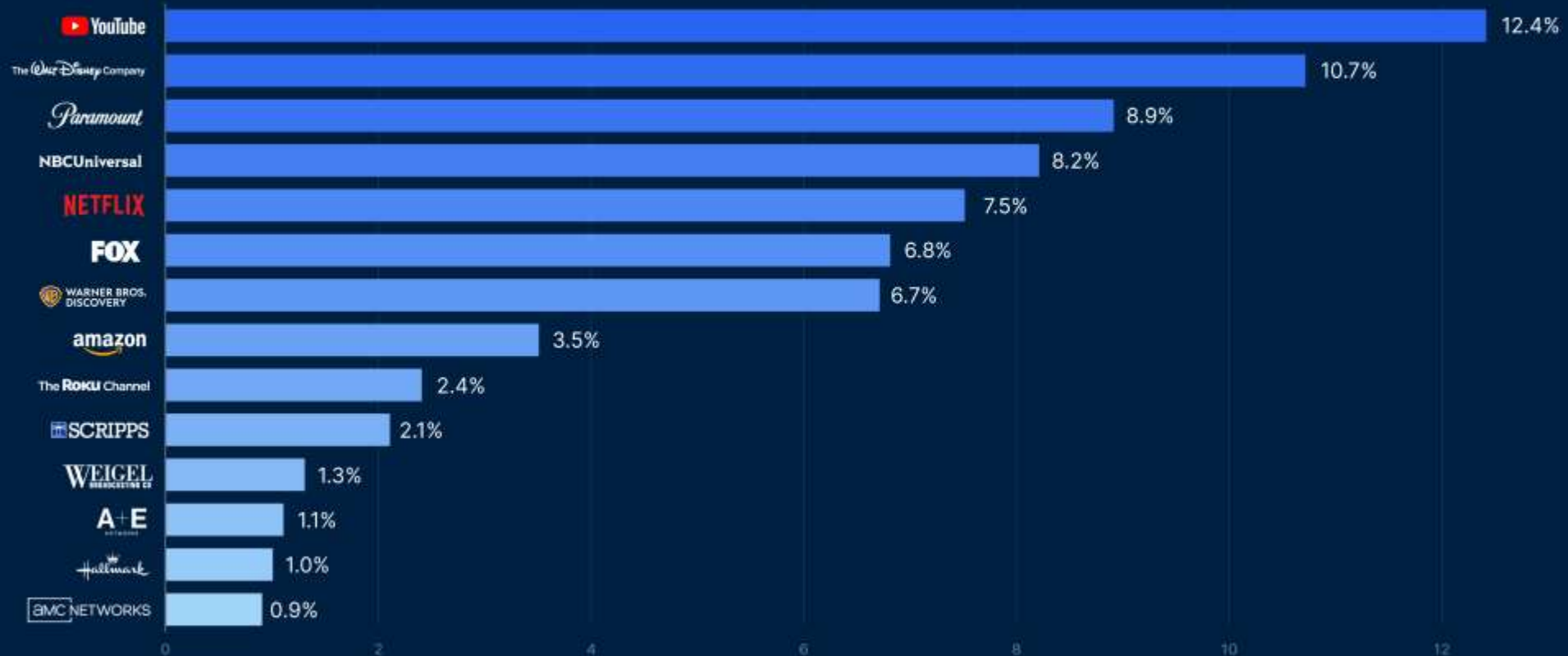
EM EMARKETER

Within Streaming TV platforms, YouTube continues to lead consumption

The Media Distributor Gauge

April 2025

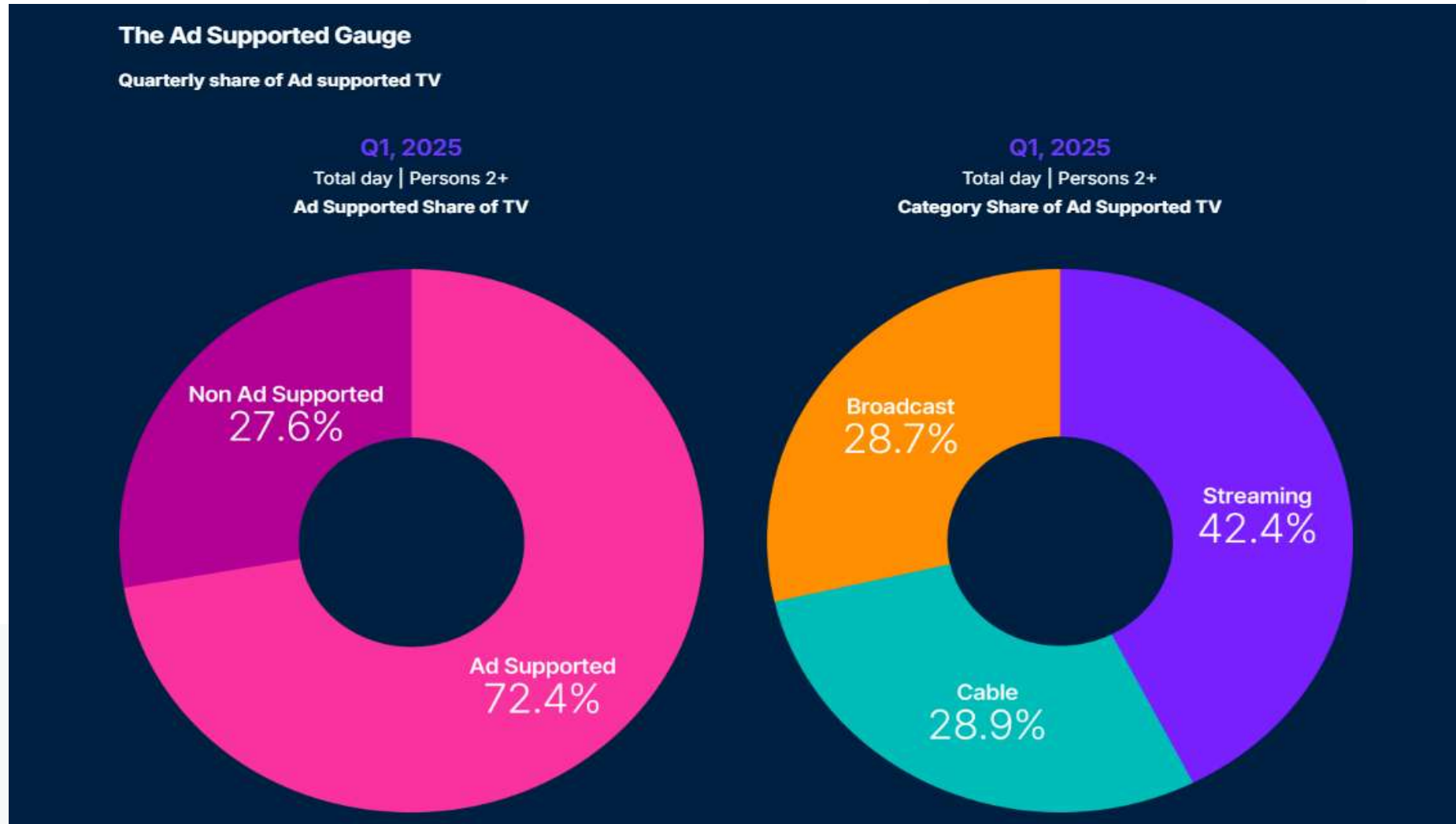
Nielsen's aggregated view of total TV usage by media company



Source: Nielsen NPOWER. Shares based on Total Day and Persons 2+ viewing minutes to all media distributor national subsidiaries. Viewing to local stations or syndicators is reflected in the appropriate broadcast affiliate or cable network. Copyright © 2025 The Nielsen Company

Nielsen

Within video, over 72% of all the content viewed is ad supported content, with almost 60% still coming from linear TV



Macro Trends



Tariffs and the economy—everything brands and agencies need to know about the changing market

Economic Uncertainty and Recession Fears

- President Trump's widespread tariff plan worsened the financial outlook, increasing recession risks (JPMorgan raised global recession expectations to 60%).
- Consumer sentiment dropped significantly (University of Michigan survey: March reading down 28.2% YoY).
- Stock market downturn followed tariff announcement ("Liberation Day").
- Consumers are pausing retail subscriptions due to financial concerns.

Impact on Marketing Budgets and Strategies

- Nearly half (43.5%) of CMOs reduced marketing spending due to inflation.
- Marketing budget growth slowed from 5.8% (Fall 2024) to 3.3% (Feb 2025).
- Marketers are shifting to value-focused messaging to appeal to cost-conscious consumers.
- Low-cost brands like Aldi and Planet Fitness are expected to thrive as consumers trade down.

Direct Effects of Tariffs on Brands and Retailers

- A 10% tariff on all imports, with reciprocal tariffs targeting the EU, China, and Vietnam.
- Brands reliant on imports (Nike, Gap, Victoria's Secret) face pressure; some are raising prices (e.g., Raen eyewear by 13%).
- Small retailers struggle with absorbing costs due to limited margins.
- Domestic manufacturing brands like New Balance are emphasizing "Made in USA" marketing.

Sector-Specific Impacts

- Automotive: A 25% tariff on imported vehicles may increase prices and slow demand; domestic brands are leveraging patriotic campaigns.
- Media Budgets: Ad spending is expected to decline; media companies may offer discounts.
- Consumer Travel: Recession fears affect travel plans; budget-friendly accommodations may see increased demand.

Impact on Ad Agencies

- Government spending cuts eliminated some agency contracts.
- Magna revised its ad sales growth forecast downward (4.3% vs. prior 4.9%).
- Ad job employment declined for the fourth consecutive month.

Consumer Behavior Insights

- Kantar study: 80% of U.S. consumers are concerned about tariffs' financial impact.
- Increased deal-hunting and reduced discretionary spending observed.

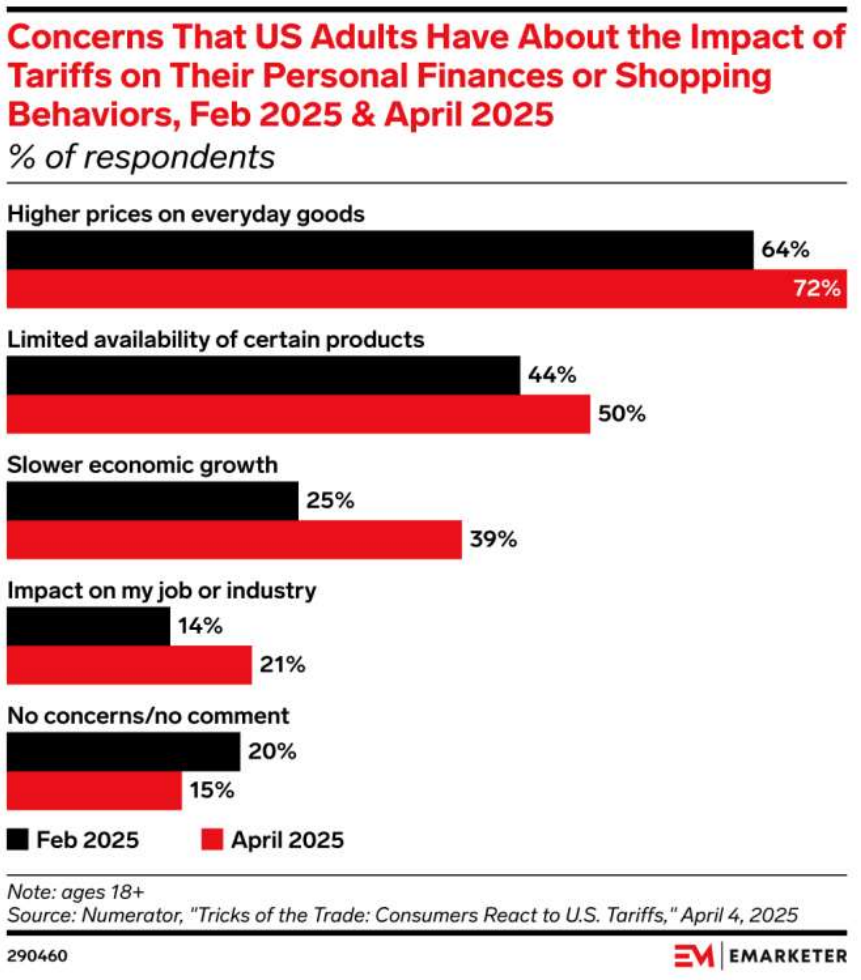
Quotes Highlighting Key Insights:

- CMO advisor Nathan Jun Poekert: Focus on messaging around savings rather than premium positioning during economic uncertainty.
- Little King retailer: Tariffs put strain on independent retailers without bulk buying power.
- Nintendo: Delayed Switch 2 pre-orders due to tariffs' potential impact.

Conclusion

- **The widespread tariffs amplify challenges for brands, retailers, and agencies already navigating economic uncertainty.** Rising costs, supply chain disruptions, and shifting consumer behavior necessitate strategic adaptations focused on value messaging and cost-efficiency. Close monitoring of economic trends will be vital for sustainable growth in this evolving market landscape.

Consumer concern over tariffs is intensifying

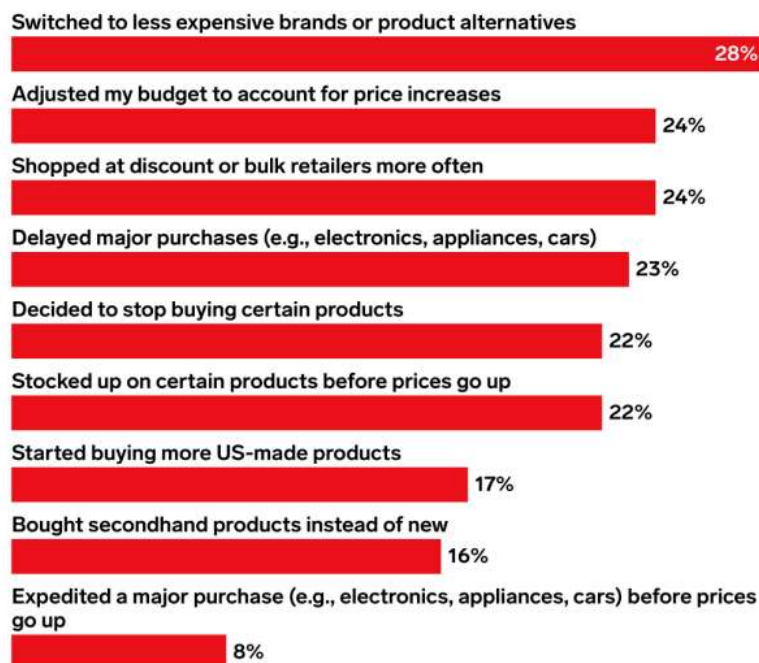


Significantly more people in April 2025 than in February worried about rising prices, product availability, and broader economic impact

In anticipation of tariff-driven price hikes, consumers are becoming more conservative with their purchases

Steps US Adults Have Taken to Prepare for Potential Price Increases Related to Tariffs, March 2025

% of respondents



Note: ages 18+; respondents could select multiple responses

Source: Collage Group, "Beyond the Price Tag: How Tariffs Are Reshaping Consumer Loyalty," April 2, 2025

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In preparation for tariff-driven price hikes, US consumers are trading down, shopping smarter, and delaying big-ticket purchases to protect their wallets

The background of the image is a dramatic, dark sky filled with heavy, dark grey clouds. Two bright, jagged lightning bolts are visible, one near the top center and another near the bottom center, both emitting a warm, orange-yellow glow. Overlaid on this scene are several large, semi-transparent, dark blue geometric shapes that resemble stylized, overlapping chevrons or the letter 'H'. These shapes are positioned diagonally across the frame, creating a modern, architectural feel.

rainstorm
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