

**rainstorm**  
*direct*

# Q3 2026 Marketplace Outlook

JUNE 2026

## Key Takeaways

### Viewership

- Linear viewership across multiple demos has shown increases (~8%) since February and are trending higher than 2025
- News viewership has been higher than 2025 all year; expect viewership to get another boost with Mid Term election coverage
- Sports remains stable over the past 3 years; expect a jump in Q4 with NFL

### Finding Efficiencies

- Most platforms are offering various Automation tools to deliver to a client's KPI
- Examples:
  - Rainstorm Direct's Guaranteed Programs
  - Rain's Performance+
  - Paramount Precision+
  - Pinterest Performance+
  - Snapchat optimization tools

### Diversify Media Mix

- Most vendors are positioning themselves as complete advertising ecosystems with access to premium content, streaming opportunities and engagement with viewers
- It is important for advertisers to utilize multiple channels in the marketing mix to find their consumers in the fragmented marketplace

### Secure Early

- Sports content is in high demand
- Women's sports are becoming more popular and expanding coverage
- To have a presence in sports, it is important to secure early
- Political dollars will have an impact starting near the end of Q3; will be hard to get a hold of inventory once the influx starts

### Expansion Opportunities

- Opportunity to test into FAST channels at cheap CPMs with economic conditions pushing more viewers here
- Vendors are offering various advertising tools to maximize presence – sponsorships, Pause Ads, Mastheads

# 2026 Media Trends Summary



## Categories & Advertisers

Financial/Insurance, Pharmaceuticals & Local Service categories lead in offline spend, with Shopping, Media Entertainment & Consumer Packaged Goods yielding the highest online spend in Q1.

While the number of advertisers in offline media continues to slowly decline, linear TV advertisers are +2% YOY and continues to increase in 2026. Despite the number of advertisers being -5% YOY; online spending continues to increase. We expect to continue to see new entrances to the marketplace, but the major players will continue to dominate the landscape in 2026.



## Media Cost & Response Rates

While average cost per spot in linear TV was -7% YOY in 2025, it's creeping back up, +2% thru April 2026. Digital CPMs were +8% YOY driven primarily by TikTok (+16%) and X (+28%)

Expect linear cost per spot to remain up YOY especially in high demand inventory like News and Sports.

Linear TV response rate has been on a decline this year, -4% YOY thru May.



## Channel Level Insights

Linear TV spending is flat YOY with Entertainment and Sports representing the majority of the spend. Offline spend is +11% YOY driven by Facebook & Instagram; however, TikTok is experiencing the largest growth +23% YOY.

Rainstorm Direct's Guaranteed program is a great way to offset rising media cost and declining response rate. Find out how you can add a layer of efficiency to your campaign today!



## Local Services spend overtaking Pharma for #2; Retail and Automotive spending down YTD

INDUSTRY GROUP	1Q '25	1Q '26	1Q '25 vs 1Q '26	April 2025	April 2026	April '25 vs April '26	% Spend YTD
Financial and Insurance	\$2,183,976	\$2,187,768	0%	\$644,763	\$656,400	2%	11%
Local Services	\$1,883,872	\$1,950,765	4%	\$589,558	\$558,785	-5%	10%
Pharmaceuticals	\$1,784,783	\$1,925,357	8%	\$544,834	\$574,929	6%	10%
Retail	\$1,355,219	\$1,246,491	-8%	\$482,496	\$438,718	-9%	7%
Automotive	\$1,431,745	\$1,293,392	-10%	\$413,964	\$309,773	-25%	6%
Media	\$942,257	\$1,087,547	15%	\$238,475	\$264,929	11%	5%
Restaurants	\$1,172,357	\$1,042,846	-11%	\$299,125	\$259,826	-13%	5%
Food and Beverage	\$1,090,659	\$995,159	-9%	\$324,059	\$264,094	-19%	5%
Telecommunications	\$1,005,677	\$915,629	-9%	\$266,782	\$224,840	-16%	4%
Government and Organizations	\$583,109	\$703,593	21%	\$182,366	\$221,081	21%	4%
Non-Rx Remedies	\$684,369	\$695,363	2%	\$184,721	\$221,973	20%	4%
Travel and Tourism	\$696,639	\$664,773	-5%	\$216,101	\$222,346	3%	3%
Medical Services and Equipment	\$614,741	\$617,345	0%	\$178,084	\$189,042	6%	3%
Personal Care Products	\$622,083	\$531,202	-15%	\$209,785	\$173,089	-17%	3%
Electronics	\$287,809	\$470,461	63%	\$72,188	\$82,325	14%	2%
HH Supplies and Cleaners	\$390,866	\$394,740	1%	\$136,164	\$134,849	-1%	2%
Apparel	\$403,913	\$362,661	-10%	\$128,884	\$118,844	-8%	2%
Miscellaneous	\$290,676	\$262,337	-10%	\$116,179	\$107,977	-7%	1%
Games, Toys and Sporting Goods	\$298,516	\$270,366	-9%	\$79,266	\$67,491	-15%	1%
Pets	\$223,710	\$221,114	-1%	\$79,825	\$71,587	-10%	1%
HH Appliances, Furnishings and Paint	\$252,962	\$212,714	-16%	\$85,210	\$74,747	-12%	1%
Education	\$165,365	\$153,697	-7%	\$49,208	\$44,460	-10%	1%
HH Building Materials and Fixtures	\$99,172	\$132,234	33%	\$42,766	\$40,913	-4%	1%
Office Equipment and Manufacturing	\$53,233	\$48,770	-8%	\$13,977	\$11,066	-21%	0%
Energy	\$8,250	\$7,869	-5%	\$2,929	\$3,516	20%	0%
<b>GRAND TOTAL</b>	<b>\$18,525,956</b>	<b>\$18,394,190</b>	<b>-1%</b>	<b>\$6,982,094</b>	<b>\$7,165,275</b>	<b>3%</b>	<b>100%</b>

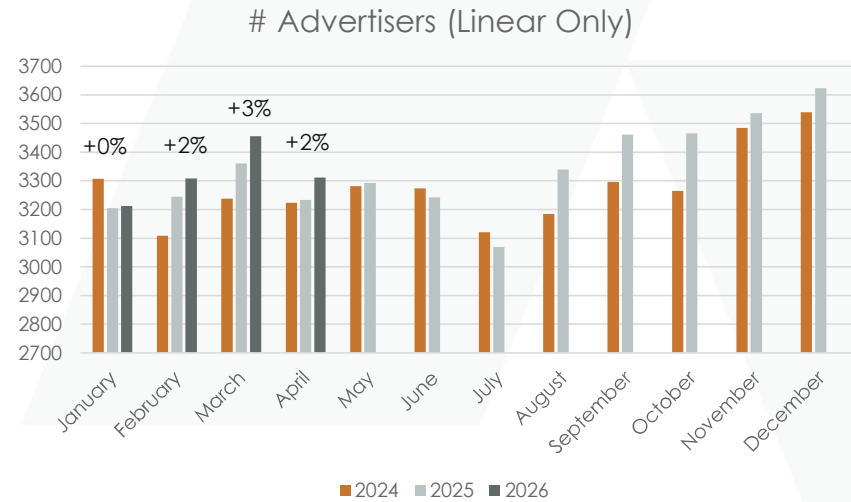
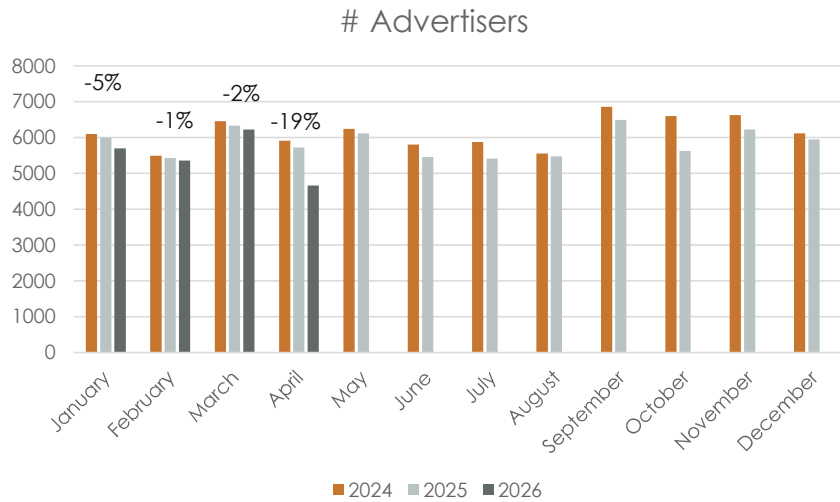
Source: MediaRadar (formerly Vivvix/Kantar)

Offline includes: TV, Radio &amp; Print

Date Range: January 2025– April 2026

OFFLINE: NUMBER OF ADVERTISERS

# # of Advertisers declined MoM in April but still +2% YOY on Linear

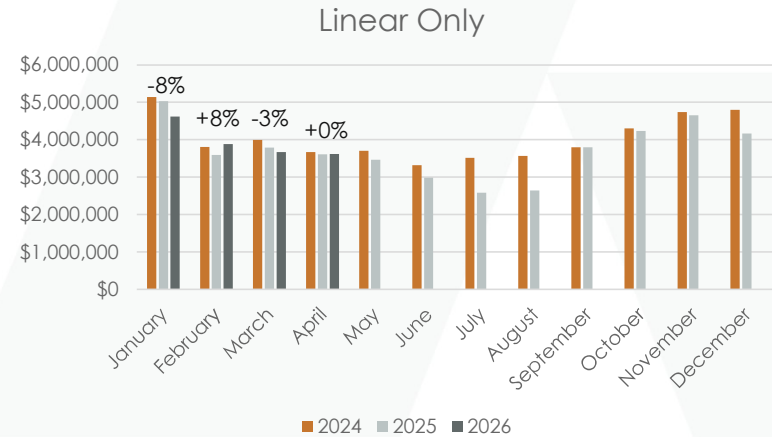
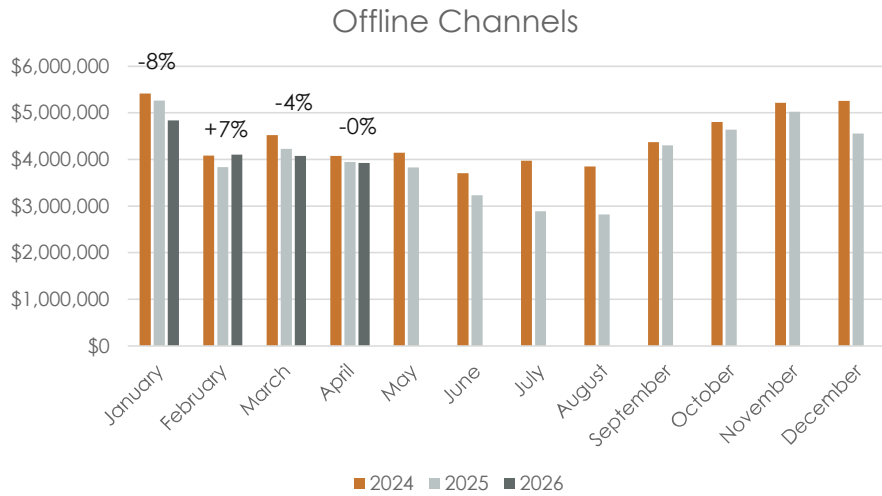


- New advertisers in 2026 include ARS Pharmaceuticals, PetSmart, Turo Car Rental, Royal Match, GrubHub

Source: Media Radar(Formerly Vivvix/Kantar)  
 Offline includes: TV, Radio & Print  
 Date Range: January 2024 – April 2026

OFFLINE: SPEND BY MONTH

# Spend -2% YOY across all Offline channels and relatively flat on Linear



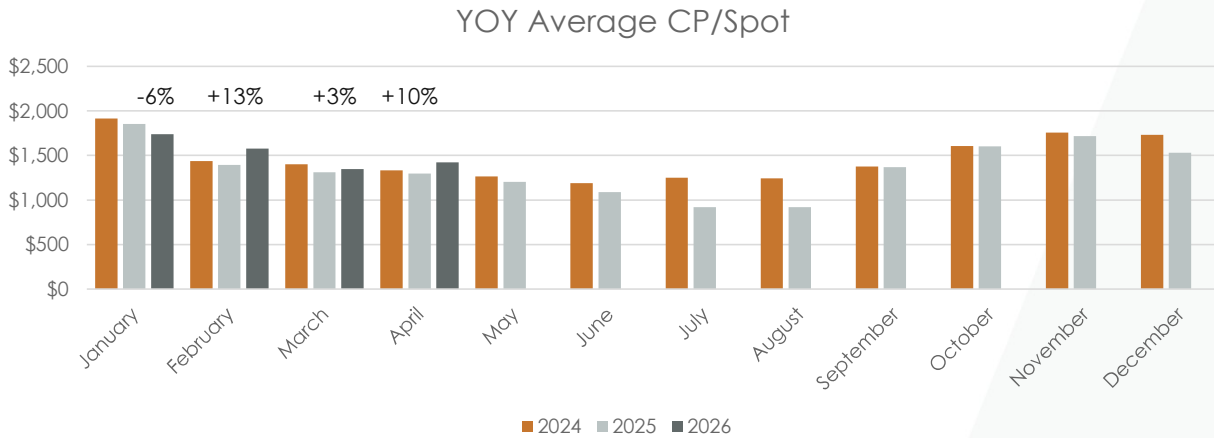
- Top 10 advertisers YTD 2026– Abbvie, Progressive, AT&T, Eli Lilly, Janson, Amazon, All State, T-Mobile, Liberty Mutual & Intuit
  - Abbvie spend +18% YOY
  - Progressive and AT&T both down slightly YOY



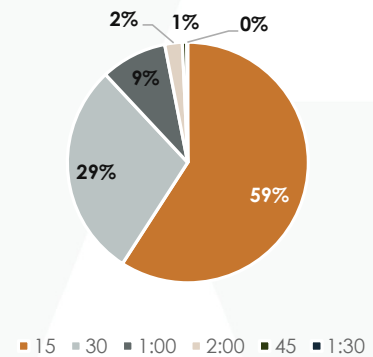
Source: MediaRadar (formerly Vivvix/Kantar), Spend in (000s)  
 Offline includes: TV, Radio & Print  
 Date Range: January 2024 – January 2026

LINEAR TV: COST PER SPOT & AD LENGTHS

# Avg. CP/spot increasing in 2026 across all tape lengths



% Units 2026 by Length



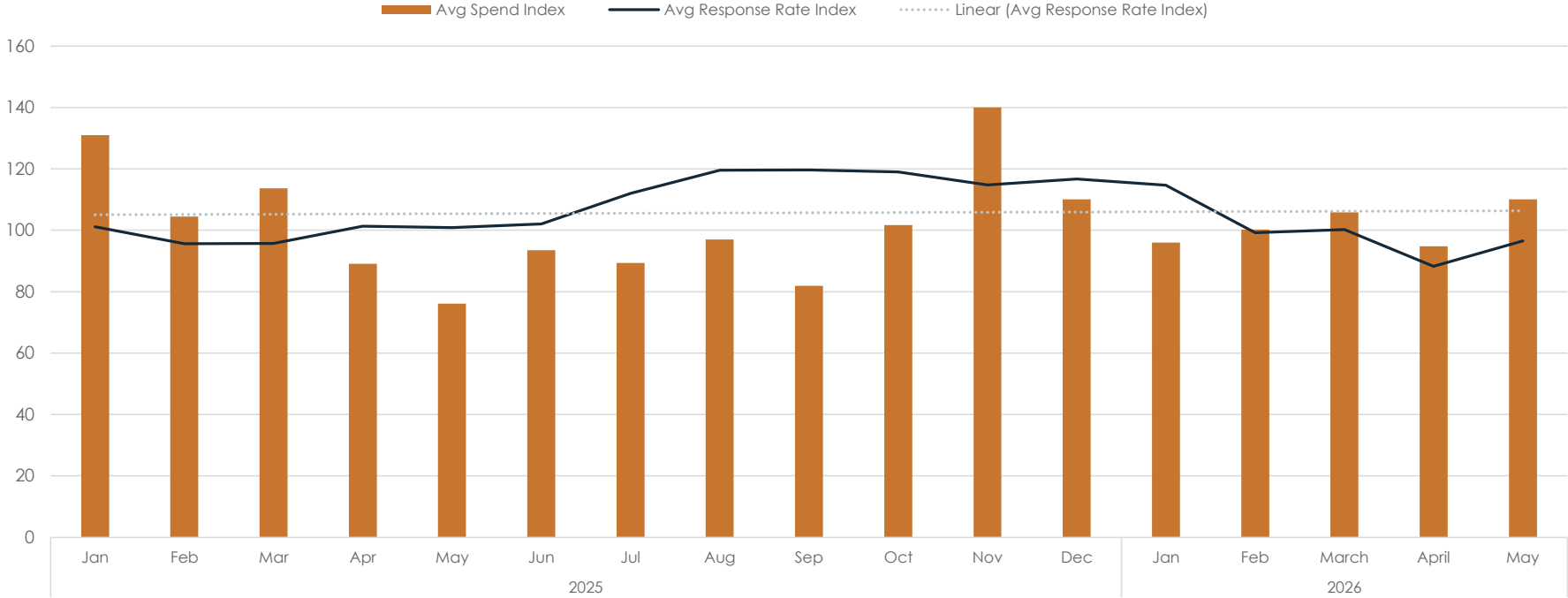
- 78% of spend YTD against :30s and :15s
- Spend allocation in longer lengths continues to increase

Length	2024		2025		2026	
	Spend	CP/Spot	Spend	CP/Spot	Spend	CP/Spot
30	45%	\$2,401	43%	\$2,144	44%	\$2,305
15	37%	\$854	38%	\$815	34%	\$880
1:00	13%	\$2,645	13%	\$2,348	17%	\$2,835
2:00	3%	\$2,086	3%	\$1,993	3%	\$2,171
45	1%	\$3,398	1%	\$3,231	2%	\$3,950
1:30	1%	\$6,483	1%	\$5,935	1%	\$6,828
<b>Grand Total</b>	<b>100%</b>	<b>\$1,453</b>	<b>100%</b>	<b>\$1,344</b>	<b>100%</b>	<b>\$1,522</b>



Source: MediaRadar (Formerly Vivvix/Kantar)  
Date Range: January 2024 – April 2026

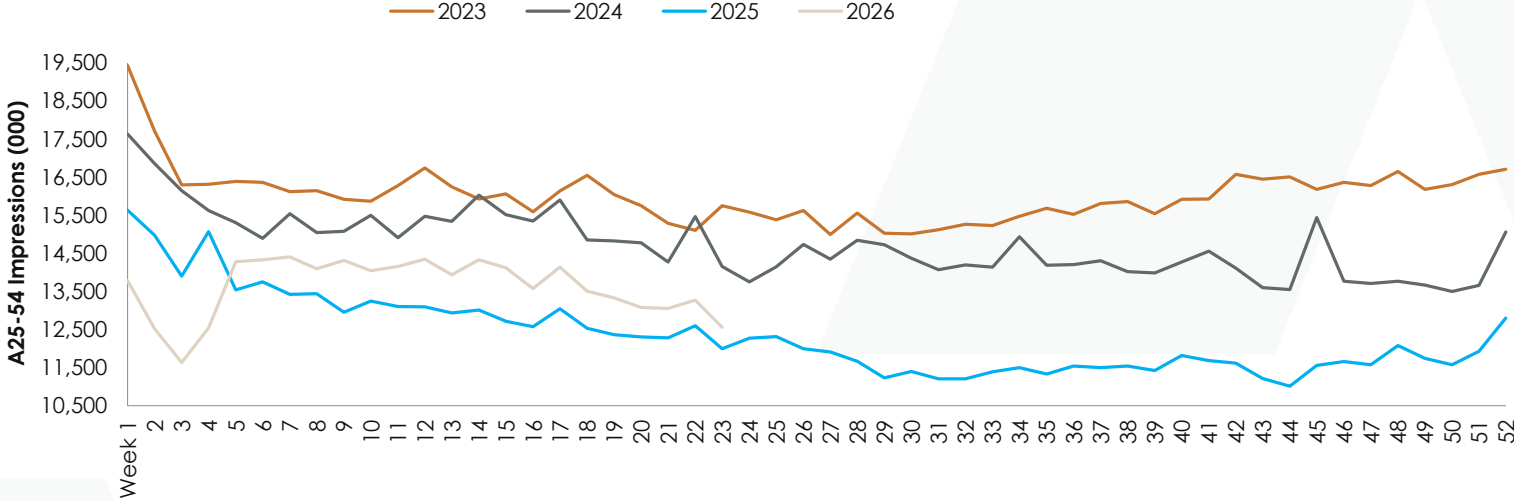
# Response Rate Index drops, -4% YoY thru May



Source: Rain Tracker  
\*Pulled 6/09/2026

# A18+ -3% YOY and has been on average +7% since February

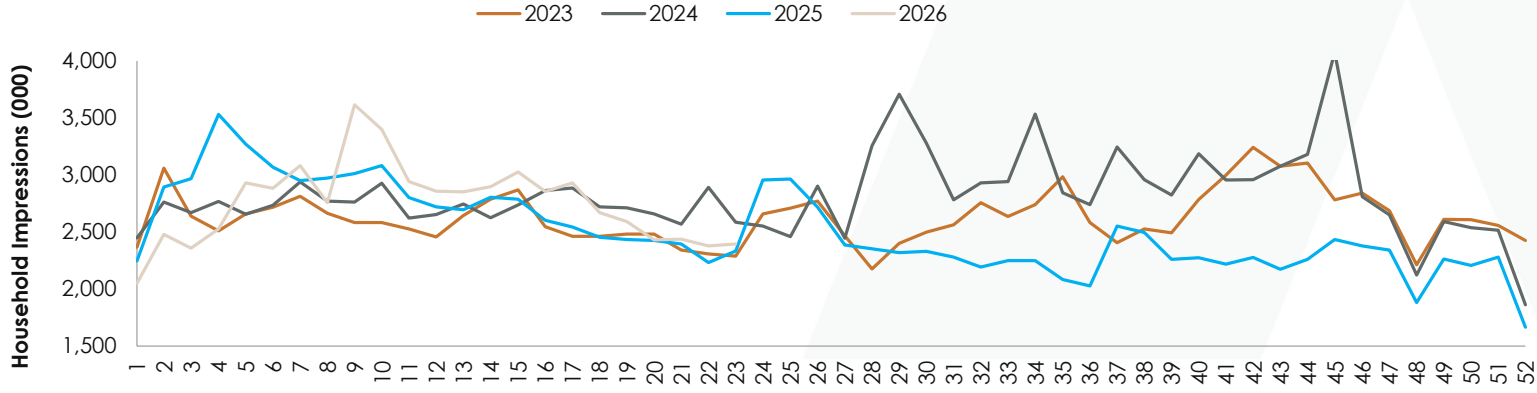
**A18+ TV Viewership For Ad-Supported Cable Stations - Overall**  
12/27/22 - 6/7/2026



Source: Nielsen  
Date Range: January 2022 – June 2026

# Cable News Viewership has been up on average 7% YOY since March

TV Viewership For Cable News Networks - Weekly Average  
12/27/22 - 6/7/2026



Source: Nielsen  
Date Range: January 2022 – June 2026