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2025 & January 2026 Market Trends Recap

Presented by: Marketplace Taskforce

March 2026

2025 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 2025.

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 up 4% in January 2026. Digital CPMs were +8% YOY driven primarily by Instagram which was +18%.

Expect Linear unit cost to remain lower YOY; however, with continued ratings declines, CPMs will continue to remain flat to up

Linear TV response rate has been on a decline in the new year, -11% YOY in February.



Channel Level Insights

Linear TV spending down 9% YOY skewed by the Olympics & Political spending in 2024. Facebook & Instagram had the highest spends across online channels in 2025, while OTT spend is growing (+16% YoY).



2025 Spend -7% YOY with Local Services Seeing Biggest YOY Growth; January 2026 spend up 3% from Previous Year

INDUSTRY GROUP	2024	2025	2024 vs 2025	Jan '25	Jan '26	Jan '25 vs Jan '26	% Spend YTD
Financial and Insurance	\$7,924,637	\$8,224,309	4%	\$939,349	\$955,138	2%	13%
Pharmaceuticals	\$6,476,344	\$6,791,182	5%	\$665,427	\$771,559	16%	11%
Local Services	\$6,766,879	\$7,614,905	13%	\$690,189	\$709,650	3%	10%
Automotive	\$5,556,792	\$5,482,268	-1%	\$564,880	\$509,669	-10%	7%
Restaurants	\$4,214,552	\$4,048,353	-4%	\$496,179	\$494,493	0%	7%
Retail	\$6,291,903	\$6,307,447	0%	\$445,264	\$444,484	0%	6%
Media	\$3,923,752	\$3,603,010	-8%	\$359,091	\$439,404	22%	6%
Telecommunications	\$3,839,351	\$3,546,056	-8%	\$380,803	\$360,722	-5%	5%
Food and Beverage	\$4,492,888	\$3,997,629	-11%	\$363,775	\$360,274	-1%	5%
Non-Rx Remedies	\$2,535,340	\$2,437,507	-4%	\$287,147	\$323,859	13%	5%
Travel and Tourism	\$2,518,109	\$2,419,138	-4%	\$257,725	\$237,293	-8%	3%
Medical Services and Equipment	\$2,033,556	\$2,272,878	12%	\$227,187	\$228,330	1%	3%
Government and Organizations	\$7,009,300	\$2,585,476	-63%	\$187,756	\$213,331	14%	3%
Personal Care Products	\$2,693,073	\$2,281,714	-15%	\$205,751	\$182,181	-11%	3%
HH Supplies and Cleaners	\$1,537,706	\$1,698,384	10%	\$144,815	\$174,202	20%	2%
Electronics	\$878,190	\$881,527	0%	\$123,107	\$163,799	33%	2%
Games, Toys and Sporting Goods	\$1,163,751	\$1,138,867	-2%	\$147,501	\$124,571	-16%	2%
Miscellaneous	\$1,242,856	\$1,010,607	-19%	\$117,151	\$109,361	-7%	2%
Pets	\$934,031	\$838,623	-10%	\$84,687	\$89,884	6%	1%
HH Appliances, Furnishings and Paint	\$1,011,128	\$992,396	-2%	\$81,395	\$81,938	1%	1%
Education	\$561,471	\$605,673	8%	\$75,623	\$79,321	5%	1%
Apparel	\$1,715,025	\$1,615,134	-6%	\$79,591	\$56,849	-29%	1%
HH Building Materials and Fixtures	\$495,545	\$462,280	-7%	\$32,566	\$36,307	11%	1%
Office Equipment and Manufacturing	\$252,145	\$190,171	-25%	\$22,846	\$16,092	-30%	0%
Energy	\$60,956	\$47,729	-22%	\$2,288	\$2,563	12%	0%
GRAND TOTAL	\$76,129,282	\$71,093,261	-7%	\$6,982,094	\$7,165,275	3%	100%

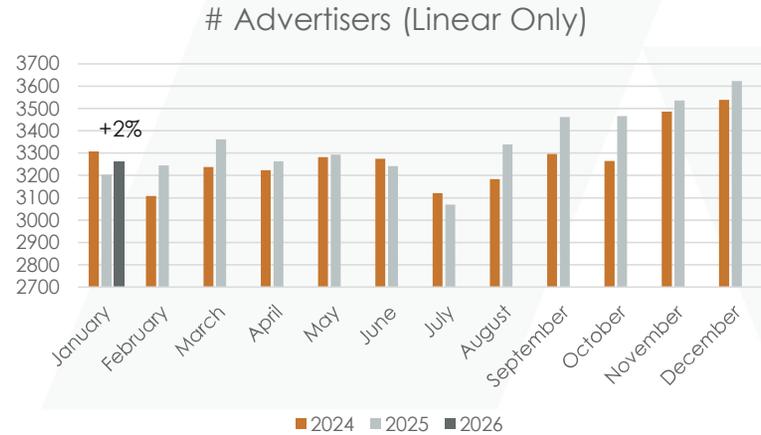
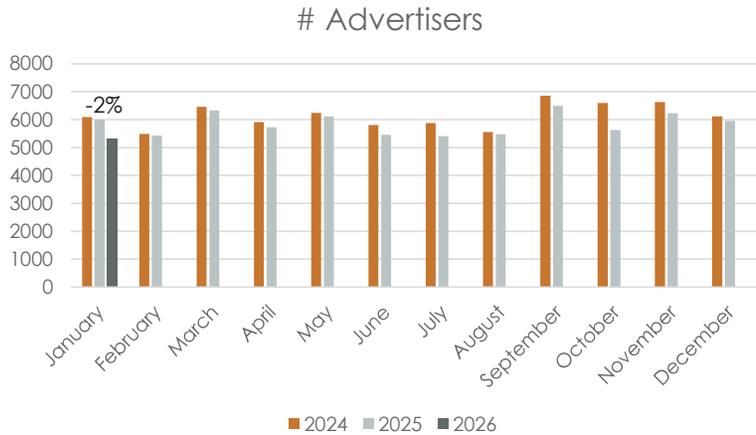
Source: MediaRadar (formerly Vivvix/Kantar)

Offline includes: TV, Radio & Print

Date Range: January 2024– January 2026

OFFLINE: NUMBER OF ADVERTISERS

of Advertisers across Offline Channels -5% 2025; Linear TV up +2% and Continues to Increase in 2026



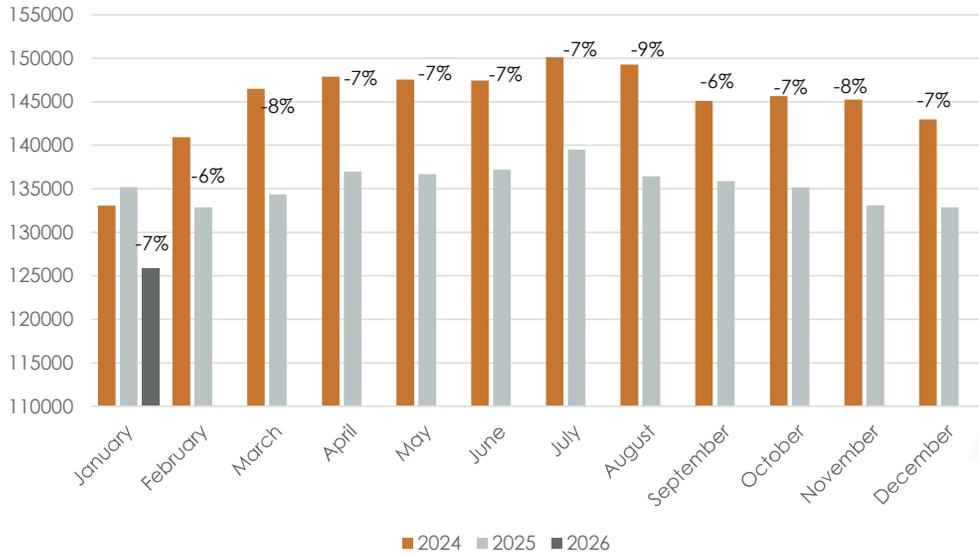
- New advertisers in 2026 include OpenAI, ARS Pharmaceuticals, Galderma, Royal Kingdom, Bridgebio Pharma

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

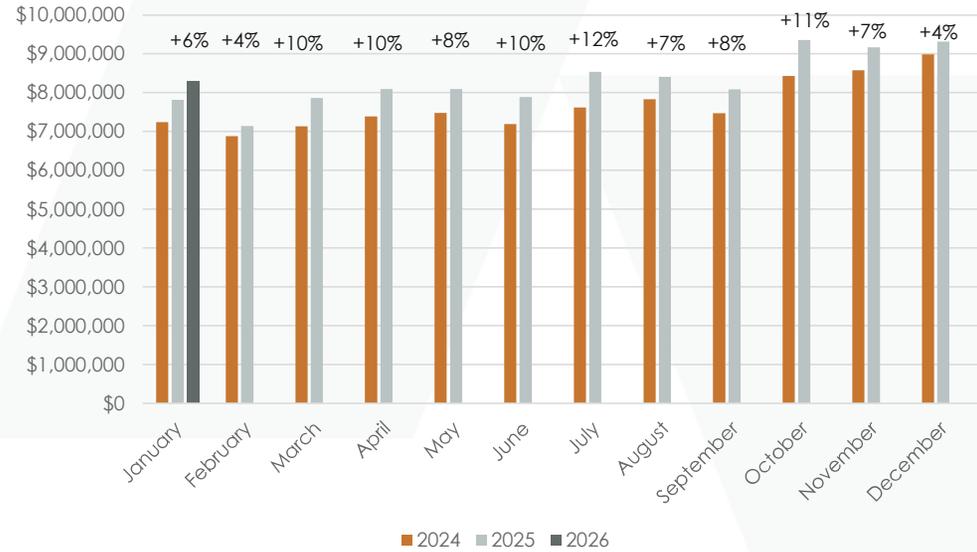


Fewer Advertisers in Market but Online Spend Continues to Increase

Online Advertiser Count



Online Advertiser Spend



- Number of online advertisers down 7% in 2025
- Online advertising spending peaking in October

Source: Pathmatics, Spend in (000s)

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

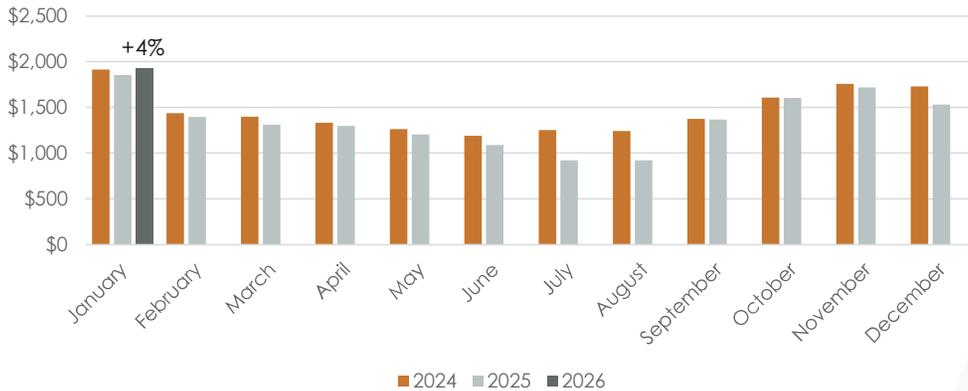
Date Range: January 2024 – January 2026



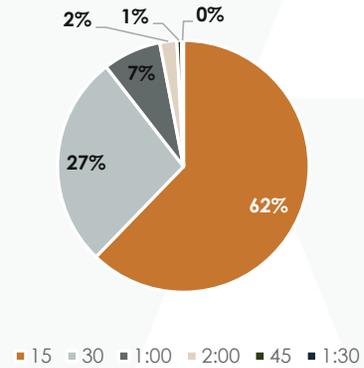
LINEAR TV: COST PER SPOT & AD LENGTHS

Avg. CP/Spot for Linear TV -7% in 2025; +4% in January 2026

YOY Average CP/Spot



% Units 2025 by Length



- :15s make up 62% of units in 2025
- Spend continues to be higher in :30s
- Spend allocation in longer lengths continues to increase in

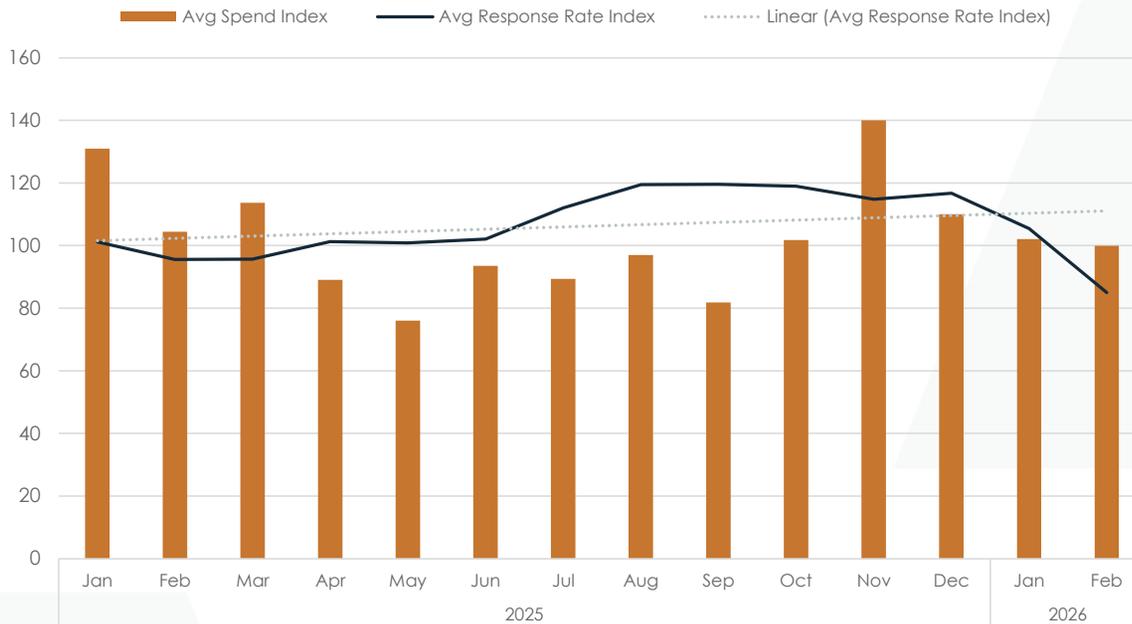
Length	2024		2025		2026	
	Spend	CP/Spot	Spend	CP/Spot	Spend	CP/Spot
30	45%	\$2,401	43%	\$2,143	44%	\$3,019
15	37%	\$854	38%	\$815	37%	\$1,185
1:00	13%	\$2,645	13%	\$2,348	14%	\$2,824
2:00	3%	\$2,086	3%	\$1,993	4%	\$2,714
45	1%	\$3,398	1%	\$3,231	2%	\$5,004
1:30	1%	\$6,483	1%	\$5,935	1%	\$8,461
Grand Total	100%	\$1,453	100%	\$1,344	100%	\$1,925



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

RESPONSE RATE

February 2026: Response Rate Index drops, -11% YOY



- Response Rate Index is 11% lower YoY, down from 96 avg index to 85 in February 2026.
- Currently, 2026 avg. Response Index overall is 95.

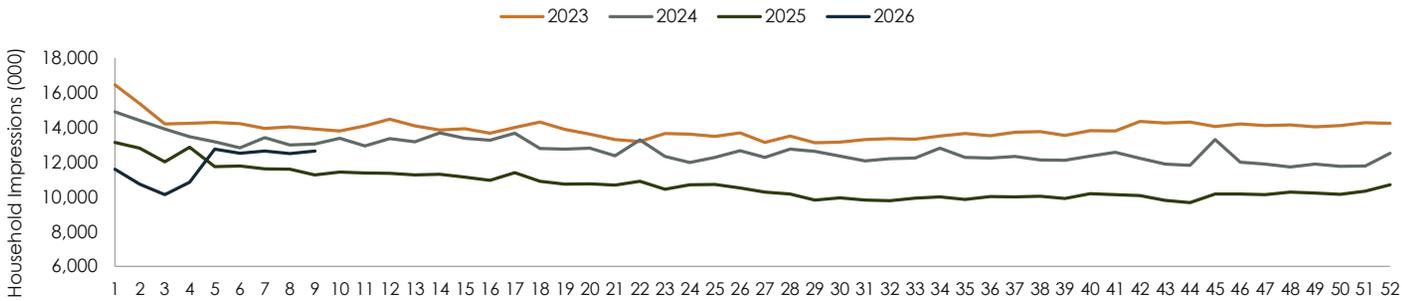


*Pulled 2/20/2026

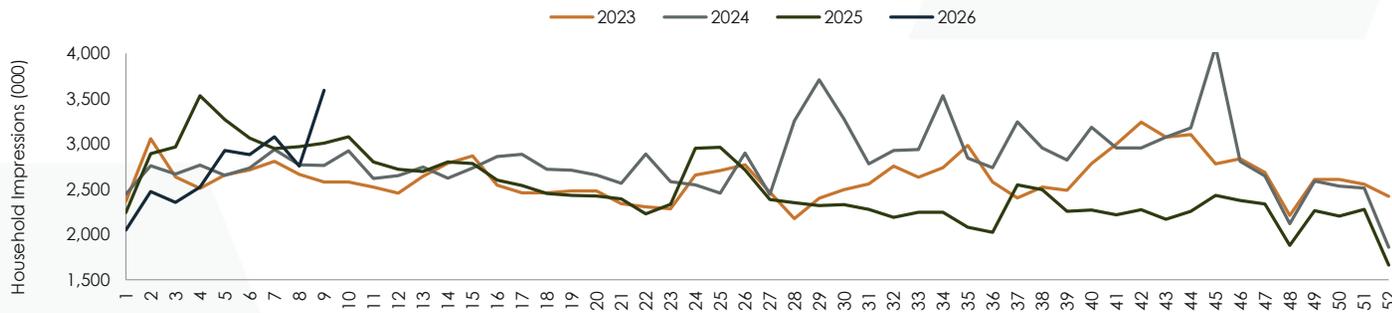
LINEAR TV: VIEWERSHIP TRENDS

2026 Viewership seeing YOY increase starting in February

TV Viewership For Ad-Supported Cable Stations - Weekly Overall
12/27/22 - 3/1/2026



TV Viewership For Cable News Networks - Weekly Average
12/27/22 - 3/1/2026

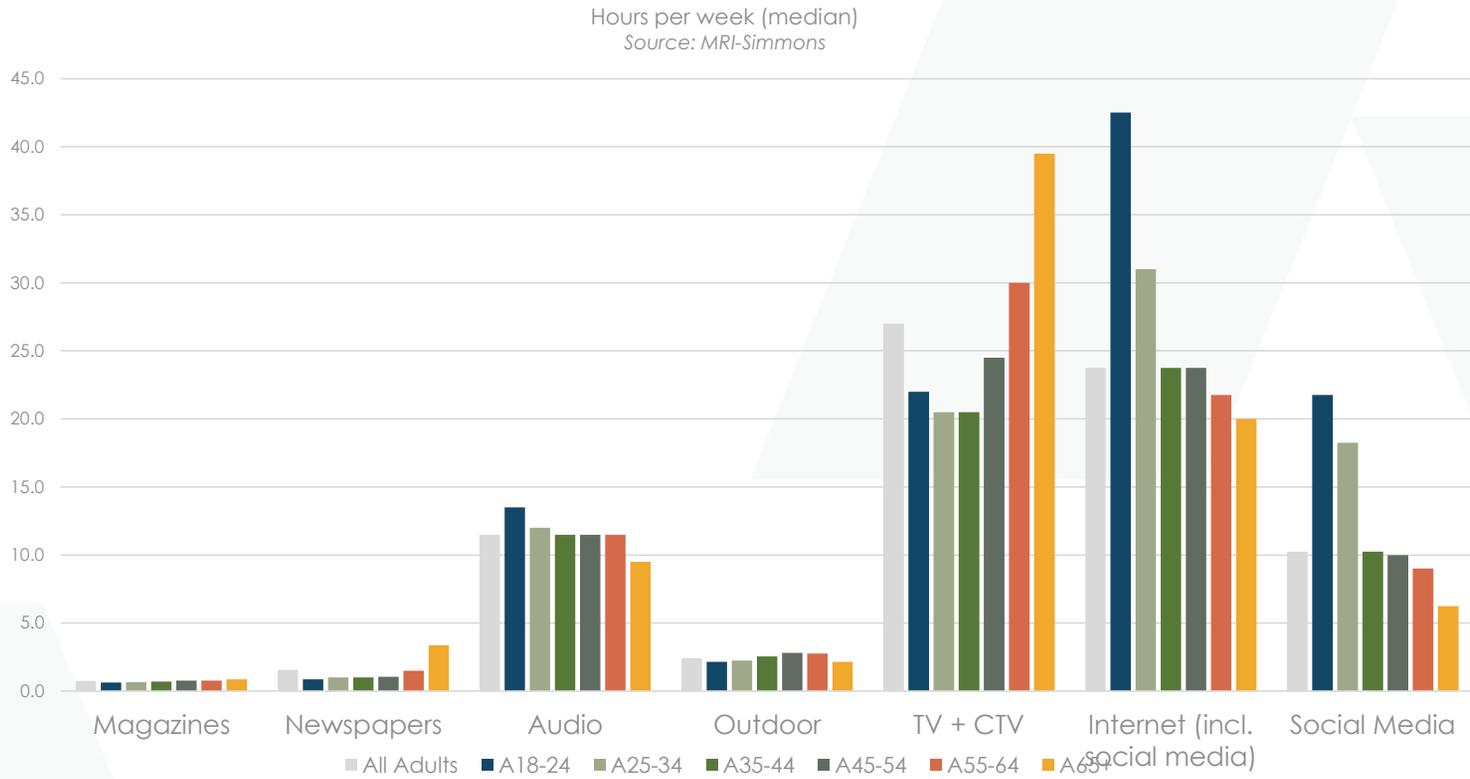


- 2026 started with 12% - 16% lower viewership YOY but has been seeing strong improvement since week 5 (Likely driven by Olympics in February and News in week 9)
- Cable News also started the year with an average 12% lower viewership YOY. However, with the start of the Iran War in week 9, viewership has begun to increase.



Source: Nielsen
Date Range: January 2022 – August 2025

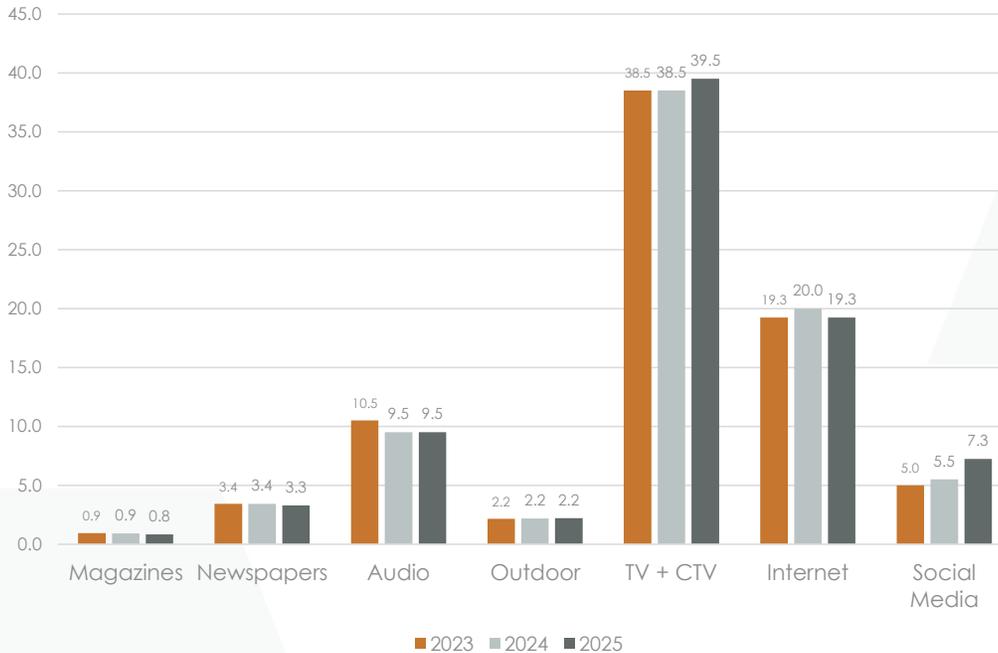
Adults 45+ spend the most time with TV/CTV, while younger audiences devote the most time to online media (including social).



Source: [MRI-Simmons](#)

Digital and social use is rising among adults 65+, as print declines and TV remains steady

Age 65+ Time spent with media
Median hrs. per week
Source: MRI-Simmons



- **Seniors 65+ continue to be heavy TV users, with TV/CTV time edging up**, making television screens (both linear and streaming) the anchor for reach and frequency in this segment.
- **Social media has become a high-growth, high-time channel for seniors**, suggesting strong opportunities for engagement on Facebook and YouTube in particular, complementary to TV rather than replacing it.
- **Print is slowly declining even among older adults**, so it plays more of a reinforcement and credibility role than a growth engine for reach.
- **Total media time among seniors is largely maxed out**; shifts are happening within channels—toward social and streaming and away from browsing and print—so the opportunity lies in mix optimization and cross-screen coordination, not increasing overall time spent.



Sources: [MRI-Simmons](#), [Perplexity \(16 sources\)](#)



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