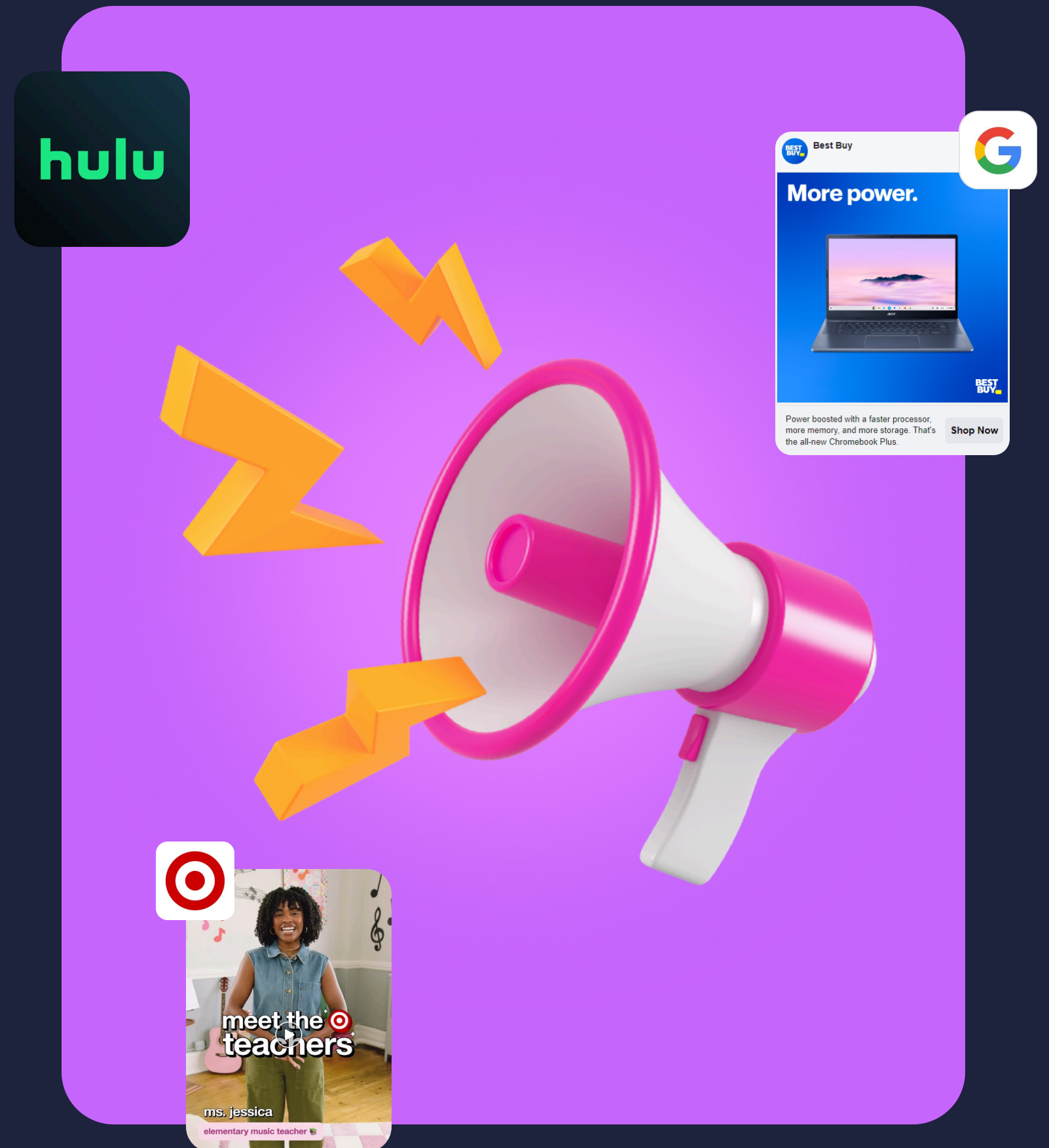












State of Digital Advertising 2025

Discover the latest trends across digital advertising and retail media



Sensor Tower | Our Customers

Top publishers trust Sensor Tower insights to grow their business

L'ORÉAL		Google			Disney
petco	HERSHEY	amazon	ROVIO	DOORDASH	depop
Walmart		Microsoft	SEGA	dyson	SONY
		Meta	OUTFIT7	Gett.	ByteDance
Alibaba	POPeYeS	Tencent 腾讯		P&G	NBA
		Johnson & Johnson		Welch's	Revolut

Note: Top publishers by app store revenue | Source: Sensor Tower

Executive Summary | State of Digital Advertising 2025

<

United States

>

\$137
Billion

Digital Ad Spend

12 months between
August 2024 and July
2025

+12%
Year-over-Year

16.3
Trillion

Digital Ad Impressions

12 months between
August 2024 and July 2025

+7%
Year-over-Year

f

Facebook

#1 Ad Channel

by ad spend among
included ad channels in
this market

\$35.2B

12 months between
August 2024 and July
2025

Shopping

#1 Category

12 months between
August 2024 and July 2025

#2 Consumer
Packaged Goods

#3 Media &
Entertainment

amazon
Amazon.com

#1 Advertiser

12 months between
August 2024 and July 2025

#2 The Walt Disney
Company

#3 Procter & Gamble

Included Ad Channels	
Only select ad channels are available in each market	
Ad Channel	Included?
Facebook	<input checked="" type="checkbox"/>
Instagram	<input checked="" type="checkbox"/>
LINE	<input type="checkbox"/>
LinkedIn	<input checked="" type="checkbox"/>
NAVER	<input type="checkbox"/>
Pinterest	<input checked="" type="checkbox"/>
Reddit	<input checked="" type="checkbox"/>
Snapchat	<input checked="" type="checkbox"/>
TikTok	<input checked="" type="checkbox"/>
X	<input checked="" type="checkbox"/>
YouTube	<input checked="" type="checkbox"/>
Desktop Display	<input checked="" type="checkbox"/>
Desktop Video	<input checked="" type="checkbox"/>
Mobile Apps	<input checked="" type="checkbox"/>
Mobile Display	<input checked="" type="checkbox"/>
Mobile Video	<input type="checkbox"/>
OTT	<input checked="" type="checkbox"/>

Note: Included ad channels vary by market. Ad spend estimates are as of August 14, 2025. Year-over-year growth calculated using ad channels that were available since August 2023 and exclude more recently released ad channels.

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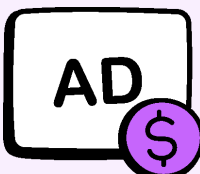
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About this Data:

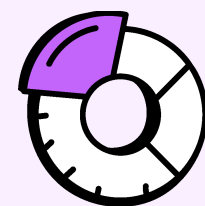
Digital Advertising Methodology



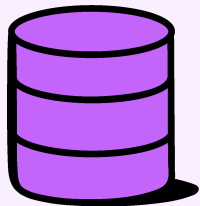
The digital ad spending and impressions estimates presented in this report were compiled by Sensor Tower's Insights team using Pathmatics by Sensor Tower Digital Advertising Insights.



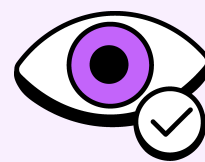
The figures mentioned in this report reflect estimated ad investments made by advertisers through August 31, 2025.



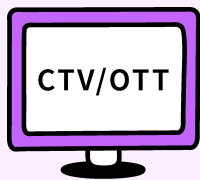
Data includes select channels in each market. Figures in this report represent the totals for these channels only, not across all digital formats.



Data Collection: Pathmatics collects a sample of digital ads from the web. In order to report the most complete picture of the digital advertising landscape, we utilize two leading data sourcing technologies: panels and data aggregators.



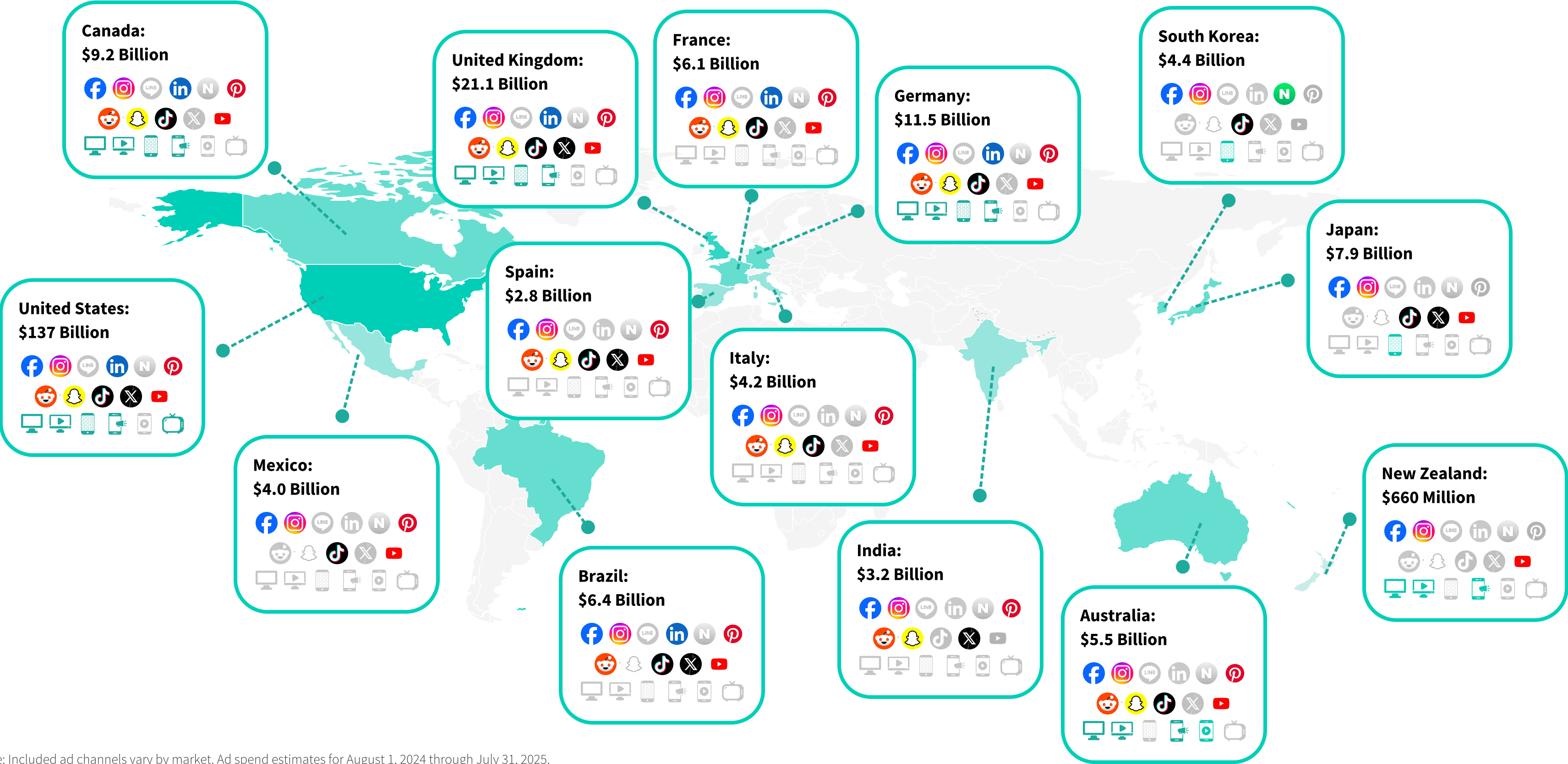
Pathmatics uses statistical sampling methods to estimate impressions, cost per thousand impressions (CPMs), and spend for each creative. Each impression served to our data aggregators and panelists is assigned a CPM, which when combined with impressions results in our spend estimates.



Pathmatics OTT data is powered by a panel of real OTT & CTV viewers and includes data representative of all Smart TV brands, such as Amazon Prime Video, Disney+, HBO Max, Hulu, Netflix, Pluto TV, Tubi, Peacock, and Paramount+.

Digital Advertising Overview

Global Overview | State of Digital Advertising 2025



Note: Included ad channels vary by market. Ad spend estimates for August 1, 2024 through July 31, 2025.

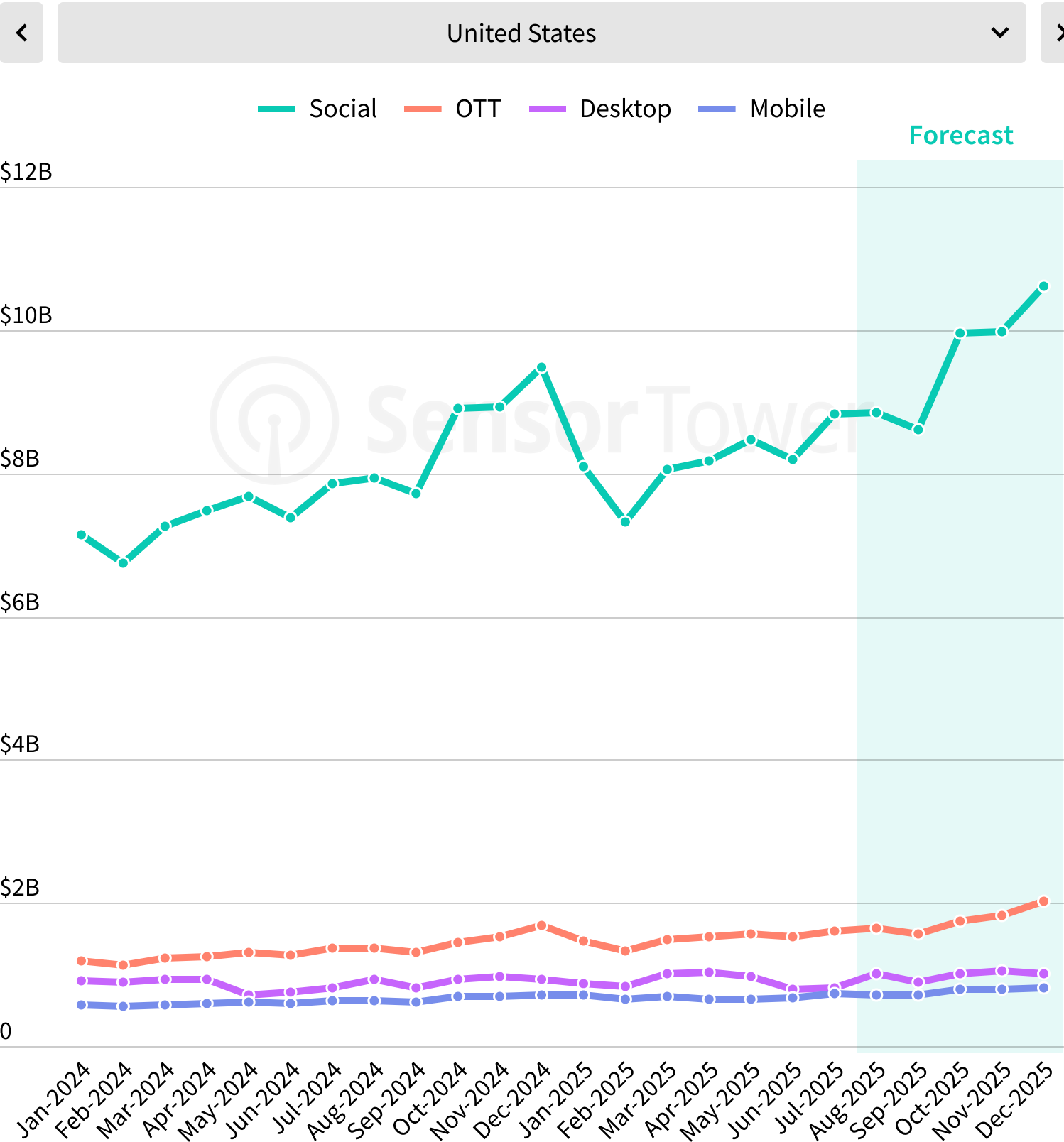
Monthly US Ad Spend on Social Channels Is Projected to Surpass \$10 Billion by December 2025

Social ad channels like Facebook, YouTube, and TikTok accounted for the majority of digital ad spend in the United States. Advertisers tend to boost their ad spend heading into the US holiday season, and as a result, ad spend across social channels is projected to reach \$10 billion each month in Q4 2025.

Among the included digital ad channels, Social leads the way across markets. A strong Q4 is also forecasted for other markets like Australia, Brazil, India, Japan, and the United Kingdom.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of August 14, 2025. Available ad channels vary by market.

Monthly Digital Ad Spend by Ad Channels



Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
LINE	○
LinkedIn	✓
NAVER	○
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Desktop Video	✓
Mobile Apps	✓
Mobile Display	✓
Mobile Video	○
OTT	✓

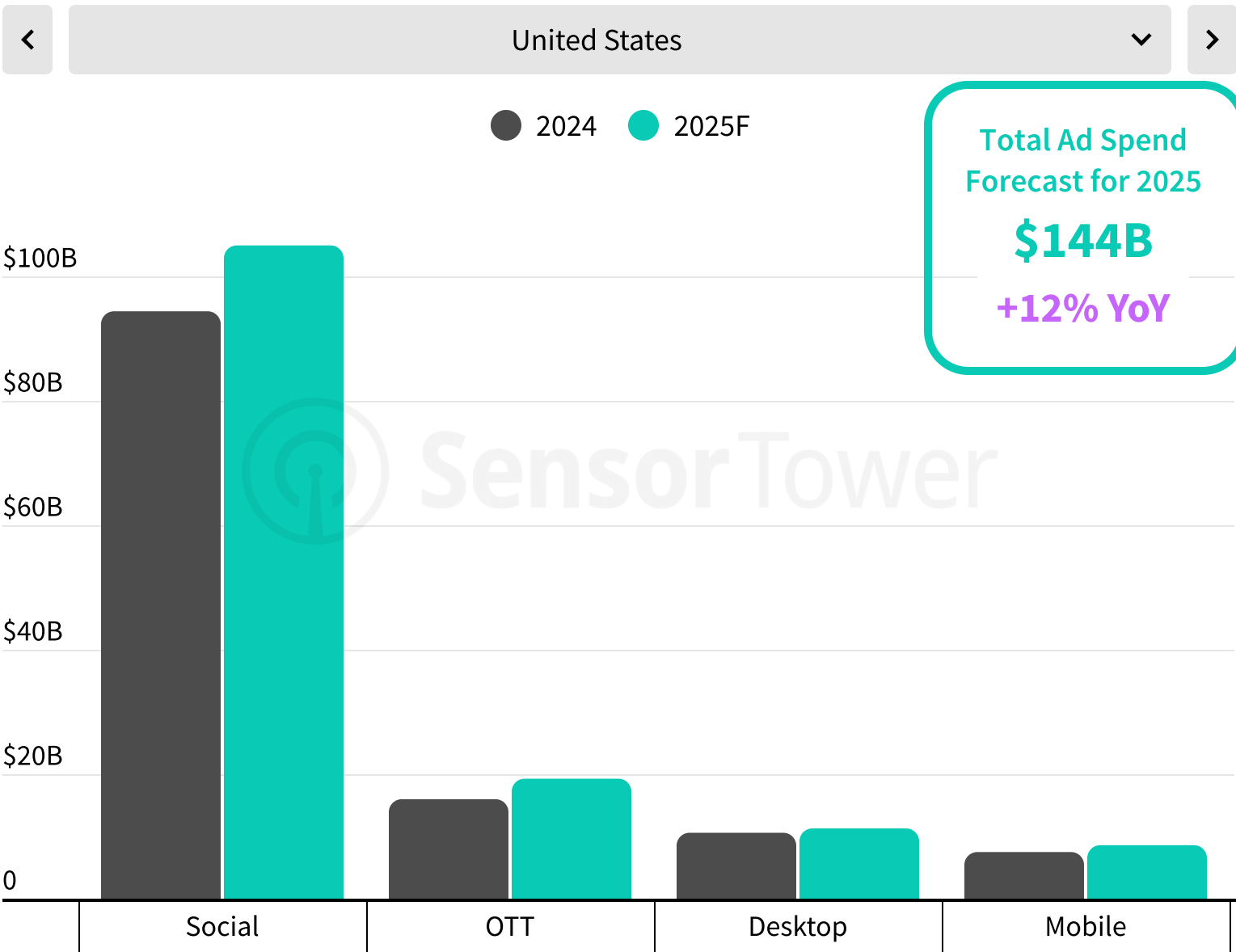
Social Channels Led US Ad Spend While OTT Achieved the Highest Growth

Social ad spend is projected to reach \$105 billion in the U.S. in 2025, accounting for more than 70% of the total among included channels. This would be an 11% year-over-year (YoY) increase, roughly in line with the overall market growth.

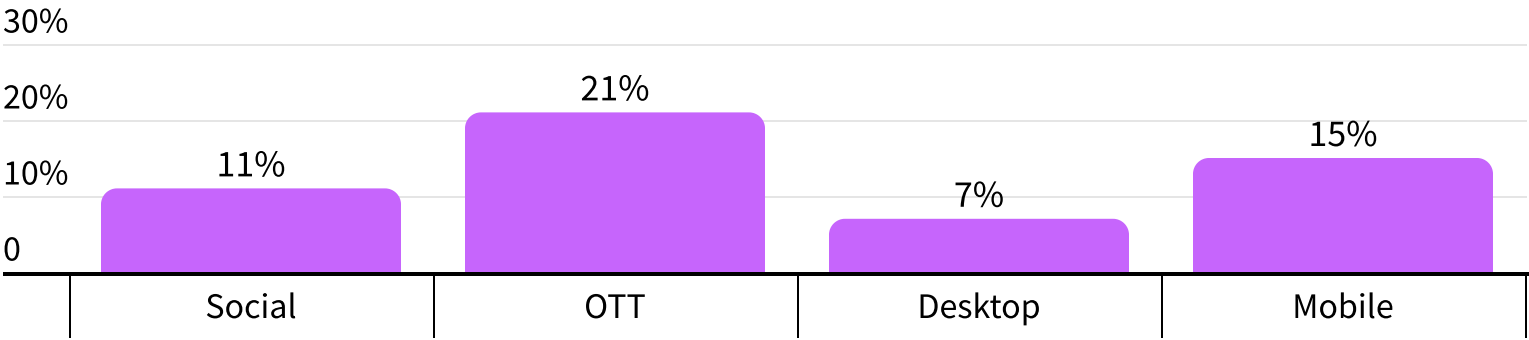
Over-the-top (OTT) streaming services' U.S. ad spend is expected to increase 21% YoY, while mobile is also on track for strong growth (+15% YoY). Desktop ad spend growth is lagging in markets like the U.S., Australia, and the UK, but it's still projected for strong growth in Canada and Germany.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of August 14, 2025. Available ad channels vary by market.

Digital Ad Spend by Ad Channels



Year-over-Year Digital Ad Spend Growth Projection for 2025



Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
LINE	○
LinkedIn	✓
NAVER	○
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Desktop Video	✓
Mobile Apps	✓
Mobile Display	✓
Mobile Video	○
OTT	✓

Shopping Advertising Accounts for 23 Cents Out of Every Dollar in US Digital Ad Spend

In the US, Shopping was the top category for digital ad spending, with leading subcategories including Apparel, General Shopping, and Home & Garden. Consumer Packaged Goods and Media & Entertainment also each accounted for more than 10% of digital ad spend, with top subcategories including Food & Beverages, Personal Care, and Film & Television.

Shopping was the top category in every included market except for Japan, where it ranked third behind Media & Entertainment and Gaming. Shopping ads are particularly popular in Europe, accounting for more than a third of digital ad spend in France, Germany, and Italy.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of August 14, 2025. Available ad channels vary by market. General spend includes creatives that aren't associated with a particular subcategory, creatives that feature products from several subcategories, or corporate ads.

Share of Digital Ad Spend by Category
12 Months Between August 2024 - July 2025



Included Ad Channels	
Only select ad channels are available in each market	
Ad Channel	Included?
Facebook	<input checked="" type="checkbox"/>
Instagram	<input checked="" type="checkbox"/>
LINE	<input type="checkbox"/>
LinkedIn	<input checked="" type="checkbox"/>
NAVER	<input type="checkbox"/>
Pinterest	<input checked="" type="checkbox"/>
Reddit	<input checked="" type="checkbox"/>
Snapchat	<input checked="" type="checkbox"/>
TikTok	<input checked="" type="checkbox"/>
X	<input checked="" type="checkbox"/>
YouTube	<input checked="" type="checkbox"/>
Desktop Display	<input checked="" type="checkbox"/>
Desktop Video	<input checked="" type="checkbox"/>
Mobile Apps	<input checked="" type="checkbox"/>
Mobile Display	<input checked="" type="checkbox"/>
Mobile Video	<input type="checkbox"/>
OTT	<input checked="" type="checkbox"/>

Strong Ad Spend Growth Across Most Categories Offset Declines from Shopping and CPG

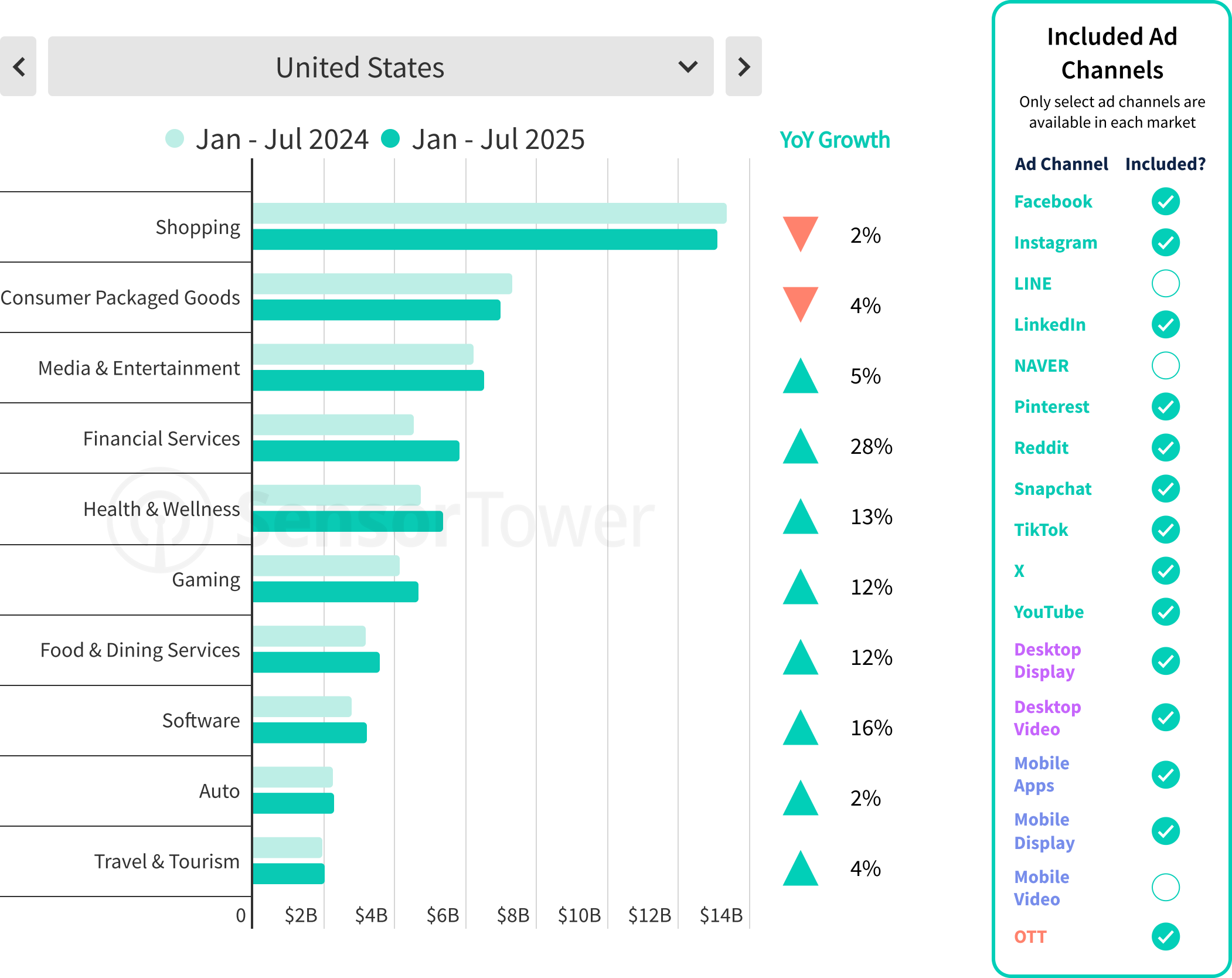
Chinese-backed retailers like Temu and SHEIN have significantly reduced their US ad spending amid concerns over tariffs, instead redirecting their investments to other markets in Europe, Asia, and Latin America. The recent end of the "de minimis exemption" will likely only accelerate this shift.

Consumer Packaged Goods (CPG) ad spend also saw a decline, driven by a particularly large 25% year-over-year (YoY) drop in the Household Supplies subcategory.

These declines were offset by increased ad spend in other categories, including Gaming, Financial Services, and Software, which maintained the overall growth of the US market.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of August 14, 2025. Available ad channels vary by market.

Top Categories by Digital Ad Spend
January - July 2025



Amazon is a Top Advertiser Globally While Temu Expands Outside the US

Between August 2024 and July 2025, Amazon was the top digital advertiser by spend in the United States, Canada, Germany, Italy, and the United Kingdom. It was also among the top three in Australia, Brazil, France, India, Japan, Mexico, and Spain, demonstrating its near-global presence.

Temu, which was the #5 advertiser in the US a year prior, ranked outside the top 25 between August 2024 and July 2025 as it sought other markets amid the increased risk of tariffs in the US. Instead, Temu focused on markets in Oceania, Europe, and select markets in the Americas (like Canada and Mexico) and Asia (South Korea).

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of August 14, 2025. Available ad channels vary by market.

Top Advertisers by Digital Ad Spend August 2024 - July 2025

United States								
Rank	Overall	Shopping	Media & Entertainment	Consumer Packaged Goods	Gaming	Travel & Tourism	Financial Services	Sol
1	Amazon.com	Amazon.com	The Walt Disney Company	Procter & Gamble	Microsoft	Expedia, Inc.	Progressive Casualty Insurance Company	Adobe Systems
2	The Walt Disney Company	Walmart Inc.	Paramount	PepsiCo, Inc.	Tencent	Priceline Group (Booking Holdings, Inc.)	Capital One Financial Corporation	Google
3	Procter & Gamble	Temu (Whaleco Inc.)	Comcast Corporation	The Coca-Cola Company	Dream Games	Airbnb, Inc.	Allstate Corporation	Microsoft
4	Comcast Corporation	Target	Warner Bros. Discovery	Unilever	Take-Two Interactive Software, Inc.	Hilton Worldwide	Liberty Mutual Insurance Company	Shopify
5	Google	Chewy, Inc.	Amazon.com	The Hershey Company	Playtika Ltd.	Marriott International, Inc.	TurboTax	Gram Inc.
6	Paramount	Samsung	Meta Platforms, Inc. (formerly Facebook, Inc.)	L'Oreal	Flutter Entertainment Plc	NBC Universal Parks & Resorts	PayPal, Inc.	Canva
7	Walmart Inc.	SheIn Group Limited	FOX Broadcasting Company (fox.com)	Mondelez International	Scopely	Uber Technologies, Inc.	JPMorgan Chase & Co.	Wix.com

Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
LINE	○
LinkedIn	✓
NAVER	○
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Desktop Video	✓
Mobile Apps	✓
Mobile Display	✓
Mobile Video	○
OTT	✓

Digital Advertisers Across Categories Embrace AI in their Marketing

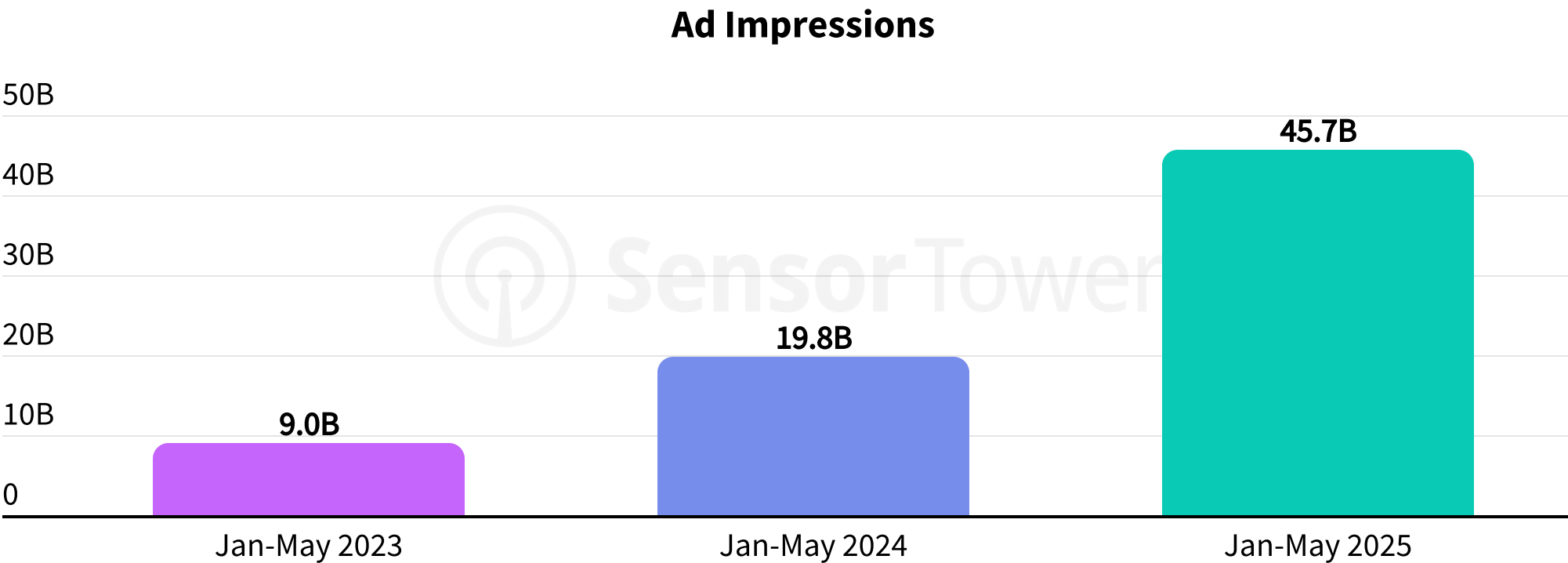
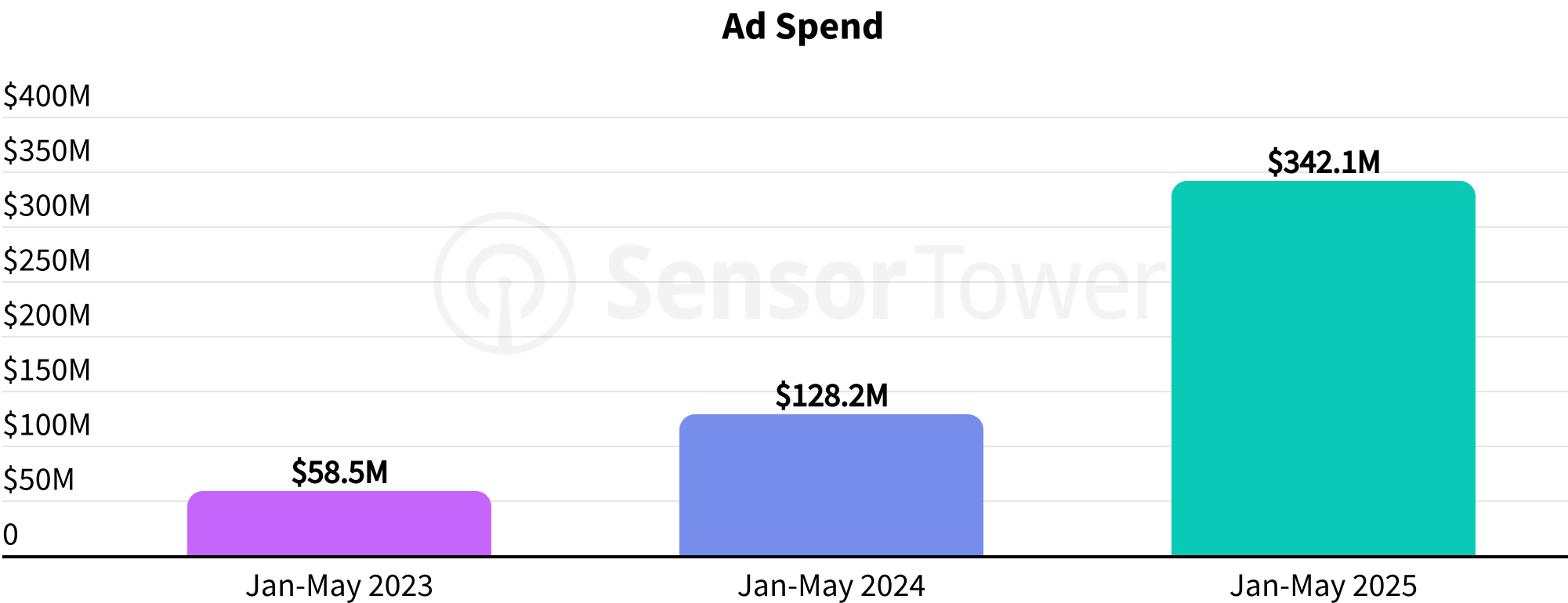
AI isn't just transforming products; it's fundamentally reshaping how companies reach their audiences. Marketing AI features now extends well beyond Generative AI brands like ChatGPT and Microsoft Copilot. Brands across various verticals are actively using their ad creatives to promote the latest AI features and underlying technology.

Over the past two years, US advertisers have more than quintupled their spending on AI-related messaging. These creatives are not merely hype; they are effectively meeting audiences where their curiosity lies: in searching for innovative AI tools, solutions, and capabilities.

The analysis is from our State of AI Apps Report 2025:
[Click here to download the full report](#) covering the latest insights covering AI on mobile, digital advertising, and retail media.

Source: Sensor Tower
Note: Includes ad creatives that mention "AI", "GPT", "OpenAI", "artificial intelligence", "machine learning", "LLM", or "large language model".

Digital Advertising Spend and Impressions for Creatives with AI-Related Terms
United States



Creatives Leveraging AI are Increasing Across Verticals

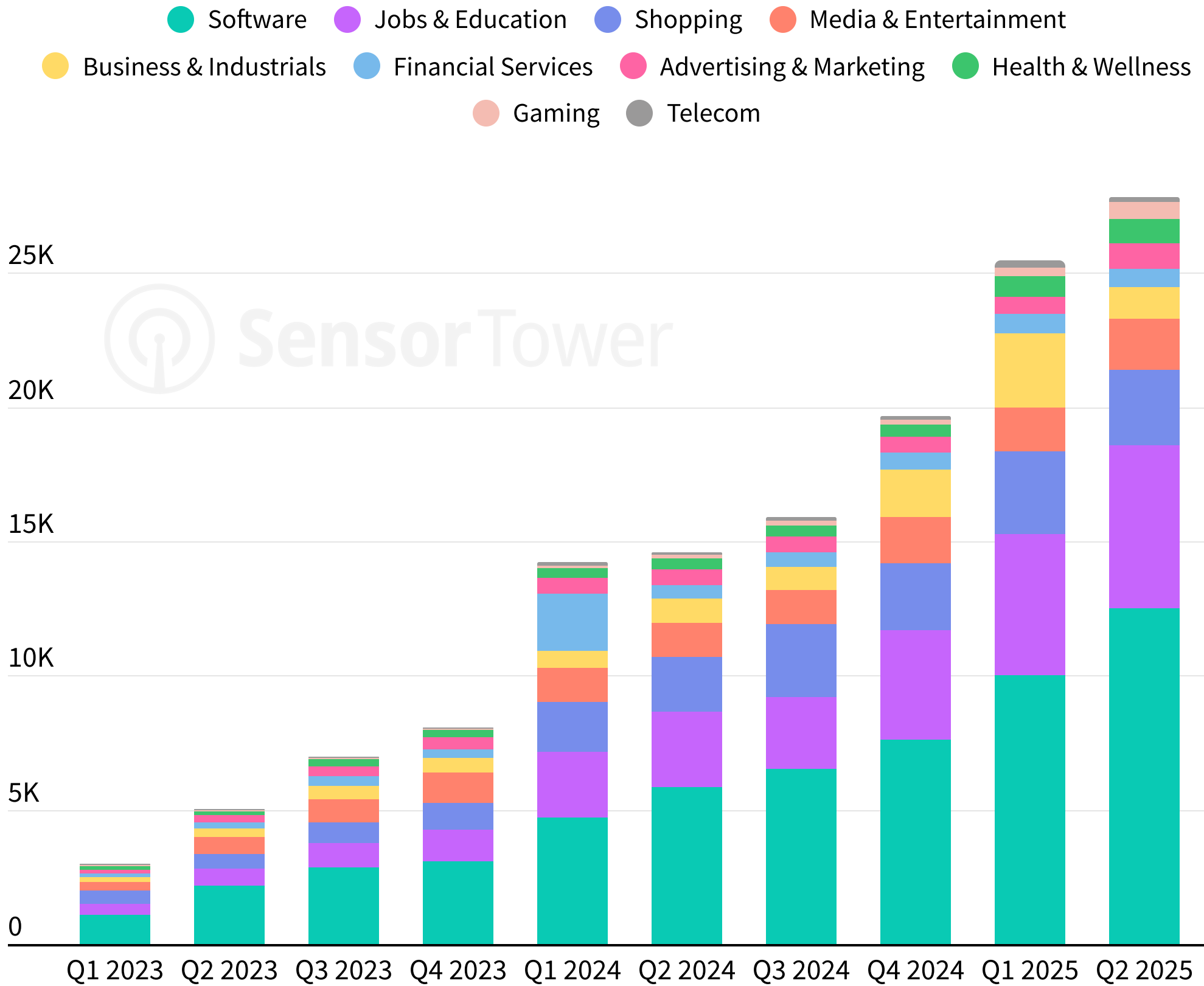
Using AI in messaging has spread well beyond tech-forward brands — it’s in every major vertical. From job training apps to wellness platforms to financial tools, brands are embedding AI not only in their products, but in the way they speak to consumers.

The number of unique ad creatives with AI-related language increased more than 10x since early 2023, and the continued growth suggests that this is far from a passing fad.

The analysis is from our **State of AI Apps Report 2025**: [Click here to download the full report](#) covering the latest insights covering AI on mobile, digital advertising, and retail media.

Source: Sensor Tower
Note: Includes ad creatives that mention "AI", "GPT", "OpenAI", "artificial intelligence", "machine learning", "LLM", or "large language model".

Number of Unique Ad Creatives with AI-Related Terms by Category
United States



Social Advertising Trends

Meta's Social Networks Account for 65% of Social Ad Spend in the US

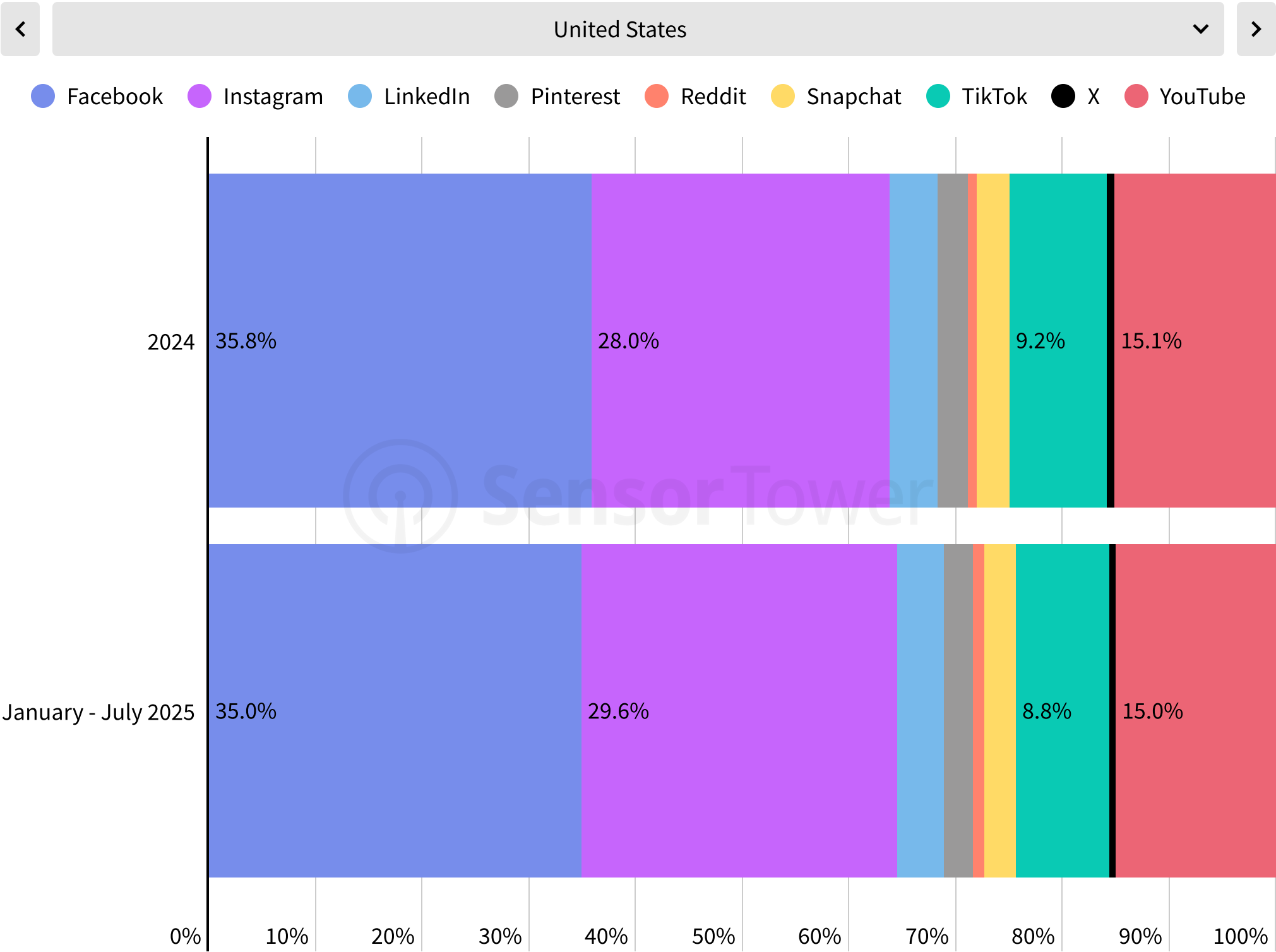
Meta still controls a huge share of digital ad spend in the United States, with Facebook at 35% market share in the first seven months of 2025 and Instagram at 29.6% market share. YouTube ranks third at 15%.

While Facebook's market share fell by nearly a percentage point compared to 2024, this was more than offset by a 1.6 percentage point gain from Instagram. Increased usage and engagement on Instagram Reels may be contributing to this shift in market share with advertisers wanting to be front and center on the surface. Meanwhile, TikTok lost some market share amid concerns of a ban in the US early.

We're continuing to release more channels across different markets! For example, you can find NAVER in South Korea with data available starting April 1, 2024, and LINE in Japan with data available starting January 1, 2025.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of August 14, 2025. Available ad channels vary by market.

Share of Digital Ad Spend by Social Ad Channel



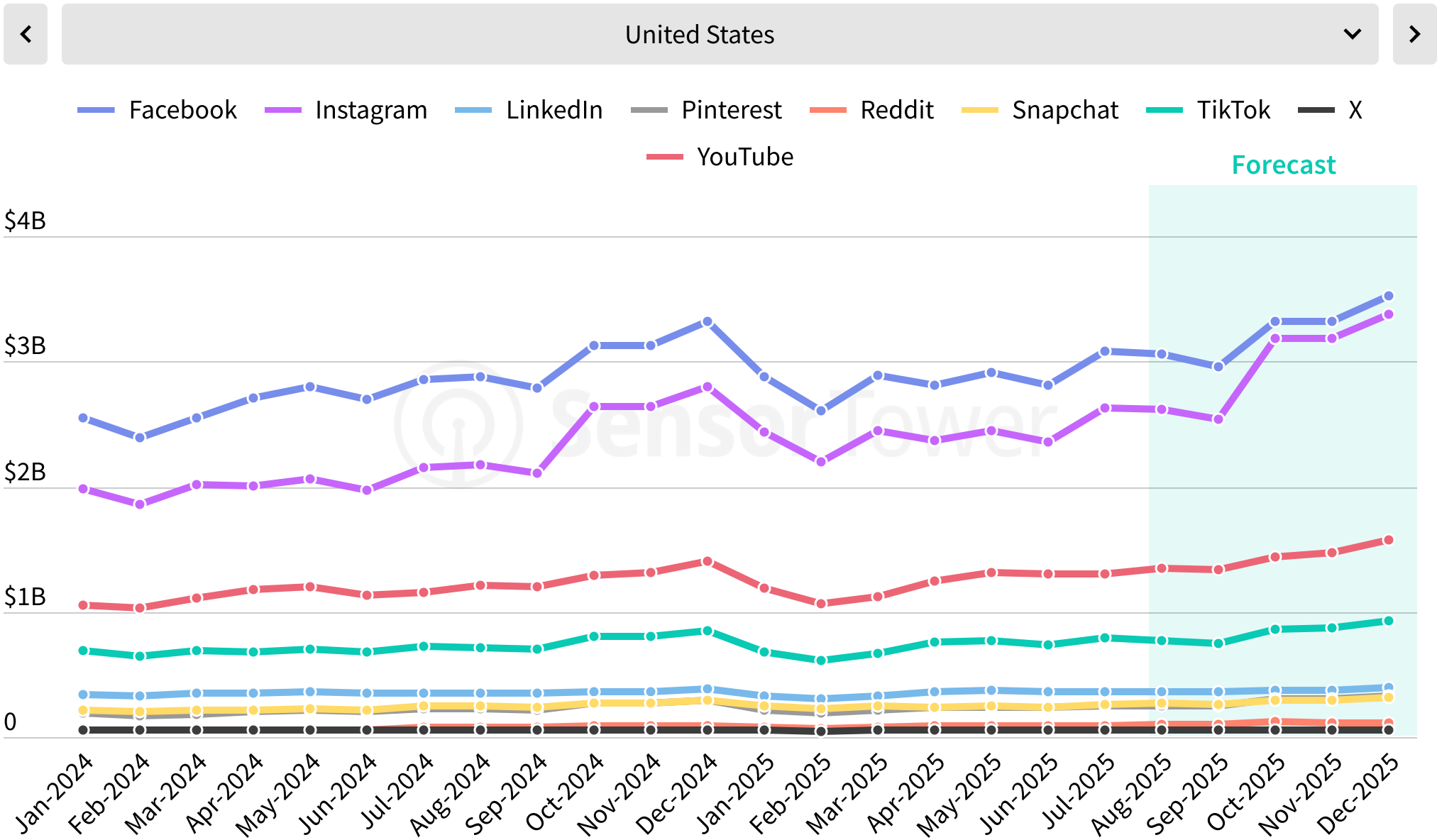
Instagram Could Soon Surpass Facebook as the Top US Social Ad Channel

Instagram was particularly popular during the 2024 holiday season in the US. If this trend continues in 2025, ad spend on Instagram could approach that of Facebook during the upcoming holiday season.

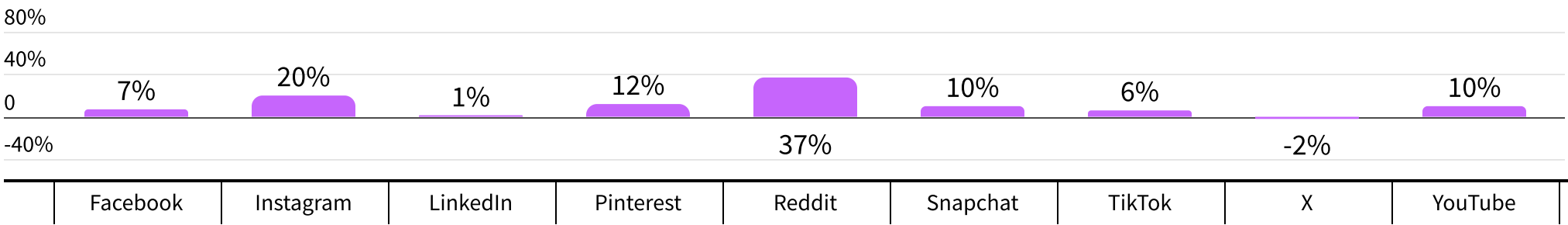
Reddit, a still relatively small but rapidly growing channel, is forecast to be the fastest-growing platform in 2025. Some of this growth may be attributed to increased traffic from chatbots, which frequently cite Reddit in their responses. According to [Sensor Tower's Web Insights](#), Reddit's web visits in the US climbed 28% year-over-year in Q2 2025.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of August 14, 2025. Available ad channels vary by market.

Monthly Digital Ad Spend by Social Ad Channel



Year-over-Year Digital Ad Spend Growth, 2025 Forecast vs. 2024

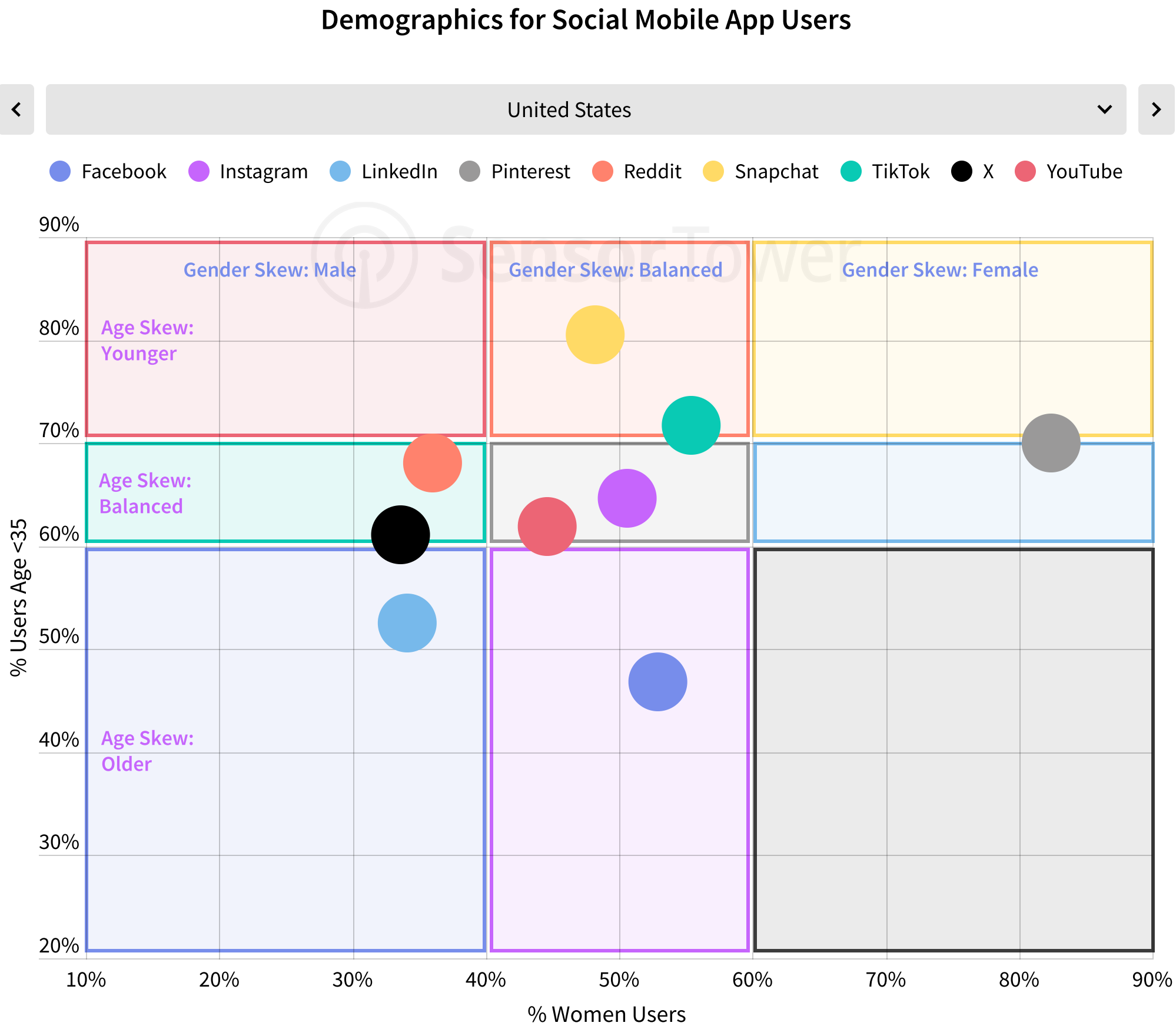


Find Your Audience: Discover Which Demographic Groups Use Top Social Networks

Sensor Tower Audience Insights breaks down how the user bases of different social apps varies. For example, Pinterest users are more likely to be young women, while older men are more likely to use X and LinkedIn. This can make these channels useful for reaching these specific demographic groups and can help you adjust your ad campaigns to speak to these audiences.

Several of the most successful ad platforms are broadly appealing. Instagram and YouTube fall in the middle of both gender and age breakdowns. Advertisers can select audience targeting within these social platforms if they are attempting to reach a certain demographic group.

Source: Sensor Tower
Note: Demographics for mobile app users on Android in the United States in Q2 2025. Gender represented as Men and Women only and is not representative of all gender identities.



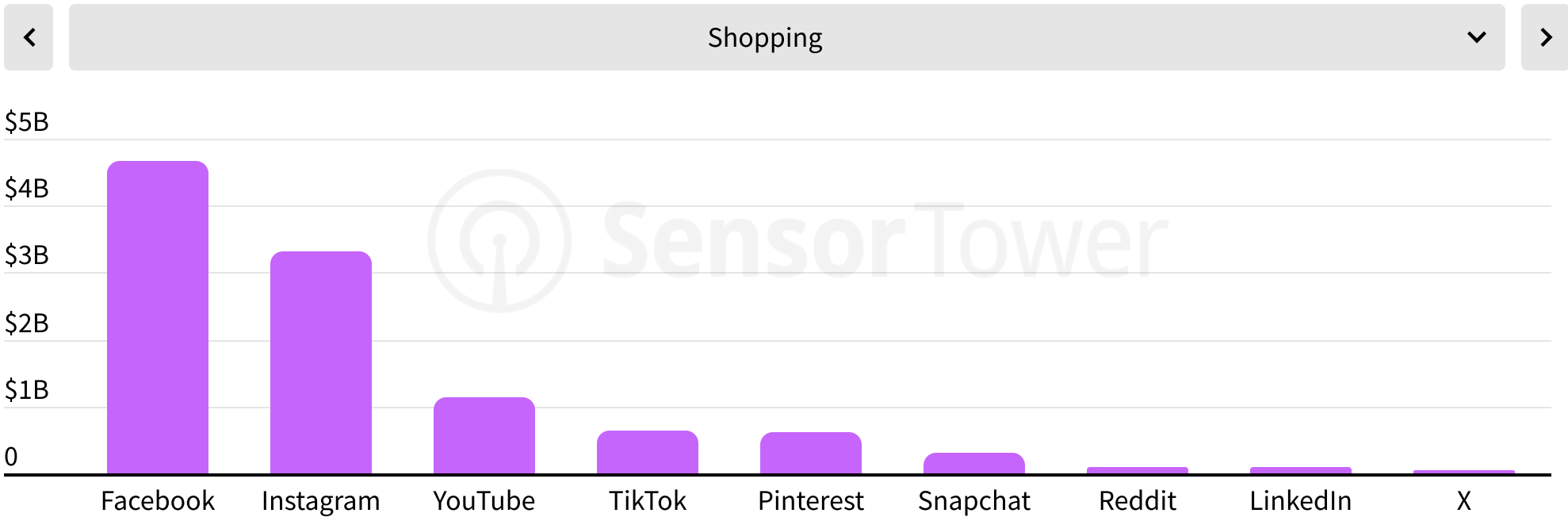
See Which Social Networks are Prioritized by Advertisers in Your Category

Given the different audiences between top social platforms, it's not surprising that advertisers in different categories tend to prefer certain social channels over others. For example, LinkedIn is a natural fit for Software and Jobs & Education advertisers. LinkedIn accounted for 25.8% of US social ad spend for Software compared to only 4.4% across all categories.

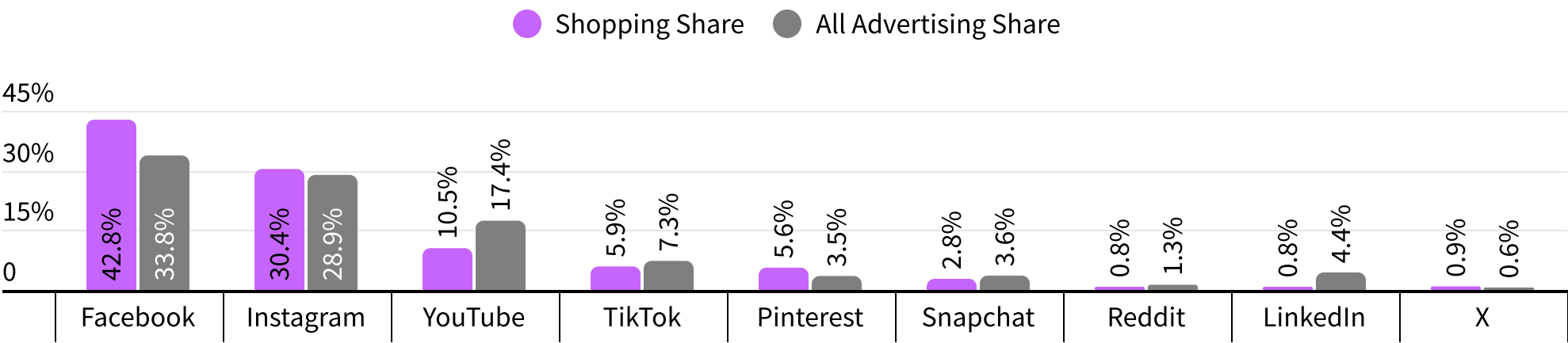
TikTok and Snapchat are favored by Food & Dining Services advertisers. This suggests that these advertisers are trying to appeal to young users since more than 70% of mobile users on both social platforms are under the age of 35.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of August 14, 2025.

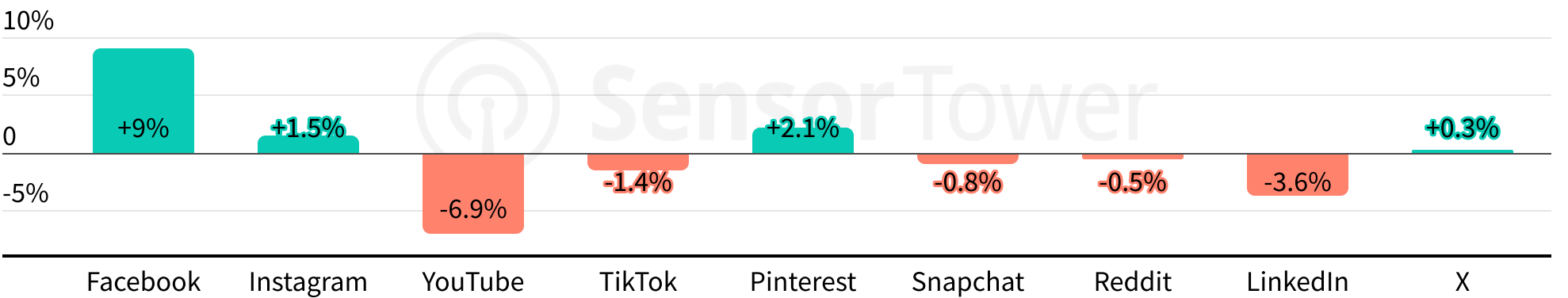
Top Social Ad Channels by Category in the United States, January - July 2025



Category Ad Share vs. Overall Ad Share by Social Channel



Difference Between Category Ad Share vs. Overall Ad Share



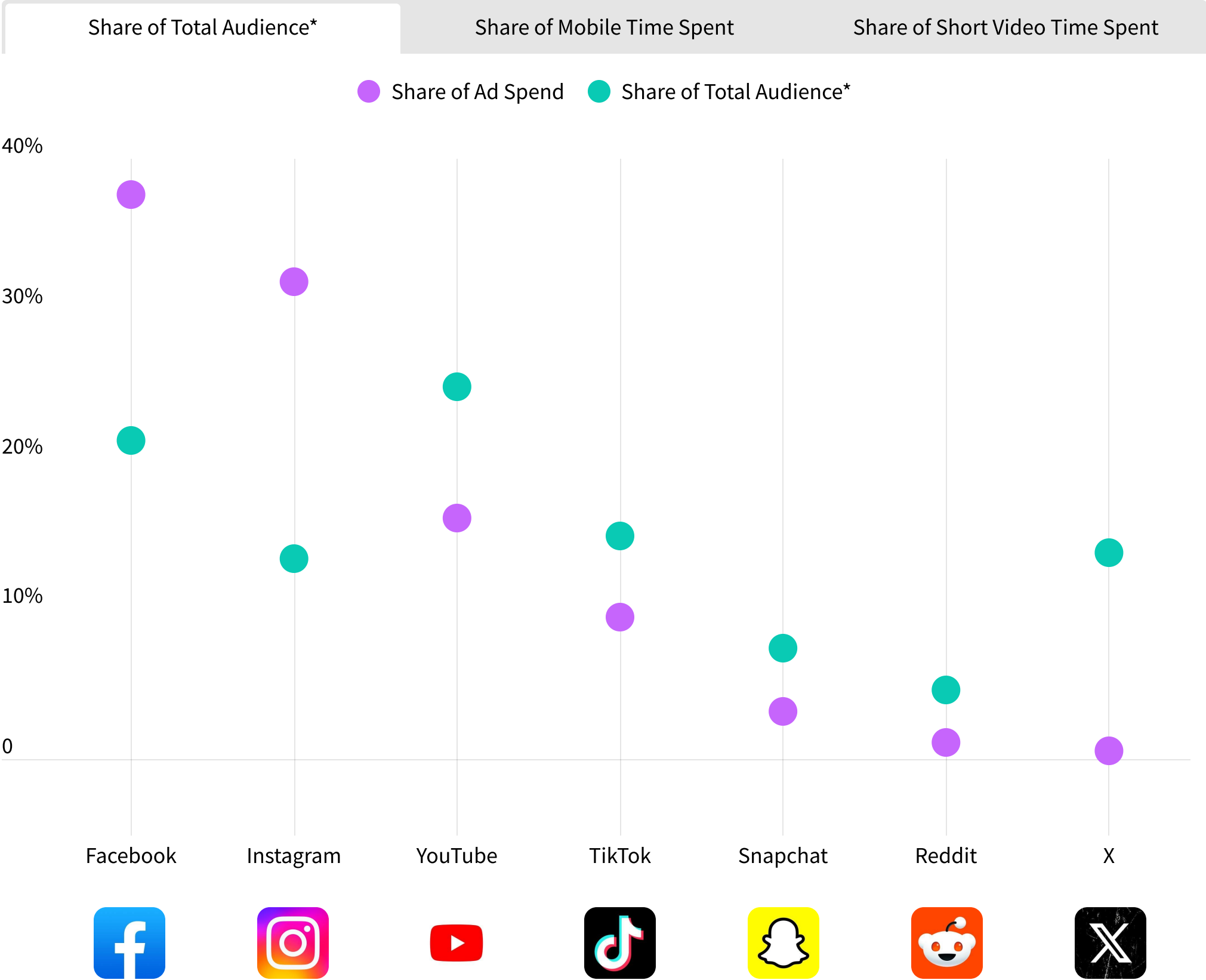
More Short Video Doesn't Necessarily Mean More Ad Revenue

Facebook and Instagram both take a disproportionately high share of ad spend despite a relatively lower share of social app audience and time spent. For example, Instagram ranks second with nearly 32% of social ad spend across the included channels, but it ranks fourth by total audience (across mobile and web) and mobile time spent.

While most top social apps have rolled out their own short video features to compete with TikTok, increased adoption of these surfaces doesn't immediately translate to more ad revenue. While YouTube Shorts accounts for 31.5% of time spent across these channels on short video, YouTube only accounts for 16% of digital ad spend, and TikTok has a similar disparity. This suggests that advertising on the main feed on Facebook and Instagram is still very popular, even as users spend more of their time on short video.

Source: Sensor Tower
Note: Ad spend includes a selection of social channels in the United States. Total audience includes unique users across mobile and web. Mobile time spent metrics across iOS and Google Play. Market share calculated among included social apps, and for total audience it counts users who use more than one social app multiple times.

Social Network Share of Ad Spend vs. Market Share for Other Metrics in the United States



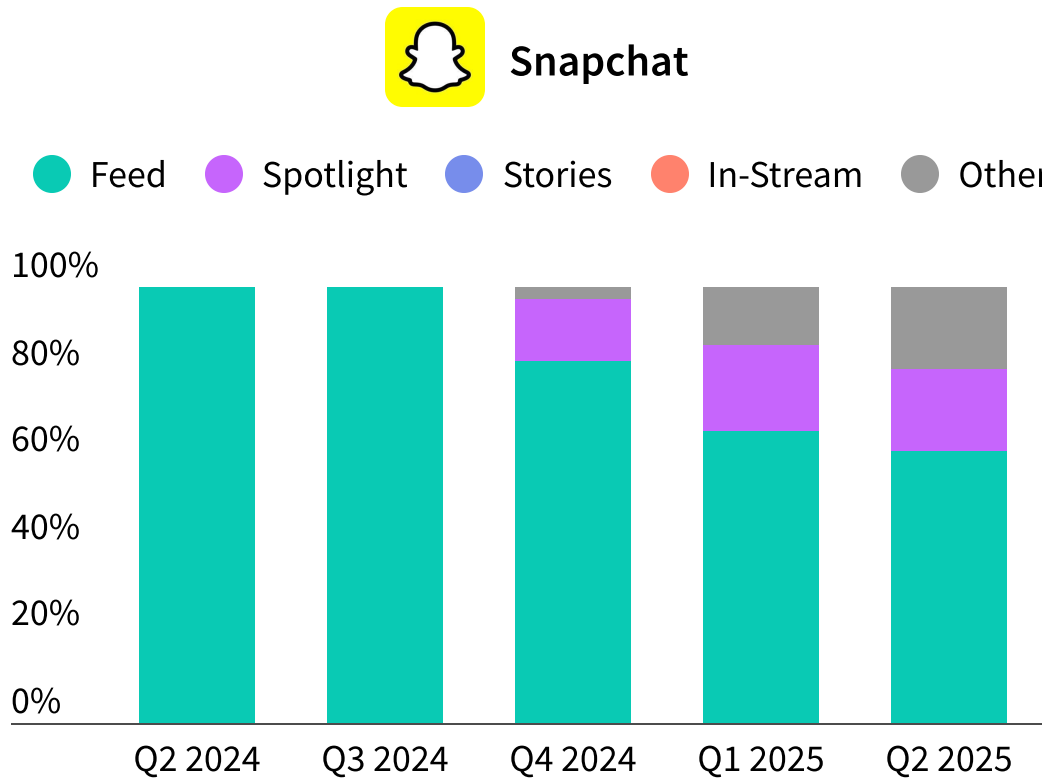
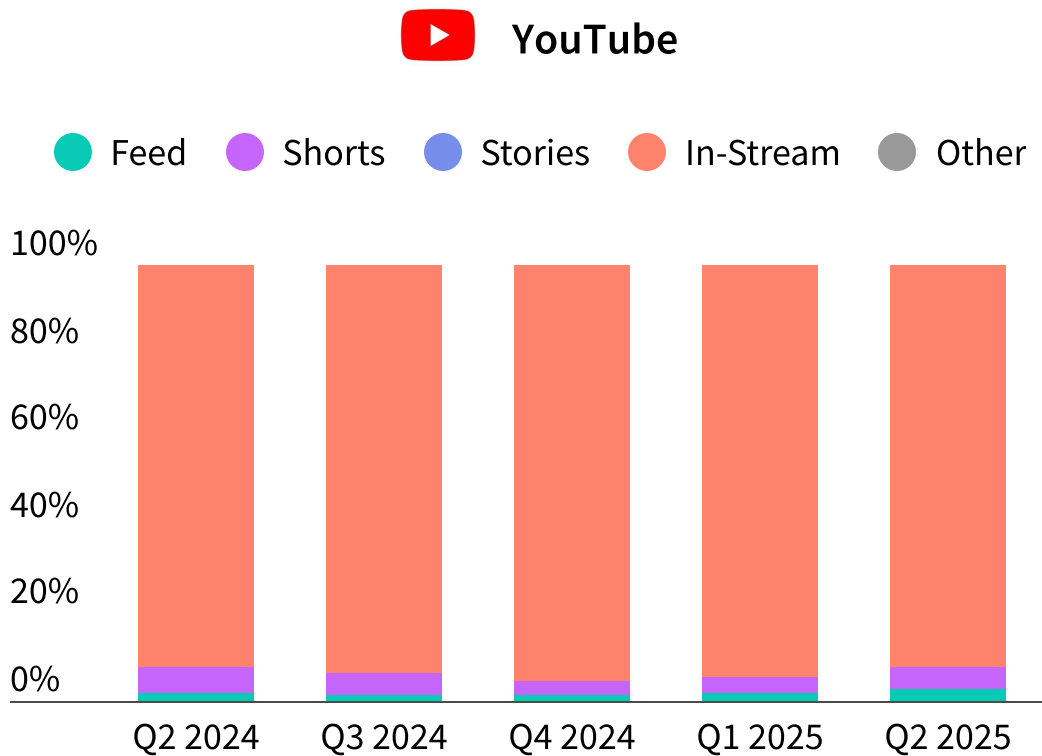
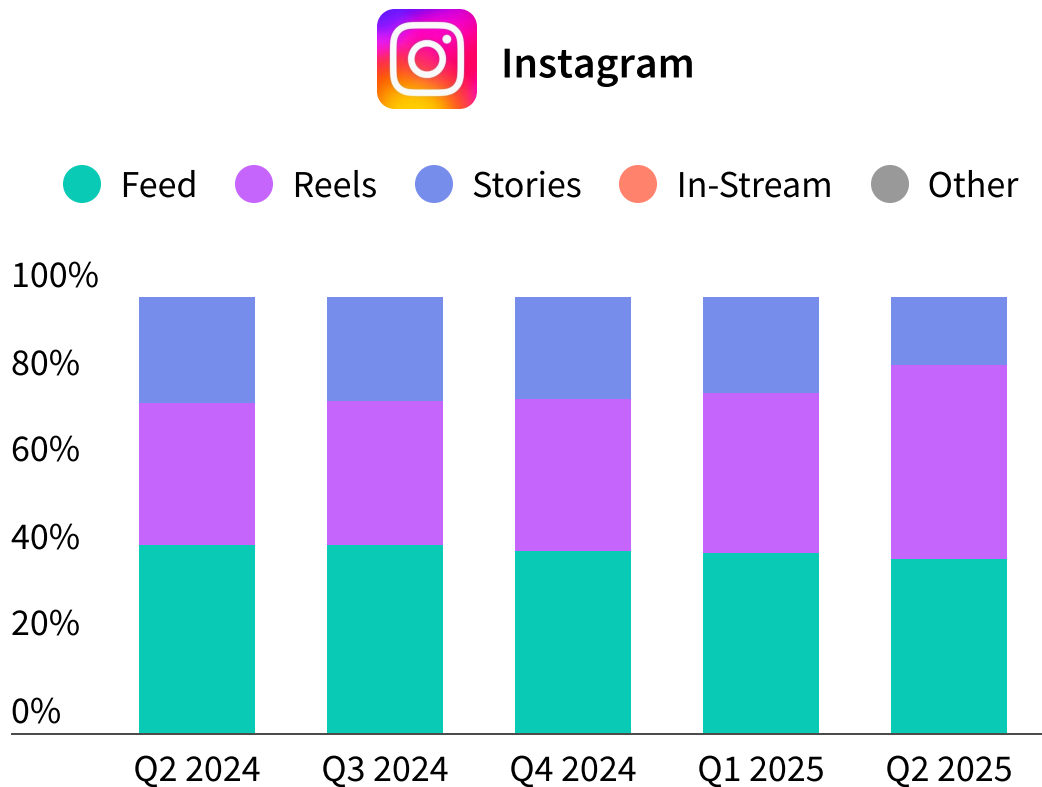
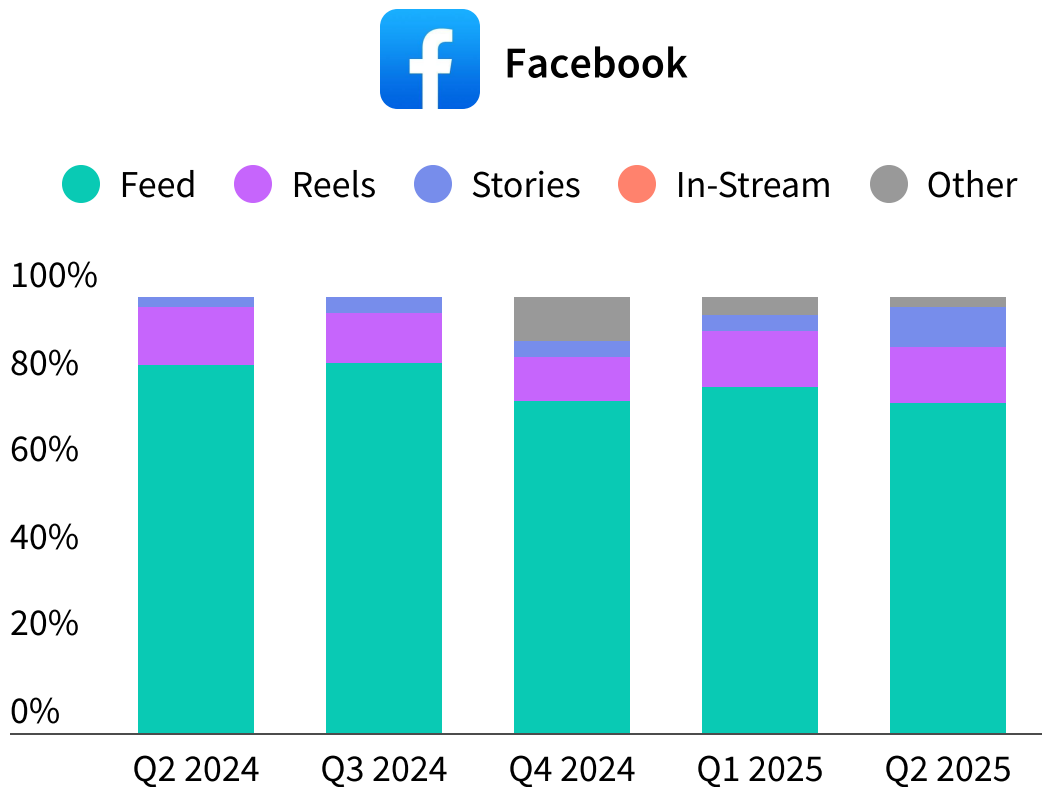
Ad Revenue from Short Videos is on the Rise for Instagram and Snapchat

As short video continues to take a higher share of social users' time, advertisers have commensurately added the medium into their media mix on select channels. For example, 44% of digital ad spend on Instagram came from Reels in Q2 2025, up from 32% in Q2 2024. This corresponded with a big drop in the share of ad spend from Stories and a more modest drop from the Main Feed.

Facebook and YouTube still monetize primarily through their main feed and in-stream ads, respectively. This could suggest that these platforms are first prioritizing increasing adoption of their short video features (Facebook Reels and YouTube Shorts) before ramping up the number of ads shown on the surfaces.

Source: Sensor Tower
Note: Ad spend estimates as of August 14, 2025.

Share of Ad Spend by Placement for Top Social Apps in the United States



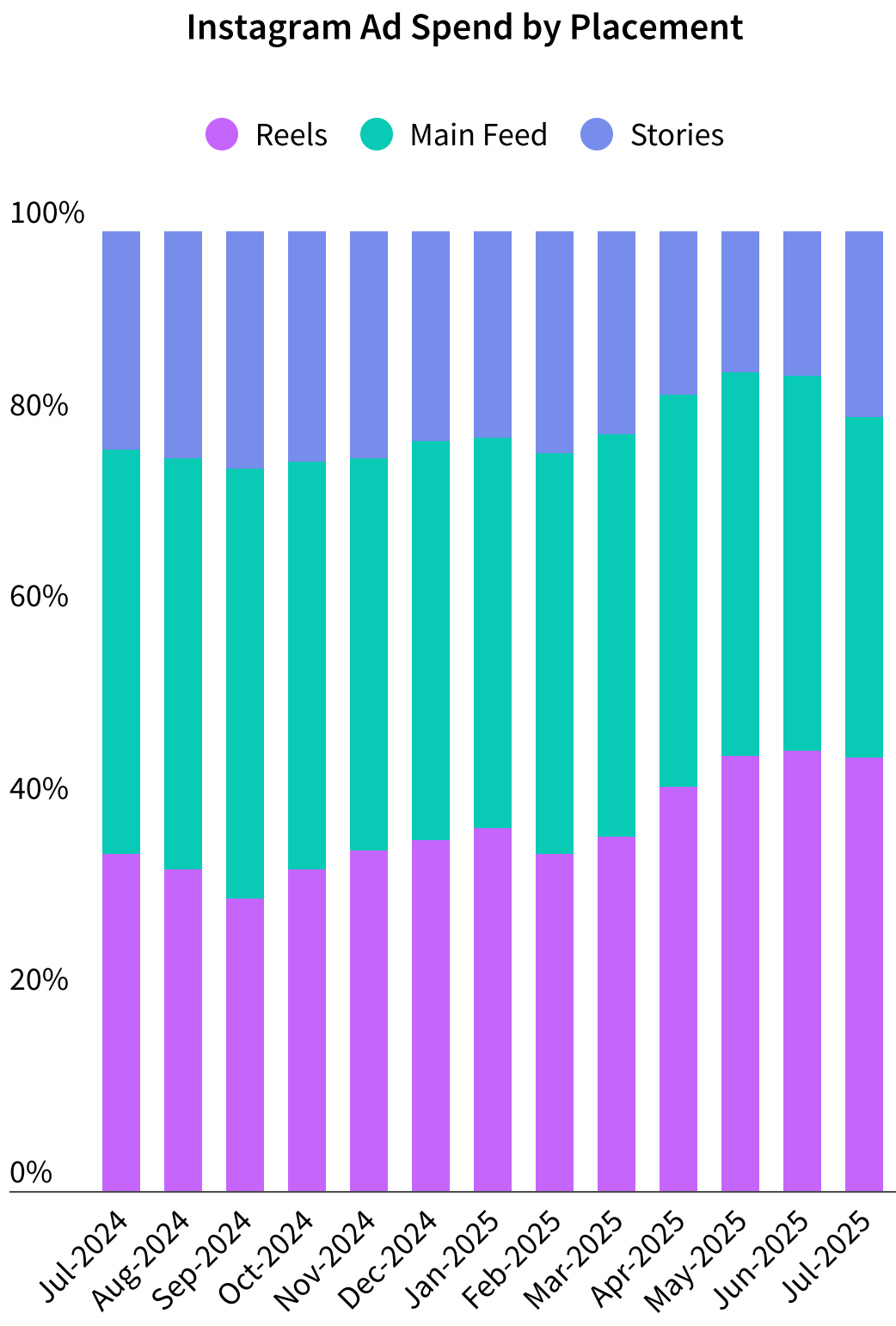
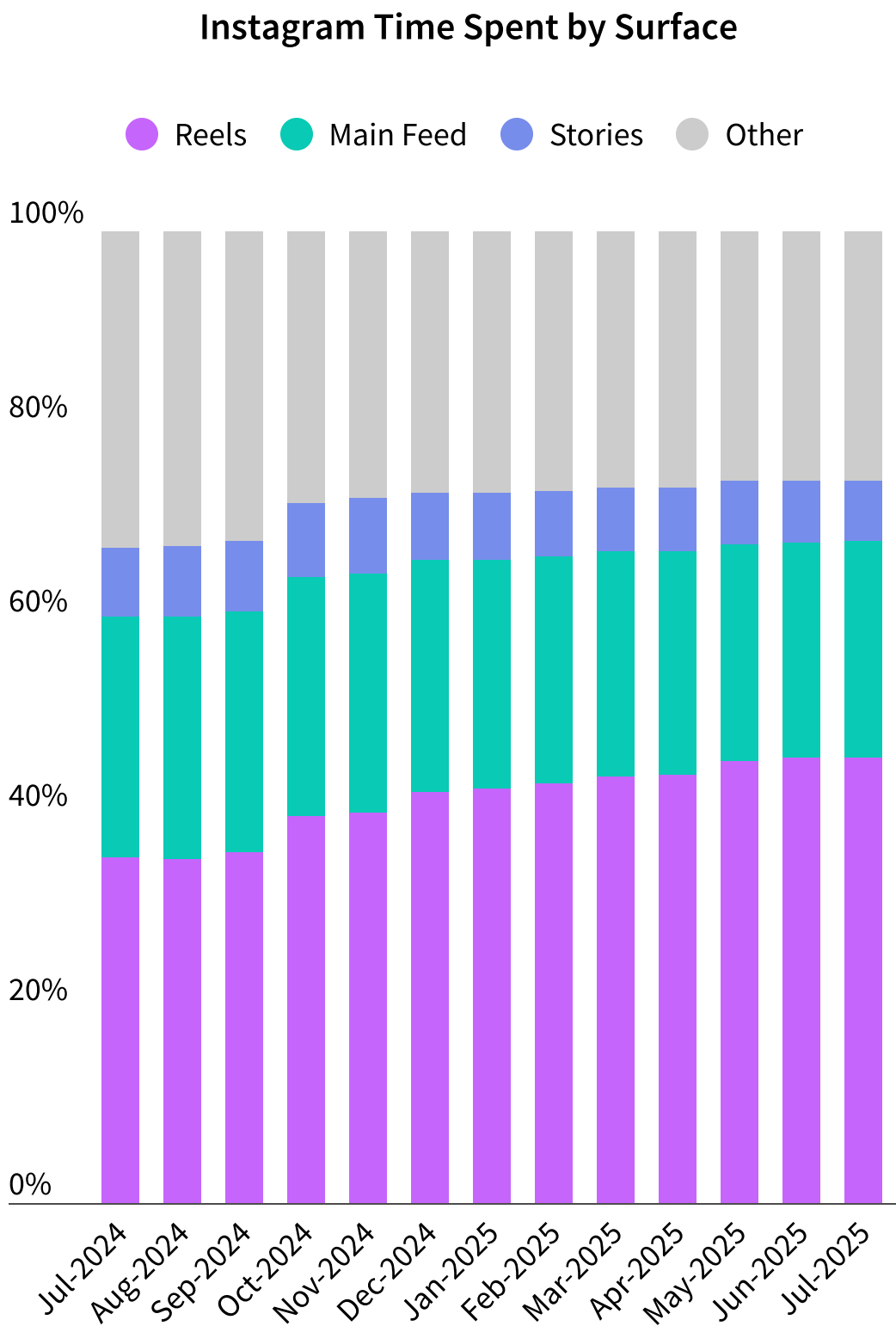
Instagram's Users Are Spending More Time — and Watching More Ads — on Reels

For Instagram, monetizing through ads on Reels has become a necessity. US Instagram users on Android phones spent nearly half of their time in the app on Reels in July 2025, a 10 percentage point increase year-over-year.

Reels' share of ad revenue saw a similar increase over this period, though a disproportionately high share still comes from the Main Feed and Stories. This suggests that there could be potential for even more advertising on Reels, though the platform needs to balance maintaining a good user experience to compete with other short video services from TikTok and YouTube.

Source: Sensor Tower
Note: Ad spend estimates as of August 14, 2025. Time spent by surface estimated for Android phones in the United States.

Instagram Time Spent by Surface vs. Share of Ad Spend by Placement in the United States



Over-the-Top (OTT) Advertising Trends

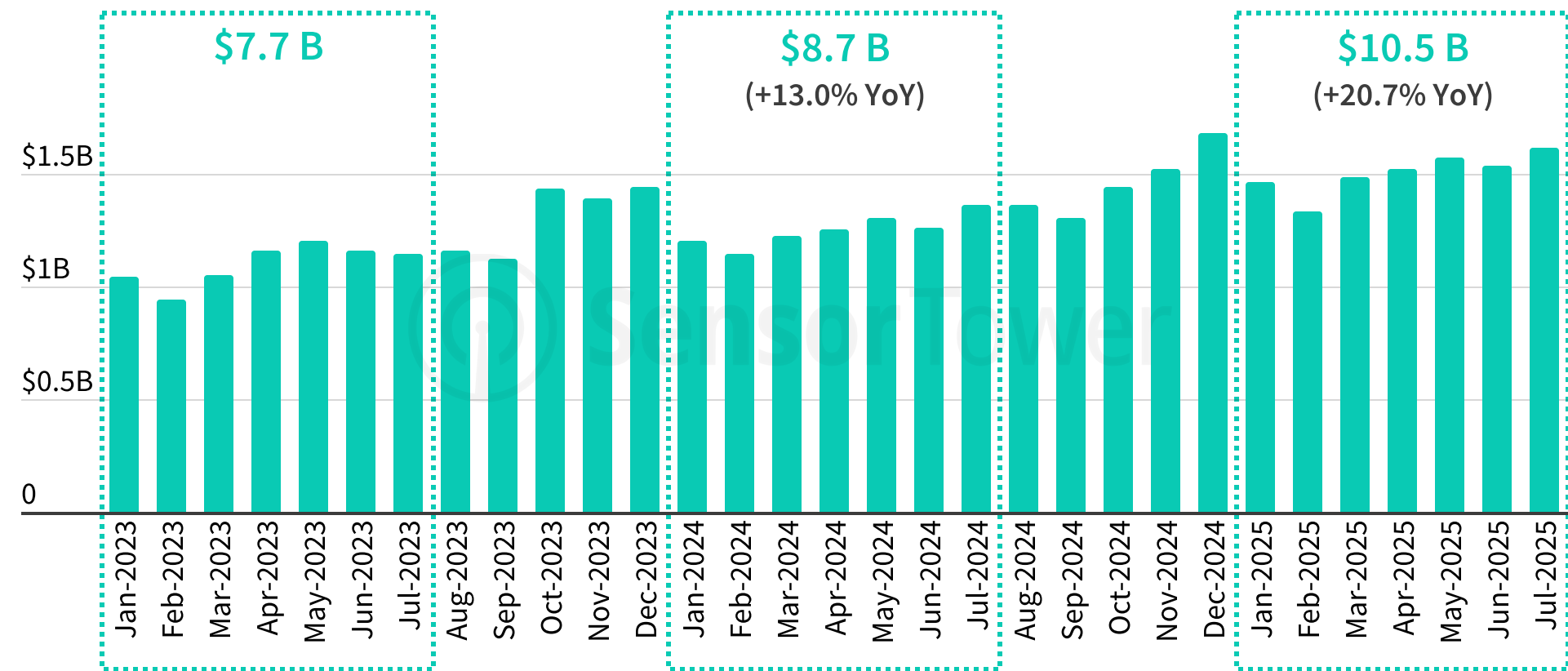
US OTT Ad Spend in 2025 Climbed More Than 20% as the Holiday Season Approaches

United States OTT ad spend reached \$10.5 billion in the first seven months of 2025, up more than 20% year-over-year (YoY). Overall, US ad spend on OTT in the first seven months of 2025 grew faster than on mobile (+15%), social (+11%), and desktop (+7%).

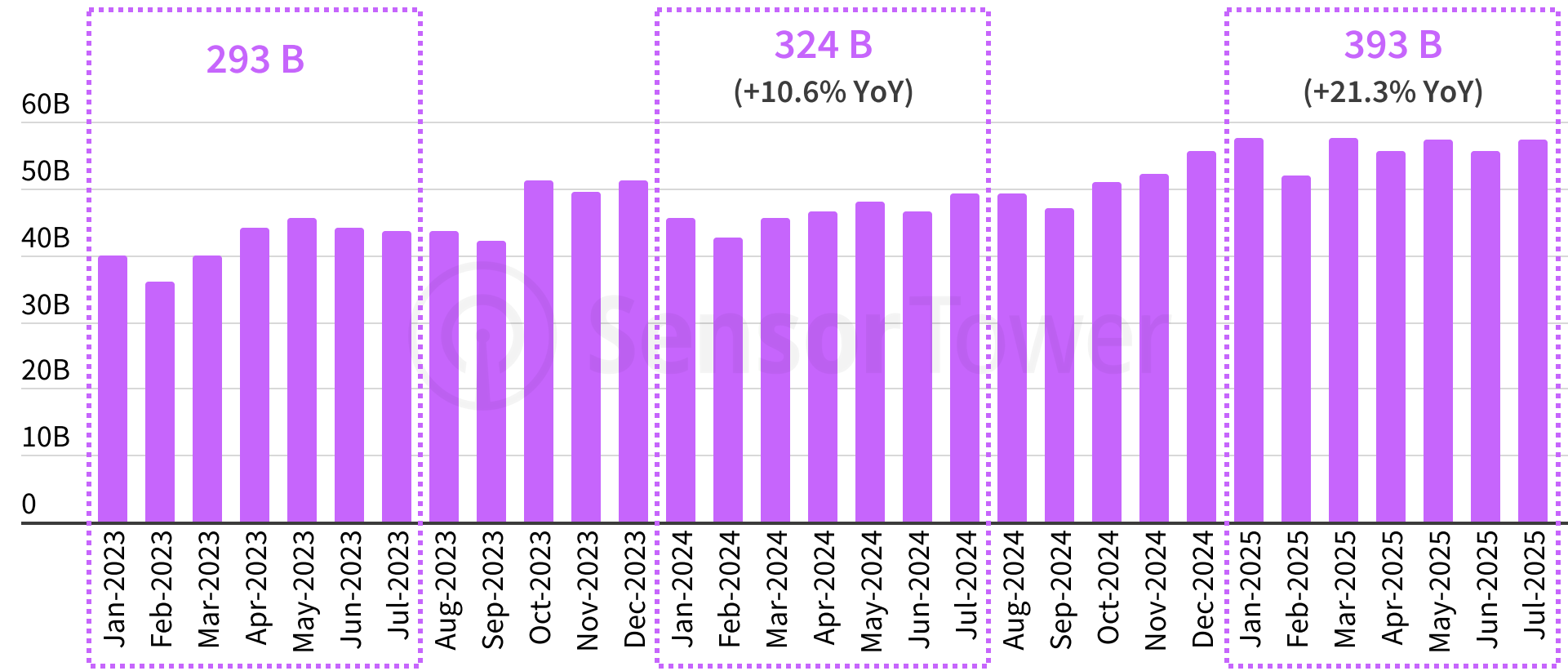
The most important time for OTT advertising in the US is approaching. Impressions and ad spend peak in Q4 each year. By the end of 2025, monthly ad spend on OTT in the US could approach \$2 billion.

Source: Sensor Tower
Note: Ad spend estimates as of August 14, 2025.

Monthly United States OTT Ad Spend



Monthly United States OTT Ad Impressions



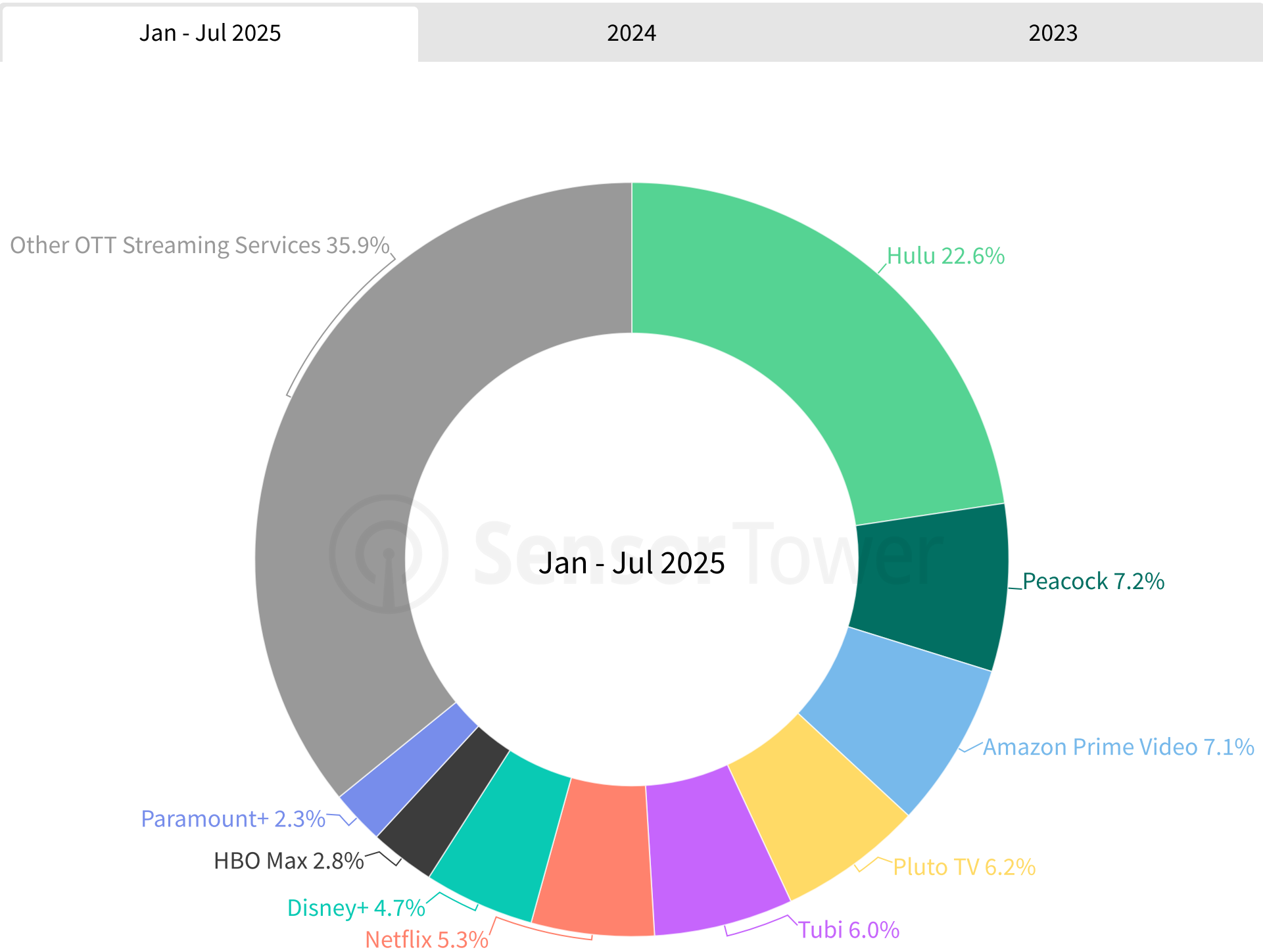
The OTT Streaming Service Market Is Getting Crowded, Providing Many Options for Advertisers

Hulu is the top streaming service for ad spend in the US, though its market share is slowly declining as more streaming services promote their own ad-supported offerings. For example, Amazon Prime Video, Disney+, and HBO Max have increased the ad load in their ad-supported plans.

Note that estimates for Amazon Prime Video, Disney+, and HBO Max began in November 2024, so their market share is only displayed in 2025. Before that, these streaming services were included in the "Other OTT Streaming Services" category.

Source: Sensor Tower
Note: Ad spend estimates as of August 14, 2025. Amazon Prime Video, Disney+, and HBO Max estimates became available in mid-November, 2024 and are only displayed separately for January - July 2025. Ad spend for these streaming services before 2025 are counted towards Other OTT Streaming Services.

Share of United States Ad Spend by OTT Streaming Service

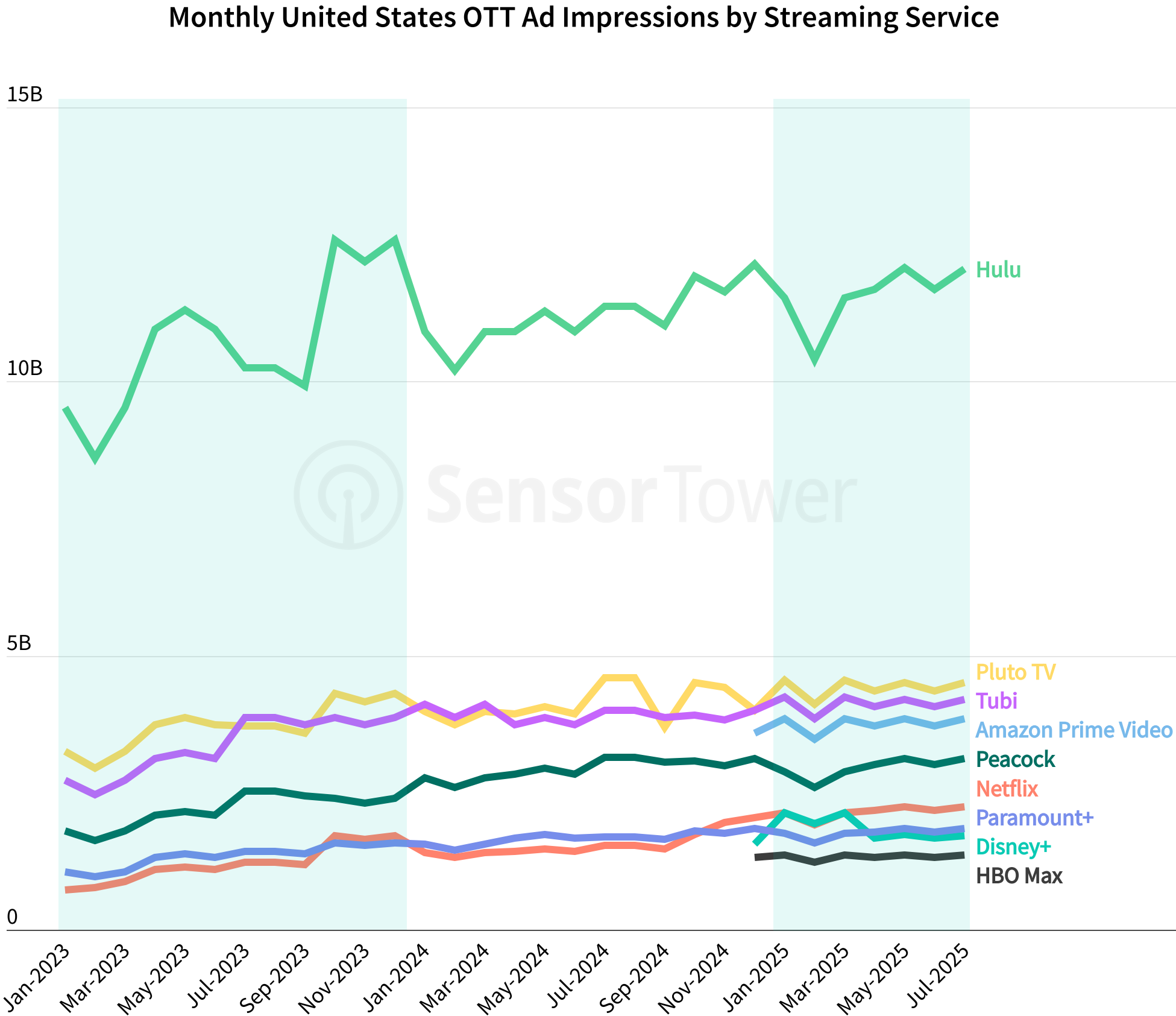


Hulu Maintains Its Lead as Impressions Climb for Top Streaming Services

Hulu surpassed 10 billion ad impressions each month so far in 2025, including more than 12 billion impressions in July. No other streaming service reached even 5 billion impressions in a month, though most still maintained strong growth.

Meanwhile, Netflix, Peacock, and Paramount+ have led the charge in terms of growth in recent years as ads become a bigger part of these streaming services' monetization strategy. Netflix's ad impressions have more than doubled from January through July 2025 compared to two years prior, and Peacock and Paramount+ ad impressions increased by more than 40% over the same period.

Source: Sensor Tower
Note: Ad spend estimates as of August 14, 2025. Amazon Prime Video, Disney+, and HBO Max estimates became available in mid-November, 2024 and are only displayed separately from December 2024 through July 2025.



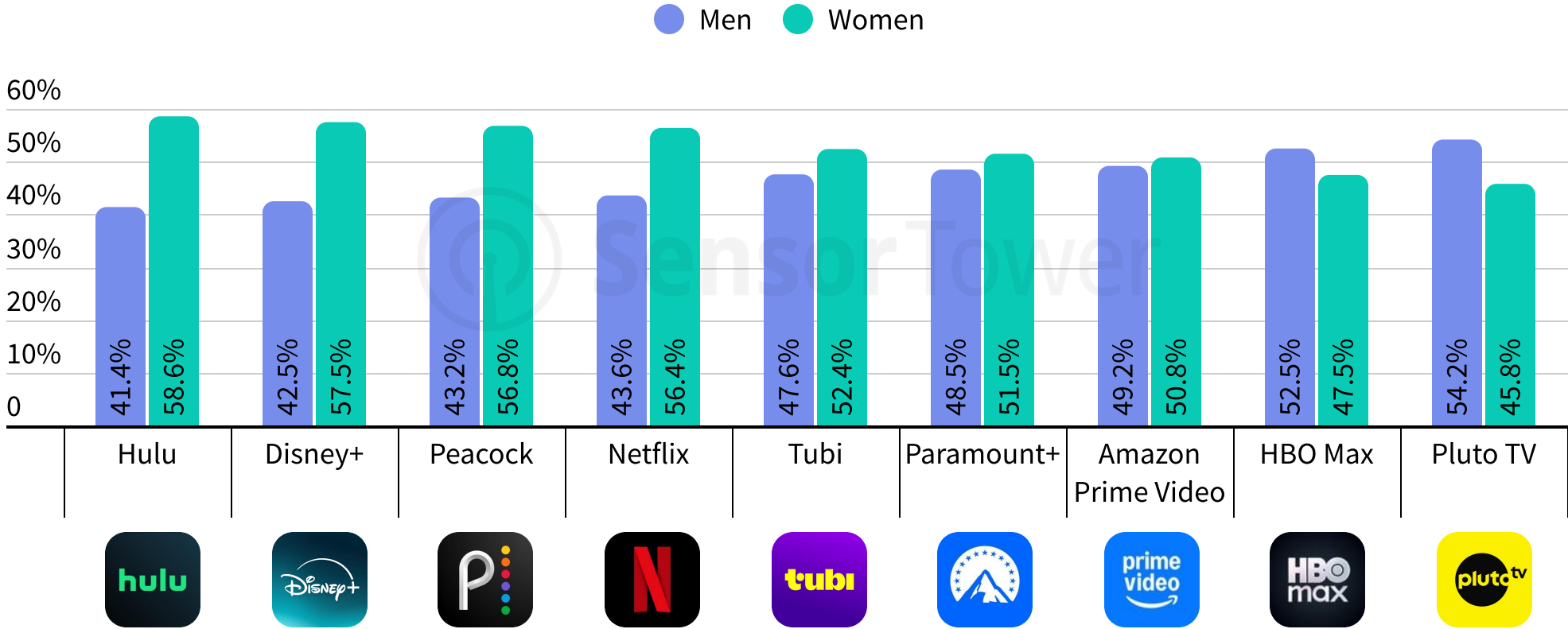
Traditional Subscription Streaming Services Are More Popular with Younger and Female Users

Mobile app users for Hulu, Disney+, Peacock, and Netflix have similar demographic breakdowns, each broadly appealing to women and younger users. Netflix and Disney+ are particularly popular with users under the age of 24, while Hulu, Peacock, and HBO Max have the highest share of users age 25-34.

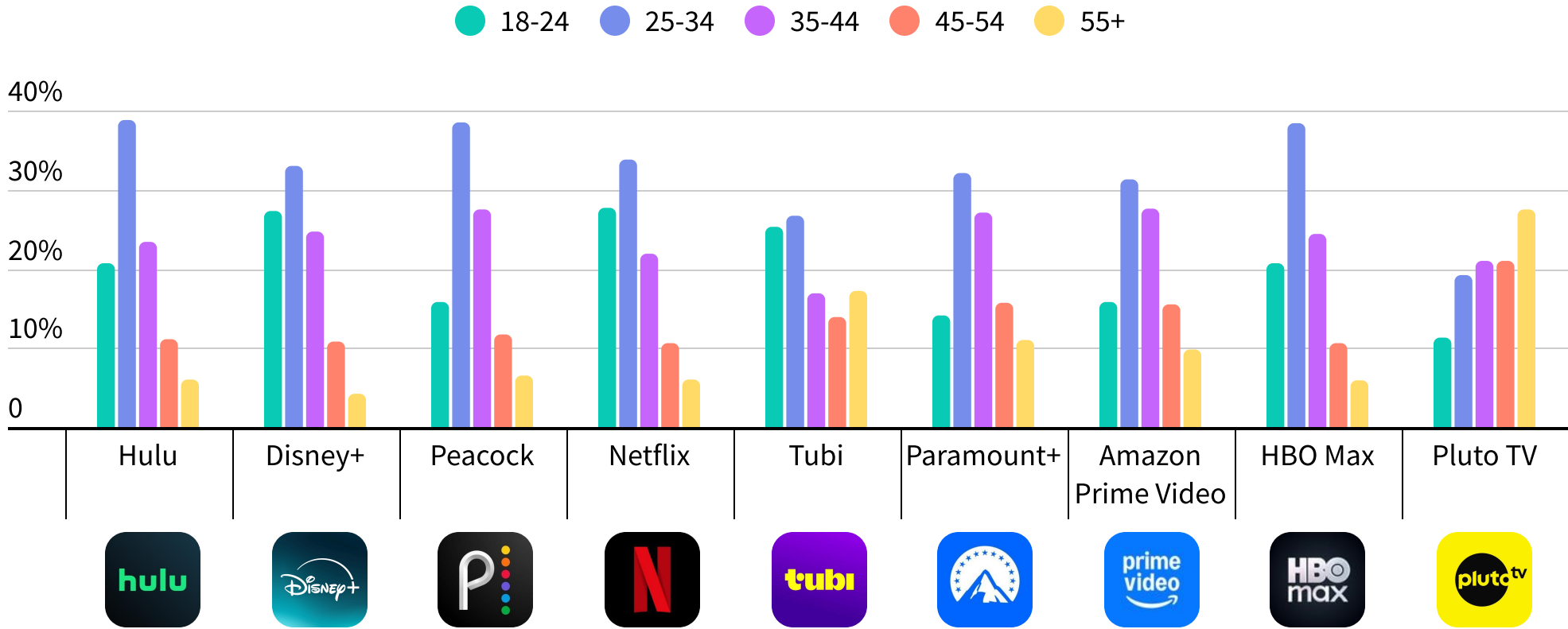
Free streaming options that exclusively monetize through ads, like Pluto TV and Tubi, appeal to different demographic groups than services that require a paid subscription. Both are more appealing to older viewers, and Pluto TV tends to skew more toward men.

Source: Sensor Tower
Note: Demographics are for mobile app users on Android in the United States in Q2 2025. Gender represented as Men and Women only and is not representative of all gender identities.

Gender Distribution for OTT Mobile App Users



Age Distribution for OTT Mobile App Users

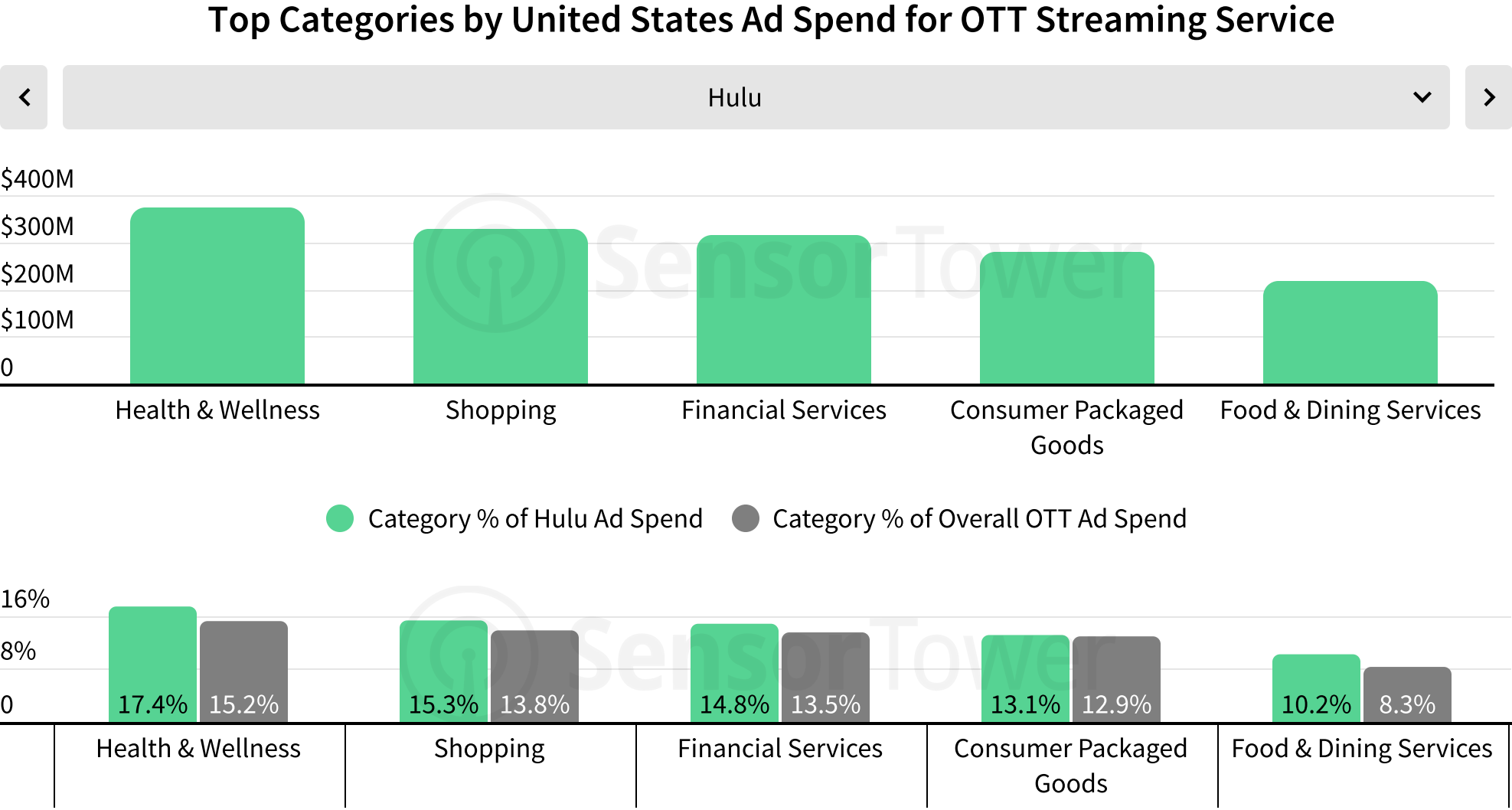
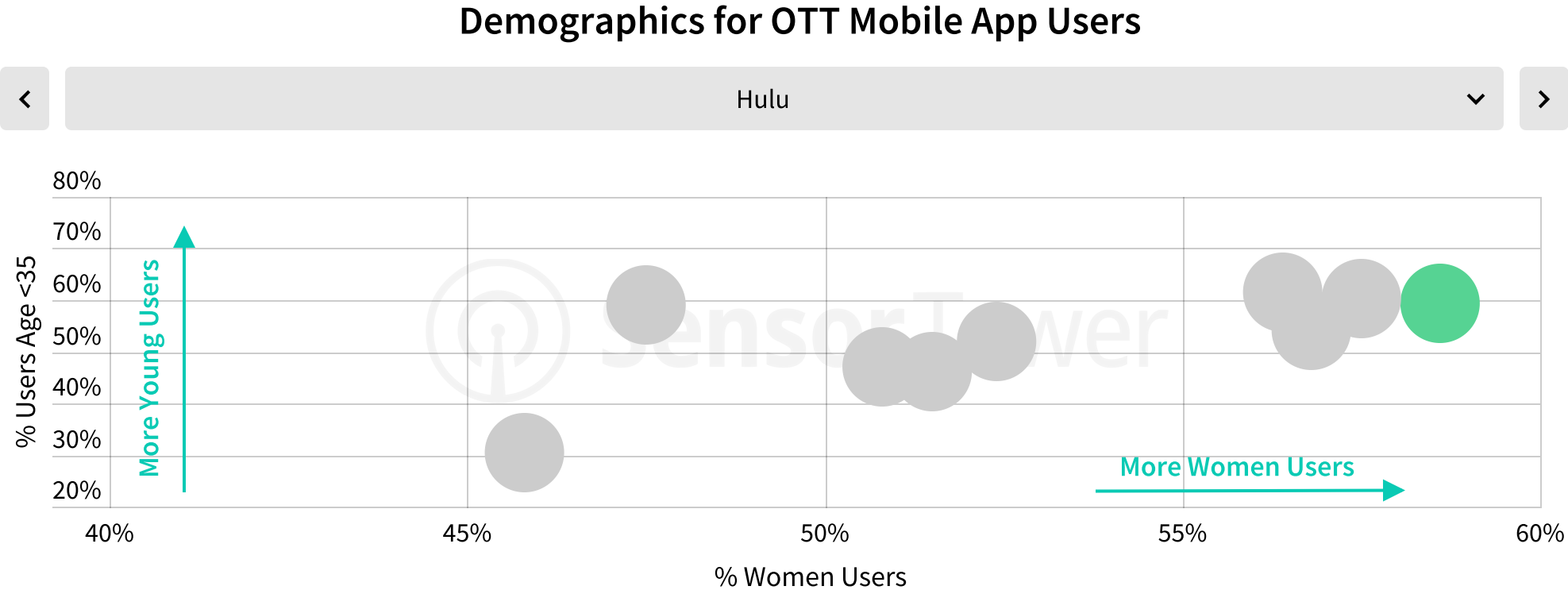


See Which Ad Categories Are Most Popular for Streaming Services

There was significant variation in which categories advertise on each streaming service. In fact, four of the streaming services had different top categories. Health & Wellness was the top category for Hulu, Peacock, and Paramount+, while other top ad categories ranged from Consumer Packaged Goods (Amazon Prime Video and Disney+), Auto (Pluto TV), Financial Services (Tubi), and Shopping (Netflix).

Pluto TV, a streaming service whose audience skews more toward older men, saw many Auto ads. Top advertisers included GMC, Hyundai, and Chevrolet. Travel & Tourism was one of the top ad categories for Netflix, largely driven by ads from Airbnb and Expedia. This was a notable outlier — Travel & Tourism was not among the top five categories on the other streaming services. Meanwhile, Food & Dining Services was unusually popular on HBO Max.

Source: Sensor Tower
Note: Ad spend estimates as of August 14, 2025. Demographics are for mobile app users on Android in the United States in Q2 2025. Gender represented as Men and Women only and is not representative of all gender identities.

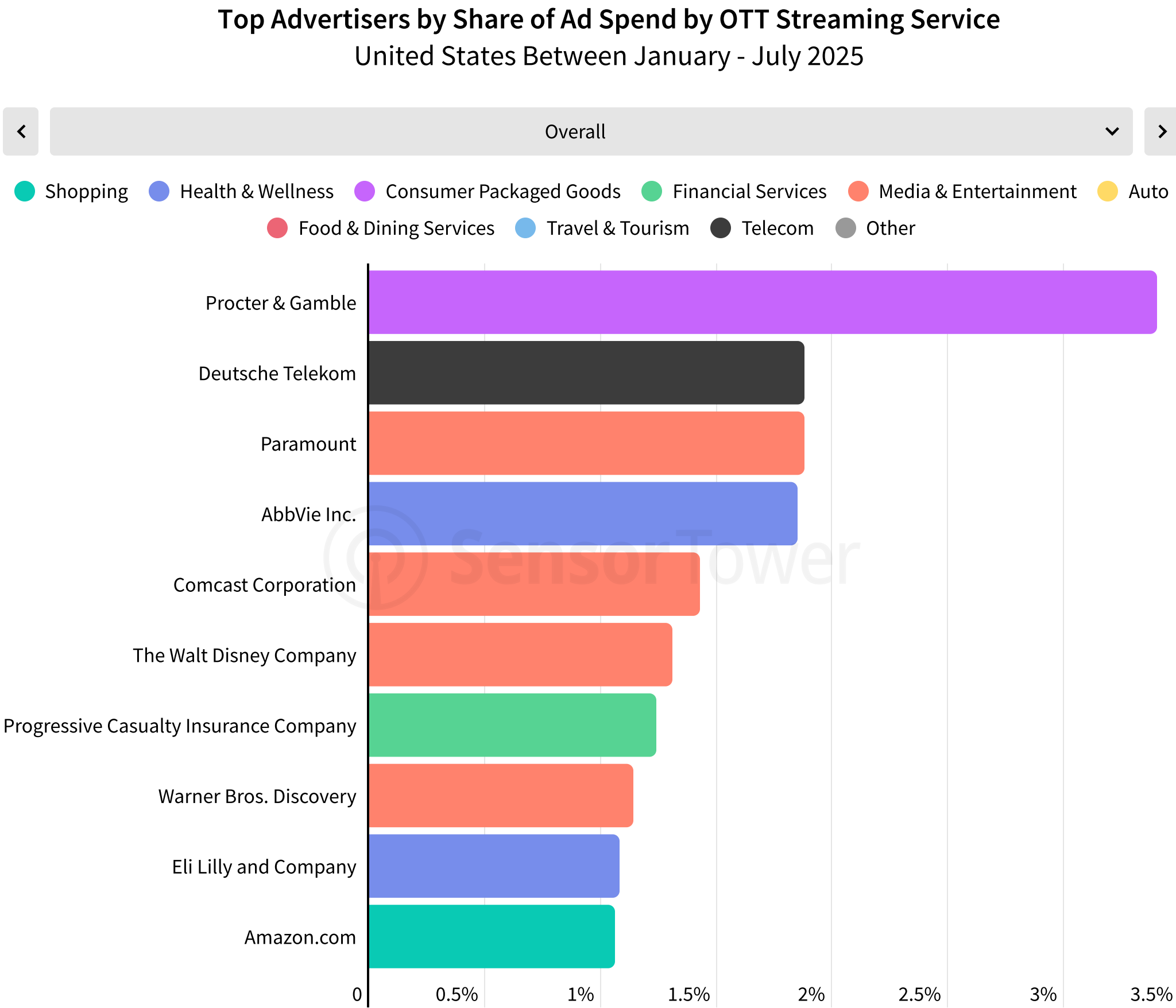


Pharmaceuticals Companies Like AbbVie and Eli Lilly Advertise Frequently Across Top Streaming Services

Procter & Gamble, the #3 advertiser in the US by ad spend across all channels, invests more into OTT advertising than any other top advertiser. 35% of Procter & Gamble's digital ad budget went to OTT in the past twelve months, more than twice as high as the overall share for OTT in the US. Procter & Gamble was the top advertiser on Pluto TV, Tubi, HBO Max, and Paramount+ and ranked #2 on Hulu.

Streaming services can end up as battlegrounds for advertising among competitors. For example, six of the top 10 advertisers on Peacock were either insurance or pharmaceutical companies. Meanwhile, car companies battled it out on Pluto TV and fast food brands favored HBO Max.

Source: Sensor Tower
Note: Ad spend estimates as of August 14, 2025. Includes January through July 2025.
Advertiser categories are based on their top category by US ad spend between January through July 2025.



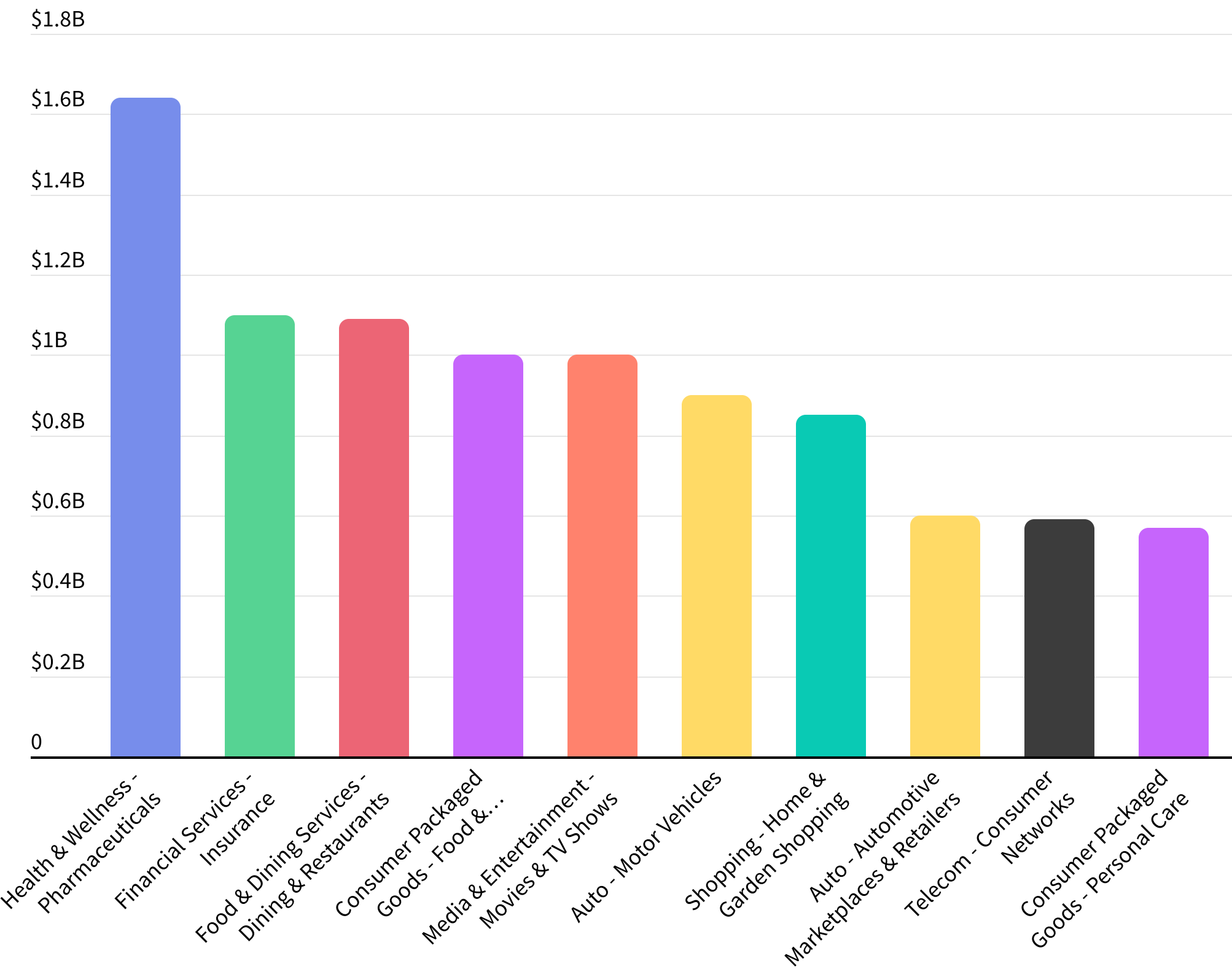
Pharmaceuticals Led All Categories by OTT Advertising in the US

OTT is the key channel for Pharmaceutical digital advertising, accounting for roughly 45% of ad spend across OTT, social, mobile, and desktop. Social channels present some compliance challenges for pharmaceutical companies, making OTT a preferred option for the industry.

Four other categories spent at least \$1 billion in ad spend over the twelve months between August 2024 and July 2025, including Insurance, Dining & Restaurants, Food & Beverages, and Movies & TV Shows. OTT was the top channel for Dining & Restaurants in the US (28% of digital ad spend), and second behind Facebook for Movies & TV Shows. Movies & TV Show advertisers can take advantage of an audience that is already interested in streaming to promote their new releases.

Source: Sensor Tower
Note: Ad spend estimates as of August 14, 2025.

Top Categories by US Ad Spend on OTT Streaming Services
United States Between August 2024 - July 2025



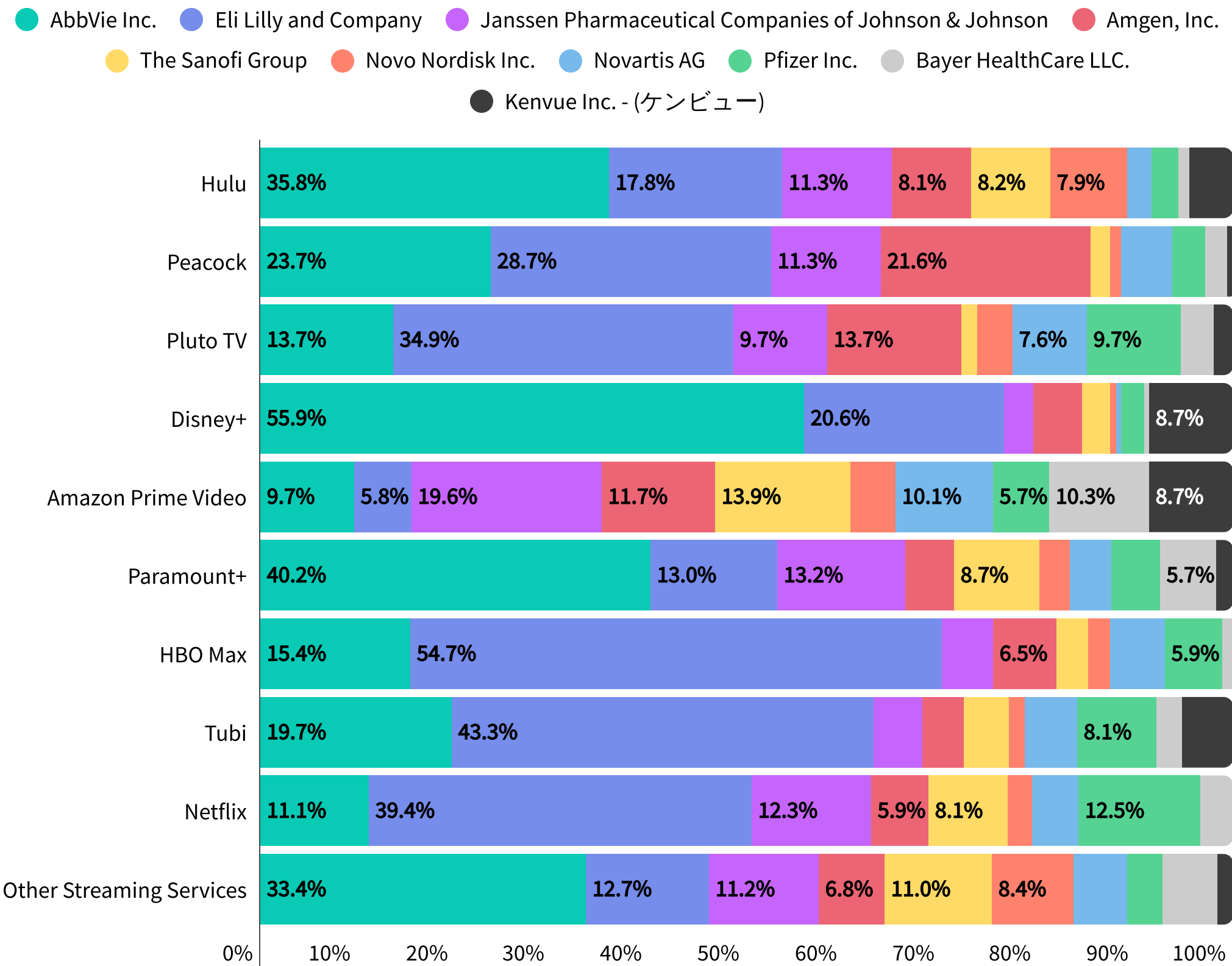
Leading Pharmaceutical Companies Diversify Their OTT Ad Strategy

With so many streaming options for US consumers, Pharmaceutical advertisers tend to distribute their ad spend across streaming services and speak to a broad audience. AbbVie and Eli Lilly are the leaders across most streaming services, with Amazon Prime Video being a notable exception.

Pfizer is one of the top advertisers on Netflix, especially for its breast cancer drug, Ibrance, and its migraine drug, Nurtec. Meanwhile, Peacock is a top choice for Amgen's psoriasis and psoriatic arthritis drug, Otezla.

Source: Sensor Tower
Note: Ad spend estimates as of August 14, 2025.

Share of Ad Spend by Streaming Service Across the Top 10 Pharmaceutical Advertisers
United States Between January - July 2025



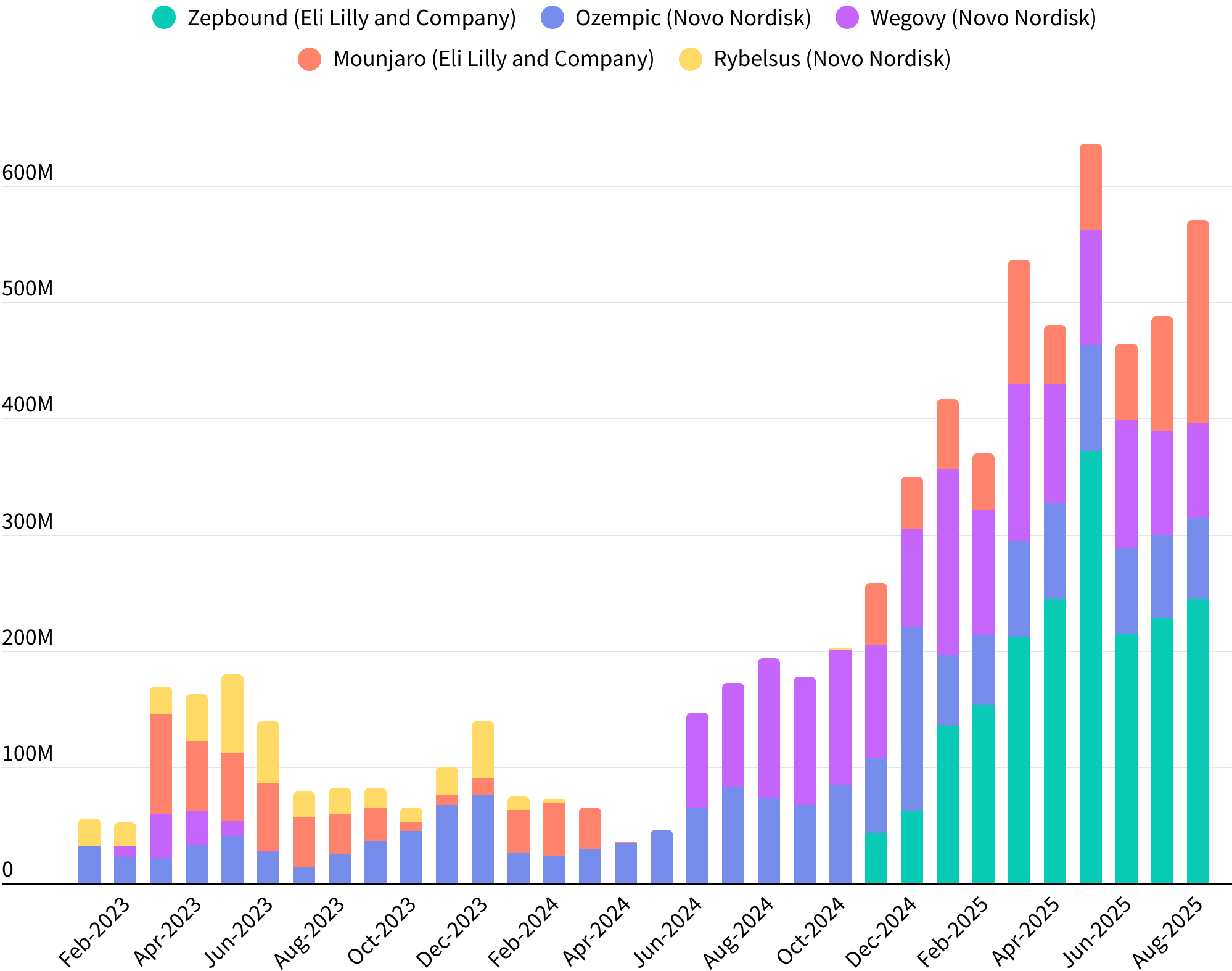
Weight Loss Drug Advertising Is on the Rise

Advertising for GLP-1 agonists like Zepbound and Ozempic has continued to climb into 2025, surpassing 400 million impressions on OTT in the US for six months in a row. Eli Lilly, in particular, has ramped up advertising for Zepbound (primarily for weight management) and Mounjaro (which is FDA-approved for type 2 diabetes).

Novo Nordisk is also advertising more for Wegovy, its weight management-approved alternative to Ozempic (which is only FDA-approved for type 2 diabetes).

Source: Sensor Tower
Note: Ad spend estimates as of August 14, 2025. Includes GLP-1 agonists (semaglutide and tirzepatide).

OTT Ad Impressions for the Top Diabetes and Weight Loss Drugs
Includes GLP-1 agonists (semaglutide and tirzepatide) in the United States



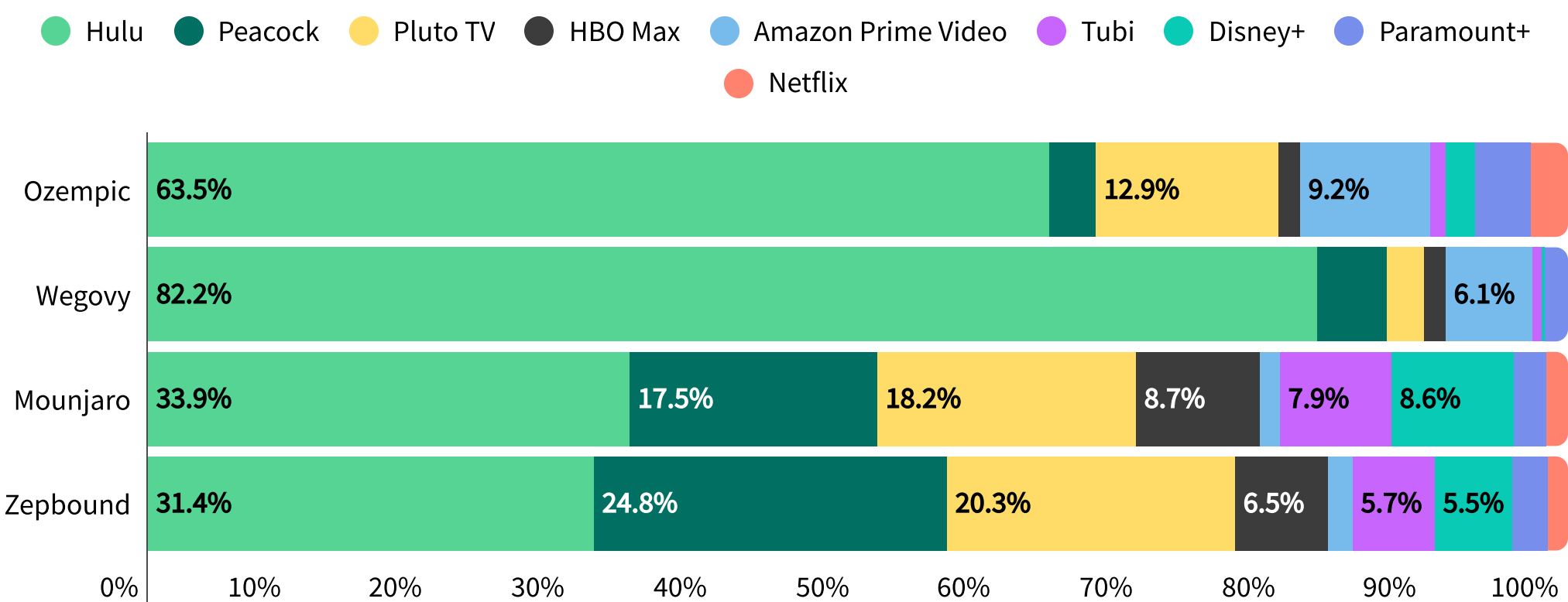
Dieters Are Spread Across Streaming Services, Supporting a Diversified OTT Ad Strategy

Mobile users in the Dieter persona (people who are mindful about what they eat) are more likely than the general population to use streaming apps. For example, Dieters are 1.95x more likely to use Peacock and 1.76x more likely to use Paramount+ than the general population. This makes OTT a good fit for companies marketing to dieters. Diabetes app users are also more likely to use streaming apps, particularly Paramount+, Pluto TV, and Peacock.

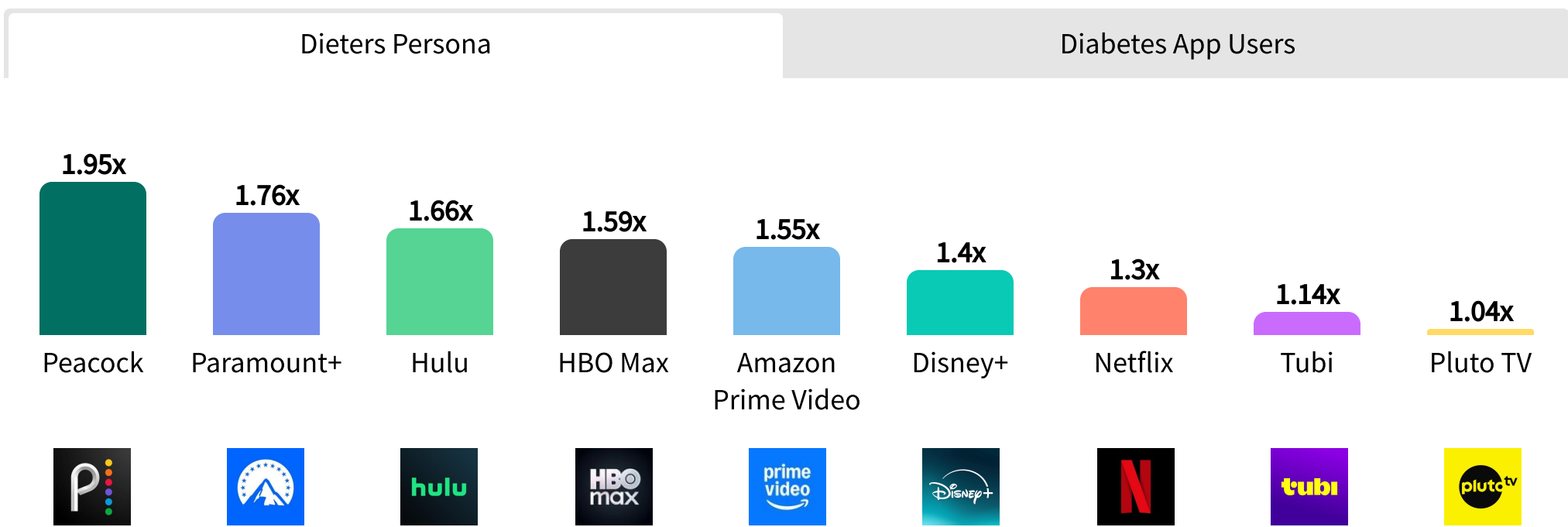
The increased likelihood of using streaming apps across top services supports a diversified ad strategy, since dieters likely use one or more of the different streaming services. Novo Nordisk frequently advertised on Hulu and Amazon Prime Video, while Eli Lilly spent a relatively high share on Peacock, Pluto TV, HBO Max, and Disney+.

Source: Sensor Tower
Note: Ad spend estimates as of August 14, 2025. Increased likelihood of use for the Dieters Persona and Diabetes app users are for mobile app users on Android in the United States in between January and July 2025. The cohort of diabetes apps include Dexcom Clarity, Dexcom G6, Dexcom G7, FreeStyle Libre2, FreeStyle Libre3, FreeStyle LibreLink, MySugr.

Share of Ad Spend by Streaming Service Across the Top 10 Pharmaceutical Advertisers
United States Between January - July 2025



Increased Likelihood of Use of Streaming Apps for Dieters and Diabetes App Users
vs. the General Population




Retail Media Advertising Trends


What is Retail Media Insights?

Pathmatics by Sensor Tower's Retail Media Insights provides marketers with complete visibility into the co-branded digital advertising ecosystem and retail media networks. Your customized marketing insights reports empower you with a view into spend, media mix, impressions and share of voice for display, video, mobile, OTT, and paid social across your selected retail partners and competitors.


- Benchmark yourself against your competitors’ co-branded campaigns to understand seasonality and trends
- Uncover retailer media network and competitor media mix & marketing strategy

[Learn More & Request a Demo Here](#)


**Retailer: Target**


**Target**


Buy one, get one 50% off board games & puzzles this week at Target




Operation Board Game [Shop Now](#)

Advertiser: Hasbro


**Retailer: Chewy**


**Chewy**


Hurry! Your pet's favorite toys, treats & more are still here with fast, free shipping. Because pets love presents, too!




Purina Beneful Chopped Blends with Salmon, Sweet Potatoes, Brown Rice & Spinach Wet Dog Food, 10-oz container, case of 8 [Shop Now](#)

Advertiser: Purina PetCare


**Retailer: Best Buy**


**Best Buy**



More power.



Power boosted with a faster processor, more memory, and more storage. That's the all-new Chromebook Plus. [Shop Now](#)

Advertiser: Google


**Retailer: Home Depot**



GET GAME-CHANGING DURABILITY WITH BEHR® PAINT

The Home Depot is an Official Sponsor of ESPN College GameDay

Advertiser: Behr Paint Company

 Sensor Tower - All Rights Reserved

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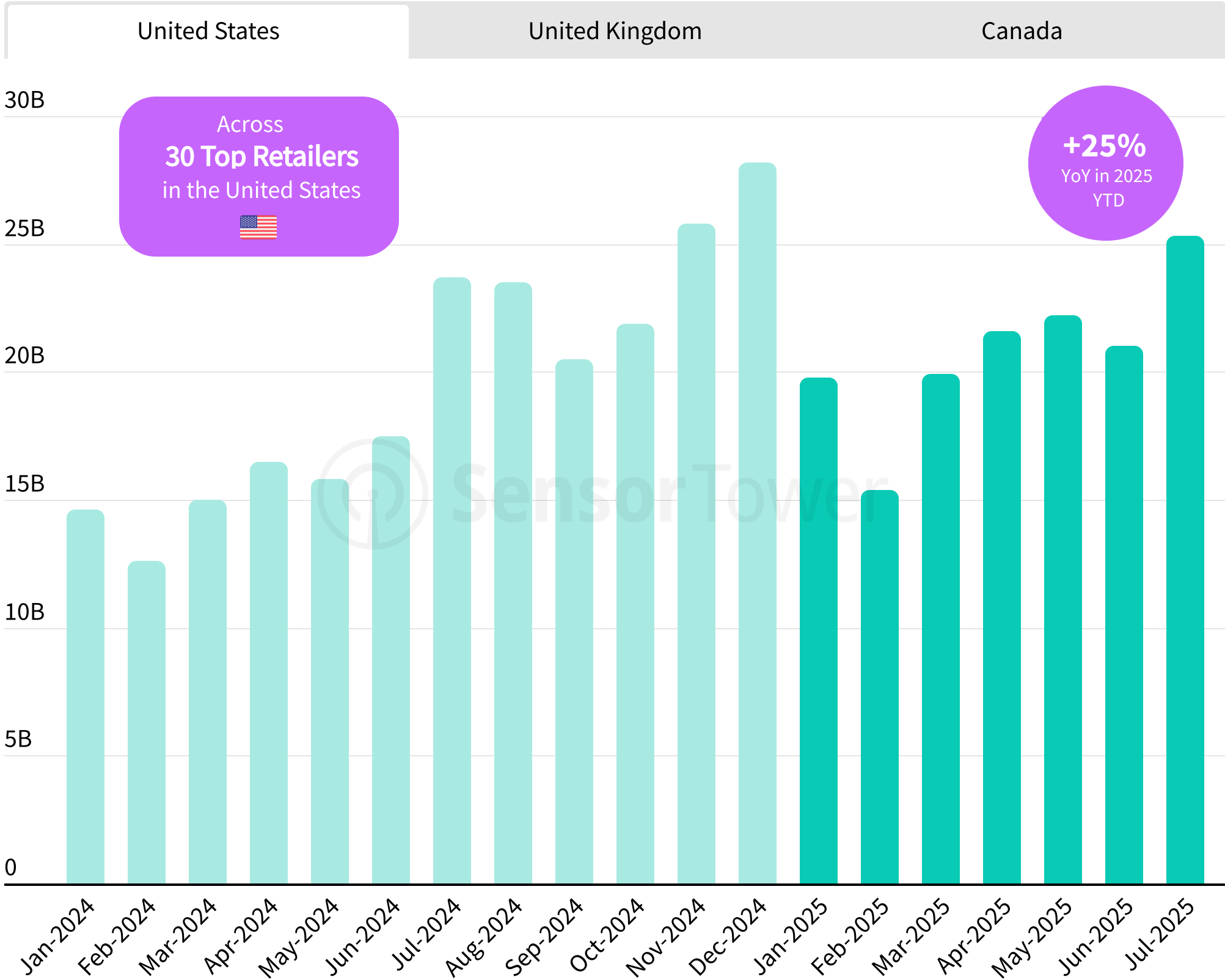
Retail Media is Becoming an Increasingly Important Ad Channel

Retail media ad impressions in the US climbed 25% YoY in the first seven months of 2025 across top retailers like Walmart and Chewy. Impressions surpassed 25 billion for just the third month ever, only trailing the peak shopping season at the end of 2024. Note that Amazon.com has been excluded from this chart, as data is available in Sensor Tower starting January 1, 2025.

Retail media impressions across nine top retailers in the UK climbed only 7% YoY, trailing the 20%+ growth in the US and Canada. However, the most important time of the year for retail media is still ahead, as advertising ramps up dramatically in Q4.

Source: Sensor Tower
Note: Includes a selection of top retailers. Amazon is available since January 1, 2025 in the United States and is excluded from this chart. See [Appendix \(page 80\)](#) for list of retailers included in each market.

Retail Media Ad Impressions in the United States, United Kingdom, and Canada



Amazon is the Runaway Leader for Retail Media in the US

Amazon had far and away the most retail media impressions in the United States, approaching 200 billion in the first seven months of 2025. The majority of these impressions were onsite, meaning they were displayed on Amazon.com rather than on offsite channels like Facebook or OTT.

Tesco was the top retail media retailer in the UK among the included retailers, just ahead of The Boots Company. Meanwhile, Walmart was the top retailer among the four included in Canada.

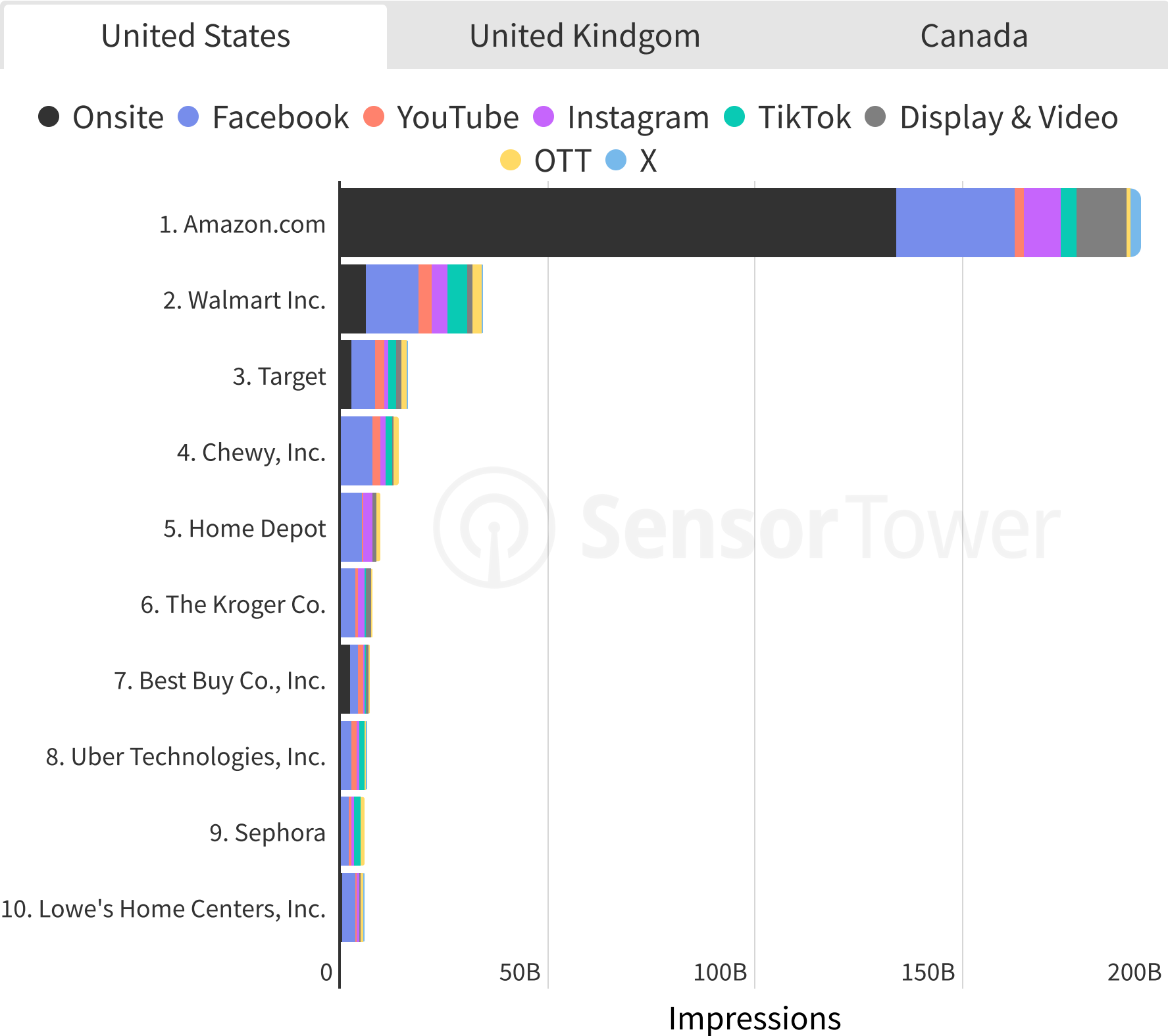
Definitions:

Onsite: Ads displayed on the retailer's website (for example, ads displayed on Walmart.com). Note that this includes onsite display only, not inclusive of search, sponsored results, or proprietary ad units per retailer

Offsite: Ads displayed on other websites, social media platforms, or OTT. For example, this includes co-branded advertisements on Facebook, TikTok, and YouTube.

Source: Sensor Tower
Note: Includes a selection of top retailers. See [Appendix \(page 80\)](#) for list of retailers included in each market.

Top Retail Media Retailers by Impressions
January - July 2025



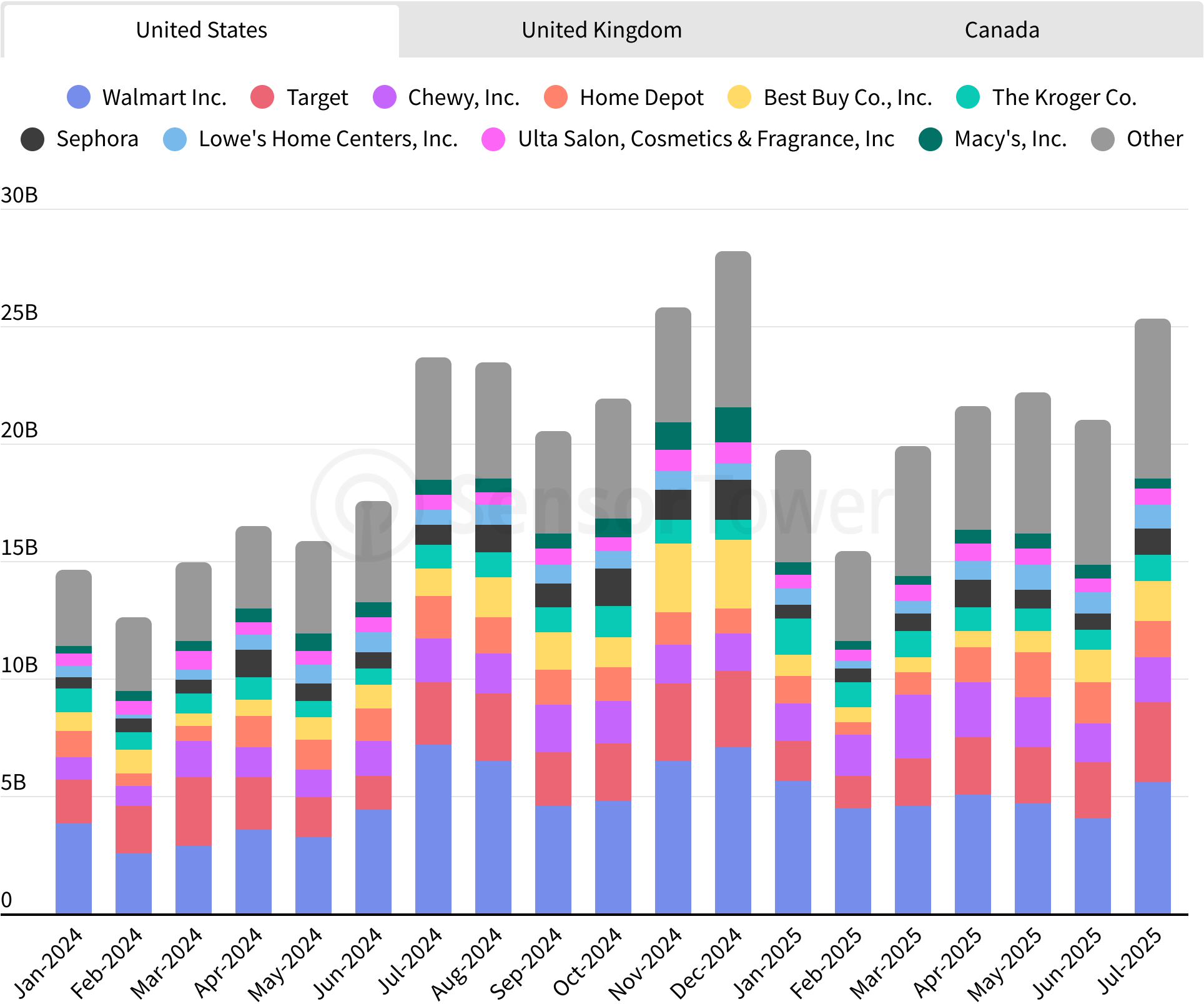
Retail Media is on Track for a Big Holiday Season in 2025

Retail media advertising is highly seasonal in the US for many of the top retailers. For example, Walmart and Target see big spikes in the late summer (July and August) and the holiday season (November and December). Other retailers popular for holidays like Black Friday and Christmas, such as Best Buy and Macy's, see big spikes at the end of the year, while home improvement retailers like Home Depot and Lowe's tend to see an uptick in impressions during the summer months.

The UK also saw a big spike in retail media during Q4, largely driven by retailers like The Boots Company, John Lewis, and Sephora.

Source: Sensor Tower
Note: Includes a selection of top retailers. See [Appendix \(page 80\)](#) for list of retailers included in each market.

Retail Media Ad Impressions by Retailer in the United States



Top CPG and Shopping Subcategories are Popular for Retail Media

Retail media impressions are spread across several top Shopping and Consumer Packaged Goods (CPG) subcategories, from Personal Care to Home & Garden Shopping to Food & Beverages. General retailers like Amazon, Target, and Walmart tend to advertise across all these subcategories, while more specialized retailers like Chewy and Best Buy are more focused.

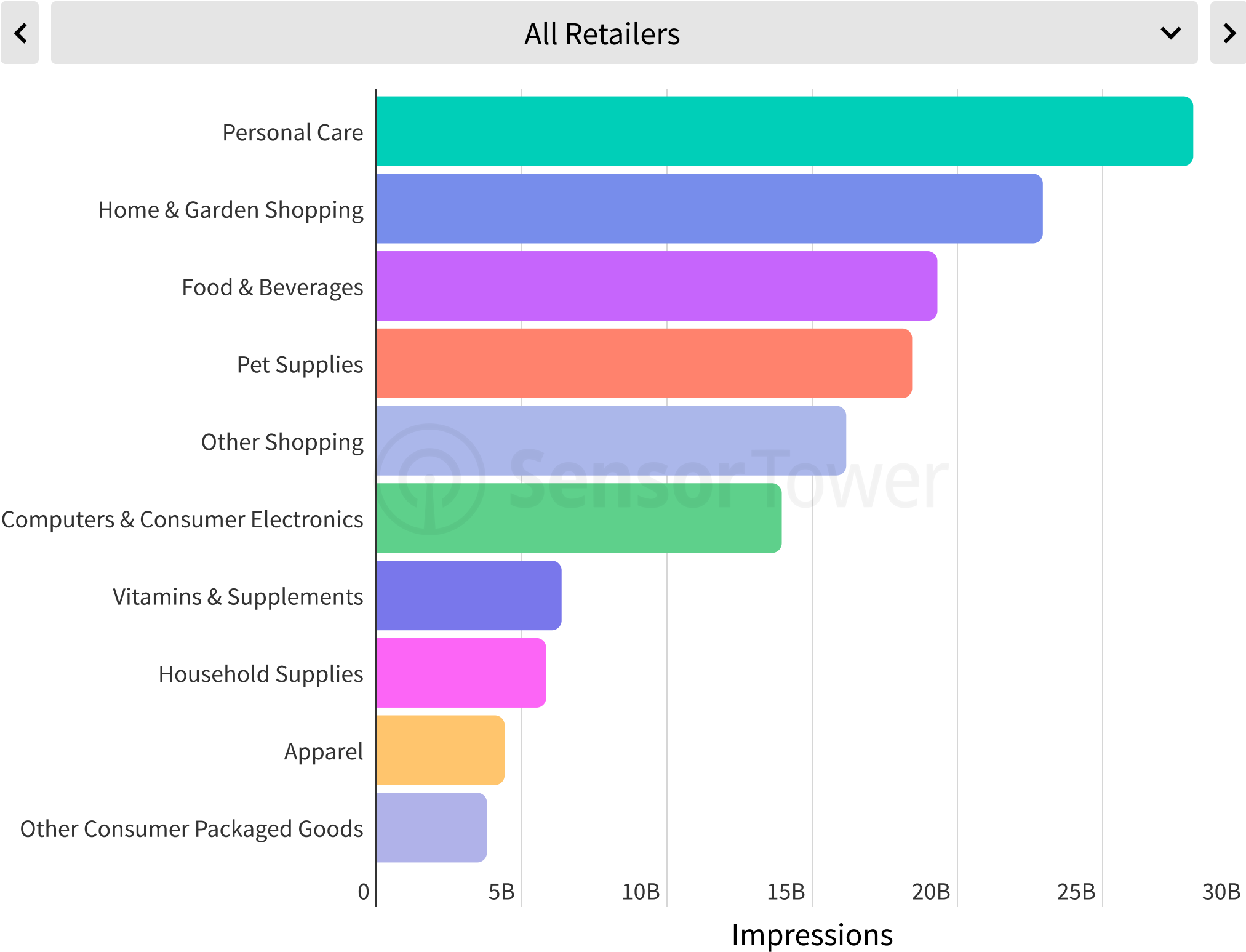
Definition:

Category: The category of the product being displayed in the advertisement. Cases where the retailer is advertising for its own brand, where the product is unidentifiable, or the advertisers are not currently tracked by Sensor Tower are excluded.

Source: Sensor Tower
Note: Includes a selection of top US retailers. Excludes cases when the advertisers are not currently tracked by Sensor Tower or advertising for retailer's own products. See [Appendix \(page 80\)](#) for list of retailers included in each market.

Top Categories by Retail Media Advertising Impressions in the United States

January - July 2025



Amazon and Walmart are Popular Retailers Across Categories

Amazon was the top option for retail media across nine of the top 10 categories, with Walmart also a strong player, ranking among the top three retailers for seven of the 10.

While these giants hold broad appeal, other categories are popular for more specialized retailers. This includes Pet Supplies, where Chewy, PetSmart, and Petco are key players, and Home & Garden Shopping (where Home Depot, Lowe's, and Ace Hardware compete with Amazon and Walmart).

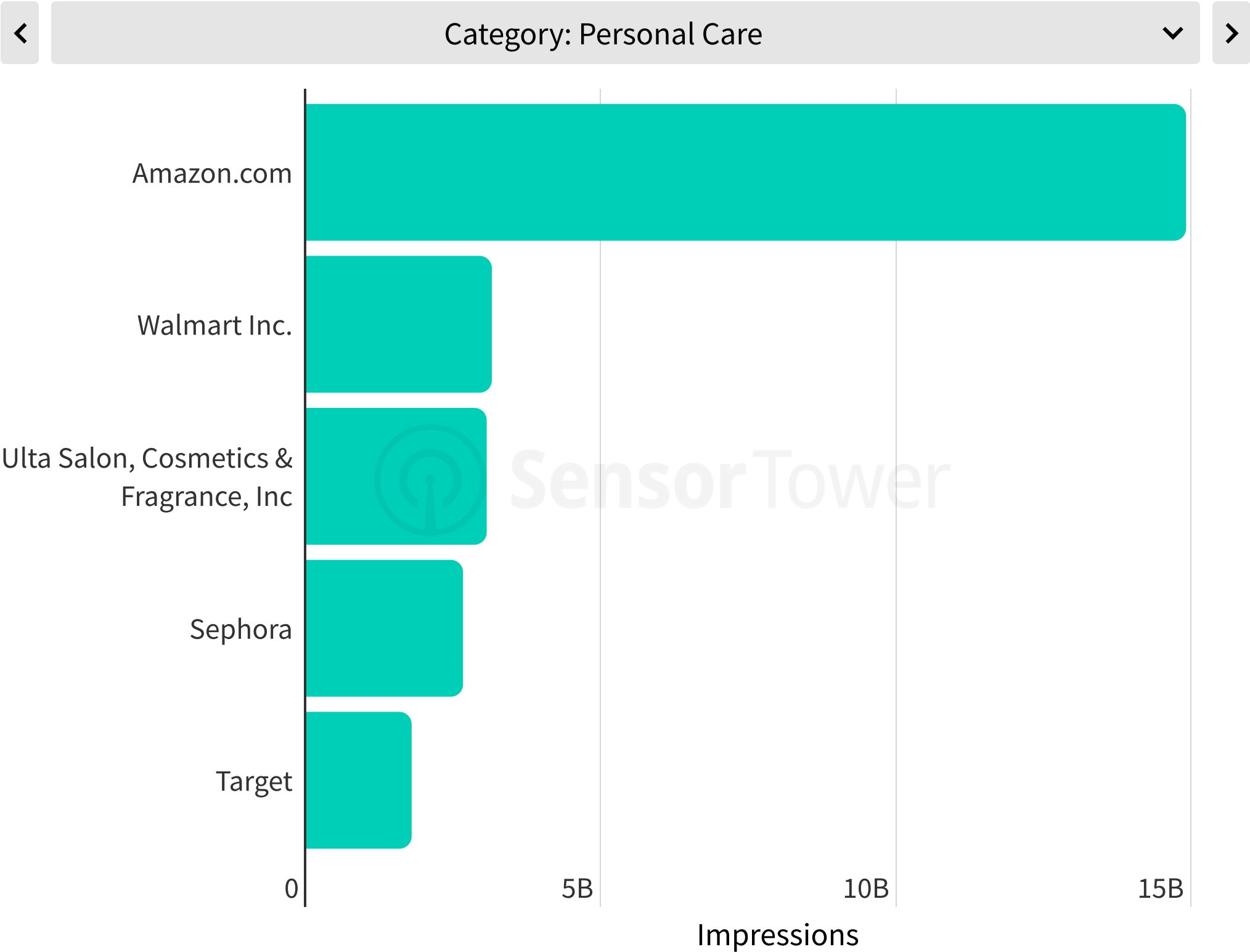
Definition:

Category: The category of the product being displayed in the advertisement. Cases where the retailer is advertising for its own brand, where the product is unidentifiable, or the advertisers are not currently tracked by Sensor Tower are excluded.

Source: Sensor Tower
Note: Includes a selection of top US retailers. Excludes cases when the advertisers are not currently tracked by Sensor Tower or advertising for retailer's own products. See [Appendix \(page 80\)](#) for list of retailers included in each market.

Top Retail Media Retailers by Category in the United States

January - July 2025



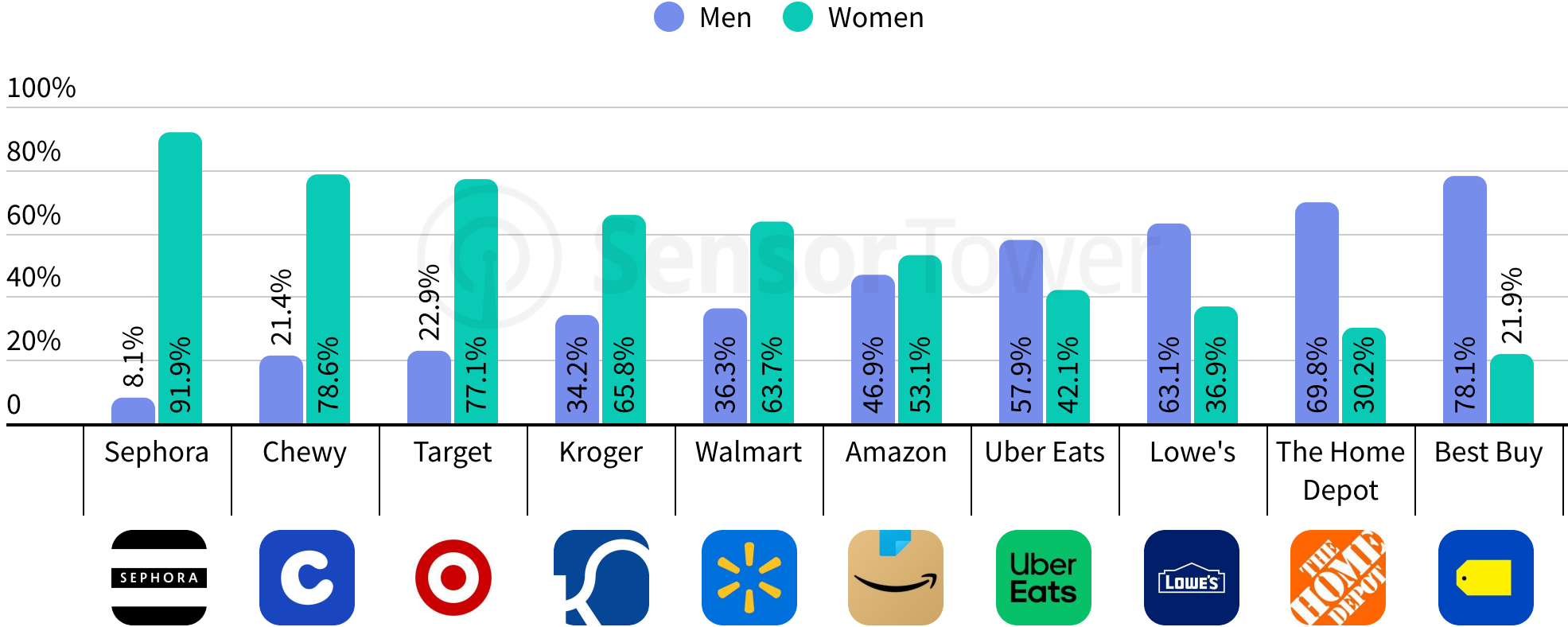
Does Your Retail Media Ad Strategy Fit with the Retailer's Audience?

In general, mobile app users for top US retailers skew towards female shoppers. Women account for at least 60% of the user base for five of the top 10 retailers by retail media impressions, including Target and Walmart.

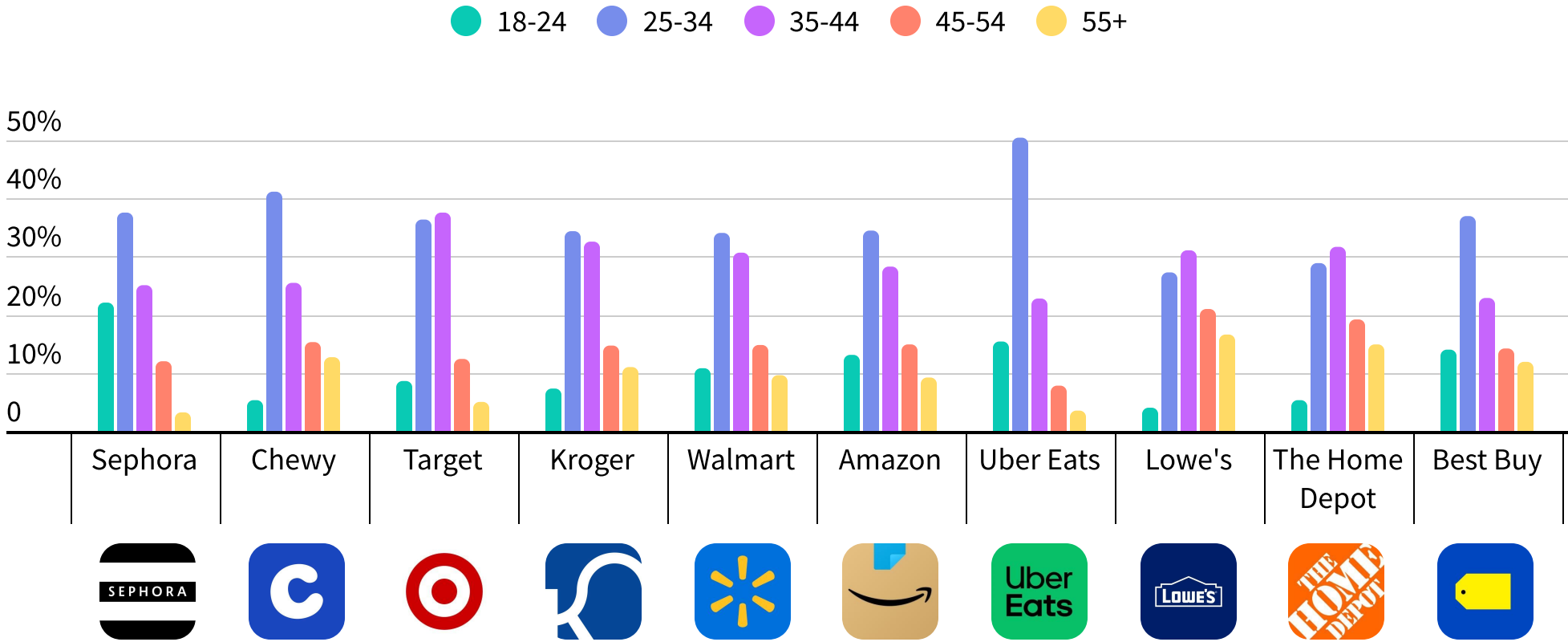
Unsurprisingly, beauty brands Sephora and Ulta have women make up more than 90% of their mobile app users. Their shoppers also tend to skew younger, with more than 80% under the age of 45. Best Buy, The Home Depot, and Lowe's are more popular with men. The home improvement retailers have an older audience on average, while Best Buy has more younger customers.

Source: Sensor Tower
Note: Demographics for mobile app users on Android in the United States in Q2 2025. Gender represented as Men and Women only and is not representative of all gender identities

Gender Distribution for Retail Mobile App Users



Age Distribution for Retail Mobile App Users

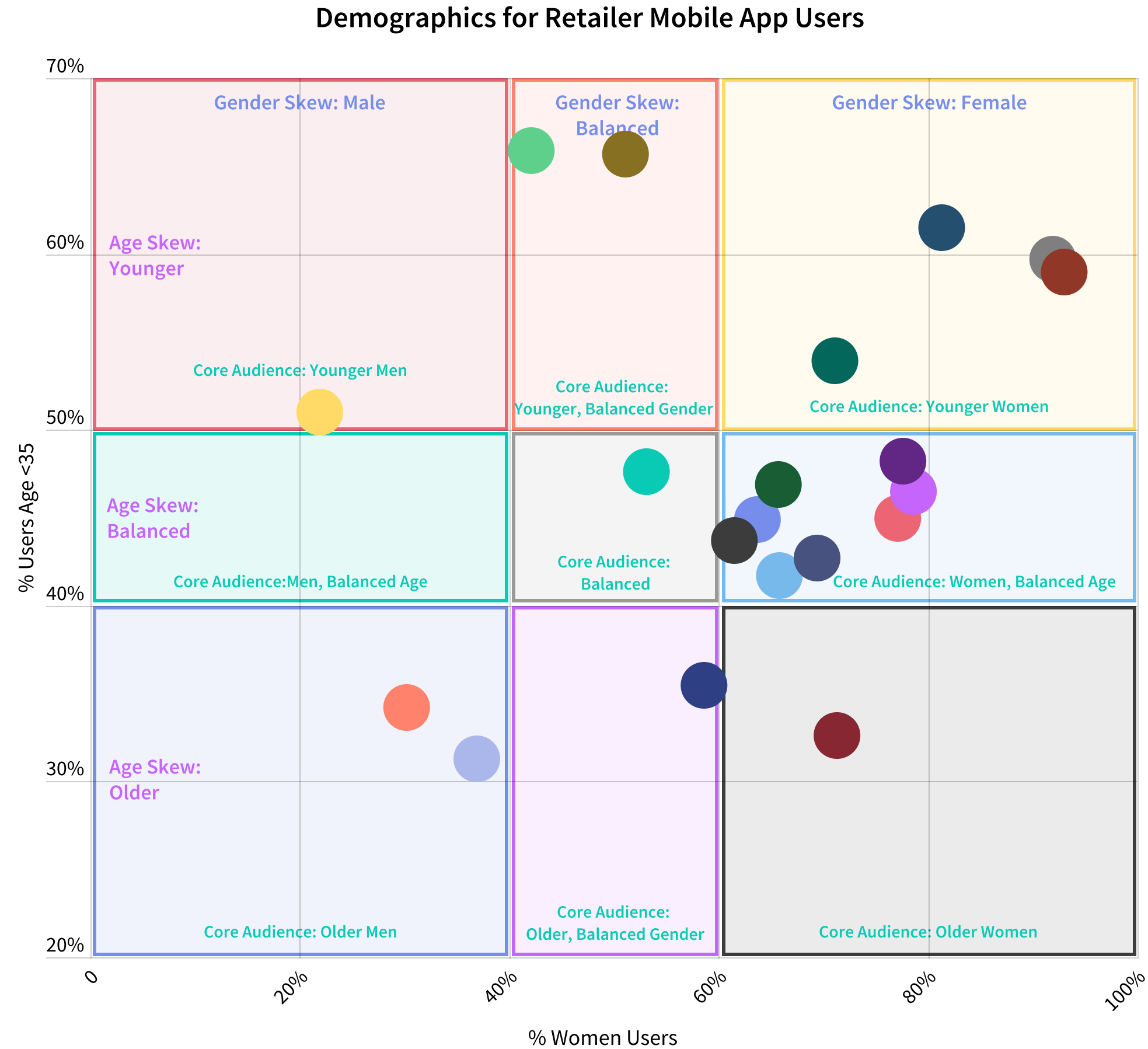


Most Retailers Tend to be More Popular with Women, with Some Notable Exceptions

Expanding to the mobile apps for the top 20 retailers by retail media impressions in the US, 13 are skewed toward women (more than 60% women) compared to only three skewed toward men (more than 60% men). Age tends to be a bit more balanced, with seven skewing toward younger users (more than 50% under the age of 35) and four skewing toward older users (more than 60% over the age of 35).

A few notable cohorts emerge: food delivery apps like Uber Eats and DoorDash appeal to young users, while Ulta and Sephora are particularly popular with young women. Meanwhile, grocery stores and delivery apps like Kroger, Albertsons, Meijer, and Instacart tend to skew slightly toward women but have a fairly balanced age distribution.

Source: Sensor Tower
Note: Demographics for mobile app users on Android in the United States in Q2 2025. Gender represented as Men and Women only and is not representative of all gender identities.



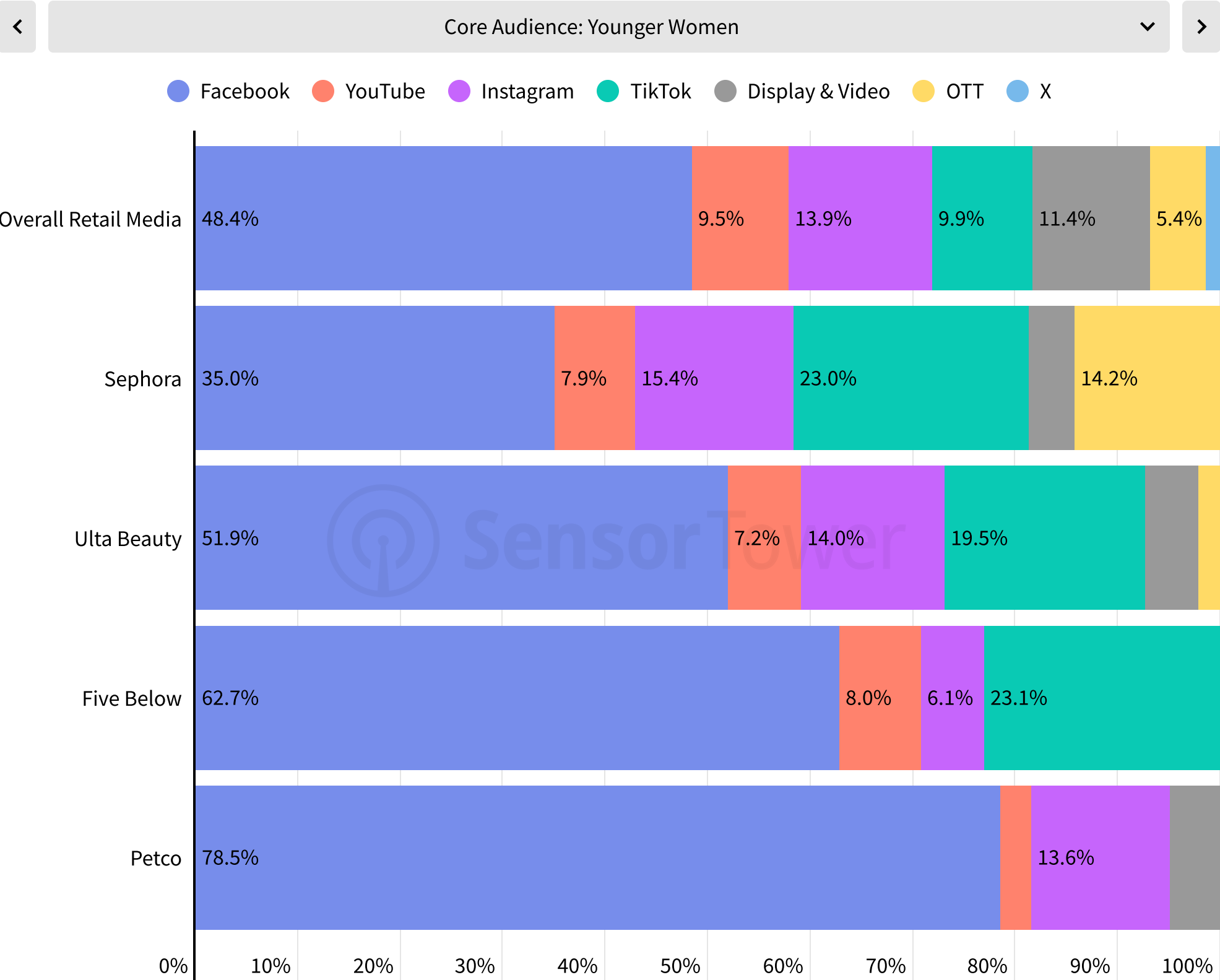
Discover How Retail Media Leverages Ad Channels to Find the Right Audience

Retail media partnerships often choose social channels that match their target demographic. For example, retailers that appeal to younger women are more likely to advertise on TikTok, with Petco as a notable exception. Petco has a greater share of its retail media on Facebook, even compared to other pet stores with an older user base like PetSmart and Chewy. This suggests that Petco may benefit from increasing its focus on other social channels like TikTok and Instagram.

Uber Eats and DoorDash, which have a very high percentage of mobile users between the ages of 25 and 34, tend to leverage social channels that also skew younger. By comparison, The Home Depot and Lowe's, which skew toward older men, have a high share of retail media impressions on Facebook and OTT.


Source: Sensor Tower
Note: Share of retail media impressions in the United States between January - July 2025.
Excludes onsite retail media impressions. Overall Retail Media category includes 31 retailers in the United States.

Retail Media Ad Channel Use by Retailer
Share of Impressions vs. Overall Retail Media Population




Are Your Competitors Taking Advantage of Retail Media?

Top brands like Nestle and Unilever diversify their retail media approach across major platforms like Amazon, Walmart, Target, and more. While their partnerships are widespread, the products they promote vary by retailer. This demonstrates that successful brands tailor their advertising to the specific audience and product mix of each retail partner.



This is big—MacBook Air with Apple M1 chip is only \$699 at Walmart. Amazing performance. Unbelievable price. Don't miss out.



Retailer: Walmart

Co-Branded Advertiser: Apple Inc.

Product: MacBook Air

Source: Sensor Tower
Note: Includes a selection of top US retailers. Excludes advertising for retailer's own products. Top product is based on number of impressions where the creative was captured.

Top Co-Branded Advertisers for United States Retailers by Impressions

January - July 2025

	Retailer: Amazon.com			
Rank	Co-Branded Advertiser	Top Product	Example Creative	
1	Samsung	Samsung	Banner	
2	Unilever	Onnit AlphaBrain Nootropic Brain Health Supplement	Banner	
3	Procter & Gamble	Always Discreet	Banner	
4	Nestle	Nespresso	Banner	
5	Peloton Interactive, Inc.	Peloton Interactive, Inc.	Banner	
6	Colgate-Palmolive	Colgate Optic White Toothbrush	Banner	
7	e.l.f. Beauty	e.l.f. Holy Hydration Line	Banner	
8	Duracell Inc.	Duracell Inc.	Banner	
9	L'Oreal	CeraVe Moisturizing Cream	Banner	
10	Apple Inc.	Apple Inc.	Banner	

Key Events in 2025:

Hoilday Shopping

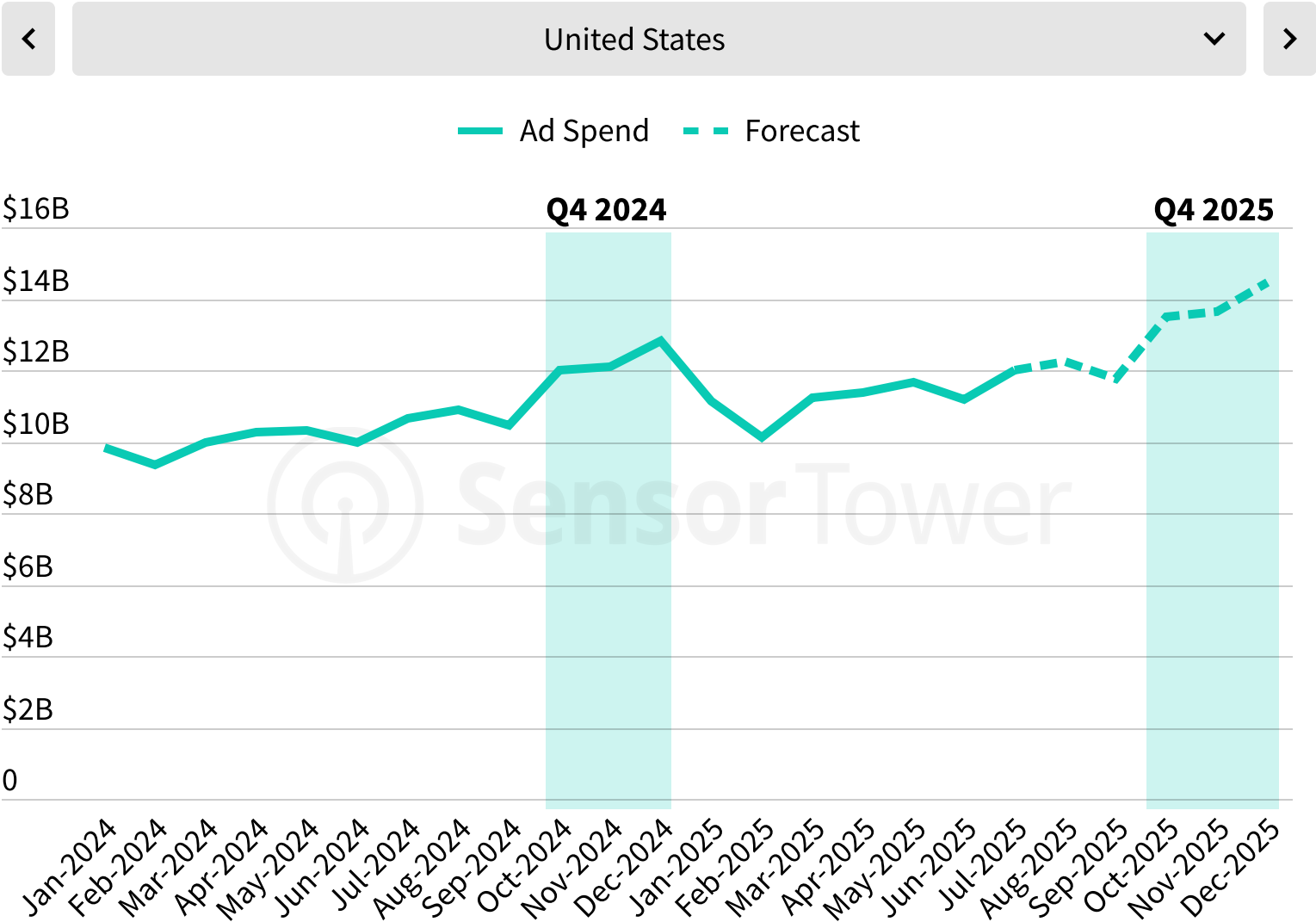
Holiday Advertising Starts Early with Ad Spend Spiking in October

With digital advertising ramping up well before Black Friday and Cyber Monday in the US, advertisers need to be prepared early for the holiday season. Digital ad spend is projected to surpass \$40 billion in Q4 2025, a 16% increase quarter-over-quarter (QoQ) and 13% increase year-over-year (YoY).

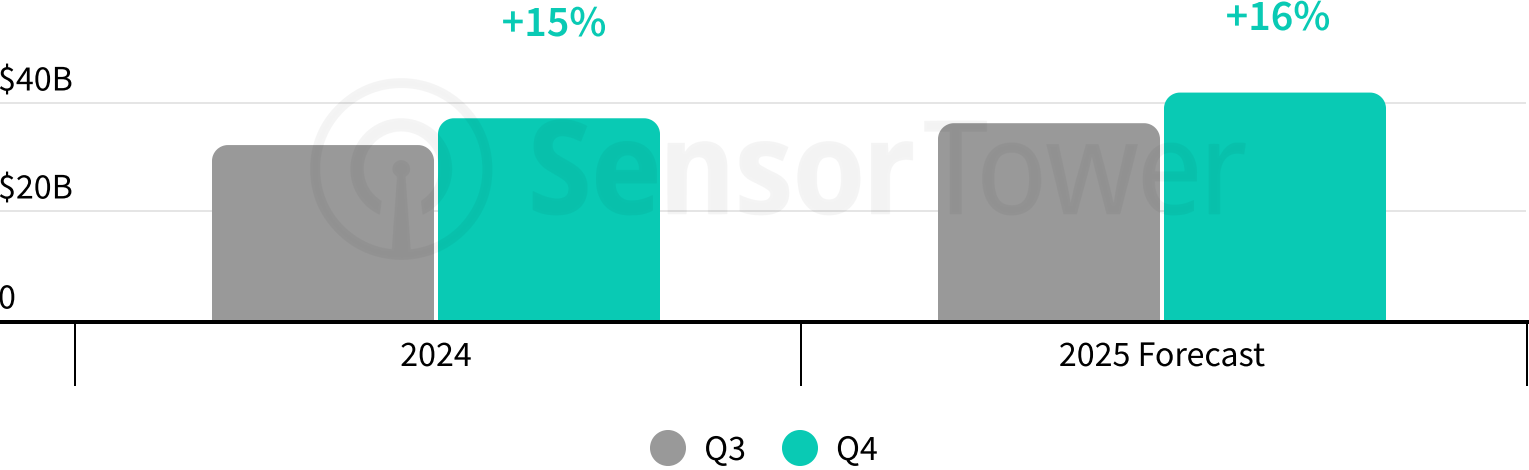
The bump in digital ad spend is not limited to the US. Markets across Europe, Latin America, and APAC are also forecasted for a strong boost in the fourth quarter, even if the holidays driving the boost vary. For example, festivals in India like Diwali boost shopping (and advertising) in October.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of August 14, 2025. Available ad channels vary by market.

Monthly Digital Ad Spend by Country



Quarter-over-Quarter Growth in Q4 vs. Q3 Each Year



Included Ad Channels

Only select ad channels are available in each market

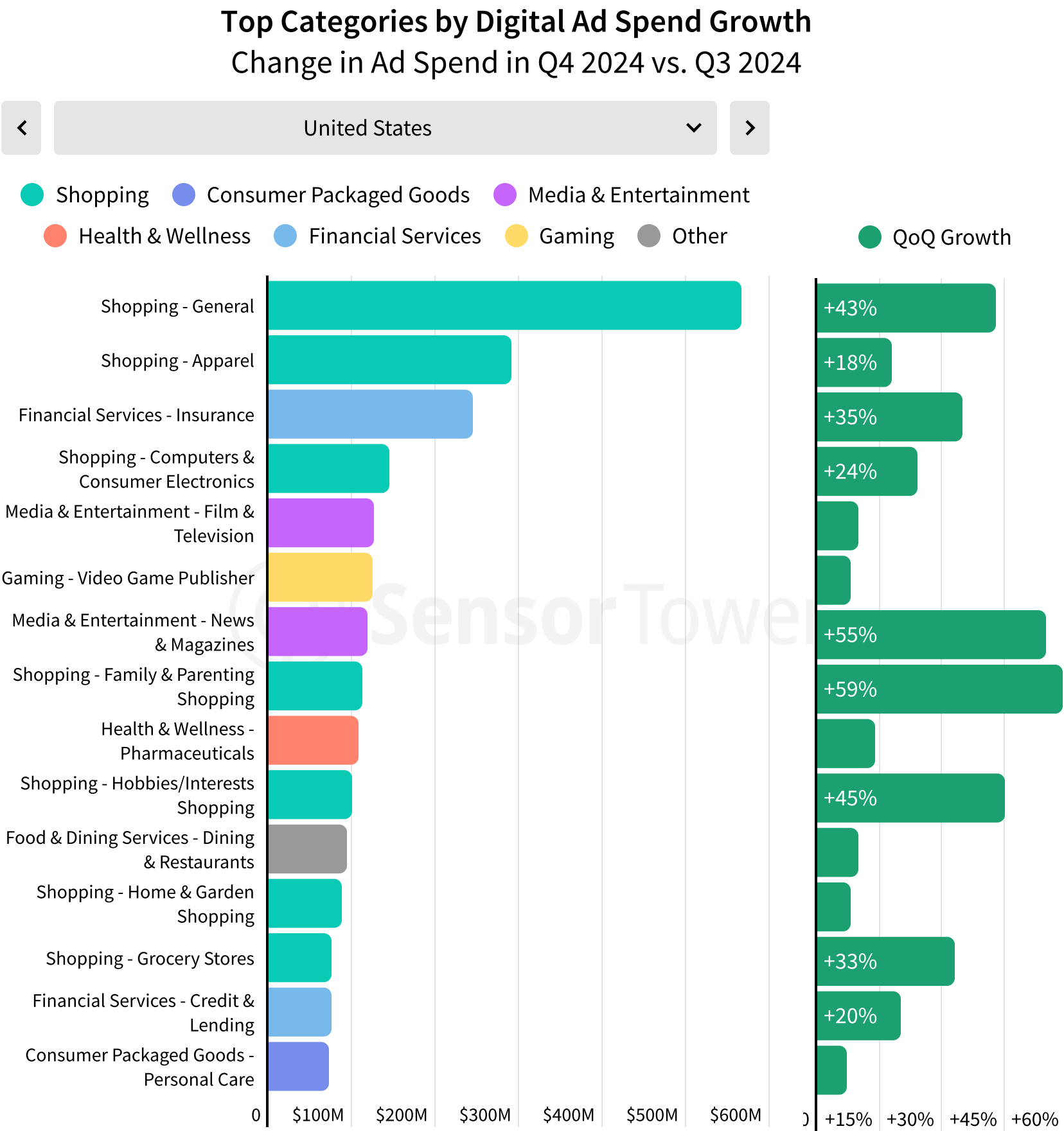
Ad Channel	Included?
Facebook	✓
Instagram	✓
LINE	○
LinkedIn	✓
NAVER	○
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Desktop Video	✓
Mobile Apps	✓
Mobile Display	✓
Mobile Video	○
OTT	✓

Discover Which Subcategories Make the Biggest Push During the Holidays

The holidays are the biggest time for shopping in the US, and naturally, most Shopping subcategories saw a big spike in digital ad spend in Q4 2024. Family & Parenting Shopping was the fastest-growing at +59% quarter-over-quarter (QoQ), followed by Hobbies / Interests, Shopping, Grocery Stores, and Computers & Consumer Electronics. General Shopping advertising also saw huge growth, up 43% QoQ.

Some non-Shopping categories also ramped up spend at the end of the year, including News & Magazines, Insurance, and Credit & Lending.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of August 14, 2025. Available ad channels vary by market. General spend includes creatives that aren't associated with a particular subcategory, creatives that feature products from several subcategories, or corporate ads.



Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
LINE	○
LinkedIn	✓
NAVER	○
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Desktop Video	✓
Mobile Apps	✓
Mobile Display	✓
Mobile Video	○
OTT	✓

When Should Brands Allocate Their Ad Dollars?

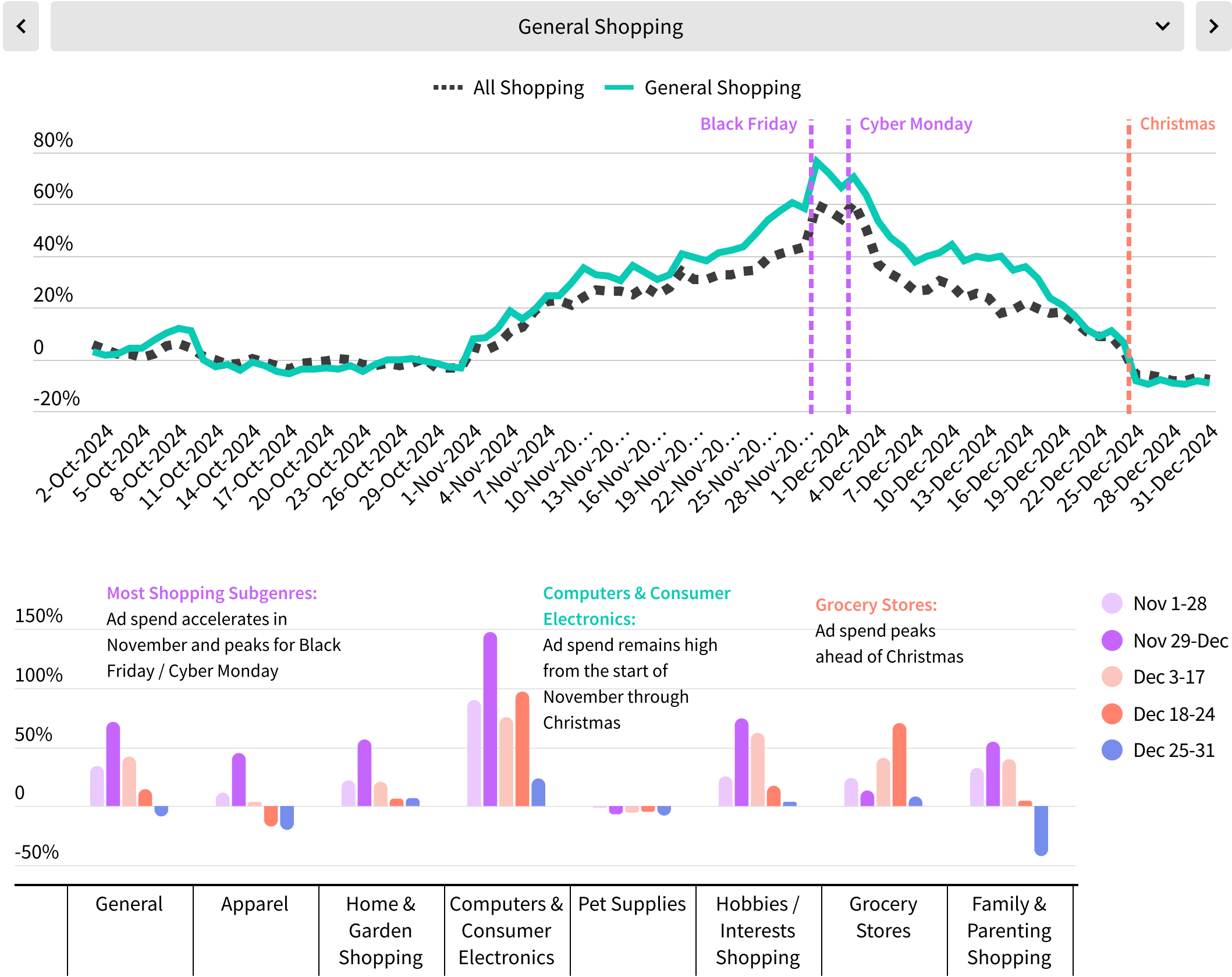
While many advertisers ramp up spend in Q4, the timing varies significantly. Most Shopping subcategories prioritize Black Friday and Cyber Monday, starting to ramp up ad spend at the start of November before peaking with these key shopping days.

Popular gift subcategories like Computers & Consumer Electronics and Hobbies / Interests Shopping keep ad spend high throughout December, with Computers & Consumer Electronics seeing a second peak ahead of Christmas for last-minute shoppers.

Grocery Stores, meanwhile, increase ad spend ahead of Thanksgiving before ramping up in earnest before Christmas.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of August 14, 2025. General spend includes creatives that aren't associated with a particular subcategory, creatives that feature products from several subcategories, or corporate ads.

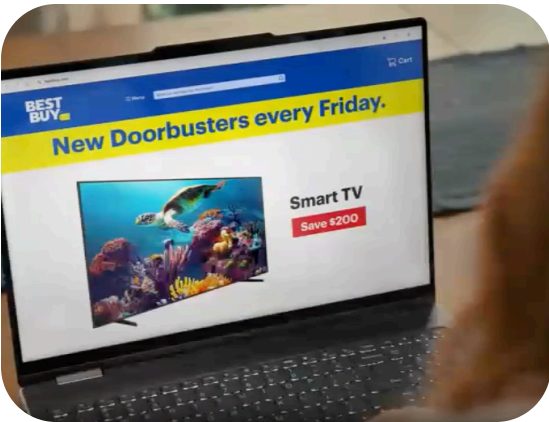
Daily US Digital Ad Spend by Shopping Subgenre in the 2024 Holiday Season
Indexed to Average Daily Spend in September for Each Subgenre



Best Buy's Holiday Ad Strategy Involves Months of Testing and Optimizing

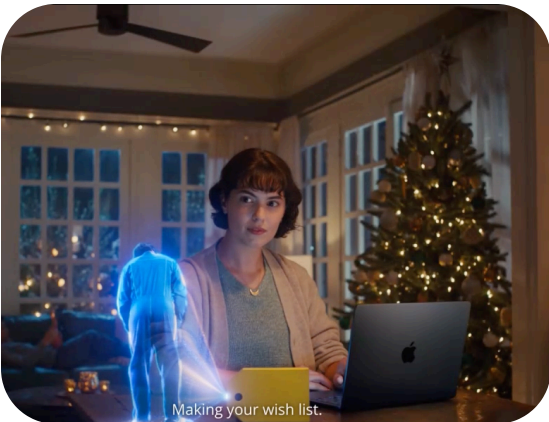
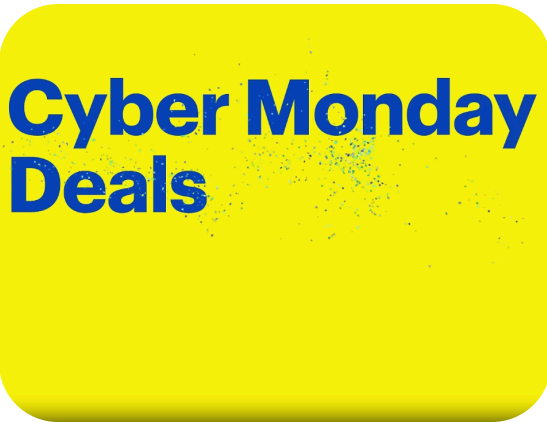
Advertisers are competing for consumer attention earlier and earlier, including testing and optimizing in the lead-up to the shopping holidays. Best Buy is a prime example, offering weekly doorbusters ahead of Black Friday and maintaining a consistent theme throughout the holiday season.

Lead-up to Black Friday (November 1 - 28)



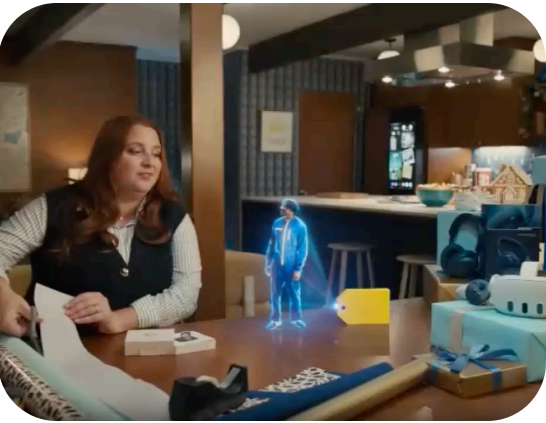
Top Over-the-Top (OTT) creatives highlighted plans for hosting visitors and the ease of shopping for "Black Friday" deals online rather than camping outside the store. Best Buy continued to use these creatives throughout the holiday season.

Black Friday / Cyber Monday (November 29 - December 2)



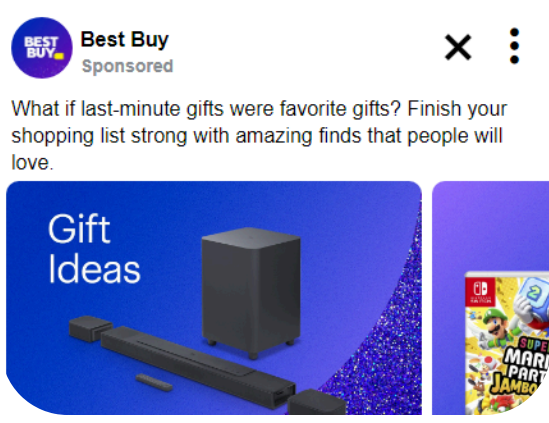
YouTube creatives promoted Best Buy's deals on specific products, while OTT creatives continued the theme of using Best Buy on a laptop to prepare for holiday celebrations.

Lead-up to Christmas (December 3 - 17)



Top video creatives shifted to promoting gift shopping. Best Buy and Google also joined forces to advertise Google's AI offering, Gemini, with holiday-themed creatives.

Week Before Christmas (December 18 - 24)



Best Buy pivoted to advertise the availability of "last-minute" gifts. The creatives were similar to the Cyber Monday creatives, but shift the focus to last-minute holiday shopping.

Source: Sensor Tower
Note: Example top digital ad creatives in the United States.

Key Events in 2025:

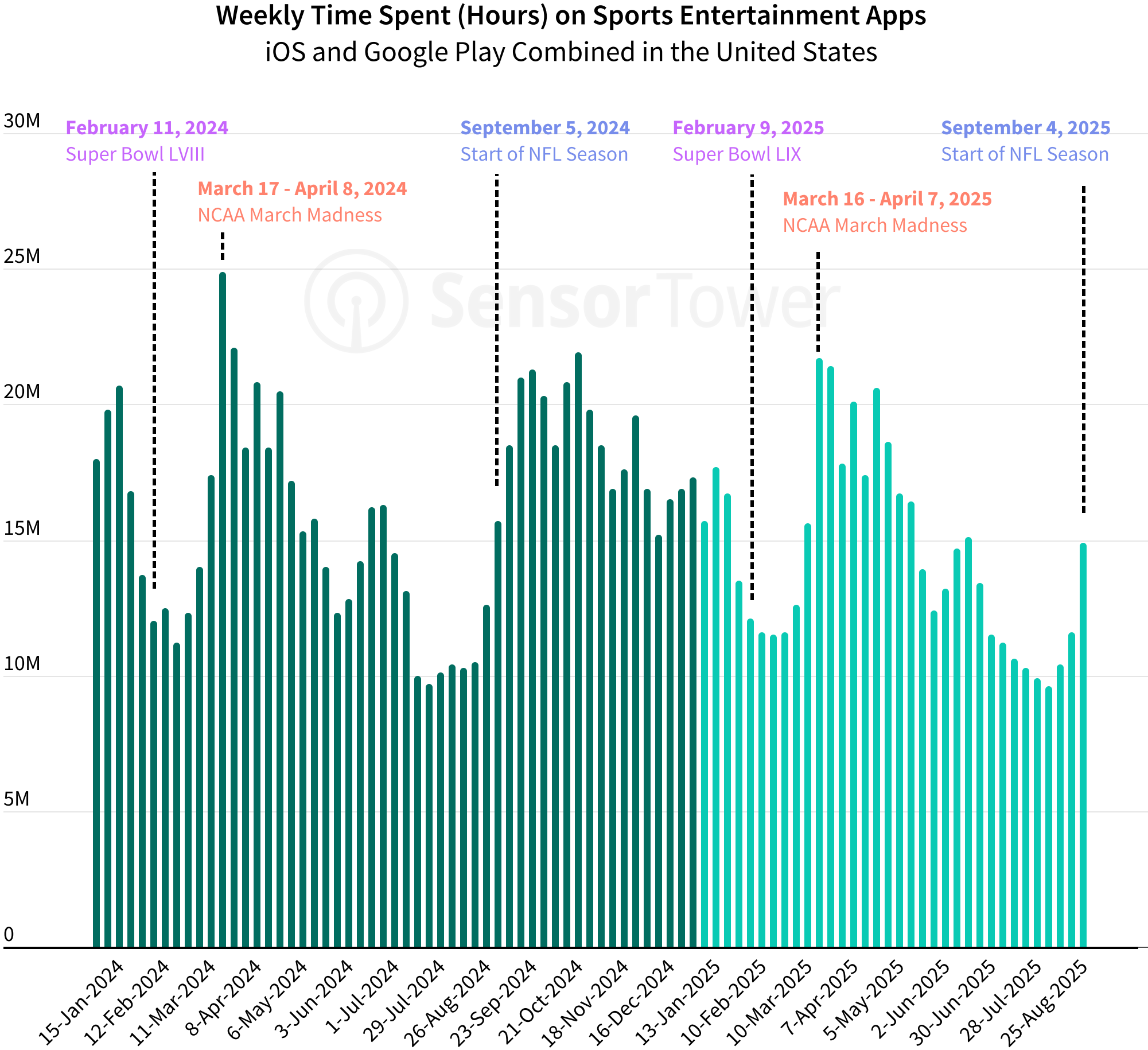
United States Sports

Football and Playoff Tournaments Drive Sports Consumption in the United States

Sports demand in the United States is strongly tied to marquee events like the National Football League (NFL) season. Playoffs and tournaments also drive interest, including the NCAA March Madness tournament and the National Basketball Association (NBA) and National Hockey League (NHL) playoffs, which both run from April to June.

These sports events provide a key opportunity for marketers looking to connect with a specific audience. And with sports content being widely dispersed across more and more streaming services, advertisers can target specific events and platforms that they feel are the best fit for their products.

Source: Sensor Tower
Note: Time spent on Sports Entertainment apps in the United States across iOS and Google Play. Sports Entertainment apps classified using Sensor Tower's App IQ taxonomy as of September 7, 2025.



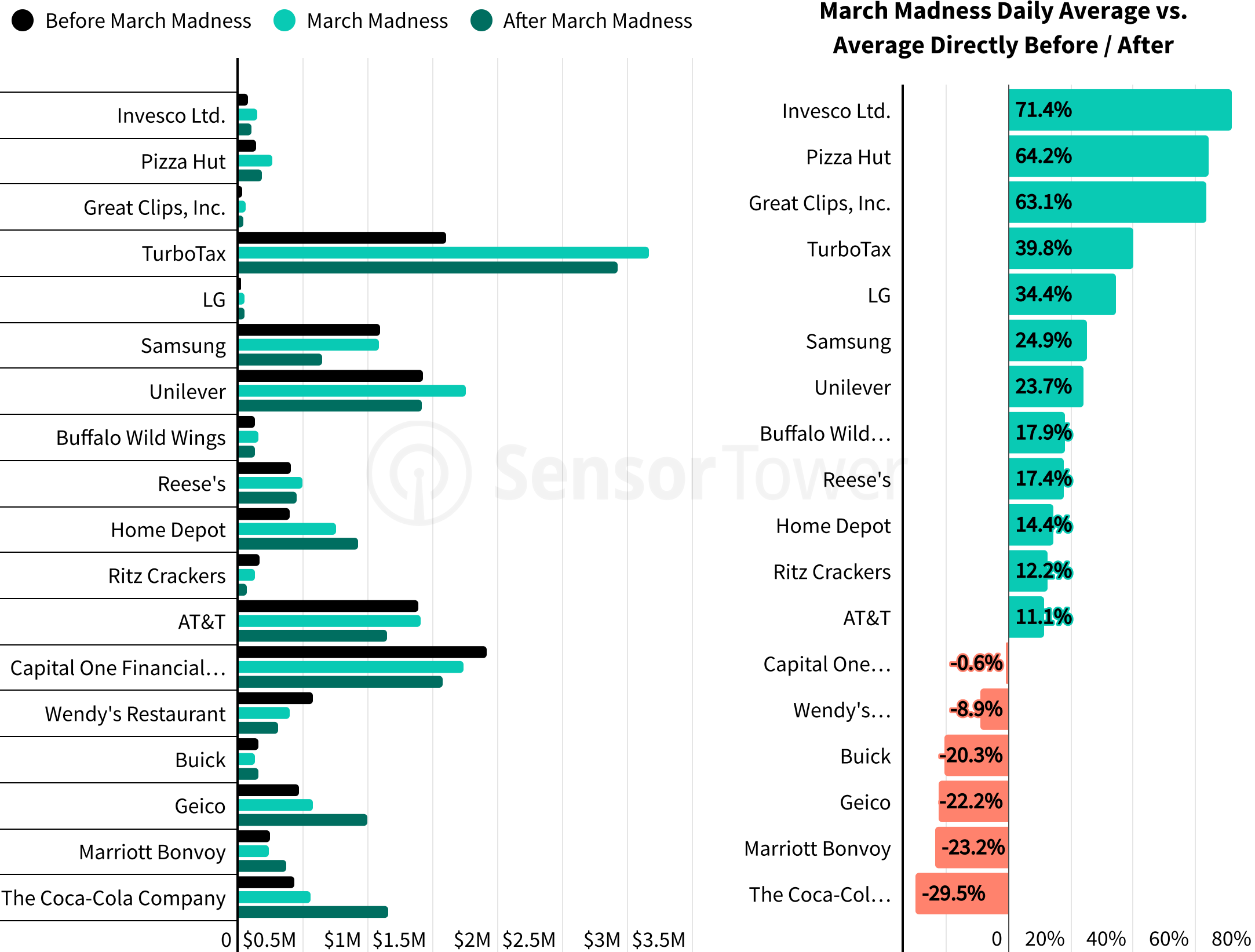
Smaller Brands Tended to Leverage their NCAA Partnerships with Big Ad Campaigns

Not surprisingly, brands with a relatively small ad budget did the most with their NCAA partnership for March Madness. Brands like Invesco, Pizza Hut, and Great Clips increased their digital ad spend by more than 60% during the tournament versus their average spend in the weeks immediately before and immediately after the tournament. For larger brands, this corporate partnership was likely just one piece of their much larger advertising strategy.

Several food and beverage companies partnered with the NCAA, seeing March Madness as an opportunity not only to increase brand awareness but to provide snack and dining options for people watching tournament games. Examples included Pizza Hut, Buffalo Wild Wings, Reese's, Ritz Crackers, and Wendy's.


Source: Sensor Tower
Note: March Madness ad spend includes average daily spend between Selection Sunday (March 16, 2025) through the Men's National Championship game (April 7, 2025). Before March Madness period includes average daily spend during the 23 days before Selection Sunday, and the after March Madness period includes average daily spend during the 23 days after the National Championship game. Includes a selection of advertising channels. Ad spend estimates as of September 7, 2025.

Increase in Digital Ad Spend for NCAA Corporate Champions and Partners
United States Average Daily Ad Spend During March Madness vs. the Period Before and After





Top Brands Highlight Men's and Women's Tournaments in Creatives

Brands used their partnership with NCAA March Madness to leverage the popularity of men's and women's college basketball. Advertisers can now also partner with individual players, further boosting the connection between the brand and the tournament.




Example Creative on LinkedIn




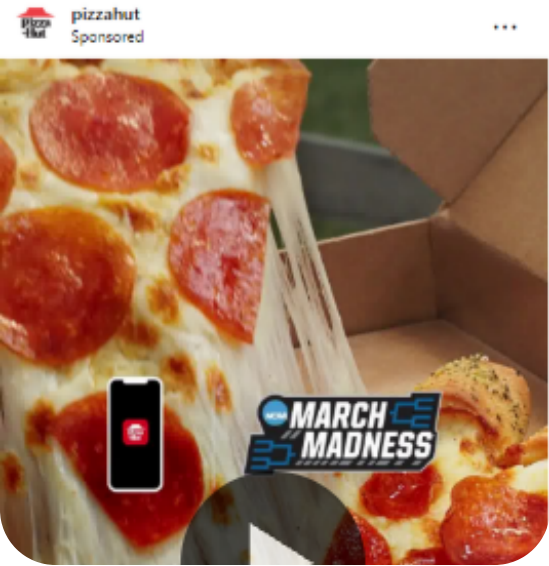


Invesco's creative combined a portrayal of the Texas women's basketball team from the 1980's with the idea of futuristic technology. This fits with the theme of Invesco's broader digital ad strategy: innovation.




Example Creative on Instagram







Pizza Hut's ad creative promoted new product offerings and their mobile app as a way to promote easy ordering for those watching March Madness games. The voiceover also sounds like Kevin Harlan, announcer of many top basketball and March Madness games, further buidling the association between the two brands.




Example Creative on Facebook




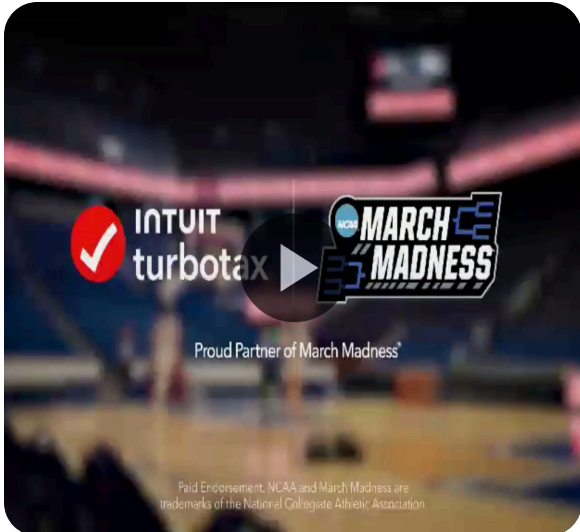


Another common features of March Madness ad creatives is including a side-by-side of the brand logo with the NCAA March Madness logo. For example, Great Clips included this for their Facebook creative offering a \$10 off coupon.



Example Creative on OTT





Turbo Tax included a pair of top college basketball players, University of Kentucky's Clara Strack for the women's team and Koby Brea for the men's team. Brands can now partner with individual players in addition to the NCAA.

Source: Sensor Tower
Note: Example top digital ad creatives in the United States.

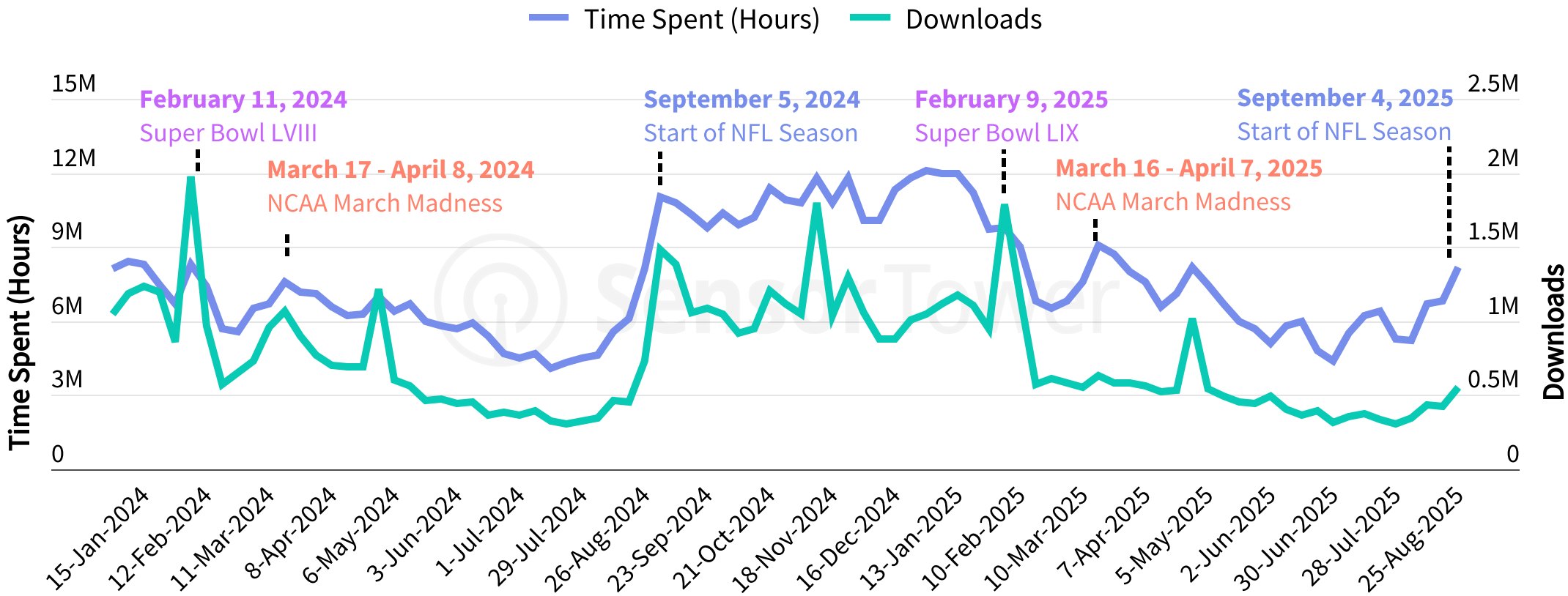
The NFL Season Remains the Focus for US Sports Betting

The NFL season dominates user attention for sports bettors in the US. Time spent in sports betting apps is significantly higher throughout the NFL season compared to the rest of the year, and the Super Bowl provides a key opportunity to add new users.

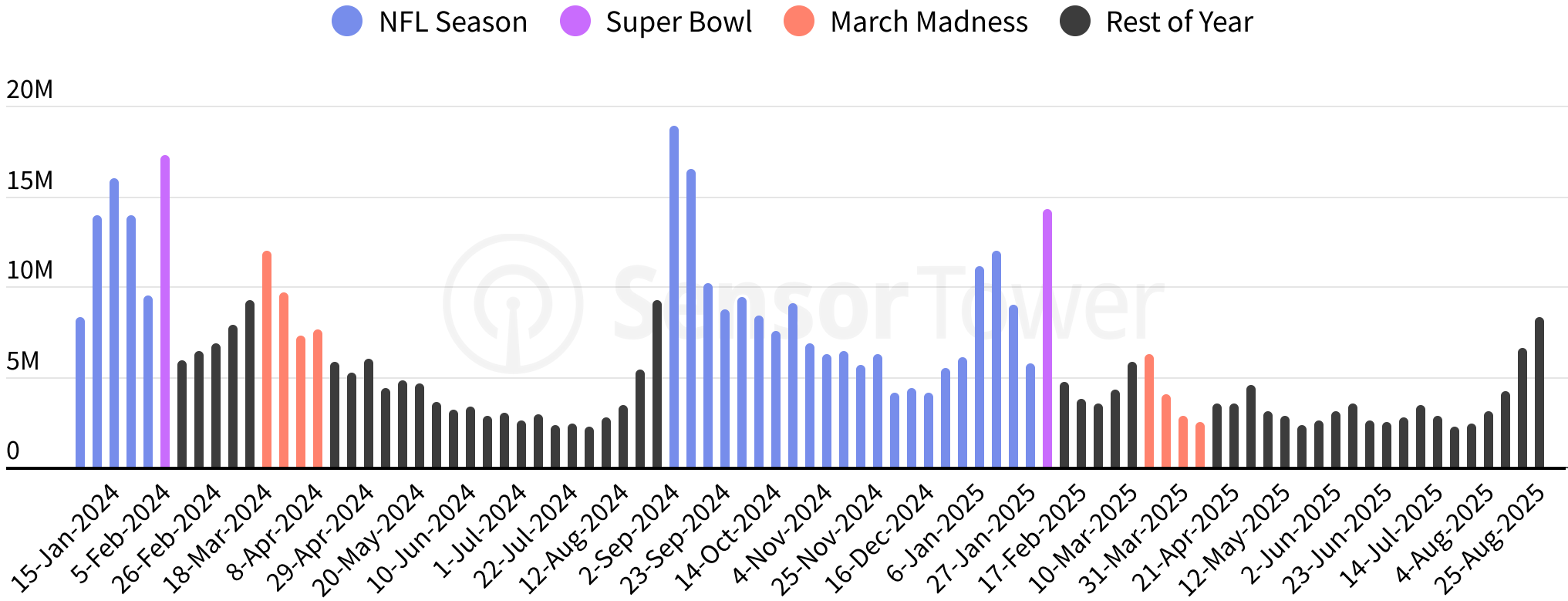
As a result, sportsbook advertisers are starting their campaigns for the 2024-2025 NFL season. Early September is a crucial time for these companies as they compete for new users who are engaged with football for the entire NFL season.

Source: Sensor Tower
Note: Time spent and downloads for Sports Betting apps in the United States across iOS and Google Play. Sports Betting apps classified using Sensor Tower's App IQ taxonomy as of September 7, 2025. Digital ad spend includes a selection of advertising channels. Ad spend estimates as of September 7, 2025.

Weekly Time Spent and Downloads for Sports Betting Apps in the United States



Weekly Digital Sports Ad Spend for Sportsbook Advertisers in the United States



Sports Betting Brands Promote Free Bonus Bets and Same Game Parlays

Because of the value of early-season bettors, sportsbooks offer enticing deals specifically to new users. This includes huge multipliers in bonus bets or even Fanatics Fancash for new customers.



DraftKings

Example Creative on TikTok



Ins & Outs 2024- Sports Betting Edition

Ins:

- Squad rides
- Same Game Parlays
- DraftKings Sportsbook New Customer Offer**
- Player Props
- Betting RESPONSIBLY



and last for ends is gonna
be betting responsibly

DraftKings' recent creative on TikTok attempts to capture a more authentic, low-budget feel. It displays a simple screenshot from a phone Notes app and even an outdated year to make it feel like a well-worn video. It also offers \$200 in bonus bets to new customers betting \$5.

you get **\$200** in
bonus bets instantly 🤪

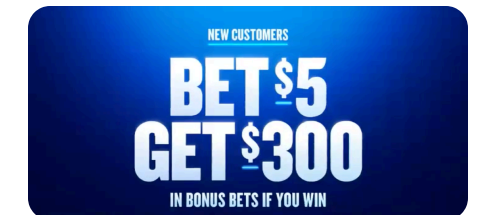


FanDuel

Example Creative on OTT

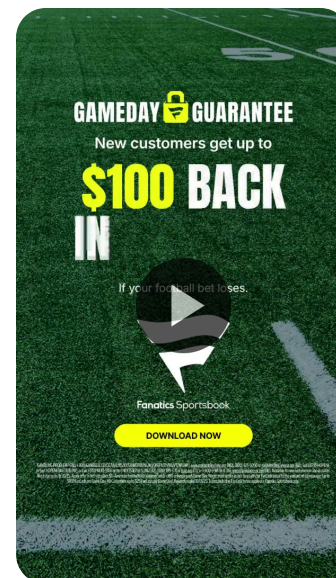


FanDuel's creative on OTT streaming services like Pluto TV, Tubi, and Hulu, promotes its same game parlay and offers \$300 in bonus bets for new customers betting \$5 (if the bet wins). It also highlights its partnership with the NFL.

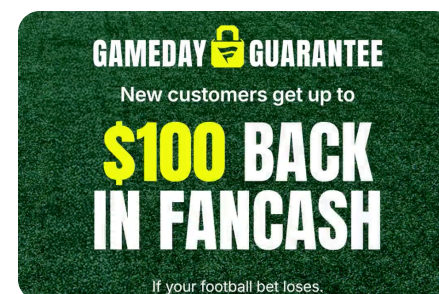


Fanatics

Example Creative on Mobile Apps

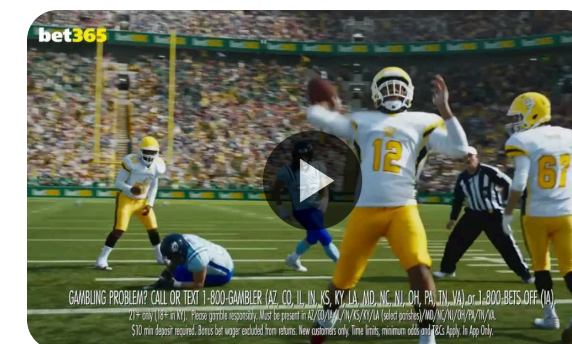


Fanatics has a simple creative offering \$100 in Fancash for new customers whose first football bet loses. The offer adds urgency, as it is only available until October.

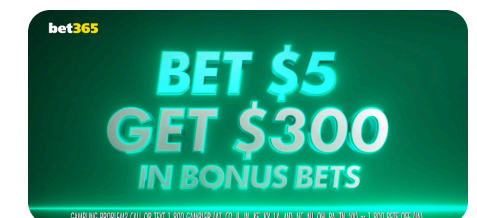


Bet365

Example Creative on YouTube



Bet365 attempts to one-up the competition with the most compelling offer: \$300 in bonus bets following a \$5 bet — win or lose. Most other offers provide less in bonus bets or require the bet to either win or lose to receive the bonus.



Source: Sensor Tower

Note: Example top digital ad creatives in the United States.

Key Events in 2025:

Back-to-School

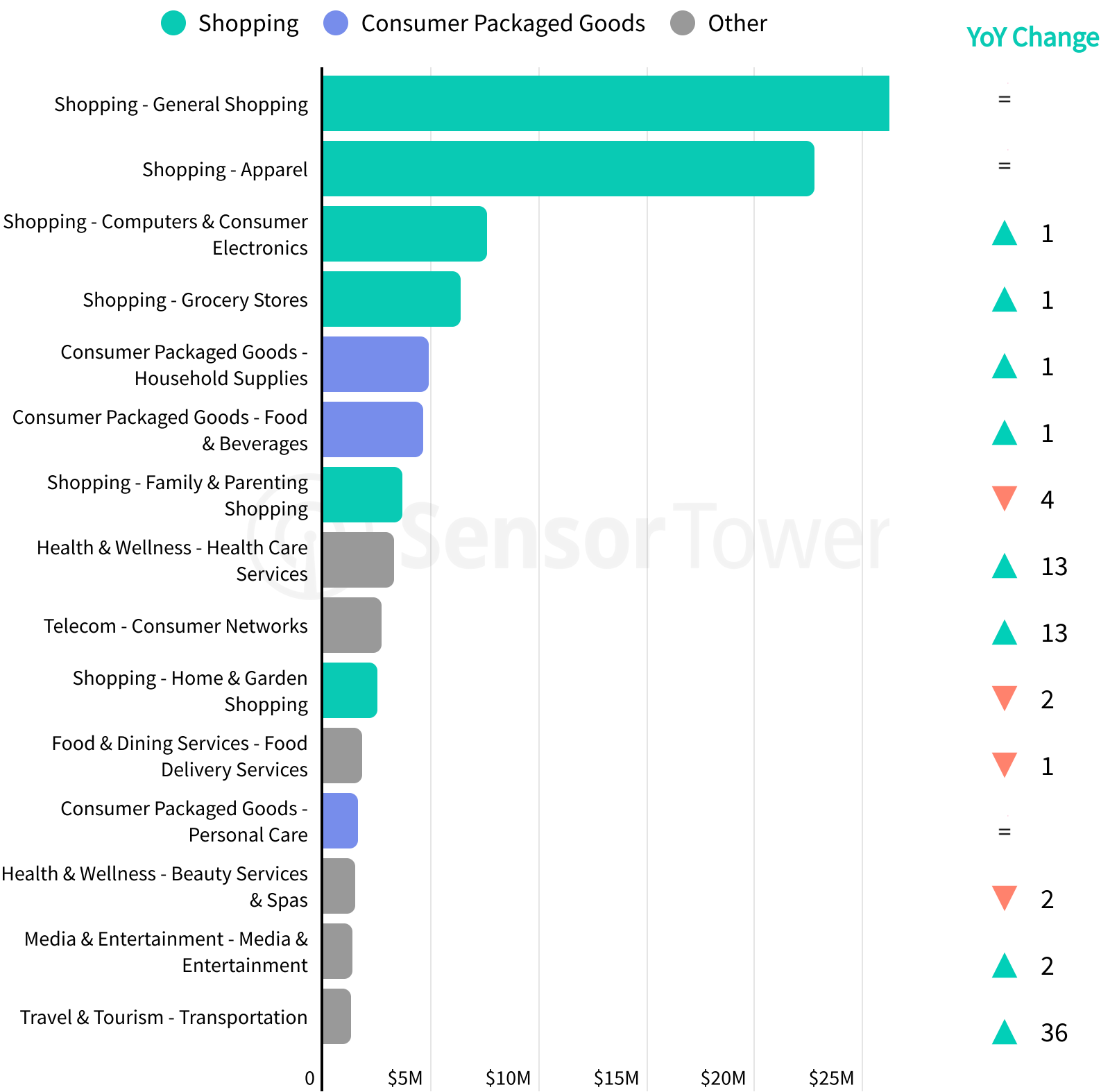
The Rise of Non-Traditional Back-to-School Advertisers

The Shopping and CPG categories continue to dominate the Back-to-School ad spend landscape, securing all of the top six positions. The General Shopping and Apparel categories lead the way, followed by Computers & Consumer Electronics and Grocery Stores, reinforcing their status as core pillars of the season.

The Back-to-School season is expanding beyond traditional retail, with a massive surge in ad spend from non-traditional sectors. Notably, the transportation category made a dramatic entry into the top 15 in 2025 after being outside the top 50 in 2024, while Health Care Services (+558% YoY) and Consumer Networks (+457% YoY) also saw explosive growth, reflecting a major shift in how brands are targeting students and families.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Back-to-School ad spend is defined by the keywords "back to school," "school supplies", or "school shopping." This analysis focuses on consumer-facing categories, including goods and services, and does not include the Job & Education category.

Top Categories by Back-to-School Ad Spend
Ad Spend between July and August in 2025



Included Ad Channels

Only select ad channels are available in each market

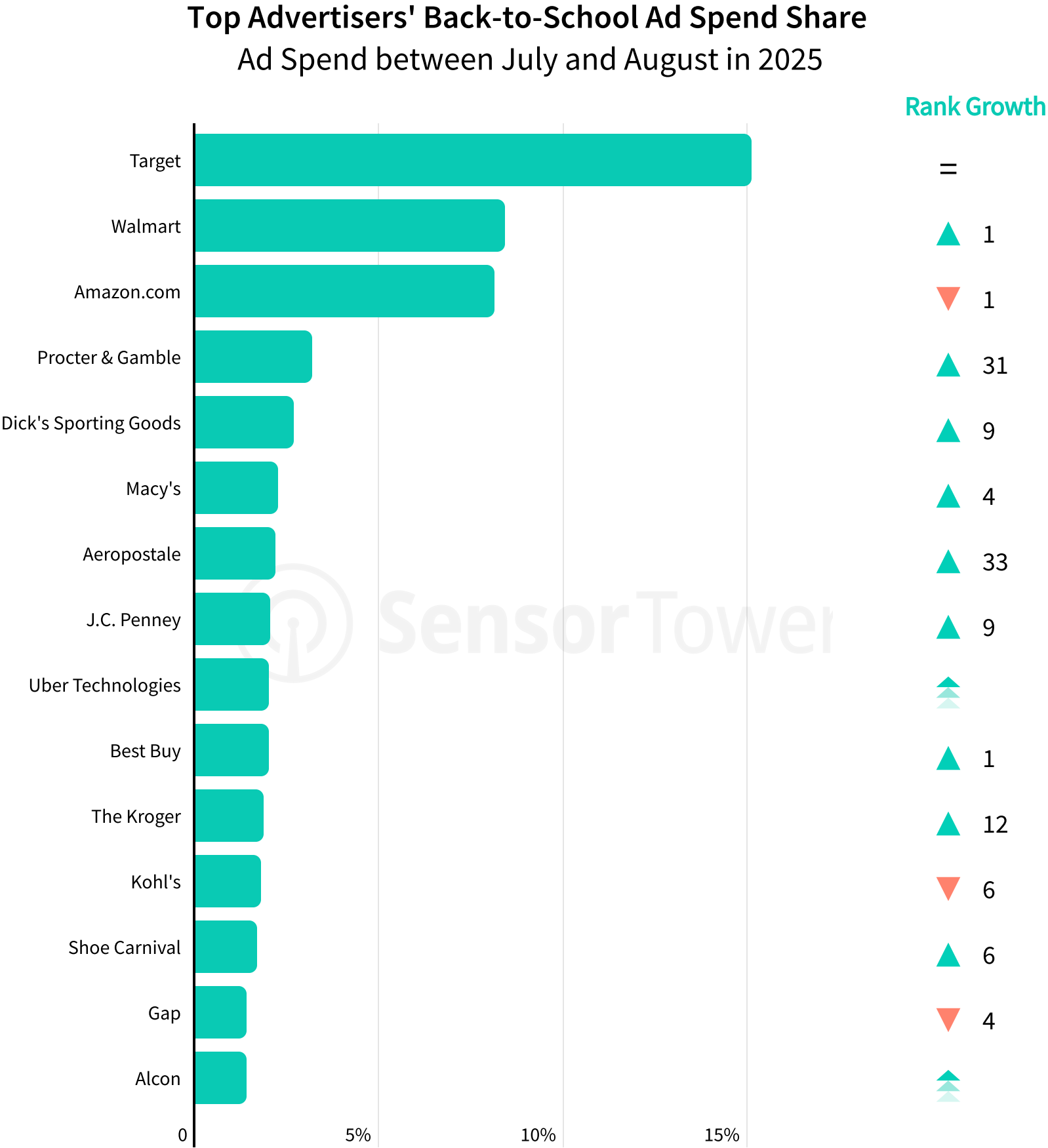
Ad Channel	Included?
Facebook	✓
Instagram	✓
LINE	○
LinkedIn	✓
NAVER	○
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Desktop Video	✓
Mobile Apps	✓
Mobile Display	✓
Mobile Video	○
OTT	✓

Beyond the Ride: Uber's Aggressive Entry into Back-to-School Advertising

Major retailers like Target, Walmart, and Amazon dominate the Back-to-School (BTS) ad landscape, accounting for nearly one-third of the total BTS ad spend. This reinforces their position as the core destinations for seasonal shopping.

Uber's massive YoY ad spend growth propelled it into the top ranks of BTS advertisers, reflecting its aggressive push to capture a new market. Its creatives are designed to appeal to both parents and students, offering a dual value proposition of convenience (free rides) and savings (discounts on Uber Eats for everything from lunch to school supplies).

Source: Sensor Tower
Note: Includes a selection of advertising channels. Back-to-School ad spend is defined by the keywords "back to school," "school supplies", or "school shopping." This analysis focuses on consumer-facing categories, including goods and services, and does not include the Job & Education category.



Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
LINE	○
LinkedIn	✓
NAVER	○
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Desktop Video	✓
Mobile Apps	✓
Mobile Display	✓
Mobile Video	○
OTT	✓

Back-to-School Advertising is Starting Earlier in 2025

While the final four weeks before September continue to be the most critical time for ad spend, many advertisers are actively shifting a portion of their budget to the earlier kick-off and mid-season periods. This indicates a strategic effort to reach parents sooner as they begin to plan their shopping and spread out their budgets.

Household Supplies brands are leading the shift toward earlier ad spend, allocating a significant 7% of their budget to the kick-off period in 2025 after having no spend in 2024. Computers & Consumer Electronics also saw a clear shift, with its mid-season share increasing by 14 percentage points. This trend is particularly evident in Walmart, where its BTS ad spend on Computers & Consumer Electronics during mid-season surged from 50% to 84% as it pulled back significantly from the final weeks.


Source: Sensor Tower
Note: Includes a selection of advertising channels. Back-to-School ad spend is defined by the keywords "back to school," "school supplies", or "school shopping." This analysis focuses on consumer-facing categories, including goods and services, and does not include the Job & Education category.

Back-to-School Ad Spend Distribution during the 12 Weeks before September
2024 vs 2025






Back-to-School Ad Strategies: A Retailer Comparison


With consumers in the United States becoming more cost conscious in 2025, brands like Walmart and Amazon make low prices a key component of their Back-to-School campaigns. The brands also attempt to appeal directly to parents and teachers, their primary audiences for Back-to-School shopping.







Target




Target’s creative strategy is built on an emotional connection with families, using phrases like “first-day butterflies to last-day hive fives.” The brand also highlights teachers to position itself as a partner that understands and values their work, building trust with both teachers and parents.





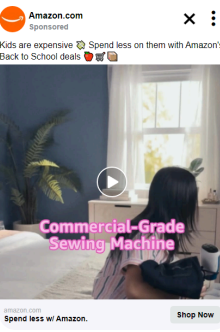
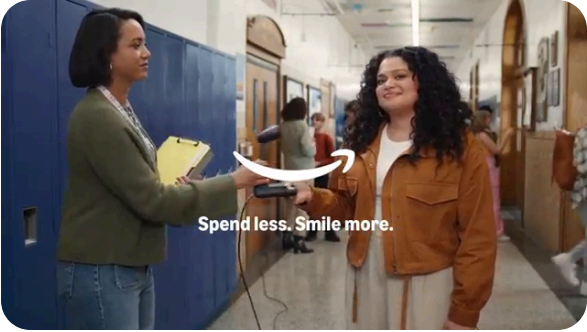
Walmart



Walmart's Back-to-School creative strategy is centered on low prices and convenience. Its ads use phrases like "shop for less" and "prices you'll love," while also positioning the retailer’s membership program as the ultimate solution for parents by delivering items directly to their home and saving them multiple trips.



Amazon



Amazon's Back-to-School ads directly address parents' financial pain points by highlighting a wide selection and low prices. By leveraging phrases like "spend less on your kids" and "Save with back to school deals," the brand effectively positions itself as a trusted, single destination for every Back-to-School need.

Source: Sensor Tower
Note: Example top back-to-school creatives in the United States.

Category Spotlight: Shopping

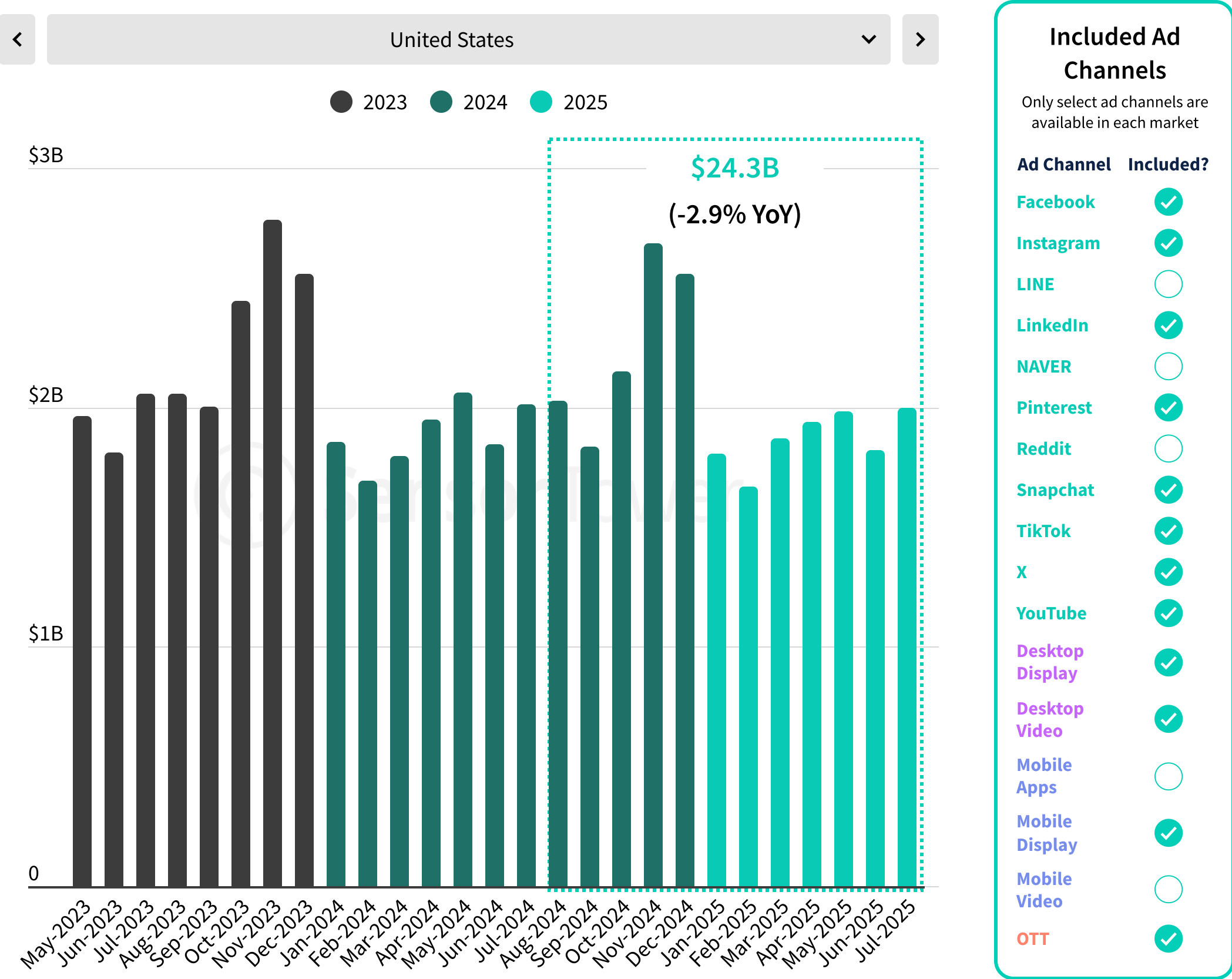
US Shopping Digital Ad Spend Declines 3%

Digital ad spend on Shopping in the US declined 3% YoY to \$24 billion over the 12 months between August 2024 through July 2025. This marked a notable shift from the previous year, where ad spend was on a positive growth trend. The decline is likely due to economic uncertainty and recent tariffs.

Beyond the US, market dynamics were varied. A slight contraction was observed in Canada (-1%) and Italy (-1%), yet most other global markets experienced marginal growth. UK and France emerged as key growth drivers, with ad spending expanding by 8% and 7%, respectively.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of September 3, 2025. India, Japan, and South Korea data are available starting January 1, 2024 and are excluded from this chart.

Monthly Shopping Category Digital Ad Spend



Included Ad Channels

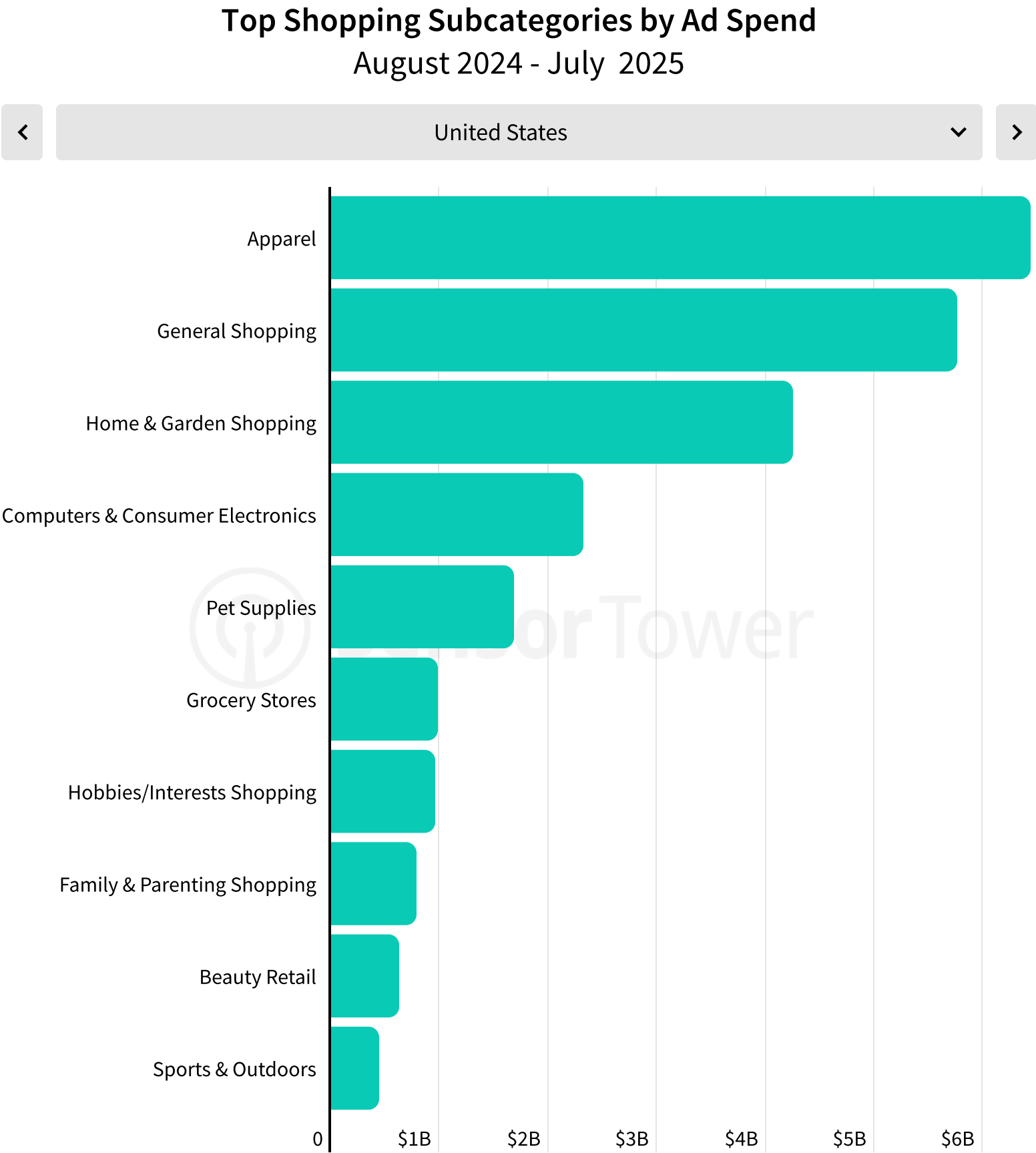
Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
LINE	○
LinkedIn	✓
NAVER	○
Pinterest	✓
Reddit	○
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Desktop Video	✓
Mobile Apps	○
Mobile Display	✓
Mobile Video	○
OTT	✓

Women's Apparel Brands in the US Pullback in Ad Spend

Digital ad expenditure by US apparel brands fell by 5% YoY in the first seven months of 2025, primarily driven by a significant 26% YoY pullback in ad spending from women's apparel brands. Despite this downturn, apparel remained the top shopping subcategory in the United States, with over \$6 billion in digital ad spend over the 12 months between September 2024 and August 2025.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of September 3, 2025. General spend includes creatives that aren't associated with a particular subcategory, creatives that feature products from several subcategories, or corporate ads.



Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
LINE	○
LinkedIn	✓
NAVER	○
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Desktop Video	✓
Mobile Apps	✓
Mobile Display	✓
Mobile Video	○
OTT	✓

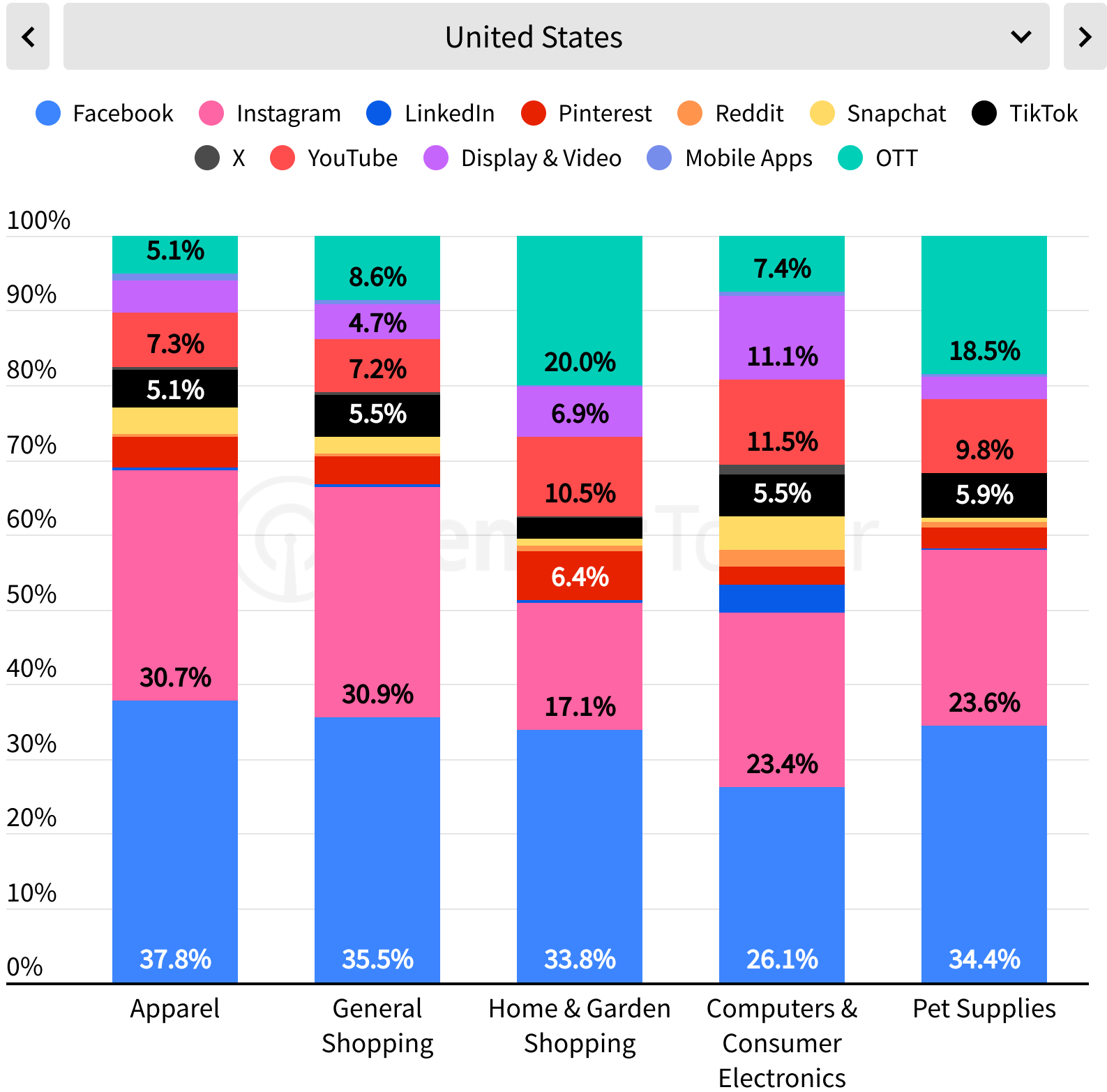
Meta Platforms Are Go-To Channels for Shopping Advertisers

Facebook and Instagram are the most popular channels for Shopping advertisers, capturing more than half of the digital ad spend for the top subgenres in the US. Apparel advertisers, in particular, are increasingly focusing on Meta platforms, with their combined ad spend on Facebook and Instagram increasing by 3 percentage points YoY in the first seven months of 2025 to reach nearly 70% of the total digital ad spend.

While social media is key, the distribution of ad spend varies by subgenre. Video form type creatives on OTT, YouTube, and TikTok are particularly popular for Home & Garden Shopping and Pet Supplies, where they account for nearly 35% of the digital ad spend.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of September 3, 2025. General spend includes creatives that aren't associated with a particular subcategory, creatives that feature products from several subcategories, or corporate ads.

Share of Digital Ad Spend by Ad Channel for Top Shopping Subcategories
August 2024 - July 2025



Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
LINE	○
LinkedIn	✓
NAVER	○
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Desktop Video	✓
Mobile Apps	✓
Mobile Display	✓
Mobile Video	○
OTT	✓

Temu and Shein have Scaled Back Their US Ad Spending

Chinese e-commerce platforms Temu and Shein have significantly reduced their US ad spend, with Temu’s dropping by 50% and Shein’s by 41% YoY in the 12 months from August 2024 to July 2025. This pullback, largely attributed to tariff-related concerns, led the platforms to drop from their positions as top two advertisers to the 3rd and 7th ranks, respectively.

While shifting their focus from the US market, Temu and Shein are attempting to gain market share across Europe's major markets (UK, France, Germany, Spain, and Italy). Temu has cemented its position as a top three shopping advertiser in these markets, while Shein, with its apparel-focused strategy, is the #1 apparel advertiser across all five.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Includes advertisers with at least \$100,000 in ad spend in the subcategory. Ad spend estimates as of September 3, 2025. General spend includes creatives that aren't associated with a particular subcategory, creatives that feature products from several subcategories, or corporate ads.

Top Advertisers by Digital Ad Spend for Shopping Subcategories
August 2024 - July2025

<

United States

>

Rank	Overall	Apparel	General Shopping	Home & Garden Shopping	Computers & Consumer Electronics	Pet Supplies
1	Amazon.com	SheIn Group Limited	Amazon.com	Home Depot	Samsung	Chewy, Inc.
2	Walmart Inc.	Gap Inc.	Walmart Inc.	Amazon.com	Google	Nestle
3	Temu (Whaleco Inc.)	Amazon.com	Temu (Whaleco Inc.)	Wayfair LLC.	Best Buy Co., Inc.	Mars, Incorporated
4	Target	TechStyle Fashion Group	Etsy, Inc.	Lowe's Home Centers, Inc.	Apple Inc.	Colgate-Palmolive
5	Chewy, Inc.	Tapestry, Inc.	TJX Companies, Inc.	Harbor Freight Tools	Ziff Davis, Inc.	General Mills
6	Samsung	Nike	Target	IKEA	Lenovo	Petco
7	SheIn Group Limited	Stitch Fix, Inc.	Dick's Sporting Goods, Inc.	Ashley Furniture Industries Inc.	Amazon.com	The Farmer's Dog, Inc.
8	Home Depot	VF Corporation	Kohl's Department Stores, Inc.	Mattress Firm, Inc.	Dell	PetSmart
9	The Kroger Co.	Signet Jewelers	Macy's, Inc.	Walmart Inc.	Hewlett-Packard (HP)	Zoetis Inc.
10	Nestle	Luxottica Retail	Adidas	Temu (Whaleco Inc.)	Remarkable AS	The J. M. Smucker Company

Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	<input checked="" type="checkbox"/>
Instagram	<input checked="" type="checkbox"/>
LINE	<input type="checkbox"/>
LinkedIn	<input checked="" type="checkbox"/>
NAVER	<input type="checkbox"/>
Pinterest	<input checked="" type="checkbox"/>
Reddit	<input checked="" type="checkbox"/>
Snapchat	<input checked="" type="checkbox"/>
TikTok	<input checked="" type="checkbox"/>
X	<input checked="" type="checkbox"/>
YouTube	<input checked="" type="checkbox"/>
Desktop Display	<input checked="" type="checkbox"/>
Desktop Video	<input checked="" type="checkbox"/>
Mobile Apps	<input checked="" type="checkbox"/>
Mobile Display	<input checked="" type="checkbox"/>
Mobile Video	<input type="checkbox"/>
OTT	<input checked="" type="checkbox"/>

Shopping Ads Spotlight

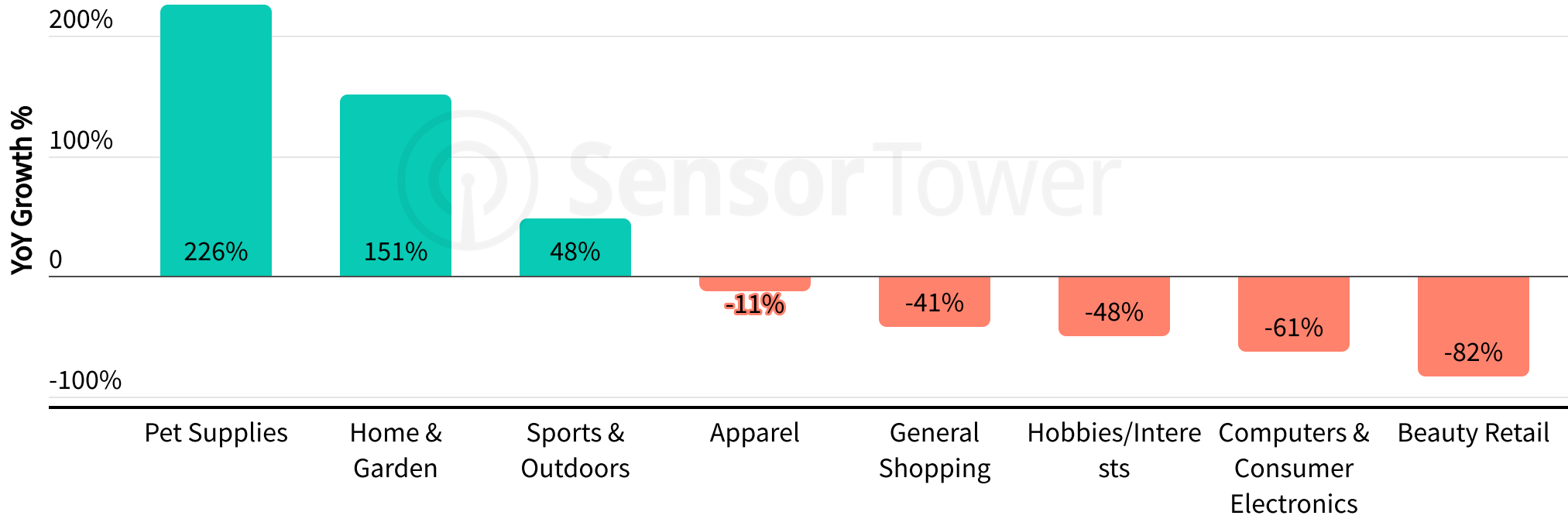
'Made in USA' Amid Tariffs

Shopping ad spending that specifically highlights "Made in USA," "manufactured in USA," or "assembled in USA" saw a significant 32% YoY increase in 2Q25. This trend was particularly pronounced in the Pet Supplies and Home & Garden subcategories, which saw massive ad spend growth of 226% and 151%, respectively.

Wayfair led the way with an explosive more than 10x YoY growth in ad spend on "Made in USA" products, while Walmart increased its spending by 104% YoY. Other key retailers, including Target, Lowe's, and Ashley Furniture, also aggressively increased their ad spend, indicating a collective strategic shift by retailers to adapt their messaging to consumer demand and recent tariffs.

Source: Sensor Tower
Note: "Made in USA" ad spend is defined by the keywords "Made in USA," "manufactured in USA," or "assembled in USA"

YoY Growth in "Made in USA" Ad Spend by Subcategory
2Q24 vs 2Q25, United States



Symple Stuff Plug-In Dimmable LED Wall Mounted Picture Light w/ Remote 40.0 H x 17.0 W x 11.5 D in gray in Silver | 17" Standar

Promoted by Wayfair

Paracord Planet Nylon Military Paracord 550 lbs Type III 7 Strand Utility Cord Rope USA Made, Size:100', Blue

Promoted by Walmart

target Sponsored

Shop now

target Box up the clutter. Organize your garage with Brightroom heavy duty storage. made in the USA. Only at Target.

Lowe's Home Improvement Sponsored

Proudly made in the USA, the American Forged Series features custom USA flag laser-etched pliers and cutters. Only at Lowe's

KLEIN TOOLS

8-20 AWG Klein-Kurve® Wire Stripper/Cutter

Features six stripping holes and a shear-cutting knife.

Shop Now

Shop durable home items from Brightroom, made in the USA

AdChoices

brightroom.

A Reduction in the Reliance on Discount-Driven Ads on RMNs

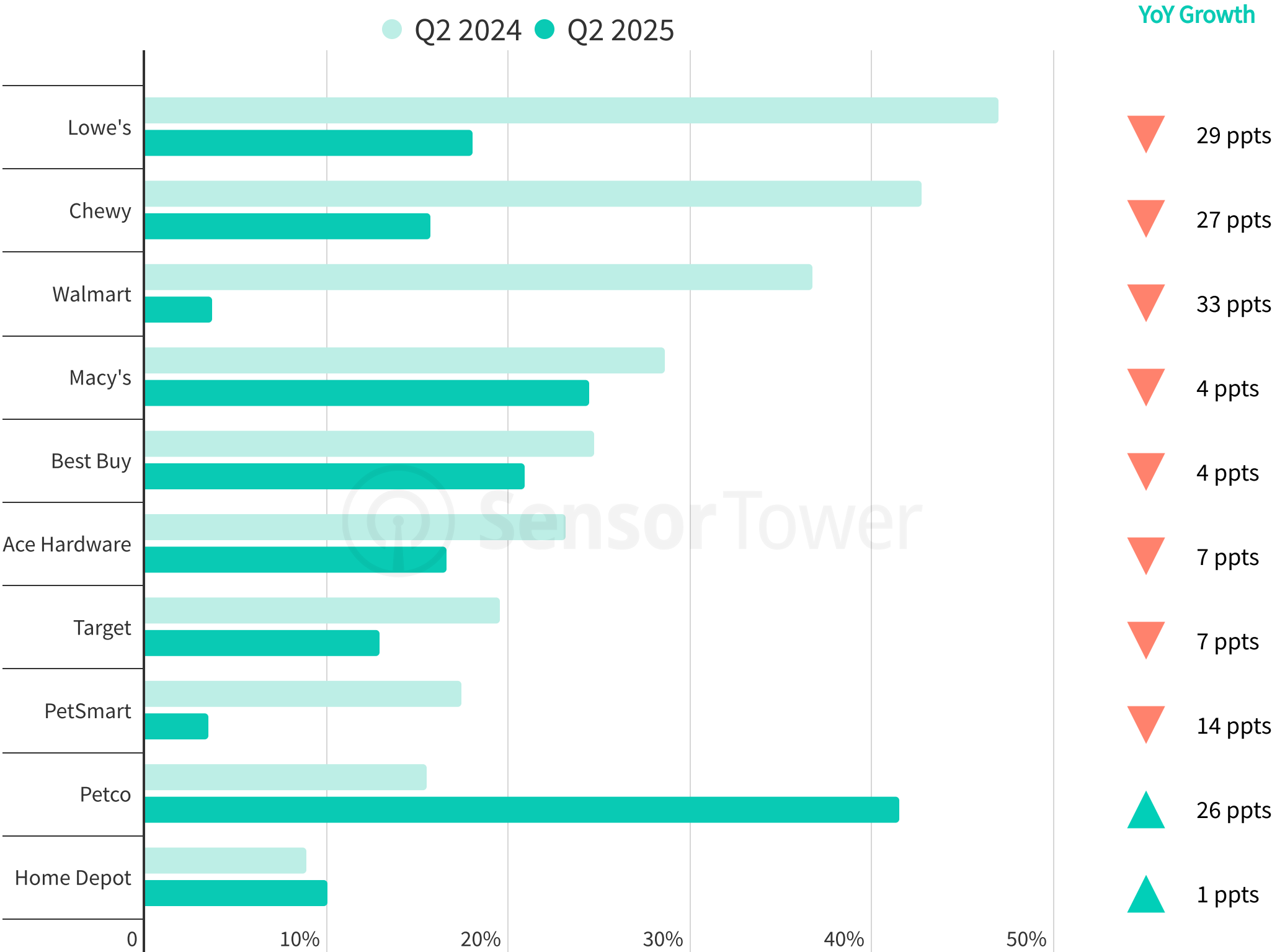
The share of ad impressions on retail median networks (RMNs) dedicated to discount-driven creatives has decreased for the majority of retailers. This collective decision by retailers and their co-advertisers is likely a response to rising costs from recent tariffs, as companies aim to protect profit margins.

The share of ad impressions on Walmart RMN for discount-driven creatives plummeted from 37% in 2Q24 to just 4% in 2Q25. This extreme change reinforces Walmart's core "Everyday Low Prices" business model, using its RMN to solidify its brand as a consistent, low-cost provider rather than one reliant on temporary deals.

Petco bucked the trend, increasing its share of discount-driven ad impressions from 15% to 41% YoY, while Chewy and PetSmart significantly scaled back.

Source: Sensor Tower
Note: Discount-driven ads are defined by the presence of keywords such as "sale," "deal," "discount," "clearance," "promo," "coupon," and "free shipping," as well as formats like "20% off" or "save \$20."

Share of Discount-Driven Ad Impressions on Retail Media Networks
Q2 2024 vs Q2 2025, United States



Category Spotlight:

Consumer Packaged Goods

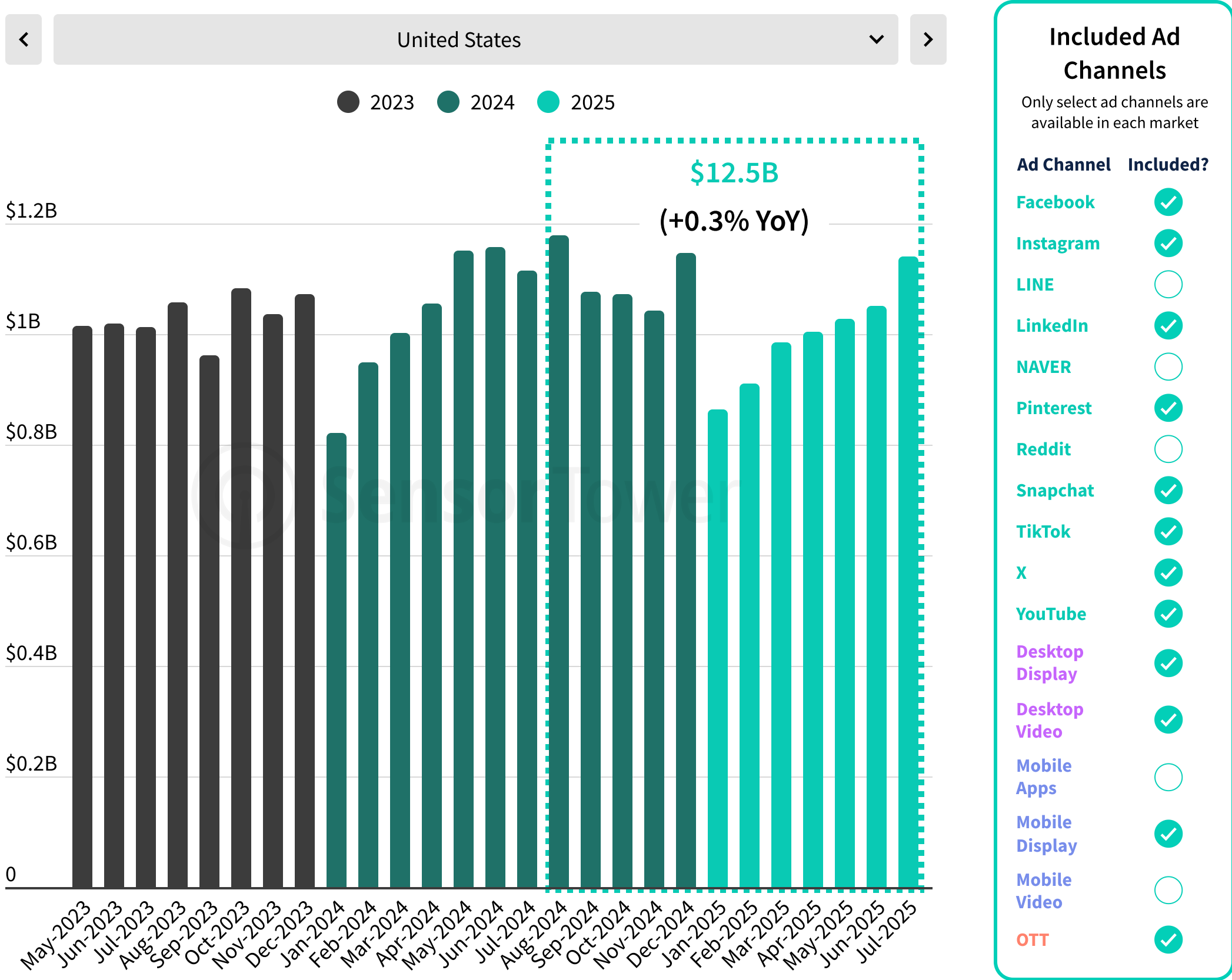
Consumer Packaged Goods Digital Ad Spend Climbed Across Major European Markets

US digital ad spend on Consumer Packaged Goods (CPG) slightly declined 0.3% YoY. CPG brands ramped up their digital ad spending during the summer, a push driven by beverage brands. Alcoholic and non-alcoholic beverages saw a 9% MoM increase in ad spend in July 2025, as they are heavily focused on seasonal marketing.

CPG digital ad spend is on the rise across Europe's major markets. The UK market led the way, climbing 18% between August 2024 through July 2025 compared to the prior 12 months. Other markets also saw growth, with Italy climbing 13%, and France and Spain each growing by 10%, while Germany grew by a steady 8%.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of September 3, 2025. India, Japan, and South Korea data are available starting January 1, 2024 and are excluded from this chart.

Monthly Consumer Packaged Goods Category Digital Ad Spend



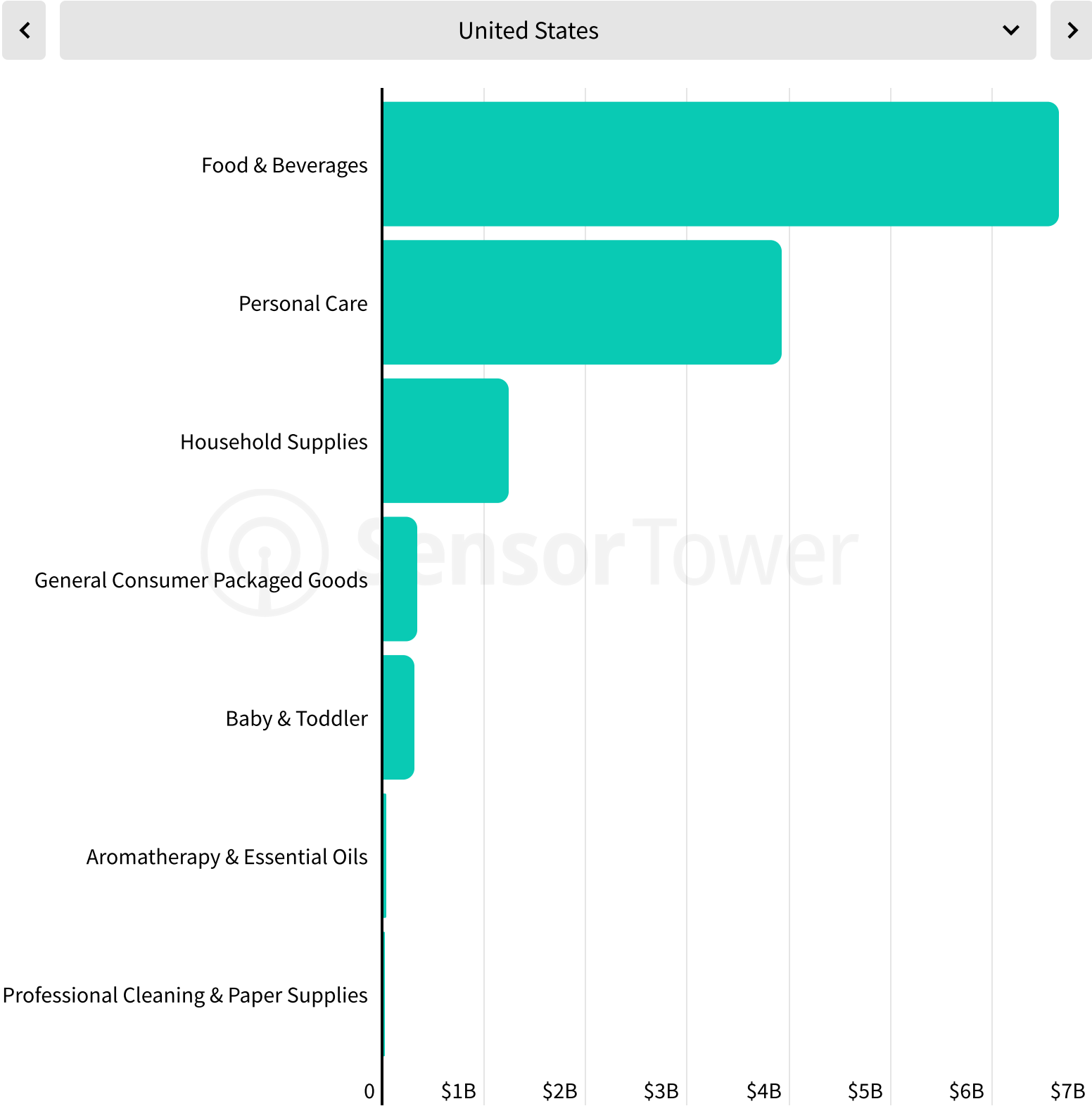
Food & Beverages Ad Spend Slightly Declines in the US

Food and Beverage remains the leading ad spending category in most of the studied markets. In the US, the category saw a modest 1% decline in ad spend YoY during the first seven months of 2025. This contrasts sharply with significant growth in the UK (+16% YoY) and Spain (+15% YoY).

In Asian markets like South Korea and India, Personal Care has been the top ad spending category, driven by a highly competitive beauty and skincare industry. This trend is also evident in Japan, where the two categories are nearly equal, underscoring a distinct marketing environment in the region.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of September 12, 2024. General spend includes creatives that aren't associated with a particular subcategory, creatives that feature products from several subcategories, or corporate ads.

Top Consumer Packaged Goods Subcategories by Ad Spend
August 2024 - July 2025



Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
LINE	○
LinkedIn	✓
NAVER	○
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Desktop Video	✓
Mobile Apps	✓
Mobile Display	✓
Mobile Video	○
OTT	✓

CPG Ad Strategies Evolve with Hybrid Social and Video Approach

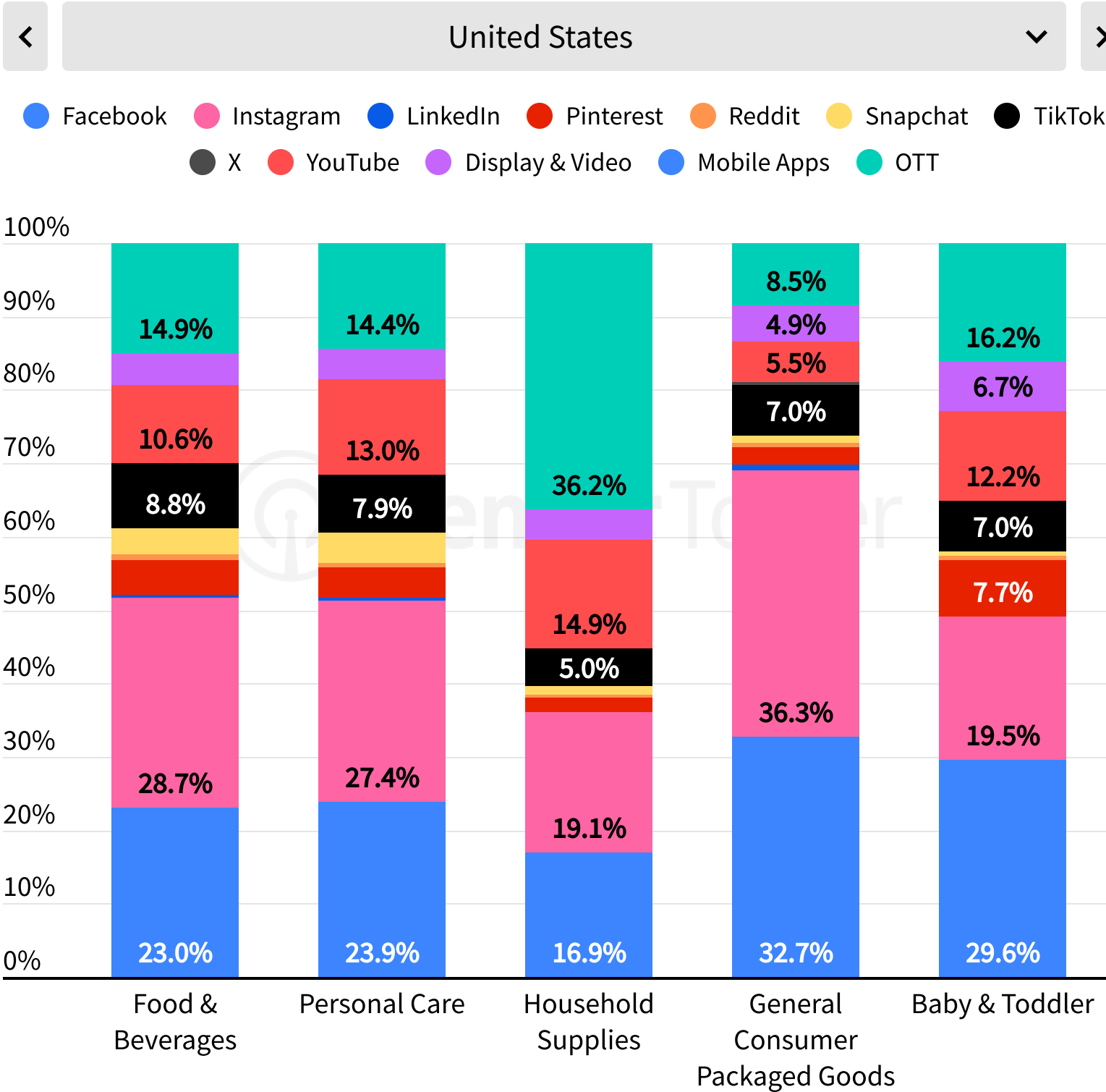
CPG advertisers are embracing a hybrid strategy that blends social and video to reach consumers. While Food & Beverage and Personal Care brands prioritize a social-first approach, dedicating over half of their ad budget to Meta platforms, they also allocate significant spend to video channels, with 35% of their budgets allocated to YouTube, OTT, and TikTok.

Meanwhile, Household Supplies advertisers are more heavily invested in a video-centric strategy, with nearly 60% of their budget on those same platforms.

As Pinterest has grown into a popular platform for parents, with more than a quarter (27%) of US parents utilizing the app, the Baby & Toddler subcategory has prioritized it, allocating a much higher share of its ad budget (8%) to the platform.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of September 12, 2024.

Share of Digital Ad Spend by Ad Channel
for Top Consumer Packaged Goods Subcategories
August 2024 - July 2025



Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
LINE	○
LinkedIn	✓
NAVER	○
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Desktop Video	✓
Mobile Apps	✓
Mobile Display	✓
Mobile Video	○
OTT	✓

Explore the Leading CPG Advertisers in Top Markets

Procter & Gamble maintains a massive advertising presence in the US with dozens of brands across CPG subcategories. The company captures a significant share of voice (SOV) in Household Supplies (41%), Baby & Toddler (32%), and Personal Care (21%), showcasing its powerful scale in a highly competitive market.

Among the top five Food and Beverage advertisers, Coca-Cola stood out as the only one to increase its ad spending with double-digit YoY growth. Between August 2024 and July 2025, Coca-Cola’s ad spend surged by 32% YoY, in sharp contrast to its competitor PepsiCo, which saw a 7% decline. Other major confection brands, such as Mars (-7%) and Hershey (-7%) also reduced their spending.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Includes advertisers with at least \$100,000 in ad spend in the subcategory. Ad spend estimates as of September 12, 2024. General spend includes creatives that aren't associated with a particular subcategory, creatives that feature products from several subcategories, or corporate ads.

Top Advertisers by Digital Ad Spend
for Consumer Packaged Goods Subcategories
August 2024 - July 2025

United States						
Rank	Overall	Food & Beverages	Personal Care	Household Supplies	General Consumer Packaged Goods	Baby & Toddler
1	Procter & Gamble	PepsiCo, Inc.	Procter & Gamble	Procter & Gamble	Unilever	Kimberly-Clark Corporation
2	PepsiCo, Inc.	The Coca-Cola Company	L'Oreal	SC Johnson & Son, Inc	L Brands	Procter & Gamble
3	The Coca-Cola Company	The Hershey Company	Unilever	Reckitt Benckiser	The Kraft Heinz Company	Abbott Laboratories
4	Unilever	Mondelez International	Kenvue Inc. - (ケンビュー)	The Clorox Company	Beiersdorf AG	Kenvue Inc. - (ケンビュー)
5	The Hershey Company	Mars, Incorporated	Estee Lauder Inc.	Georgia-Pacific LLC	L'Oreal	Reckitt Benckiser
6	L'Oreal	General Mills	Colgate-Palmolive	Henkel AG & Company	SC Johnson & Son, Inc	Harbinger Ventures
7	Mondelez International	Diageo	Haleon plc	Kimberly-Clark Corporation	Jones Road Beauty (JustSteven LLC)	Nestle
8	Kenvue Inc. - (ケンビュー)	Ferrero	Nutrafol (Nutraceutical Wellness, Inc.)	Church & Dwight Co., Inc.	Kenvue Inc. - (ケンビュー)	Bobbie Baby, Inc.
9	Mars, Incorporated	Anheuser-Busch InBev SA/NV	Kimberly-Clark Corporation	Energizer Holdings, Inc.	Just Ingredients	WaterWipes (Irish Breeze Ltd)
10	General Mills	Nestle	Prose (PerSé Beauty, Inc.)	Reynolds Consumer Products Inc.	The Sanofi Group	Hello Bello

Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
LINE	○
LinkedIn	✓
NAVER	○
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Desktop Video	✓
Mobile Apps	✓
Mobile Display	✓
Mobile Video	○
OTT	✓

Category Spotlight:

Travel & Tourism

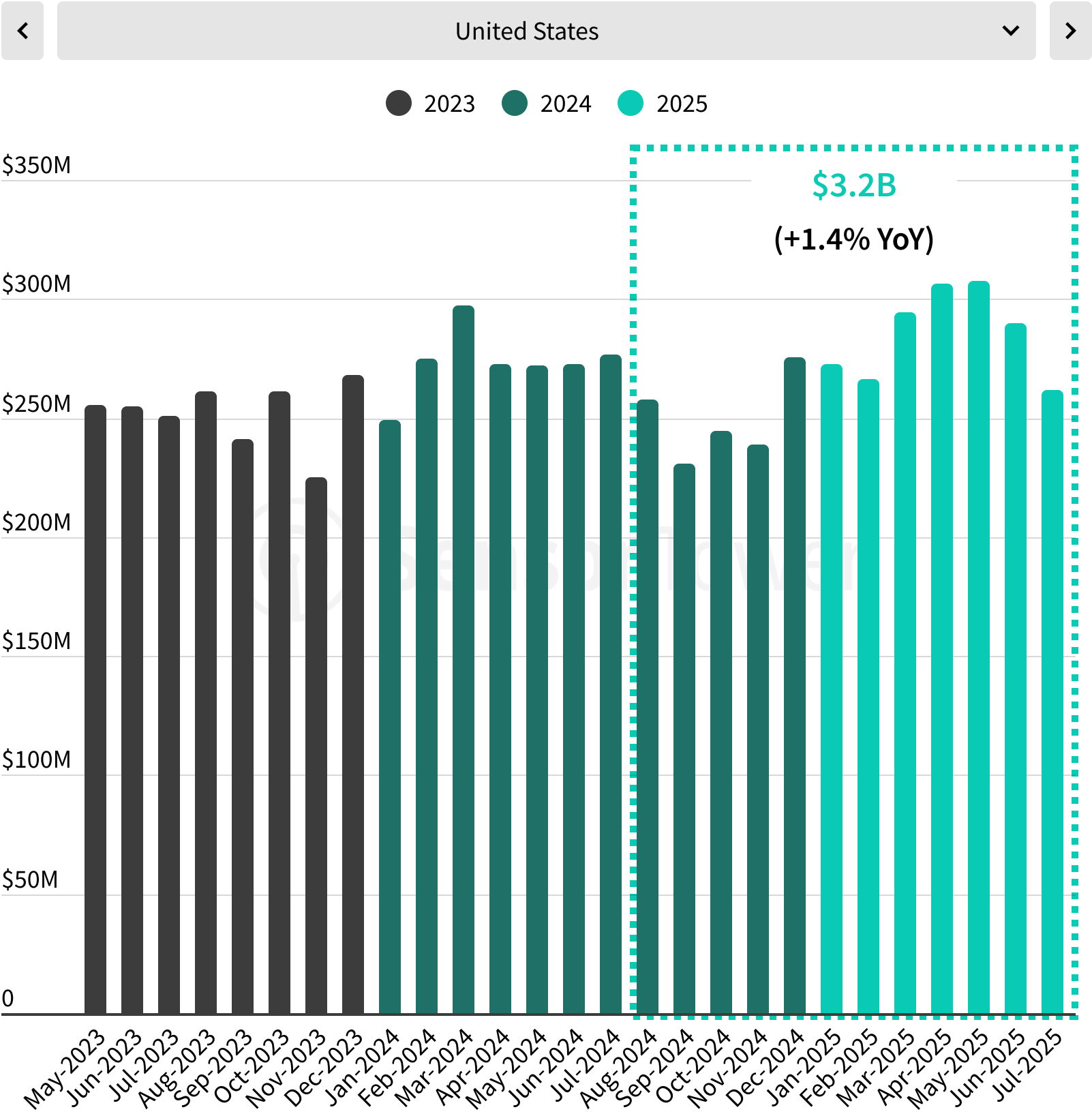
Travel & Tourism Advertising is Stable in the US While Europe Surges

Digital ad spend in the Travel & Tourism sector saw modest growth in the US, with a 1% YoY increase from August 2024 through July 2025. In Europe, ad spend was led by strong growth in Italy and Spain, which grew by 35% and 29%, respectively. France and the United Kingdom also saw double-digit YoY growth, with increases of 12% and 10%, respectively.

As demand for summer travel grows, US travel advertisers focused their ad spend during the spring of 2025 (between March and May). During this period, ad spend increased by 7% YoY compared to the same period in 2024, a strategic effort to capture consumer interest before the peak summer booking season.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of September 3, 2025. India, Japan, and South Korea data are available starting January 1, 2024 and are excluded from this chart.

Monthly Travel & Tourism Category Digital Ad Spend



Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
LINE	○
LinkedIn	✓
NAVER	○
Pinterest	✓
Reddit	○
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
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Desktop Video	✓
Mobile Apps	○
Mobile Display	✓
Mobile Video	○
OTT	✓

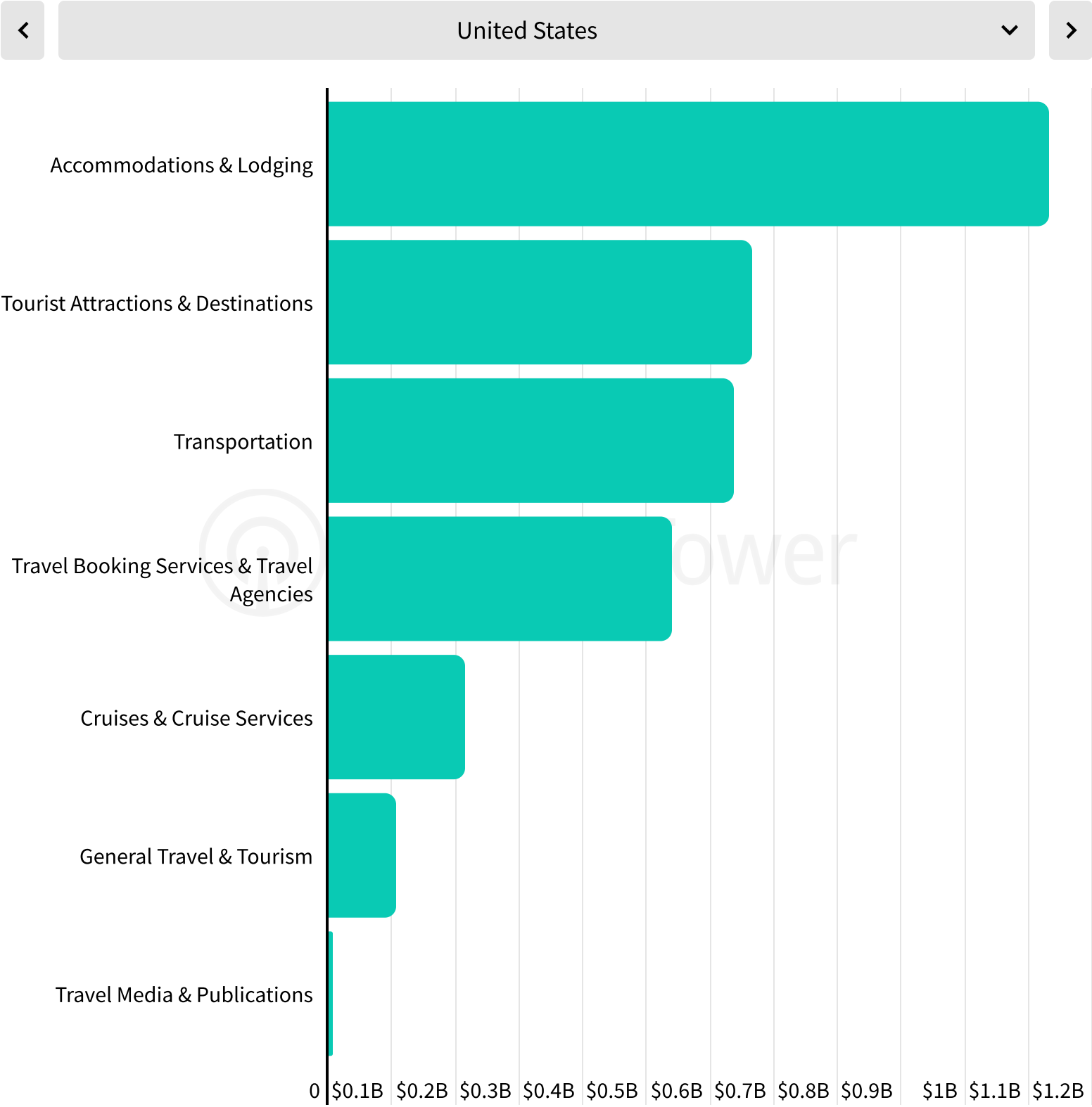
Know Your Market: Booking Behaviors Drive Regional Spending

Accommodations & Lodging was the top ad spend subcategory in the US from August 2024 to July 2025. This was largely driven by vacation rental brands like Airbnb and VRBO (an Expedia brand), which collectively accounted for nearly one-third of the total share of impressions.

Travel Booking Services & Travel Agencies was the top subcategory by digital ad spend in the UK, Australia, Brazil, Italy, Germany, and Spain. While it ranked as the fourth-largest subcategory in the US, this indicates different travel booking behaviors and market dynamics across countries.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of September 12, 2024. General spend includes creatives that aren't associated with a particular subcategory, creatives that feature products from several subcategories, or corporate ads.

Top Travel & Tourism Subcategories by Ad Spend
August 2024 - July 2025



Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
LINE	○
LinkedIn	✓
NAVER	○
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Desktop Video	✓
Mobile Apps	✓
Mobile Display	✓
Mobile Video	○
OTT	✓

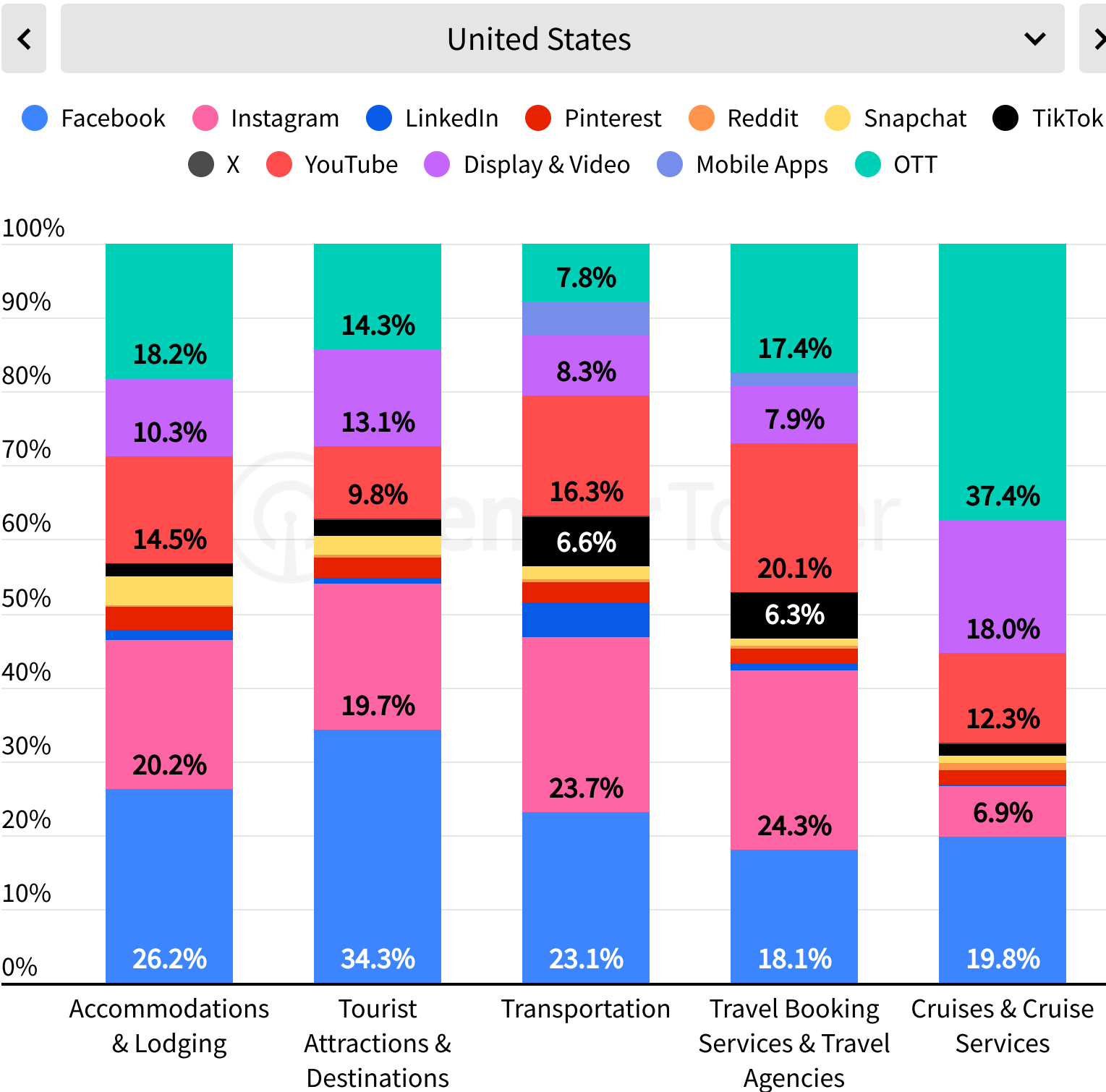
Travel Advertisers Double Down on Instagram in the United States

Travel brands are strategically increasing their digital ad spend on Instagram. In the first seven months of 2025, the Accommodations & Lodging sector boosted its ad spend share on Instagram by 6 percentage points YoY. Travel Agencies and Tourist Attractions & Destinations category also saw significant increases of 4 percentage points. Despite these shifts, Facebook continues to hold a leading position in total ad spend share for most subcategories.

Cruises & Cruise Services are making a significant strategic shift towards OTT as a primary ad channel in the US. The platform's ad spend share has significantly increased by 7 percentage points YoY in the first seven months of 2025, accounting for nearly 40% of the subcategory's total digital ad spend.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of September 12, 2024.

Share of Digital Ad Spend by Ad Channel
for Top Travel & Tourism Subcategories
August 2024 - July 2025



Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
LINE	○
LinkedIn	✓
NAVER	○
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Desktop Video	✓
Mobile Apps	✓
Mobile Display	✓
Mobile Video	○
OTT	✓

Airbnb Overtakes VRBO as the Leading Accommodations & Lodging Advertiser

Expedia, Inc. maintained its position as the top digital advertiser in the US from August 2024 to July 2025, even with a notable 30% YoY decline in its ad spend during the first seven months of 2025.

Expedia, Inc. secured its top spot by having three of its core brands, VRBO, Expedia, and Hotels.com, rank among the top 10 Travel & Tourism brands, allowing the company to target different market segments, from vacation rentals to hotels and general travel.

A notable shift occurred in the US Accommodations & Lodging sector, where Airbnb overtook VRBO as the leading advertiser. While VRBO pulled back its ad spending by 41% YoY in the first seven months of 2025, Airbnb increased its own by 11% YoY.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Includes advertisers with at least \$100,000 in ad spend in the subcategory. Ad spend estimates as of September 12, 2024. General spend includes creatives that aren't associated with a particular subcategory, creatives that feature products from several subcategories, or corporate ads.

Top Advertisers by Digital Ad Spend for Travel & Tourism Subcategories
August 2024 - July 2025

United States						
Rank	Overall	Accommodations & Lodging	Tourist Attractions & Destinations	Transportation	Travel Booking Services & Travel Agencies	Cruises & Cruise Services
1	Expedia, Inc.	Airbnb, Inc.	NBC Universal Parks & Resorts	Uber Technologies, Inc.	Priceline Group (Booking Holdings, Inc.)	Royal Caribbean Cruises Ltd.
2	Priceline Group (Booking Holdings, Inc.)	Expedia, Inc.	Six Flags Entertainment Corporation	Enterprise Holdings, Inc.	Expedia, Inc.	Carnival Corporation
3	Airbnb, Inc.	Hilton Worldwide	SeaWorld Parks & Entertainment	Southwest Airlines Co	TripAdvisor, Inc.	Norwegian Cruise Line
4	Hilton Worldwide	Marriott International, Inc.	Education First (EF) - Signum International AG	The Hertz Corporation	GetYourGuide Deutschland GmbH	Viking Cruises
5	Marriott International, Inc.	Choice Hotels International, Inc.	Great Wolf Resorts, Inc.	United Airlines, Inc.	Navan (Formerly TripActions, Inc.)	MSC Cruises
6	NBC Universal Parks & Resorts	InterContinental Hotels Group (IHG)	Alterra Mountain Company	Delta Air Lines, Inc.	Fora Travel, Inc	The Ritz-Carlton Yacht Collection (Cruise Yacht OpCo)
7	Uber Technologies, Inc.	Best Western	Visit California (California Travel & Tourism Commission)	Lyft, Inc.	Cheapcaribbean.com, Inc	Classica Cruise Operator Ltd
8	Choice Hotels International, Inc.	Hyatt Corporation	Merlin Entertainment Group	Amtrak (National Railroad Passenger Corporation)	Flash Pack	City Cruises PLC
9	Enterprise Holdings, Inc.	MGM Resorts International	Vail Resorts Management Company	Turo	VacationVIP LLC	American Cruise Lines
10	Royal Caribbean Cruises Ltd.	HotelTonight	Dominican Republic Ministry of Tourism	Alaska Airlines	Apple Vacations	Silversea Cruises LTD.

Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
LINE	○
LinkedIn	✓
NAVER	○
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Desktop Video	✓
Mobile Apps	✓
Mobile Display	✓
Mobile Video	○
OTT	✓


















































































































































































































































Appendix A:

Digital Advertising Ad Channels by Market

Data includes select channels in each market. Figures in this report represent the totals for these channels only, not across all digital formats.

- At this time, our technology allows us to report down to nine individual streaming services: Amazon Prime Video, Disney+, HBO Max, Hulu, Netflix, Peacock, Paramount+, tubi and PlutoTV. All other OTT campaigns outside of these nine services are grouped into a single OTT Streaming Services (General) bucket.
- Several new ad channels have been recently released and are not yet in this report, including TikTok and YouTube in South Korea and LINE in Japan. These are available for Sensor Tower customers at <https://pathmatics.sensortower.com> or you can [request a demo here](#).

Included Ad Channels by Market

Key:  Included ad channel  Recently added channel (only included in select slides)  Ad channel not included in market														
Ad Channel	United States	Australia	Brazil	Canada	France	Germany	India	Italy	Japan	Mexico	New Zealand	South Korea	Spain	United Kingdom
Facebook														
Instagram														
LINE														
LinkedIn														
NAVER														
Pinterest														
Reddit														
Snapchat														
TikTok														
X														
YouTube														
Desktop Display														
Desktop Video														
Mobile Apps														
Mobile Display														
Mobile Video														
OTT														

Appendix B:



























Included Retail Media Retailers by Market

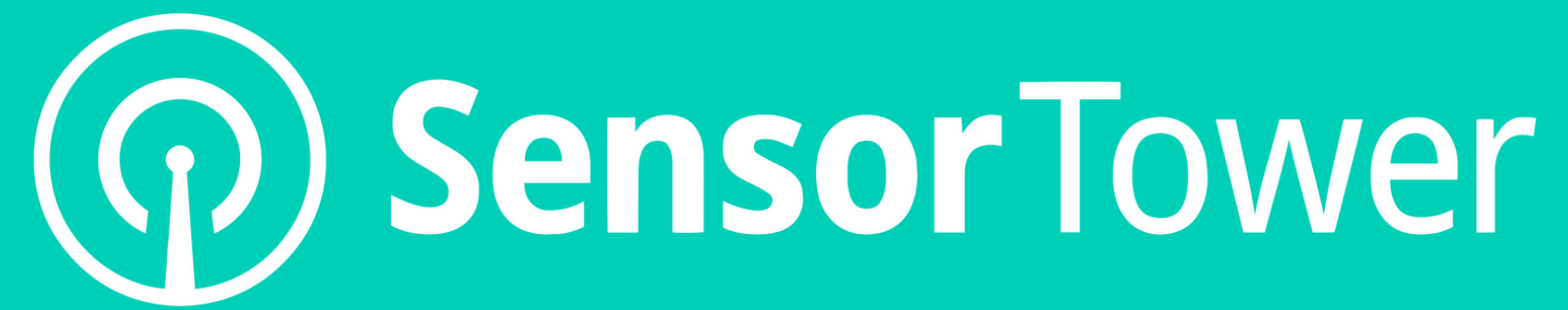
Retail media advertising data include select retailers in each market. Figures in this report represent the totals for these retailers only, not across all retailers in the market.

- Most of the analysis in this report focuses on the most recent quarter. However, for the analysis covering retail media impressions over time by market, any retailers that only have partial data available are excluded. For example, Amazon data coverage in the United States began January 1, 2025, so it is excluded from the year-over-year analysis (page 36).
- Category and advertiser analyses exclude cases when the advertisers are not currently tracked by Sensor Tower or advertising for retailer's own products.

Included Retail Media Retailers by Market

Key:  Included retailer  Recently added retailer (only included in select slides)

United States		United Kingdom		Canada	
Retailer		Retailer		Retailer	
Ace Hardware		Five Below		Publix Super Markets	
Ahold Delhaize		General Nutrition Corporation (GNC)		Sam's West (Sam's Club)	
Albertsons Companies Inc.		Home Depot		Sephora	
Amazon.com		Hy-Vee, Inc.		Seven & i Holdings Co., Ltd.	
Best Buy Co., Inc.		Instacart (Maplebear Inc.)		Target	
Chewy, Inc.		Lowe's Home Centers, Inc.		The Kroger Co.	
Costco Wholesale Corp		Macy's, Inc.		Uber Technologies, Inc.	
CVS Health		Meijer Inc.		Ulta Salon, Cosmetics & Fragrance, Inc	
Dollar General Corporation		Petco		Walgreens	
DoorDash, Inc.		PetSmart		Walmart Inc.	
Family Dollar Stores, Inc.					



About Sensor Tower

Sensor Tower is the leading source of mobile app, digital advertising, retail media, and audience insights for the largest brands and app publishers across the globe.

With a mission to measure the world's digital economy, Sensor Tower's award-winning platform delivers unmatched visibility into the mobile app and digital ecosystem, empowering organizations to stay ahead of changing market dynamics and make informed, strategic decisions.

Founded in 2013, Sensor Tower's mobile app insights have helped marketers, app, and game developers demystify the mobile app landscape with visibility into usage, engagement, and paid acquisition strategies. Today, Sensor Tower's digital market insights platform has expanded to include Audience, Retail Media, and Pathmatics Digital Advertising Insights, helping brands and advertisers understand their competitor's advertising strategies and audiences across web, social, and mobile.

Press Inquiries: press@sensortower.com





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Request a free demo!



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