



# The State of Viewership

Analyzing approximately 45 billion hours of linear and streaming

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# Learnings from the first half of 2024

As America and its advertisers gear up for a massive election season, we are reflecting back on the changes and advancements our industry saw in the first half of 2024. AI disrupted the TV data industry with innovations that provide actionable context to video, streaming platforms fought against churn, women's sports reached new heights, and advertisers within growing industries like pharmaceutical carved new market share for themselves.

Amidst these changes, we continue to follow the data to make sense of how Americans are engaging with streaming, linear, and advertising. Learnings from the first half of 2024 show that streamers optimizing release schedules, promoting bundling efforts, and emphasizing innovative content such as live events will be rewarded. Meanwhile, ahead of the election and amidst an unprecedented political ad blitz, the U.S. public is deeply engaged with news and events like the presidential debate.

Through all of this, ad-tiers on SVOD platforms have become mainstay, presenting advertisers with more opportunities than ever before to target consumers. Smart marketers are leaning into the ample data at their fingertips and optimizing their campaigns with cross-screen targeting and measurement, including the data segments, CTV PMPs, and online video PMPs available for near real-time targeting through [samba.tv/audiences](https://samba.tv/audiences).

The future of measurement is upon us, and we are excited to share our learnings from the first half of the year.



Team **Samba**

# Methodology

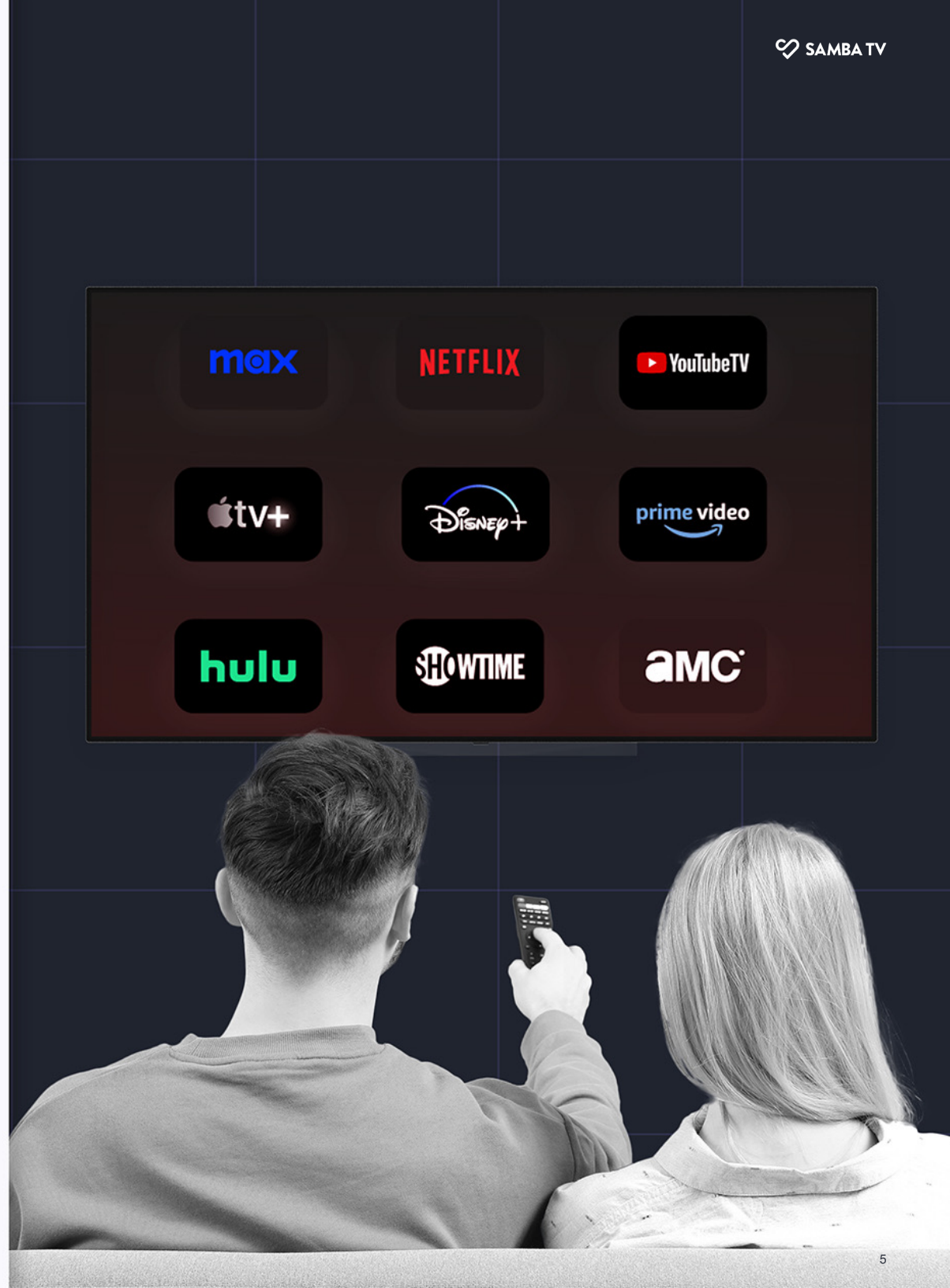
Samba TV gathers viewership data via its proprietary Automatic Content Recognition (ACR) technology from tens of millions of opted-in Smart TVs. Samba TV's ACR is integrated at the chipset level across 24 of the top Smart TVs sold in more than 100 countries globally and captures content that crosses the TV screen, regardless of source. This results in unbiased, comprehensive viewership insights from around the world.

As is standard industry practice, Samba TV analyzes the large proprietary dataset to project household-level TV viewership utilizing its research panel of more than 3M smart TVs, balanced and weighted to the U.S. Census across age, gender, ethnicity, and household income. By contrast, Samba TV's panel is nearly 80x larger than the legacy industry model and is aligned to the US census by 0.03%.

Samba TV does not estimate viewership on non-TV devices such as mobile phones. Samba TV measures at the household level, and does not extrapolate to the individual viewer.

## TV Trends: Streaming & Linear

As streaming consumption reaches new heights and linear continues to decline, trends are emerging around how people discover TV and engage with all of the different platforms at their fingertips, including ad-supported SVOD tiers. Churn is increasing, making it essential for streamers to optimize their release schedules, maximize awareness, and keep viewers engaged with their platforms.



## OTT consumption hits record high in H1 2024, while linear drops year-over-year

U.S. households watched a record-high level of OTT content in H1 2024, up 40% from 2023, while linear consumption dropped by 1% year-over-year. Similarly, the average daily reach of linear dropped slightly by 2%, as linear TV's audience ages out, live events shift to streaming, and more viewers cut the cord.



# -1%

Linear hour viewers dropped by 1% year-over-year, falling to the lowest levels since pre-pandemic

# +40%

OTT hours viewed increased by 40% year-over-year in H1'24, reaching a record high

# -2%

The average daily reach of linear dropped 2% year-over-year, with less than half of U.S. households watching daily

# Ad-supported streaming and FAST are the future for advertisers

With the shift from linear to streaming, the question of where to reach consumers remains persistent for advertisers. Luckily, all major streaming platforms have now launched ad-supported options and consumers are showing willingness to watch ads in exchange for lower subscription fees, with over half of SVOD sign-ups in 2024 driven by ad-tiers. Coupled with FAST, this presents advertisers with ample opportunities to reach cord-cutters, which has become increasingly essential as younger audiences turn away from cable and don't look back.

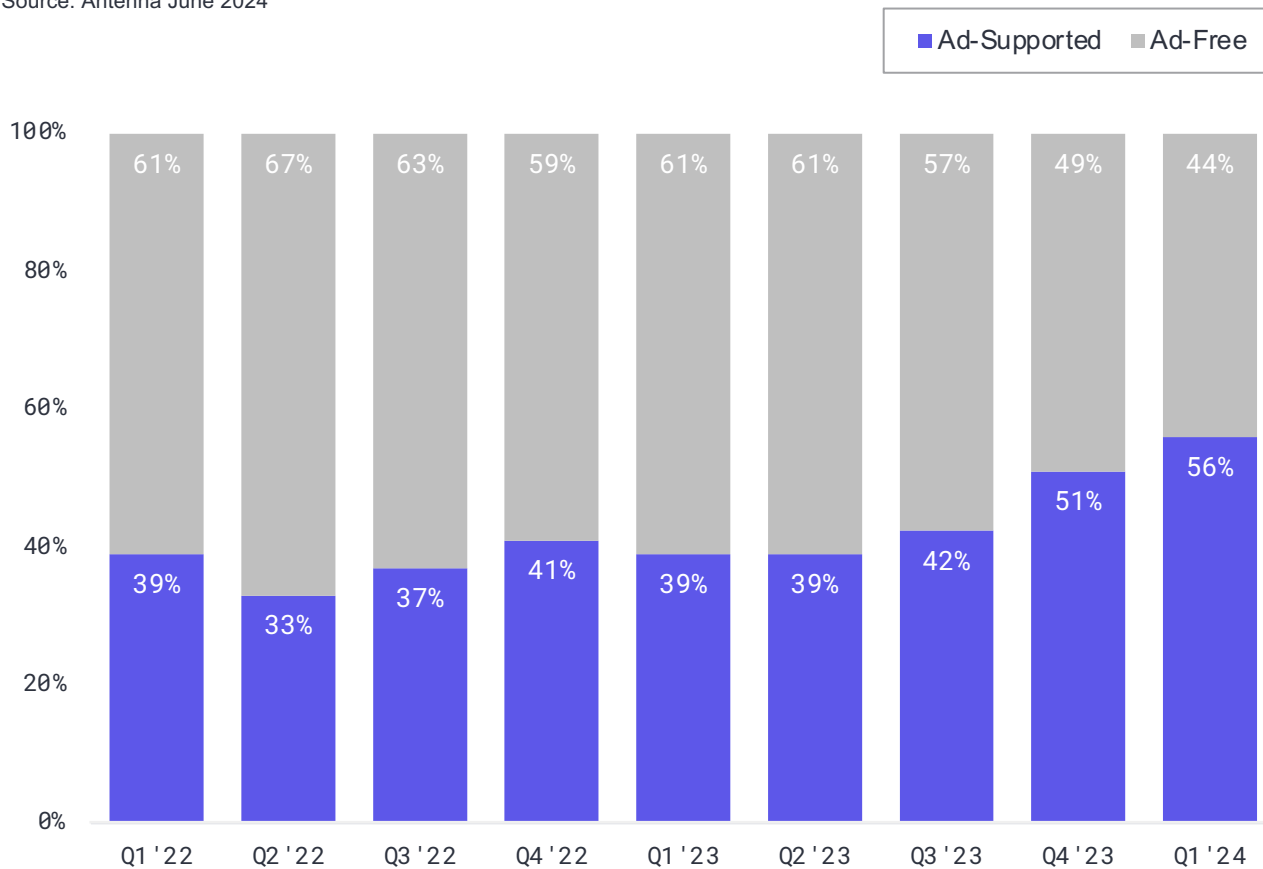
# 33%

of U.S. streamers watch FAST services\*



## SVOD gross adds by plan tier

Source: Antenna June 2024



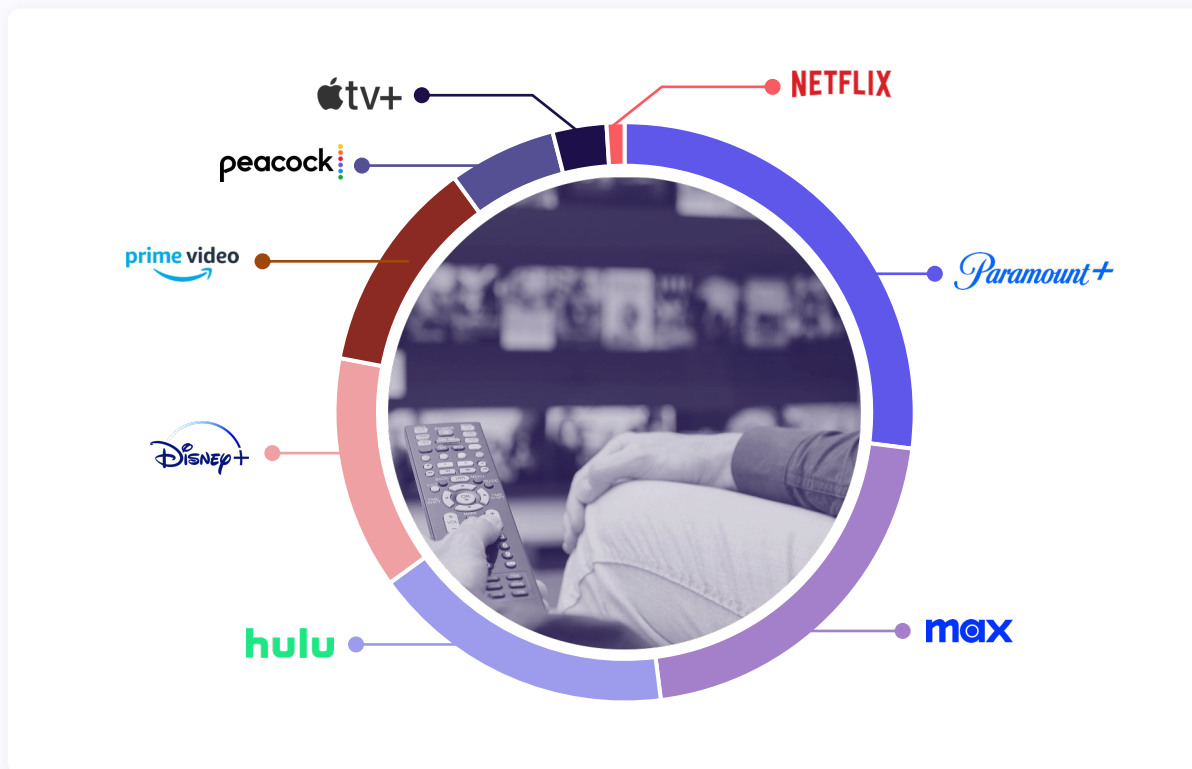
\*Source: EMARKETER Forecast, Feb 2024

## Streamers bullish on promoting their services

As ad-tiers become the norm for streaming platforms and competition heats up, these platforms are spending large amounts to advertise their own services, including billions of promotional campaign impressions across linear and OTT. Top streamers served over 20 billion impressions, led by ViacomCBS's Paramount+ and Warner Bros. Discovery's Max with their built-in linear presences. However, the only streamers that served more promotional ads year-over-year were Max and Amazon Prime Video, with H1 2024 marking the introduction of Amazon Prime Video's ad-supported plan.

**Linear & OTT ad impressions share of voice by streaming service provider based on ad impressions served promoting their streaming service: H1 2024**

Advertiser	Ad impressions	YoY
<i>Paramount+</i>	5.6B	-2%
<b>max</b>	4.3B	+43%
<b>hulu</b>	3.5B	-15%
<b>Disney+</b>	2.6B	-25%
<b>prime video</b>	2.6B	+2%
<b>peacock</b>	1.2B	-55%
<b>apple tv+</b>	658M	-8%
<b>NETFLIX</b>	169M	-31%





# Churn highly prominent on SVOD, as many viewers watch two or less services per half

Although Subscription Video On Demand (SVOD) platforms have consistently added subscribers each quarter, the number of cancellations has increased to the point of net additions dropping by more than 3 million year-over-year. Data from the firm Antenna shows that churn is extremely common in the streaming space, with users adopting subscription cycling as a way of life. Although streaming is ubiquitous, with 99M households streaming content in H1 2024, about 44% are only willing to watch one or two platforms in six months. In today’s churn-heavy landscape, streamers must find ways to keep viewers engaged with their platform, including optimizing release schedules, promoting loyalty through bundles, and emphasizing innovative content such as live events.

## 99M

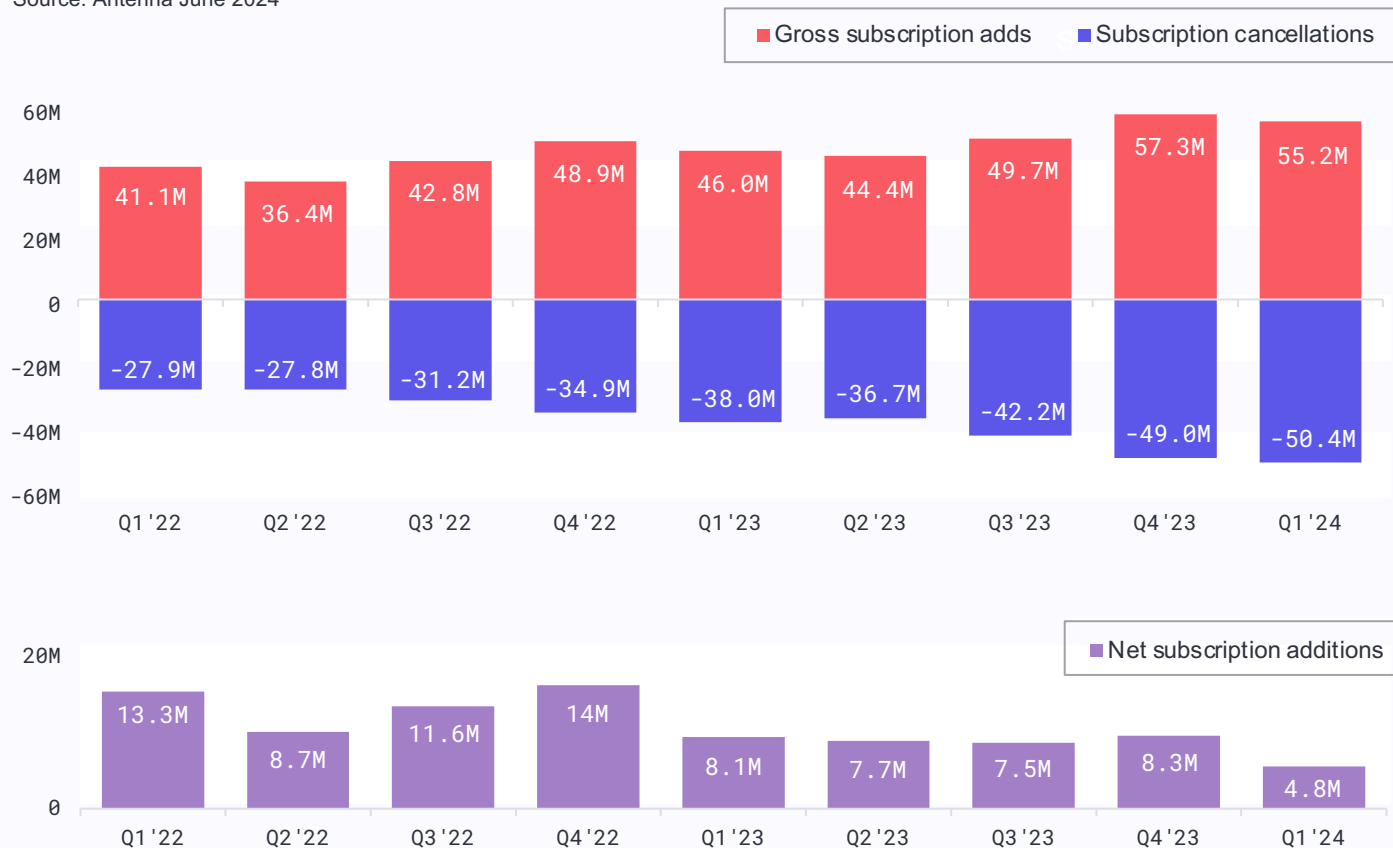
U.S. households watched OTT content during H1 2024

## 44%

of U.S. streaming households watched 2 or less services during H1 2024

### SVOD volatility

Source: Antenna June 2024

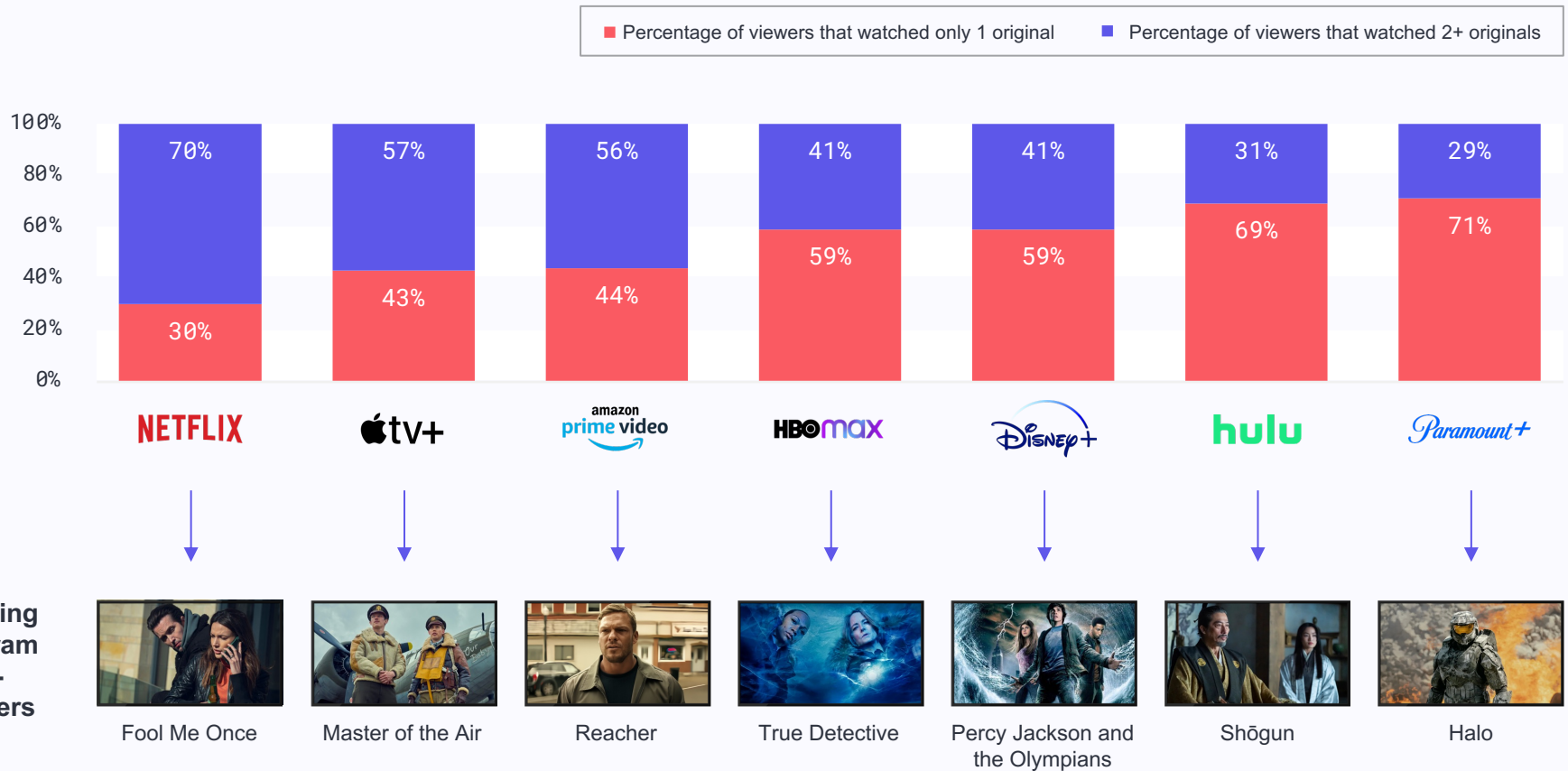


# Flight risk: viewers oftentimes watch just one original per platform

Despite heavy content investments, many streamers continue to lose viewers after only one show, as people demonstrate that their interest in a specific platform is oftentimes tied to a singular piece of content. The exception to this was Netflix, which highlights its effective use of in-app and omni-screen promotional efforts to more deeply engage audiences. With churn presenting real challenges for streamers, they must find ways to ensure audiences are engaging with their broader content library and see the value of their subscriptions beyond one new program.

## Stickiness by streaming platform

Within top 50 originals on streaming platform in H1 2024



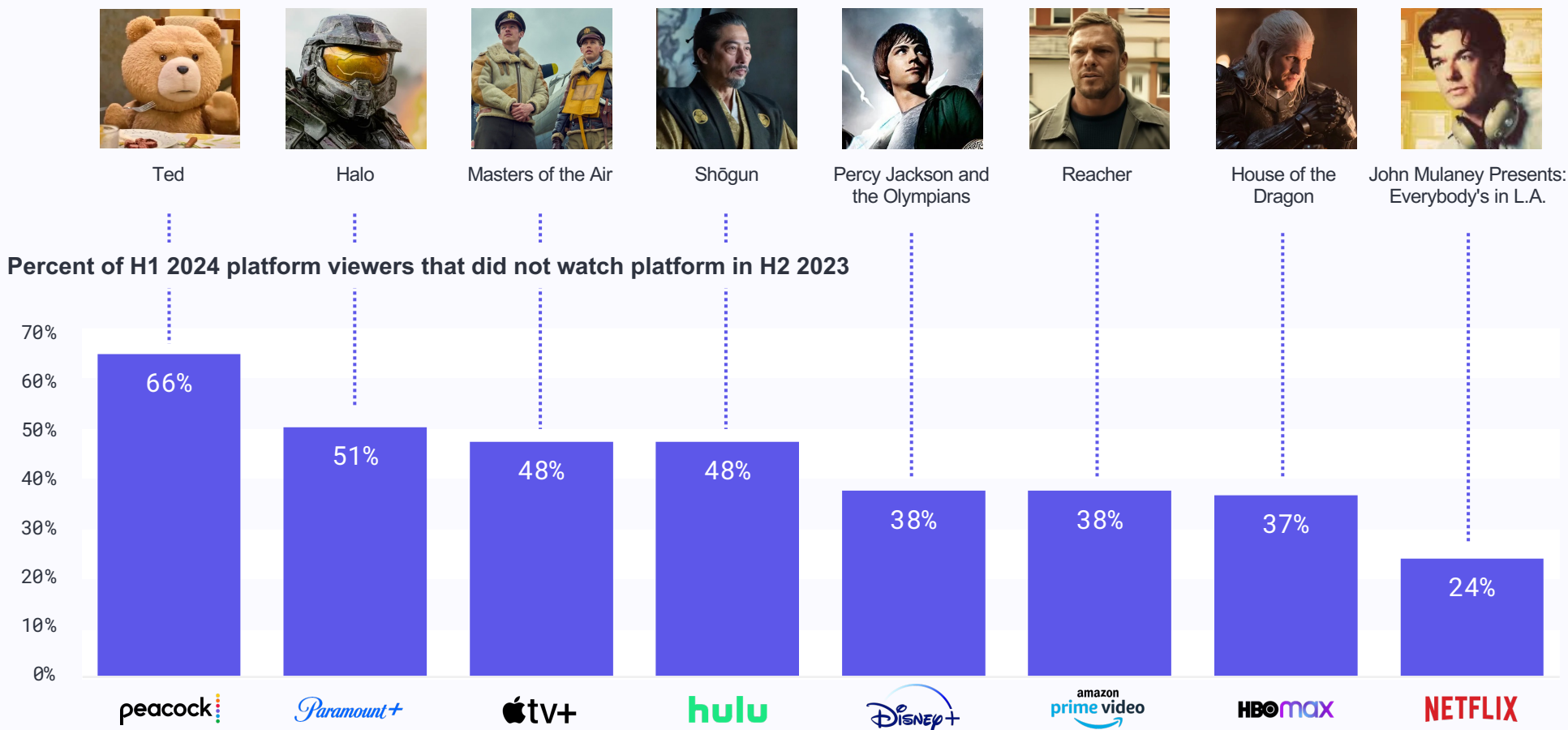
**Highest reaching H1 2024 program among single-program viewers**

# Subscription cyclers come back for buzzy new shows

When people subscription cycle, what brings them back to a previously abandoned platform? Content is king, with popular new shows like Ted, Masters of the Air, and Shōgun drawing back audiences, along with shows releasing highly anticipated new seasons like House of the Dragon and Reacher. Netflix, which saw the lowest level of churn, had success in drawing back audiences through its foray into live events, with John Mulaney Presents: Everybody's in L.A. representing the top program re-engaging Netflix cyclers. In addition to investing in strong content that resonates with audiences, streamers must make sure they release and promote content strategically, with campaigns flighted to drive early awareness during key times.

## Top program re-engaging subscription cyclers

Based on households that did not watch platform originals in H1 2024



# Bundling prevents churn

In addition to making investments in strategic content, streamers looking to prevent churn should lean into the value of their bundles. Data from the firm Antenna shows that users who subscribe to the Disney Bundle and Apple One are less likely to churn than those subscribed to individual components of those bundles. For example, the churn rate for AppleTV+ was just under 9% in March 2024, but for Apple One it was less than 4%. With many viewers watching just one program per platform, promoting content across a bundled portfolio helps mitigate the risk of audiences churning after they've finished the one show they were interested in on the platform.

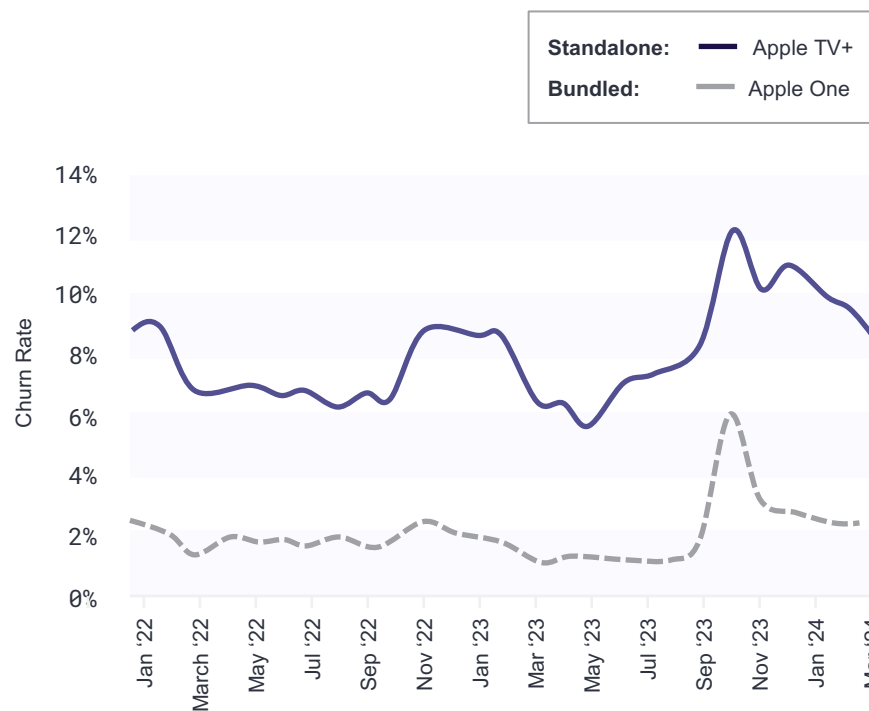
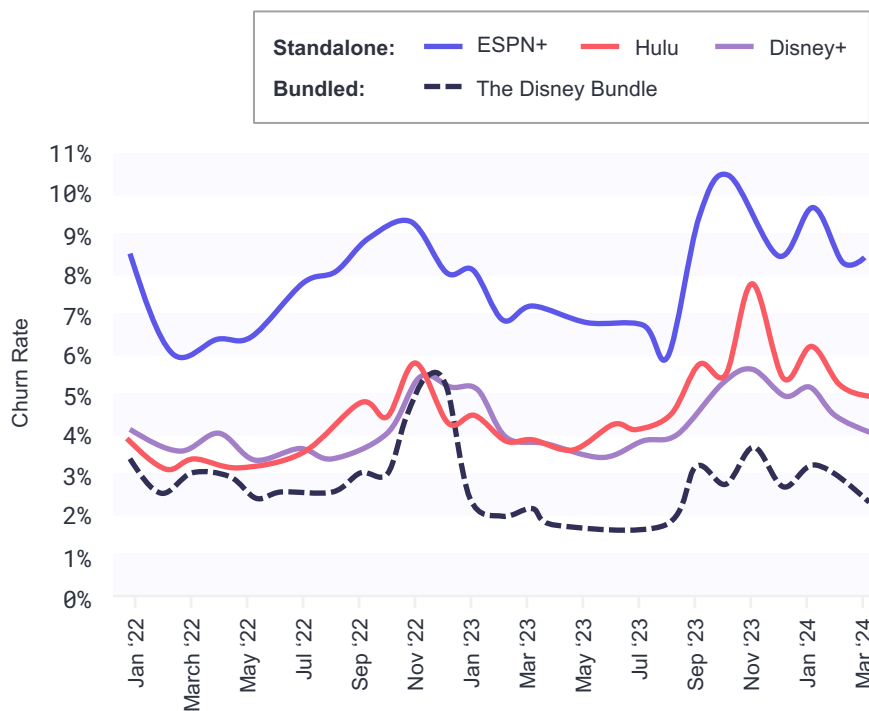
## 2-6pts

of difference in Churn Rate between bundled SVODs (Apple One and The Disney Bundle) vs. standalone SVODs (Apple TV+, Disney+, ESPN+, Hulu)

Source: Antenna June 2024

### Disney and Apple churn by standalone vs. bundled subscription

Source: Antenna June 2024



\*US-only | Excludes Fee Tiers, MVPD + Telco Distribution, and select Bundles The Disney Bundle is inclusive of Duo Basic/Premium, Trio Basic/Premium, and Legacy Bundle

\*US-only | Excludes Fee Tiers, MVPD + Telco Distribution, and select Bundles Apple One is inclusive of Family, Individual and Premier plans

## Viewers binge docuseries and crime shows at the highest rate

Samba TV data continues to show that when given the option to binge, viewers will do so. This proved true with top bulk release shows from H1 2024 like Testament: the Story of Moses, Detective Forst, and Tires, each of which drove binge rates over 60%. However, not all genres are created equal when it comes to bingeing. We see that docuseries and crime shows are most likely to be bingeed, as audiences are eager to learn what happened and whodunit. On the other hand, comedies and dramas are less likely to be bingeed. When flighting release schedules streamers should bear this in mind and give thrill-seeking docuseries viewers the opportunity to gobble up content quickly, while spacing out plot-driven comedies and dramas.

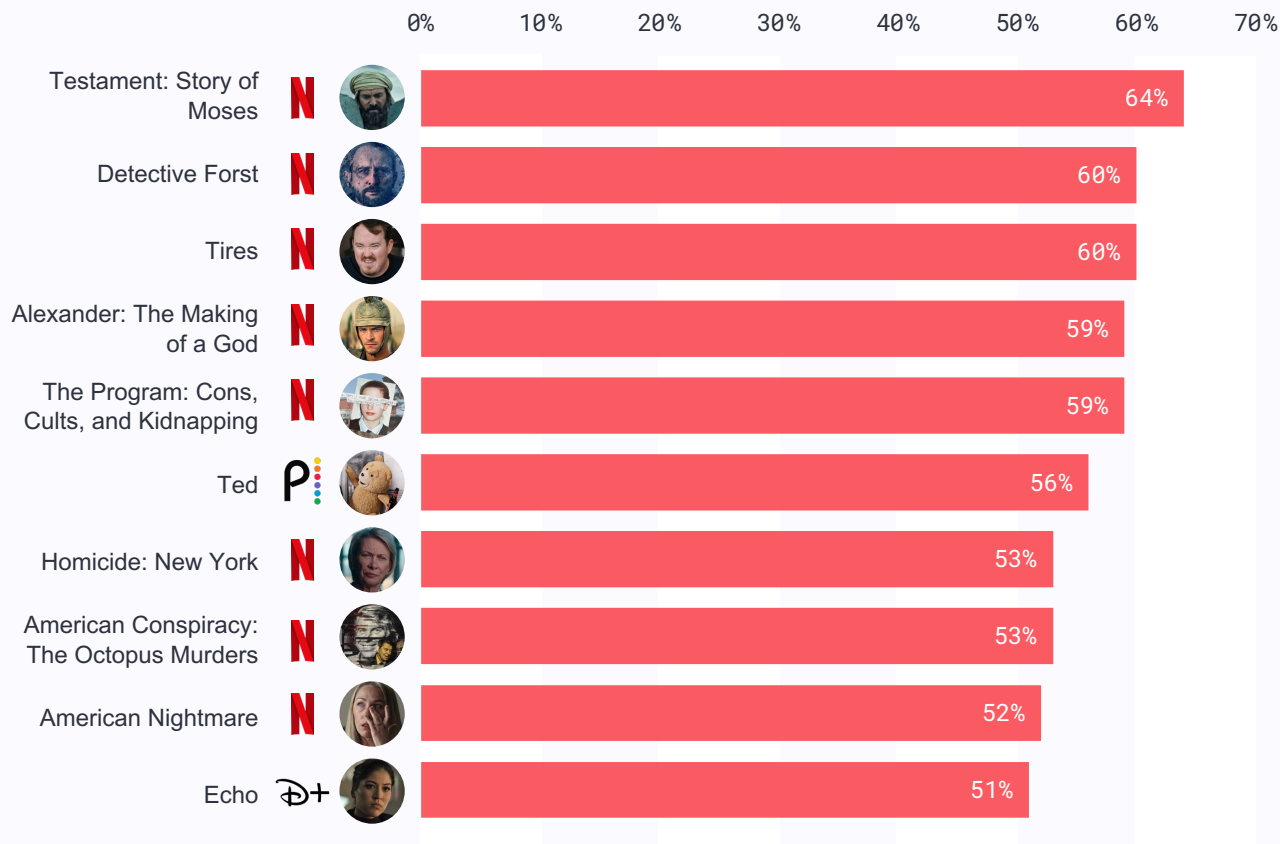
### Binge rate by genre

Among top 50 multi-episode release shows of H1 2024



### Top streaming shows with multi-episode releases on premiere date

Percent of 31-day season finishers that bingeed in first five days



# Binging most prominent among diverse households and in warmer climates

America loves to binge, but which Americans love to binge the most? Data shows a stronger tendency to binge among households in warmer climates such as Houston, Orlando, and Phoenix, as compared with cooler coastal DMAs that prefer to space out their viewership. There was also a higher binge rate among Black and Hispanic households than white or Asian households.

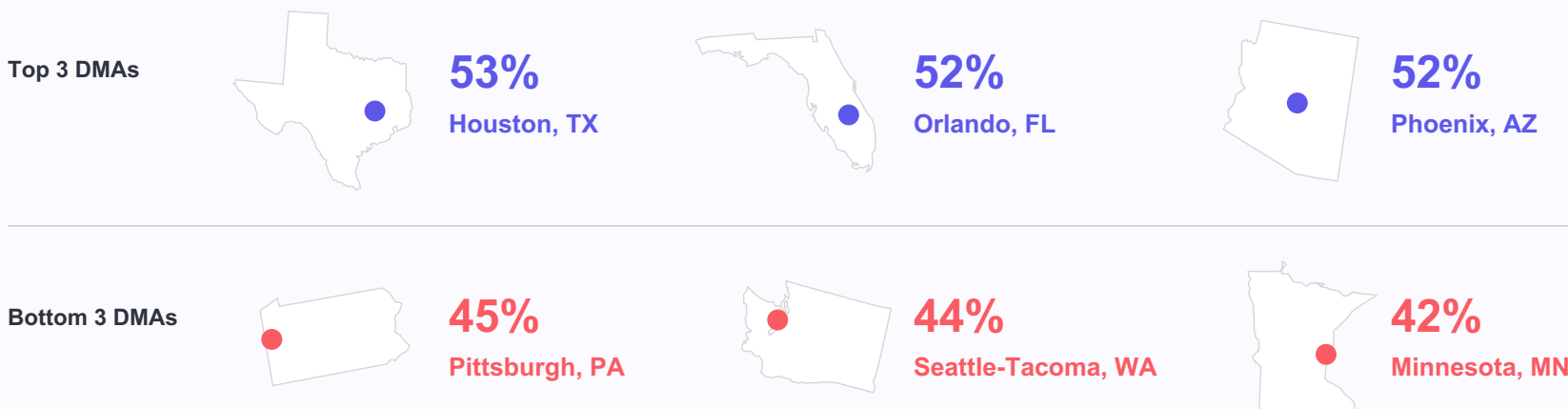
## Average binge rate\* by ethnicity

Among top 25 bulk release shows of H1 2024



## Average binge rate\* by top 3 and bottom 3 DMAs

Among top 25 bulk release shows of H1 2024, within top 25 DMAs

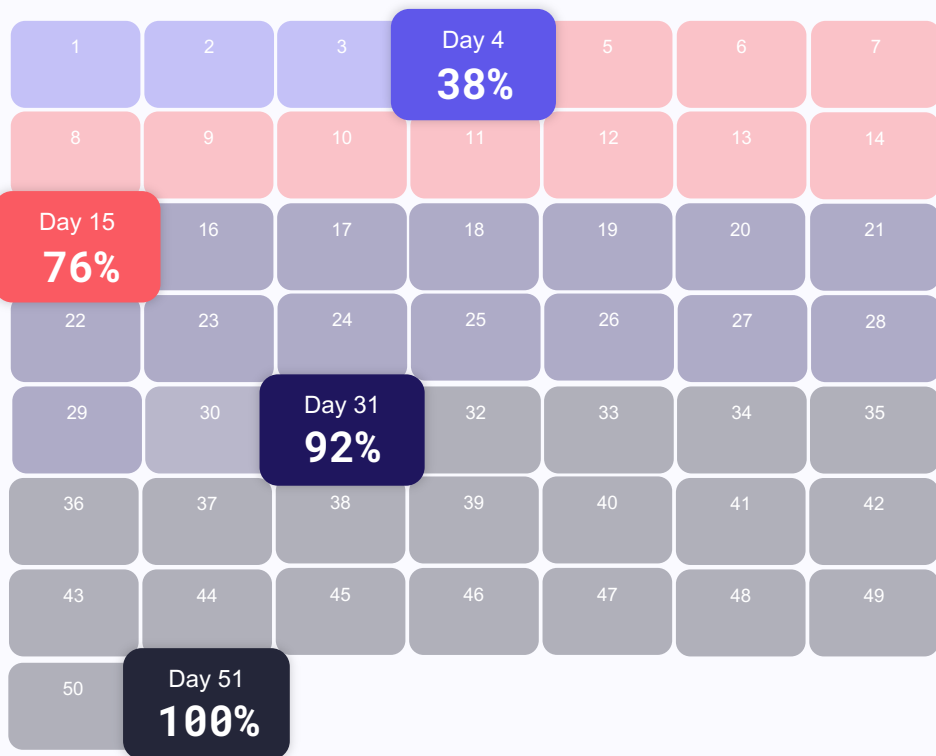


\*Binge rate defined as percent of 31-day season finishers that binged in first five days

# Majority of viewers watch new shows in the first two weeks

Although streaming content is available on-demand at any time, new TV premieres continue to drive the majority of viewership within their first two weeks. In fact, across the top shows of the first half of 2024, the vast majority of viewership occurred within the first two weeks, with the shows averaging 76% of 51-day viewership by day 15. A primary exception this half was *Baby Reindeer* on Netflix, which drove just 40% of its 51-day viewership by day 15, indicating that word-of-mouth propelled new tunes-ins past the typical mark for that popular program.

**Average household viewership achieved by day**  
Percentage of 51-day viewership\*

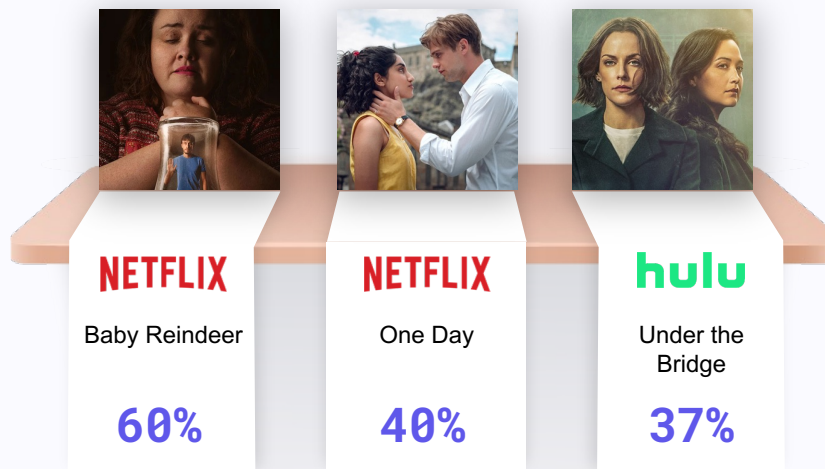


\*Averages include data from the top 50 streaming premieres of H1 2024 released prior to 5/12/24 to allow a full 51-day viewership window to transpire

**SPOTLIGHT: Baby Reindeer on Netflix**

**Baby Reindeer saw 60%**  
of its viewership occur  
*after* the first 15 days

**Shows with the longest discoverability windows**  
Based on percentage of 51-day viewing households that watched after the first 15 days



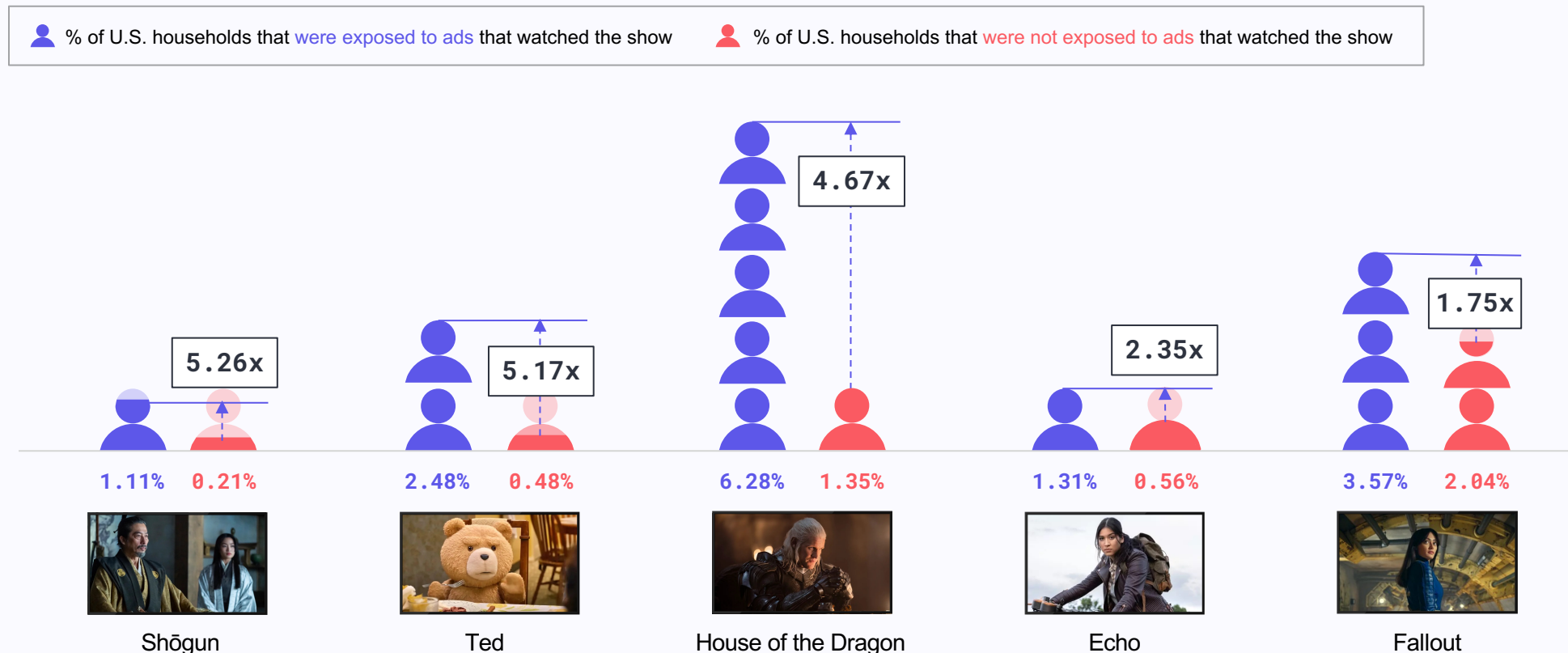
# Ad exposure moves the needle in driving people to watch new TV shows

People discover new shows to watch from various places, including friends, social media, in-app suggestions, and - of course - TV advertising. But how effective are TV ads in driving tune-in? Tune-in data across some of the biggest hits from the first half of the year shows that ad exposure consistently drove people to watch. In fact, across Max’s House of the Dragon, Peacock’s Ted, and Hulu and FX’s Shōgun, there were increases in viewership exceeding 4.5x between audiences exposed to ads and those who did not see ads. Those campaigns clearly reached receptive audiences with thoughtful creatives, thereby moving the needle to inspire viewership. As streamers look to maintain their audiences and drive retention, they should use Samba TV tune-in rate measurement to determine the tactics and creatives that are driving views at the highest rate.

## Tune-in rate measurement:

Samba TV’s best-in-class outcome measurement product for TV viewership. The TV ad exposed tune-in rate measures the percentage of households exposed to promotional ads that watched the show, while unexposed tune-in rate shows the percentage of households who did not see a promotional ad that watched the show.

**Tune-in rate by TV ad exposed group vs. unexposed:** Viewership measured within 30 days of ad exposure





## Biggest TV Moments

The first half of 2024 ushered in some highly anticipated new seasons of TV, including House of the Dragon S2 and Bridgerton S3. However, new originals dominated the leaderboard this half, as streamers promoting innovative takes on existing IP like Netflix's Fool Me Once and Hulu's Shōgun are rewarded. Meanwhile, sports continue to dominate on linear, with women's basketball reaching new heights, along with political events like the first presidential debate of the year.



# The Super Bowl rocks the ratings, as sports and news remain linear’s saving grace

This year’s Super Bowl between Kansas City and San Francisco was a nail-biter until the very end and drove the highest viewership of any Super Bowl since pre-pandemic times. It was the top viewed linear event of the half and was joined on the leaderboard by other NFL programming, including three playoffs games that drove over 26M views. Looking at the top linear events outside of sports, it’s clear that big-ticket sports games offer a great opportunity to capture audiences already tuned in to surrounding programming, with the Tracker premiere that aired after the Super Bowl bringing in high viewership. It was no match for the first Presidential debate of 2024 between Trump and Biden, however, which was the most viewed non-sports program of H1 2024. Looking ahead, as streamers gobble up rights to sports programming such as Netflix broadcasting NFL games next Christmas, linear will struggle to maintain its hold.

**86 out of the 100** most watched linear programs of H1 2024 were related to **sports**

## Top H1 2024 linear programs

Based on live + same day household viewership

Rank		Network	Households
1	Super Bowl LVIII	<b>CBS</b>	39.0M
2	NFL Playoffs (2023 AFC Championship Game)	<b>CBS</b>	27.4M
3	NFL Playoffs (2023 NFC Championship Game)	<b>FOX</b>	26.7M
4	NFL Playoffs (Buffalo Bills vs Kansas City Chiefs)	<b>CBS</b>	26.6M
5	Presidential Debate Hosted by CNN	Various	25.2M

## Top H1 2024 linear programs excluding sports

Based on live + same day household viewership

Rank		Network	Households
1	Presidential Debate Hosted by CNN	Various	25.2M
2	Tracker	<b>CBS</b>	24.7M
3	The Oscars	<b>abc</b>	13.3M
4	The 66th Annual Grammy Awards	<b>FOX</b>	11.8M
5	60 Minutes	<b>CBS</b>	7.9M

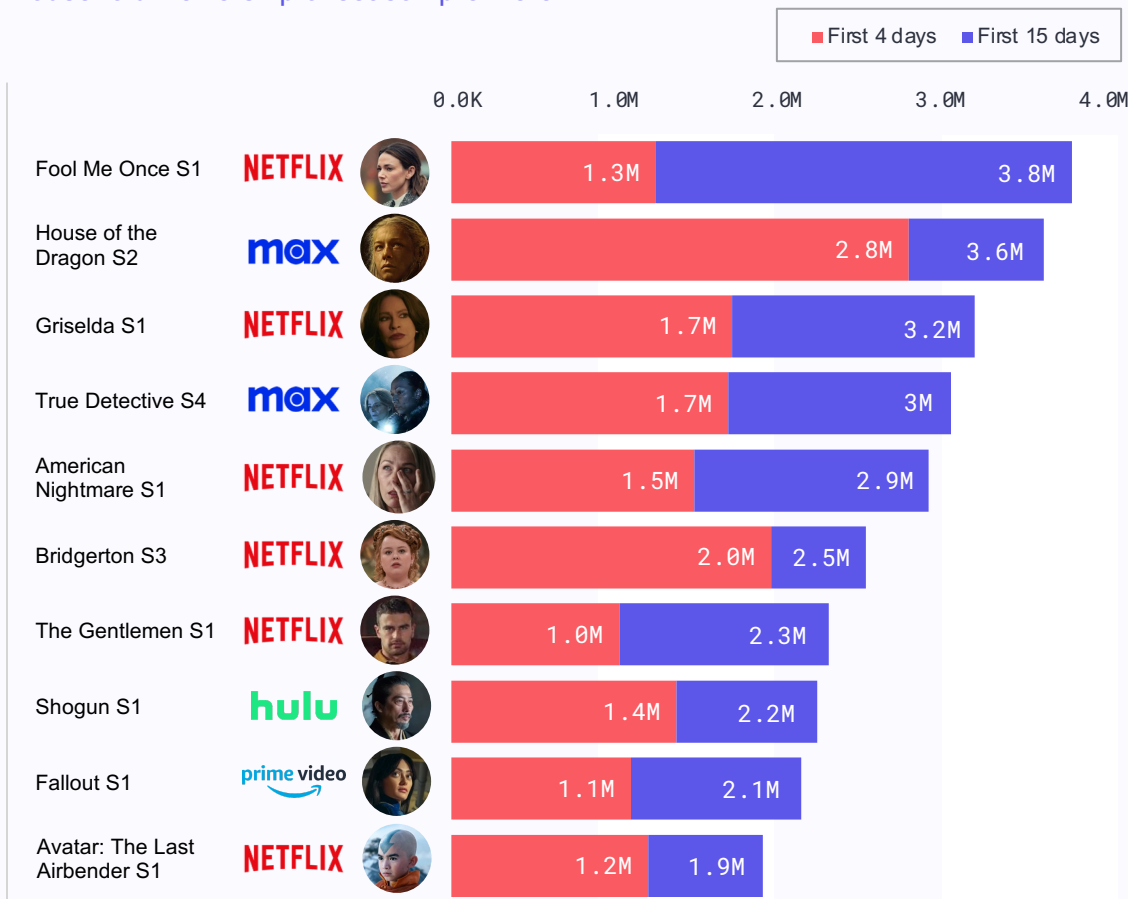


# New originals based on existing intellectual property drive streaming views

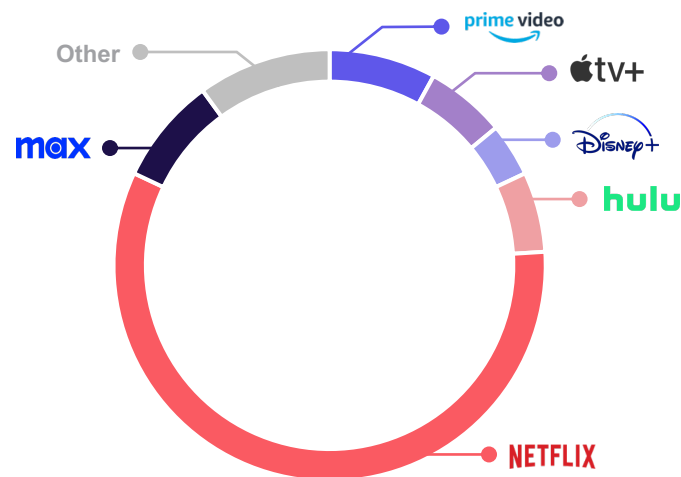
One of the biggest critiques of the entertainment industry is that too many productions are dependent on existing intellectual property. We saw this half that every top show was a spinoff or based on a book, true story, or other existing IP like a video game. However, 7 of the 10 were first seasons, illustrating that creative new takes on existing IP captures audience attention. Across both the top 10 shows and the top 50, Netflix represented 60% of programming, led by thrillers like Fool Me Once S1 and Griselda S1. Max leaned into tried and true material, with season two of House of the Dragon representing the second most popular premiere of the half, and True Detective season four landing the #4 spot.

## Top H1 2024 streaming shows

Household viewership of season premiere



Percentage of shows in top 50 originals: H1 2024  
Based on viewership of premiere in first 15 days

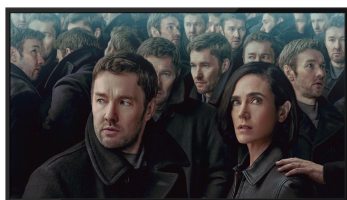


# Measurement of audience overlap drives better discovery, with House of the Dragon viewers watching drama and fantasy programming across platforms

As entertainment advertisers looking to plan ad campaigns, they should lean into viewership data that sheds light on user behavior. The content that people watch across networks and platforms can provide insight into how best to reach them. For example, viewers of House of the Dragon over-indexed by 7.34x based on viewership of The Boys on Amazon Prime Video. When planning for season two of Rings of Power, a show that bears resemblance to House of the Dragon, they could consider targeting viewers of The Boys.

## Highest indexing OTT programs among viewers of House of the Dragon premiere

H1 2024, HOTD viewership window covers 15 days following premiere



Dark Matter



10.88x



The Acolyte



10.13x



Shōgun



8.04x



The Boys



7.34x



3 Body Problem



7.18x

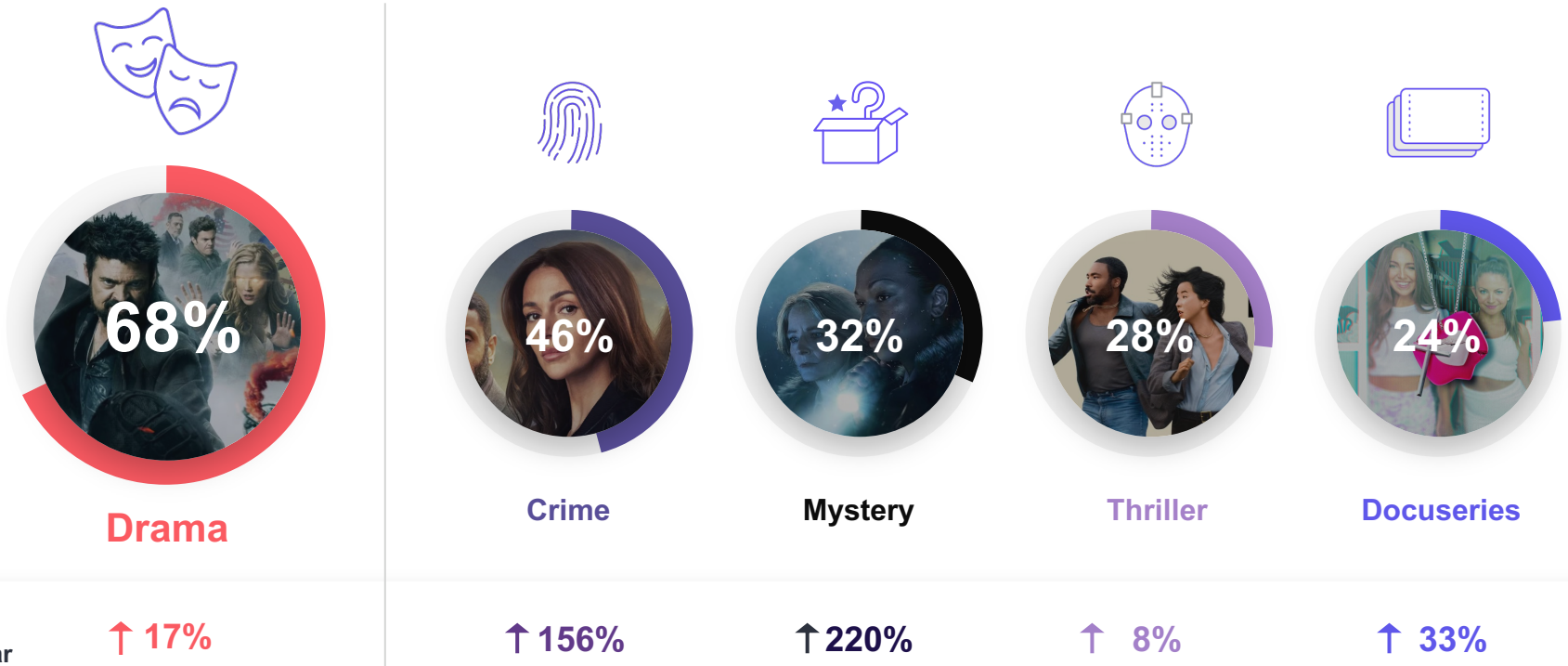
\*Excludes premium networks

\*\*From a different streaming service

# Drama remains dominant, while mystery and crime programming gains popularity

When asked what their favorite genre of TV is, the majority of Americans answer comedy, according to a Statista study from 2023. However, data shows that comedy is far from being the most popular type of programming, comprising just 20% of the top 50 streaming shows of the half. The most popular genre of H1 2024 remained drama, which represented over two-thirds of the top shows at a 17% increase year-over-year. Crime and mystery followed, each with year-over-year increases exceeding 150%, as studios lean into thrilling content that captures audience attention.

Most represented genres across the top 50 streaming shows: H1 2024



# Break-out hit Shōgun emerges as destination programming

People have different habits when it comes to TV, with some keeping it on all day as background noise, some turning it on to unwind, and others seeking out specific shows. Sometimes a new, exciting program will come along that sparks intentional interaction from audiences, with people turning the TV on to watch and immediately turning it off when they're done. Enter "destination programming," with Hulu and FX's Shōgun providing a prime example. Throughout its season, 70% of viewers turned the TV on specifically to watch, while 91% turned the TV off once they were done. As streamers compete for limited attention from viewers, rights to this type of breakout destination hit are essential in maintaining subscriptions and getting eyes on content - and ads - within the platform.

## 10 weeks

Shōgun was one of the top 10 streaming shows for **10 weeks** in 2024

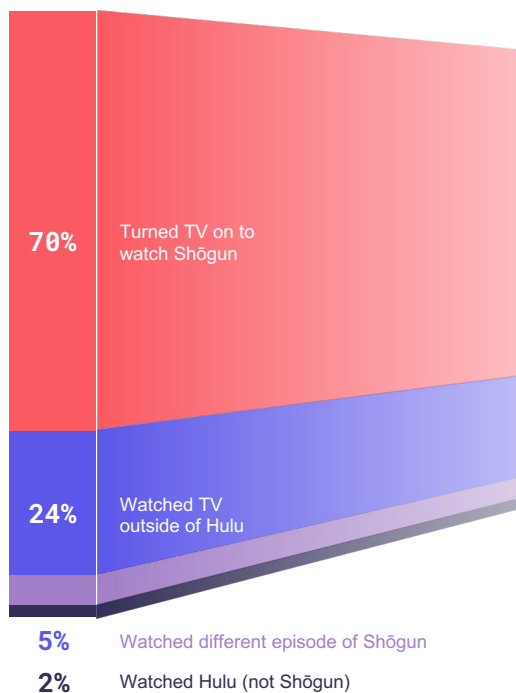
## 2.2M

U.S. households watched the premiere of Shōgun during its **first 15 days**

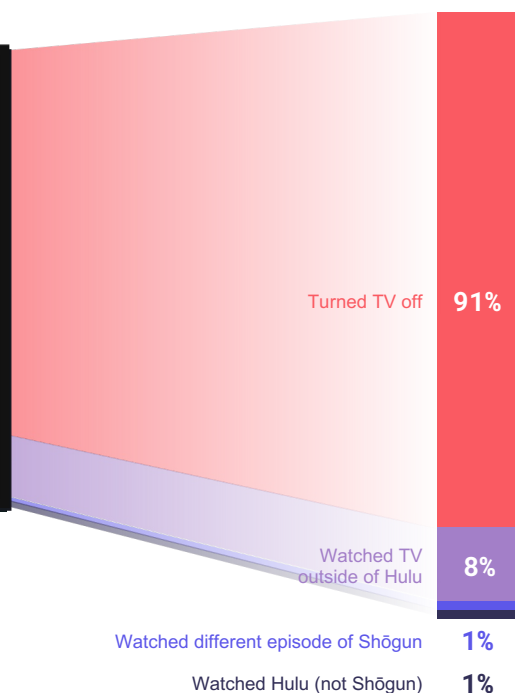
### Lead-in and lead-out viewership among Shōgun viewers

Measures 30 minute window before and after Shōgun viewership

#### Before watching Shōgun



#### After watching Shōgun



# Women’s basketball reaches new heights during March Madness and WNBA season

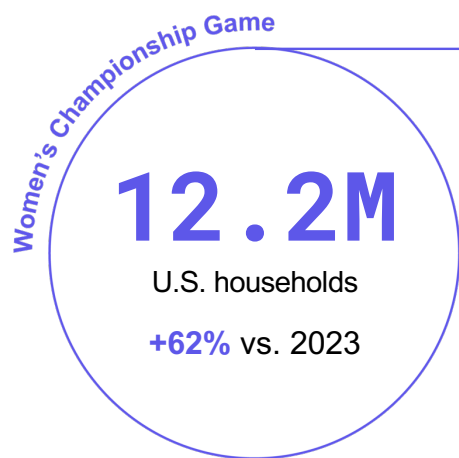
The growth of women’s sports viewership was brought to the forefront during the 2024 March Madness tournament, as the women’s Championship Game surpassed the men’s Championship Game in viewership for the first time ever. The momentum of women’s basketball and superstar Caitlin Clark carried over to the WNBA, with multiple WNBA games in 2024 surpassing 1.5M tune-ins. The highest reaching game was the Connecticut Sun vs Indiana Fever game on May 14th, which drove 1.7M people watching as Connecticut ultimately took home the victory. By comparison, that was nearly 50% higher viewership than any WNBA game in 2023.

## 1.7M

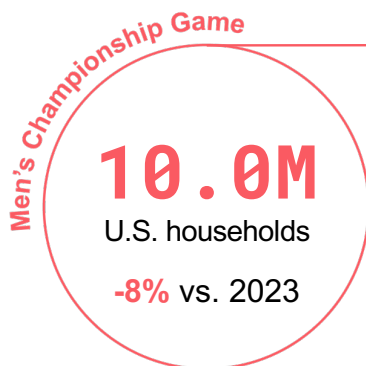
U.S. households watched the Connecticut Sun vs Indiana Fever WNBA game

That was **47%** higher than viewership of any WNBA game in 2023

### March Madness Championship Game viewership: H1 2024



**24.6M** watched the women’s tournament overall (up 41% YoY)



**35.3M** watched the men’s tournament overall (down 2% YoY)

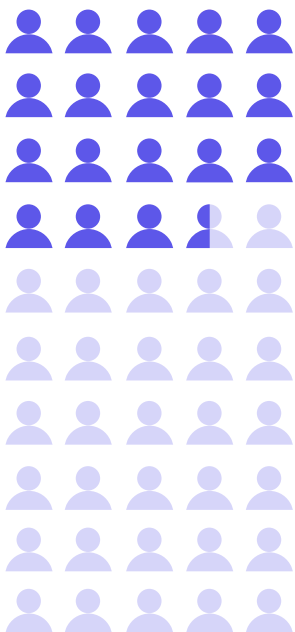


# Diversity among TV leads is down YoY, despite diverse casting driving viewership

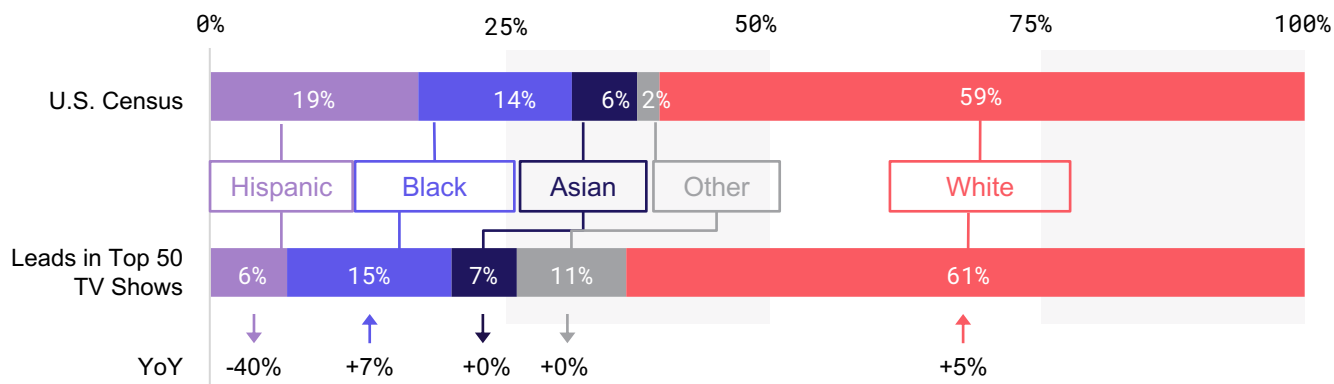
Within the top 50 TV shows of the first five months of the year, 39% of top-billed actors were Hispanic, Black, Asian, or another ethnicity such as mixed or Native, while 61% were white. This marked a 7% decrease in representation of diverse groups year-over-year. Although data continuously shows that diverse audiences consume content with diverse leads at a high rate, there is room for studios to increase diverse casting and develop quality content highlighting diverse stories. There was a negative correlation between shows with non-white cast members and Rotten Tomatoes scores, indicating that shows with higher levels of diversity received lower ratings from critics. Similarly, diverse groups were underserved by advertisers, with 63% of total ad impressions reaching white households, as traditional advertising fails to reach diverse audiences.

# 39%

of top-billed cast members were Black, Hispanic, Asian, mixed race, or of another non-white ethnicity, down 7% year-over-year

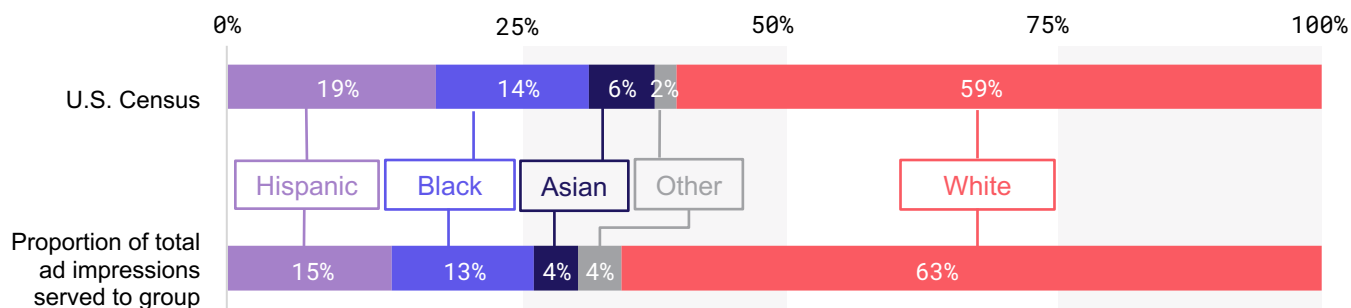


## Ethnic diversity of leads within top TV shows vs. U.S. population



## Linear & OTT ad impressions served by ethnic group vs. census breakdown

Based on ad impressions served 1/1/24- 5/1/24





## Advertising

Although Life & Entertainment remains the advertising vertical serving the most TV ad impressions, powerhouses like Pharmaceutical and Heathy & Beauty are ramping up their share of voice. And as the 2024 election gets closer political advertising is heating up as well, though both presidential candidates have a long way to go in reaching diverse households.























## Insurance and QSR brands remain top advertisers, joined this half by pet and electronics brands

While four of the top five advertisers serving the most ad impressions were consistent year-over-year (the newcomer being Burger King, up from eighth place in H1 2023), some notable additions to the top 20 list came from pet and electronics brands. Electronics & Communication brand Consumer Cellular was the #8 advertiser of the half, driven by a series of ads featuring Ted Danson. Consistent with the overall trend of pet ads increasing, cat and dog food brands Purina and The Farmer's Dog were both newcomers to the top 20 list, at #6 and #19, respectively.



### Top linear + OTT advertisers\* by impressions: H1 2024

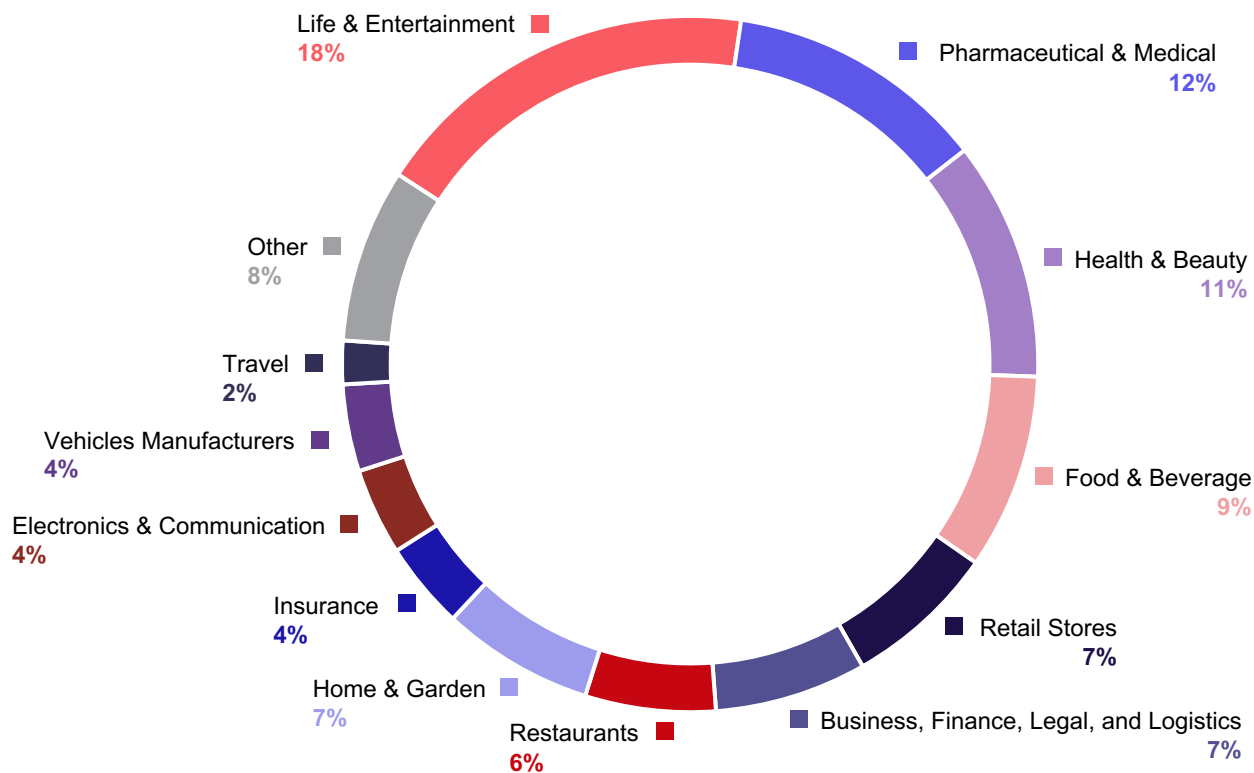
1		11	
2		12	
3		13	
4		14	
5		15	
6		16	
7		17	
8		18	
9		19	
10		20	

\*Excludes TV networks

## Entertainment ads comprise the lion's share of impressions, followed by pharmaceutical

As TV networks and studios advertise their new programming, oftentimes with host-channel promotion, Life & Entertainment remains the vertical sharing the highest number of ad impressions across linear and OTT at 18% of the total. This was down slightly from 19% in H1 2023, impacted by verticals like Pharmaceutical & Medical and Health & Beauty each gaining two percentage points share of voice. Several top Life & Entertainment advertisers, including FOX, HGTV, Discovery, and Food Network, shared fewer ad impressions year-over-year, which also impacted the drop.

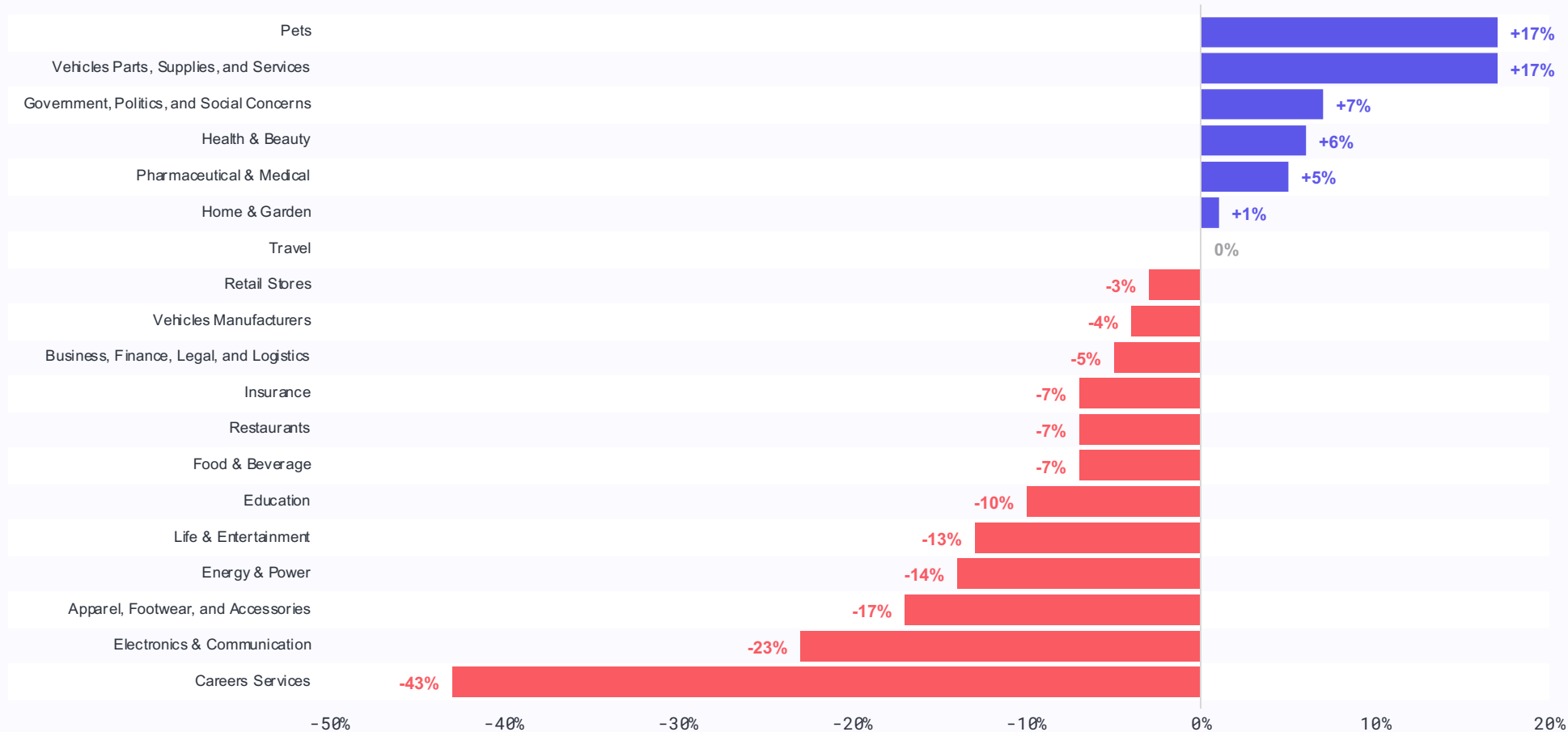
Percent of total linear & OTT ad impressions served: H1 2024



## Pet advertising heats up while Career Services and Life & Entertainment cool down

With 66% of U.S. households owning a pet, the pet industry is leaning in hard to advertising efforts. Consumers spent \$147 billion on pet retail products in 2023, driving advertisers within the space to increase ad impressions by 17% in H1 2024. On the other hand, the career services industry drove a sharp decline in ad impressions, impacted by slowed tech hiring and brands shifting their strategies to reach Gen Zers new to the workforce on social and digital, rather than TV. Meanwhile in the Life & Entertainment space, which represents the vertical driving the highest ad impressions, there was a 13% decline, also impacted by ads shifting to digital and social.

### Year-over-year change in linear & OTT ad impressions served: H1 2024 vs. H1 2023



## Pharmaceutical brand Lilly and preparedness brand 4Patriots among top growers

With Pharmaceutical & Medical representing one of only a handful of verticals to serve more impressions in H1 2024 than the prior year, Lilly, a 148-year-old company, emerged as a leader from a growth perspective. It was joined by 4Patriots, which has capitalized on the public's increasing focus on self-preservation in today's doomsday economy, with doomsday prep now representing a \$2.46 billion industry. Meanwhile, with political spending forecasted to hit \$12 billion this year, Fox News Radio turned up the ads and ranked among the top growing advertisers, with a focus on connected TV ads to reach voters.

### Top 25 advertisers based on year-over-year growth in linear & OTT ad impressions

Among top 500 advertisers, H1 2024 vs H1 2023



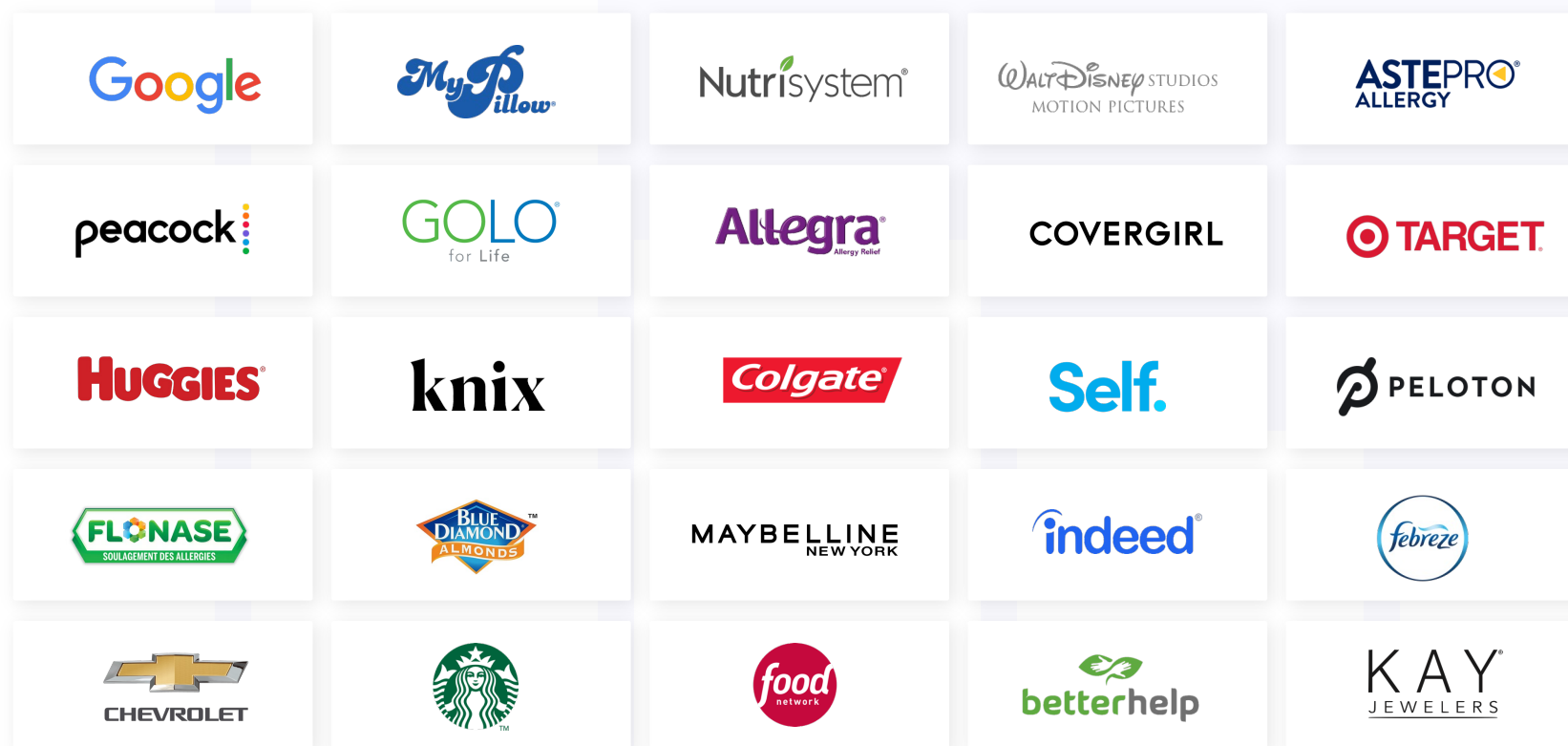
				
				
				
				
				

## Health and Beauty brands among those driving year-over-year decreases

Among the advertisers serving significantly fewer impressions year-over-year, about half were Health & Beauty brands. While Golo was among a top growing brand in H2 2023, this year it shifted to one of the advertisers with the largest decreases, as its products have been overshadowed by competitors like Ozempic. MyPillow ranked second for the largest decrease in ad impressions, having implemented cost-cutting measures such as closing production facilities. Other notable brands serving fewer year-over-year impressions were Peacock and Walt Disney Studios Motion Pictures, likely as they shift impressions to social and digital.

### Bottom 25 advertisers based on year-over-year growth in linear & OTT ad impressions

Among top 500 advertisers, H1 2024 vs H1 2023



## 94% of linear and OTT ads reached only half of U.S. households, up two percentage points year-over-year

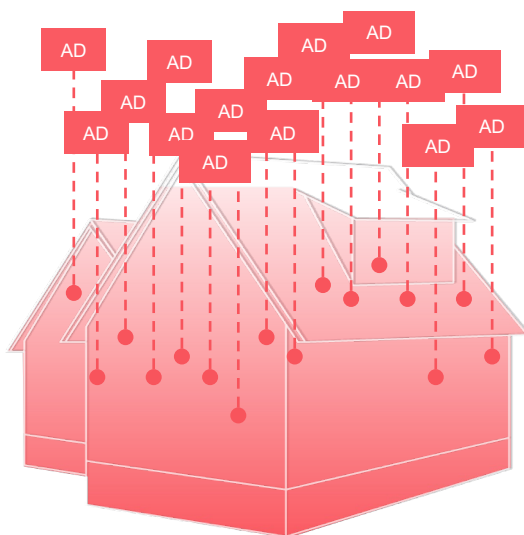
Oversaturation among heavy TV viewers has been a problem for advertisers year after year, and it's only getting worse. Samba TV data shows that half of TV viewers - those who consume the most linear TV - are seeing 94% of linear and OTT ad impressions, which was up from 92% in H1 2023. Conversely, the other half of TV viewers are seeing just 6% of TV ads, down from 8% in 2023. While half of Americans were underreached or not reached at all, the other half were bombarded by over 149 TV ads daily, driving ad fatigue among the overexposed.

# 149

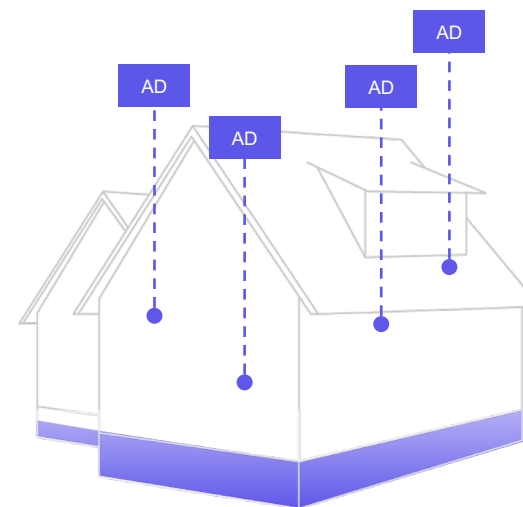
Average number of TV ads seen per day by the **top 50%** of linear TV households

# 10

Average number of TV ads seen by the **bottom 50%** of linear TV households per day



**94%** of TV ad impressions reached the **top 50%** of linear TV households: H1 2024













**6%** of TV ad impressions reached the **bottom 50%** of linear TV households: H1 2024



# Majority of QSRs serve fewer ads YoY, while Burger King leans into gamification

With inflation driving many restaurants to rethink their advertising strategies and raise their prices, the majority of top QSR brands served few ad impressions year-over-year. An exception was Burger King, which launched a \$5 campaign and new video game associated with its loyalty program, ultimately serving 25% more ad impressions than last year. Chili's was also a top growing brand, with its viral No Mascot campaign, a playful jab at competitors' mascot strategies. Looking at the networks and programs that QSR purchasers are consuming, there was an affinity for streaming movies like Hit Man and Road House, along with baseball and basketball on linear.

## Top restaurant advertisers by ad impressions: H1 2024 vs. H1 2023

1		-13%
2		+25%
3		+10%
4		-22%
5		-17%
6		+24%
7		-19%
8		-29%
9		-33%
10		-6%

## Growing restaurant brands

Top increases by impressions among restaurant brands in top 500 advertisers



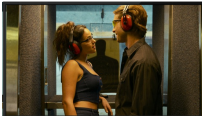


## Top indexing TV among Taco Bell, Burger King, or Denny's purchasers\*: H1 2024



### Linear Networks



### Streaming Programs

-  **NETFLIX**  
Hit Man
-  **NETFLIX**  
Baby Reindeer
-  **prime video**  
Road House











\*Based on Samba TV and Affinity solutions purchase data



# Retail ad impressions on TV down, with industry shifting to digital

The retail industry has shifted a high proportion of ad impressions to digital, and as a result many top retail brands drove year-over-year decreases in linear and OTT ad impressions while others remained stagnant. One exception was PetSmart, which was consistent with the overall increase in pet brand impressions. PetSmart has leveraged consumer spending trends by promoting their weekly offerings and discounts. IKEA also emerged as a growing brand with its recent campaign capitalizing on pet products. Meanwhile, shoppers at top retail brands like Walmart, Target, and TJ Maxx favored Netflix content on streaming, and culture oriented networks on linear like Destination America and the Cooking Channel.

## Top retail advertisers by ad impressions: H1 2024 vs. H1 2023

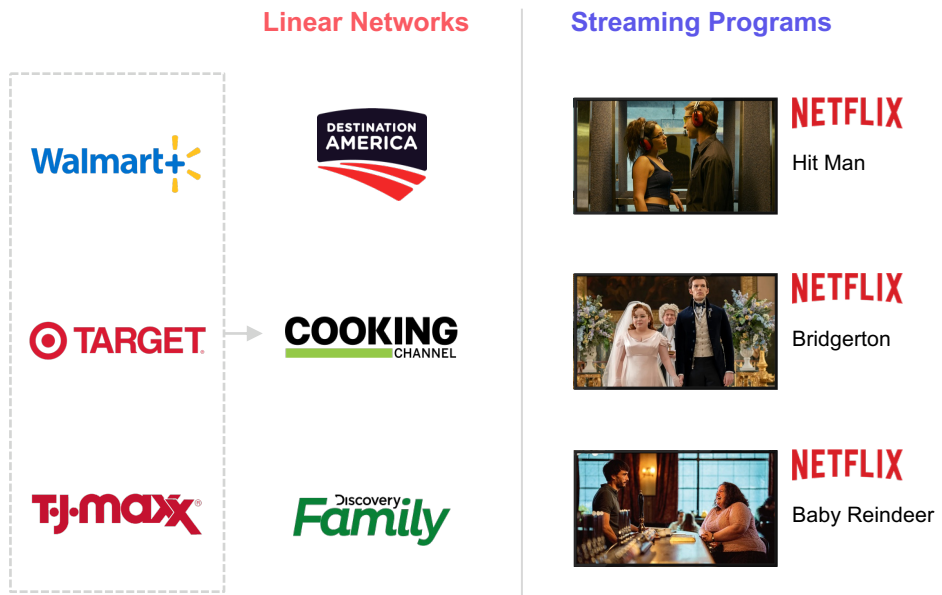
1		+2%
2		+2%
3		+10%
4		-7%
5		-19%
6		-25%
7		-23%
8		+40%
9		-33%
10		-45%

## Growing retail brands

Top increases by impressions among retail brands in top 500 advertisers

- 
- 
- 
- 
- 

## Top indexing TV among Walmart, Target, or TJ Maxx purchasers\*: H1 2024



\*Based on Samba TV and Affinity solutions purchase data

# Travel industry bounces back from pandemic with top brands pumping up ads

The travel industry continues to bounce back from pandemic losses, with the majority of top travel brands serving more ad impressions year-over-year. Trivago has emerged as a leading advertiser in the space with a 284% increase in ad impressions. The spike was associated with their innovative campaign using AI to create TV ads in multiple languages, effectively broadening reach among non-English speaking audiences. Meanwhile, Southwest Airlines drove a 239% increase in ad impressions, following an advertising investment of \$266 million during 2023. Airline purchasers consumed sports on linear TV, along with breakout hits like Shōgun on Hulu and True Detective on Max.

## Top travel advertisers by ad impressions: H1 2024 vs. H1 2023

1		+284%
2		-22%
3		+7%
4		-15%
5		+20%
6		+24%
7		+17%
8		+7%
9		-11%
10		+239%

## Growing travel brands

Top increases by impressions among travel brands in top 500 advertisers

1  2  3  4  5 


## Top indexing TV among Delta, United, or American Airlines purchasers\*: H1 2024





### Linear Networks



### Streaming Programs

 **NETFLIX**  
The Roast of Tom Brady

 **NETFLIX**  
Shōgun

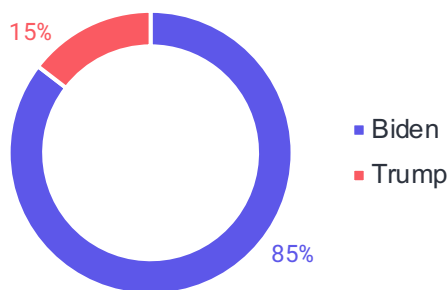
 **NETFLIX**  
True Detective

\*Based on Samba TV and Affinity solutions purchase data

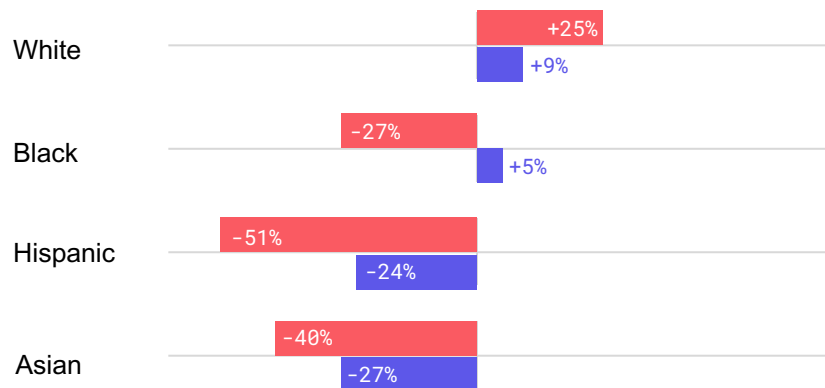
# Ahead of dropping out of the presidential race, Biden served 5x the ads as Trump

Before announcing in July that he would no longer be running for president, Biden hit America's TV screens with an unprecedented ad blitz, serving about 5x as many ads as Trump in H1 2024. The audience that was reached by both Biden and Trump's ads was disproportionately white, however, with both candidates over-indexing among white households. On the other hand, Biden ads over-indexed among Black households, while Trump ads under-indexed. Looking at the first presidential debate on June 27, which many sources point to as the event that propelled Biden to withdraw, viewership was high at 25.2M households, making it the fifth most watched linear event of the half. Among some key swing states, Michigan, Pennsylvania, and Wisconsin saw slight over-indexes in viewership compared to the U.S. as a whole, while households in Georgia and Nevada were less likely than the average U.S. household to watch.

Trump vs. Biden ad impressions: H1 2024



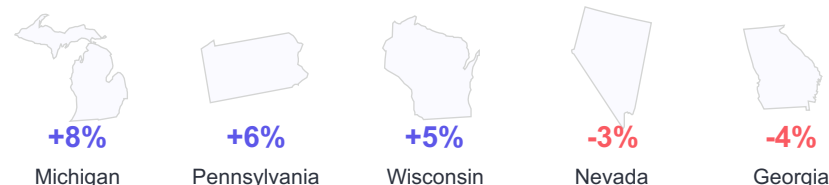
Ad reach index by ethnicity, compared to U.S. census : H1 2024



25.2M

U.S. households watched the first presidential **debate** of 2024 between Trump and Biden on 6/27

Debate viewership index among key swing states



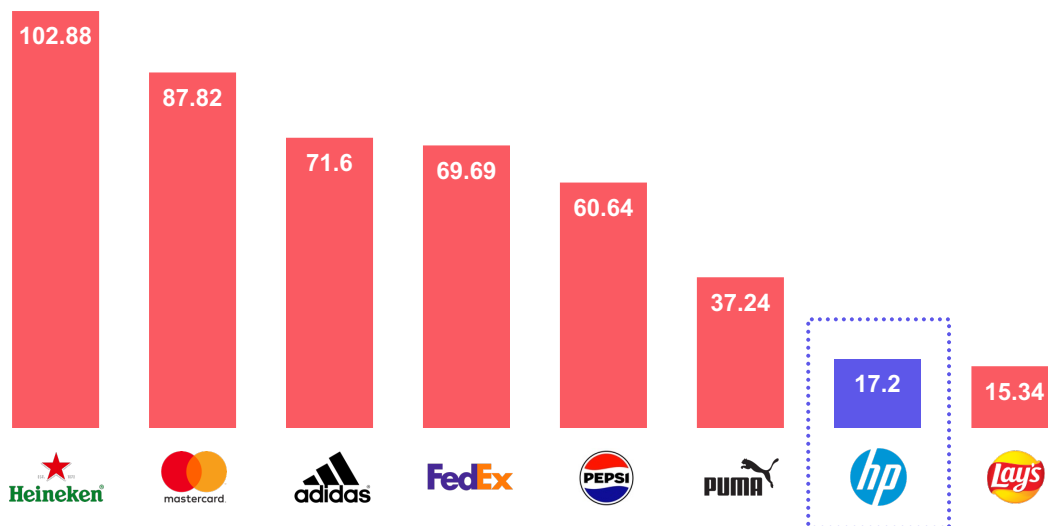
# HP uses Samba AI technology to gather insights on the value of a Real Madrid sponsorship

Samba launched new generative AI technology in H1 2024 that unlocks innovative insights for brands, such as recognizing products and logos seen on any type of TV content. HP used this Samba AI technology to better understand the value of its sponsorship with Real Madrid, as HP logos are on their jersey shoulders. For the April 9th UEFA Champions League match against Manchester City, a Samba AI study showed that Heineken was the most prominently featured logo during the game at an average frequency exceeding 100, and was followed by several brands which had logo placement on ad boards like Mastercard and FedEx. HP was the brand with the seventh highest average frequency throughout the match at 17.2, reaching a total of 507k U.S. households.



## UEFA Champions League logo brand comparison

Average frequency for 4/9/24 Real Madrid vs. Manchester City game among tracked brands



### HP spotlight

<p><b>507K</b> US household viewers</p>	<p><b>221</b> Total cumulative instances</p>
<p><b>8.7M</b> Household impressions</p>	<p><b>17.2</b> HH average frequency</p>

# Key takeaways from the first half of 2024



## Lean into advanced AI measurement to make more informed decisions about sponsorships

AI innovations are providing actionable context to video, such as logo and product recognition. Use this measurement to gain a true understanding of everything seen on-screen and stay ahead of competitors.



## Use bespoke release schedules to optimize viewership for new streaming shows

New data shows that viewers prefer to binge docuseries and crime shows to a greater extent than drama or comedy. When planning release schedules for new shows streamers should account for these consumer preferences.



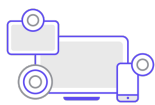
## Mitigate platform churn through bundling opportunities

With 50.4M SVOD cancellations in Q1'24, churn is a real problem for streamers. Retain subscribers by laying into the value of bundled subscriptions.



## Political advertisers should use comprehensive, first-party data to reach underserved voters in swing states

With the 2024 election season in full swing, it's more important than ever to be precise when developing a targeting and measurement strategy. Reach out to learn more about Samba TV's political solutions.



## Diversify buys through AVOD, FAST, and digital targeting

With more opportunities than ever to reach consumer and younger viewers in particular shifting away from linear, advertisers must develop an omniscreeen approach across devices.