

MarketCast

Holiday Advertising Report

A Brand Marketer's Guide to In-Season Campaign Management

The Holiday Season Has Changed

The holiday season is the most important advertising window of the year. It is also the most unforgiving. Budgets are at their peak. Creative is locked. Media is bought. And brands are running their best work at exactly the same time, competing for attention, in the same programming and across the same platforms. Meanwhile, those same consumers are faced with more obligations, demands, and stress than at any other time of the year.

To deliver on their holiday bets, brands must have clear goals up front, rapid insights into campaign performance, and the ability to adjust on the fly. Gut feel is not enough and what the data from the 2025 holiday season shows will surprise you.

Holiday-themed ads are better liked than the average ad running in the same window, but they are also remembered less, linked to brands less, and less likely to break through. The clutter problem is real, measurable, and working against even well-crafted creative.

This is not a challenge to holiday advertising's value. The season remains the highest-potential window on the calendar for retail and auto brands specifically. The point is that in an environment this competitive, assumption is expensive. The brands that win are not necessarily the ones with the biggest budgets or the best creative. They are the ones paying close enough attention to know what is working early enough to act on it.

This report delivers the benchmarks, the warning signs, and the framework to do exactly that.

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Methodology

The Holiday Report is based on MarketCast's measurement of 614 advertisements identified with Thanksgiving, Black Friday, Christmas or New Year's messaging, that aired between November 1 and December 31, 2025, across linear television and CTV. Of this universe, we analyzed 395 ads that had a minimum reportability threshold of 100 responses per ad.

The categories measured include Apparel and Accessories, Beauty and Skincare, Retail and Department Stores, Automotive, and Automotive Dealers and Services.

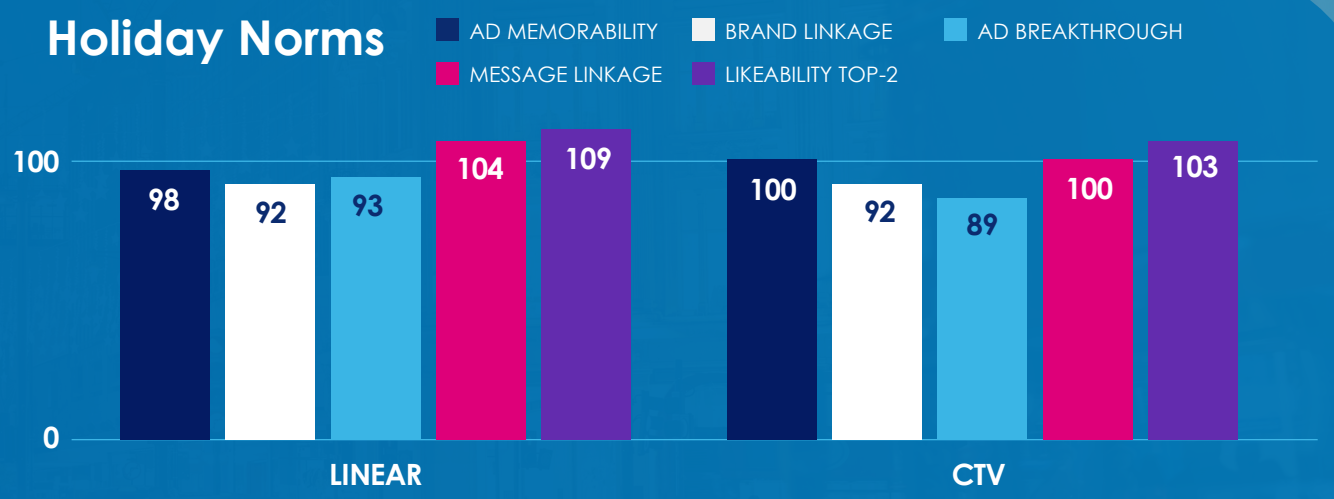
METRIC	WHAT IT MEASURES
Ad Memorability	Share of the general sample that correctly recalled seeing the ad
Brand Linkage	Among those who recalled the ad, the share who correctly attributed it to the right brand
Ad Breakthrough	Among the total sample, the share who both recalled the ad and correctly attributed it to the brand
Message Linkage	Among those who recalled the ad, the share who correctly identified its primary message
Likeability	Among those who recalled the ad, the share who rated it positively

The Holiday Advertising Environment Is Harder Than You Think

Holiday-themed ads are better liked than the average ad running in the same window. On both linear and CTV, holiday creative scored higher on Likeability than the all-ads norm for the same period. Audiences responded to the warmth and familiarity that holiday advertising trades in and the "comfortable feeling" these ads offer.

But Likeability was where the holiday advantage ended. On both linear and CTV, holiday ads fell at or well below the norm for Brand Linkage, Ad Breakthrough, and Ad Memorability. While these gaps were modest in isolation, the principle holds: when every brand invests in premium, emotionally resonant creative simultaneously, the competition increases.

Standing out during the holidays is demonstrably harder than standing out at any other point in the year and likeability isn't a success metric on its own. If Brand Linkage or Ad Breakthrough are lagging, that is a signal worth investigating.



An index comparison of the normative performance for ads that were identified as holiday ads versus ads that ran during the same period of November 1 - December 31, 2025.

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Who You're Reaching: Demographic Benchmarks

During the holiday season, the gaps between audience segments are larger and more counterintuitive than most marketers expect. Evaluating differences across demographics using an index, it's easy to see where the surprises lie.

Age & Gender

What isn't surprising was the difficulty in breaking through to younger audiences. We saw that on both CTV and linear, Ad Breakthrough among 18-34 year olds was much lower than the oldest cohort (55+). We also see an expected Ad Breakthrough gap between men and women. During the holiday season, when clutter is at its peak, knowing who you're trying to reach and how hard it is to cut through is an important element in your creative and media strategies.

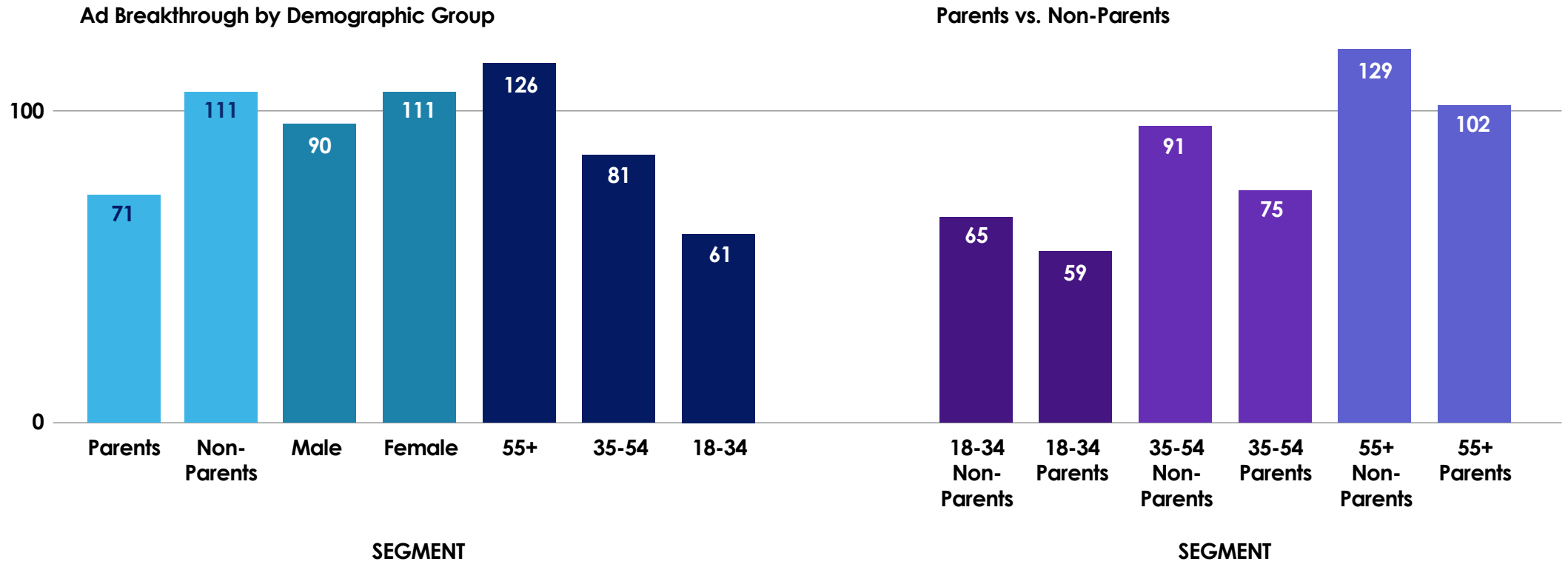
The Parent Gap

The most counterintuitive finding in the data involved parental status. Parents overindexed by 14 points on Likeability, whereas non-parents underindexed by four. If you were to measure success by Likeability, you may have counted that as a success among parents.

But entertainment did not always correspond to Ad Breakthrough. In fact, parents broke through at a significantly lower rate with a 40-point Ad Breakthrough gap between their indices on linear and 26 points on CTV. The audience most emotionally engaged with holiday advertising was also the least likely to remember it and connect it to a brand. The most probable explanation: parents were navigating the busiest, most logistically demanding time of their year while being simultaneously targeted by every brand with a family-oriented message. The noise worked against all creative, including creative they genuinely liked.

The natural question was whether this was a parental-status story or simply an age effect in disguise, since parents skew toward middle age. The cross-tab data answered that directly. On linear, the parent gap persisted within every age group and grew with age. Parental status was an independent factor, not an artifact of age composition.

Linear TV Holiday Ad Breakthrough Index by Demographic Group



Indexed against the holiday norm

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The Warning Signs to Watch

The 2025 holiday window revealed patterns that recurred across media, categories, platforms, and budget levels. None of them were unique to the brands that experienced them. All of them were detectable early, if you knew what to look for. Here are the warning signs worth monitoring in your own campaign.

The Media Environment's Impact on Campaign Results

When the Environment Penalizes Brands Already Struggling With Attribution

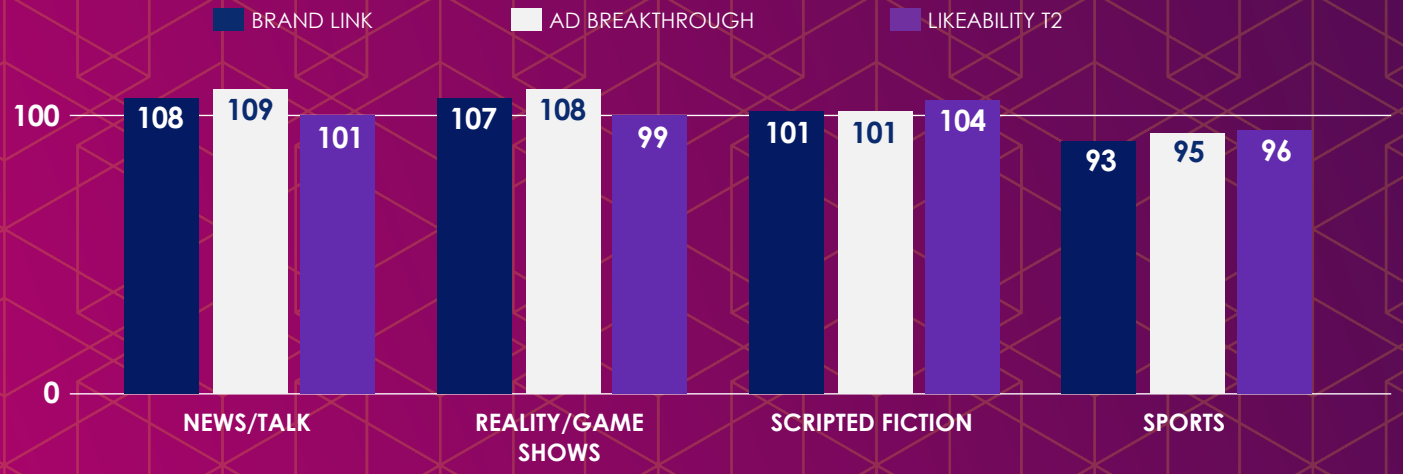
Sports was the only genre where Brand Linkage ran below the holiday linear norm and the brand-level data showed it was the same ads performing differently in a different context, not different creative. The pattern is sharpest in auto, where two specific brands that were already struggling with attribution fell roughly 20 to 25 points below the holiday norm in Sports while still delivering above-norm Message Linkage. Sports viewers were absorbing the message but not tagging the brand. For advertisers already in the "message sticks, brand doesn't" zone, Sports amplified the problem rather than correcting it.

When Scale Creates the Illusion of Stability

Scripted Fiction was where most holiday creative ran and most spend was concentrated. It was also where the gap between Ad Memorability and Brand Linkage was widest at the brand level. Several brands post Ad Memorability at or above norm while Brand Linkage ran more than 10 points below it. For brands already carrying an attribution gap, Scripted Fiction was the largest exposure surface for an unresolved problem.

When Genre Lifts Are Mistaken for Creative Fixes

News/Talk and Reality/Game Shows indexed above the holiday norm on Brand Linkage because the brands performing well overall performed especially well there. A leading online pet specialty retailer, a dominant e-commerce platform, and top-performing specialty beauty brands all posted Brand Linkage 15 to 25 points above norm in both genres. The flip side: brands already struggling with attribution did not recover in these environments. An attentive viewing context amplified what the creative was already doing, in both directions.



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The Retail Paradox: More Spend, More Ads, Less Brand Attribution

When Investment Scales But Brand Attribution Does Not

The three largest Retail advertisers on linear all posted Brand Linkage below norm — falling 5, 7, and 8 points short — and none cleared the norm on CTV. Additional spend did not compound into brand attribution. When Brand Linkage doesn't track with media weight, frequency was not the fix.

When Strong Linear Performance Masks a CTV Problem

One major electronics retailer posted CTV Brand Linkage roughly three-quarters below the basket norm and the largest single-brand gap in the entire Retail CTV dataset. Message Linkage was also below norm, ruling out the "message sticks, brand doesn't" pattern. Its Linear Brand Linkage was already soft and CTV made it worse. The two environments need to be monitored separately, not averaged together.

When Ad Memorability and Brand Linkage Decouple

One major home improvement retailer posted Brand Linkage 14 points below norm on Linear and nine points below on CTV across 16 qualifying ads each. Ad Memorability was at norm. Viewers saw the ads and did not connect them to the brand. When memorability was healthy but brand attribution was not, the problem was creative distinctiveness and it did not resolve itself over the course of the season.

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Auto's Holiday Warning: Everyone Sounds the Same



When the Message Lands But the Brand Does Not

The Auto category carried the highest Message Linkage norms of any category but the weakest Brand Linkage norms. The sharpest example posted Brand Linkage nearly 28 points below the Auto linear norm while delivering Message Linkage 17 points above it, giving it the widest brand-versus-message split in the basket. Two other brands showed the same shape, confirming a category-wide pattern. When a message landed but Brand Linkage lagged, generic campaign naming was the first thing to examine.

When Creative Volume Stops Compounding

The Auto brand running the most creative variants — 18 on CTV, 15 on linear — landed at or just below the basket norm on Brand Linkage on both platforms. Here, the creative concept, not insufficient frequency, was the ceiling. If additional variants were not moving Brand Linkage, the answer was not more variants.

When Underperformance Is Not Isolated to One Metric

Two brands underperformed at multiple funnel stages simultaneously. On linear, one posted Ad Memorability roughly 11 points below norm and Message Linkage more than 50 points below it. On CTV, that brand and one other posted the two lowest Ad Memorability and Brand Linkage scores in the Auto CTV dataset, both roughly 15 to 16 points below norm. When multiple metrics trended in the same direction at the same time, it pointed to the media plan.

What Winning Looks Like: Top 10 Linear Holiday Ads

The warning signs we listed will tell you when your campaign is in trouble, but we can also learn from the brands that broke through. These advertisers understood that product and offer specificity, a proven creative system with both discipline and flexibility, and distinctive brand assets do more for advertising performance than scale and creativity alone.

Ads ranked by Breakthrough.

RANK	BRAND	AD	PTS ABOVE NORM
1	Weather Tech	Office Gift Exchange	30
2	amazon	Home for the Holidays	24
3	SKECHERS	Getting into Slip Ins	23
4	chewy	Holidays with Pets	22
5	amazon	Holidays: Joy Ride	21
6	chewy	Holidays: Junior	19
7	Etsy	I Get You	17
7	DICK'S SPORTING GOODS	Make Your Wish List	17
9	amazon	Gift for Girlfriend's Dad	16
10	HOBBY LOBBY	Hot Cocoa	15

What Winning Looks Like: Top 10 CTV Holiday Ads

Ads ranked by Breakthrough

RANK	BRAND	AD	PTS ABOVE NORM
1	PETSMART	Black Friday Weekend Deals	28
2	DICK'S SPORTING GOODS	Celebrities Get Gifts From Santa	26
3	chewy	Holidays with Pets	20
4	chewy	Holidays: Hunter	16
5	chewy	Holidays: Junior	14
6	PETSMART	Putting Ornaments On the Tree	11
6	TARGET	Early Black Friday Deals: Bigger and Brighter	11
8	amazon	Home for the Holidays	9
8	Walmart	Lil' Roy Holidays: Adivina quién	9
10	OLD NAVY	Holiday Denim	8

Building Your Measurement Framework: Five Things to Do This Season

The brands that protect their holiday investment are not the ones that measure more. They are the ones that measure the right things, against the right benchmarks, early enough to act.

1 Know What "Good" Actually Looks Like For You

The overall platform norm is a starting point. Your real benchmark needs to reflect your platform, your audience, your category, and your brand's own historical baseline. A Retail brand on linear is not playing the same game as an Auto brand on CTV. Establish the right expectations before your campaign goes live, not after the first results come in.

2 Do Not Let Likeability Fool You

The data is clear: holiday ads are better liked and less remembered than the average ad running in the same window. Do not use Likeability as a proxy for effectiveness. An ad that wins on warmth but underperforms on Brand Linkage or Ad Breakthrough is a signal worth investigating, not a result worth celebrating.

3 Your Hardest-to-Reach Audiences Deserve the Most Attention

Younger viewers, male audiences, and parents are consistently the hardest to break through to during the holiday season. If any of these groups are central to your objectives, deliberate monitoring is not optional. Only the data will tell you if your campaign is working.

4 Match Your Creative Expectations to Your Media Environment

Brand Linkage isn't as strong in sports programming. Auto creative on CTV generates the lowest Likeability in the dataset. If your media plan is weighted toward environments that work against brand attribution, your creative needs to compensate. Build your expectations around your actual environment.

5 Stay on Top of Your Ad Performance, the Season Moves Fast

By the time a brand realizes its campaign is not performing, it has often already committed a significant portion of its budget. Build a measurement cadence into your plan before the season starts. The brands that win are not necessarily the ones with the biggest budgets or the best creative. They are the ones paying attention to the right signals, early enough to do something about it.

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How MarketCast's Advertising Solutions Can Help

Every finding in this report — the platform benchmarks, the audience gaps, the category context, the in-season performance signals — represents the intelligence MarketCast delivers continuously, throughout the season, while there is still time to act.

We measure advertising effectiveness across the full lifecycle, from creative development through in-flight optimization, connecting creative quality, media performance, and outcomes into a single continuous view.

To learn more about how MarketCast measures ad performance, contact us at hello@marketcast.com.