

The State of **Snapchat** Advertising in the U.S.

An Analysis of Snapchat Ad Spend, Impressions, & Creative Trends from Top Advertisers

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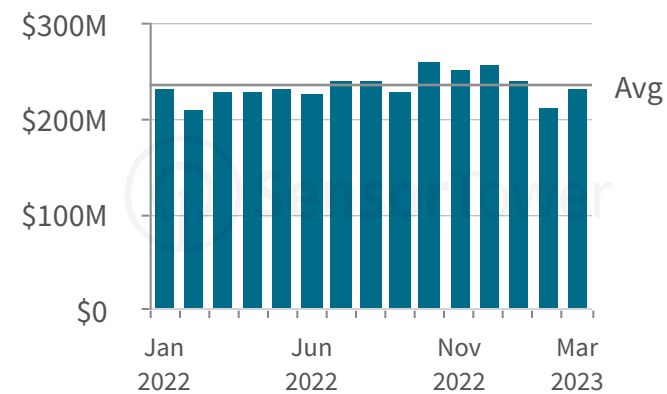


Snapchat Ad Overview



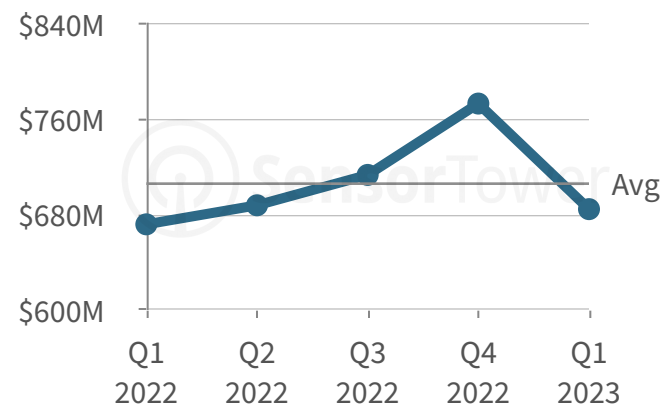
U.S. Advertisers Steadily Increased Snapchat Advertising in 2022

U.S. Snapchat Advertising, Q1 2022 through Q1 2023



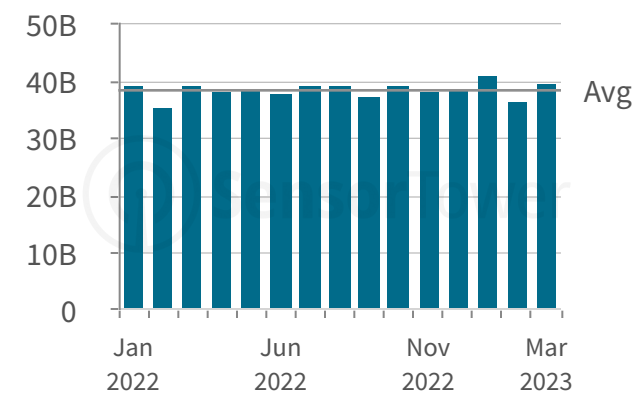
\$237M

Average Monthly Snapchat Ad Spending



\$707M

Average Quarterly Snapchat Ad Spending



39B

Average Monthly Snapchat Ad Impressions



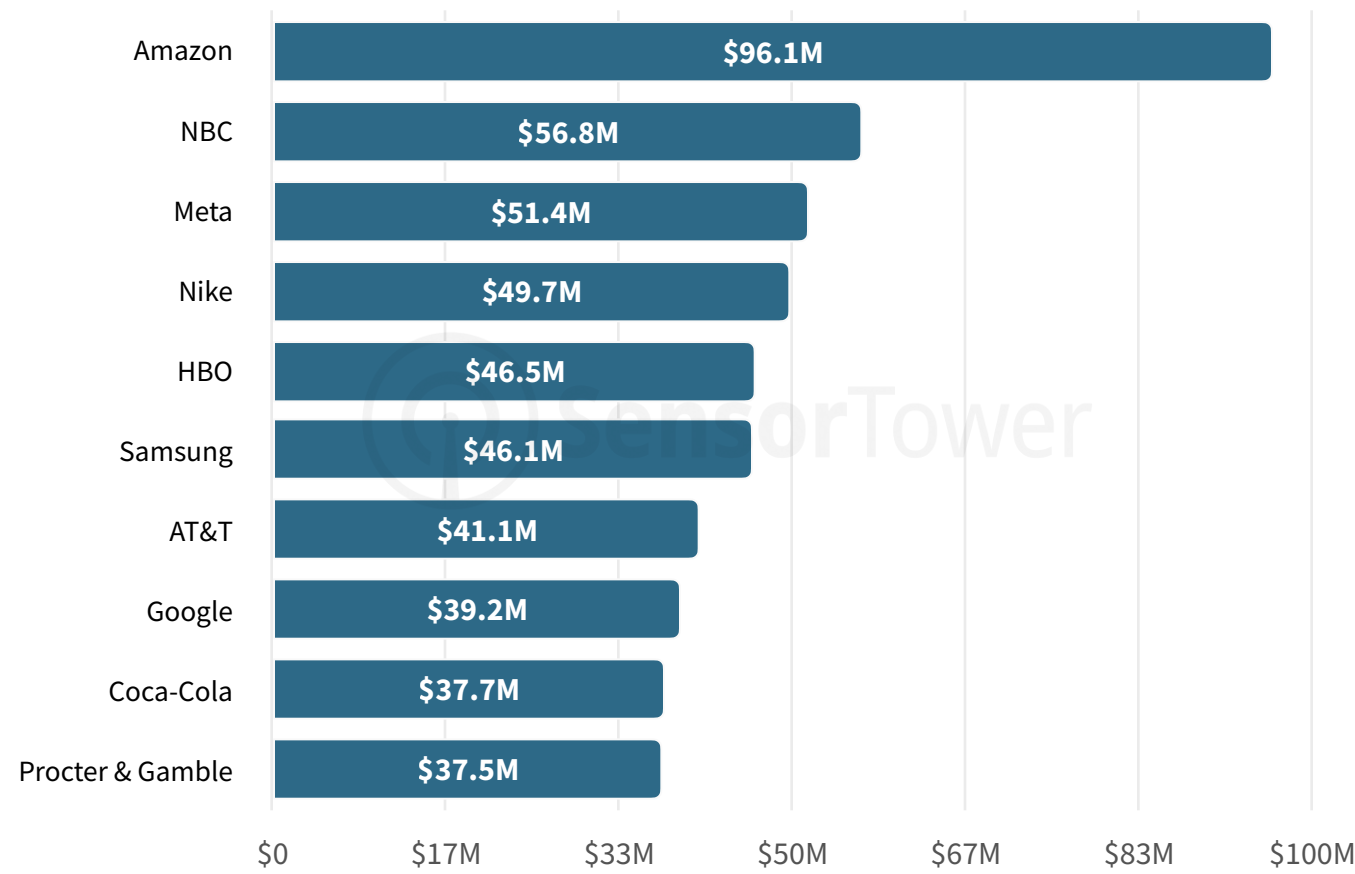
Tech Dominates the Top 10 Advertisers on Snapchat

Top Advertisers by Snapchat Ad Spend, 2022

Amazon, Meta, Samsung, and Google made up four of the top ten advertisers on Snapchat in 2022. Tech advertisers accounted for \$232M in Snapchat spending, making up 46 percent of all spending by the top 10 advertisers in 2022.

Among the top 5, Media advertisers HBO and NBC were at second and fifth place, respectively. In 2022, both HBO and NBC allocated more than 95 percent of their Snapchat ad budgets to their streaming service brands. HBO spent \$45.3M on its HBO Max creatives and NBC spent \$56.3M for its Peacock TV creatives.

Top 10 Advertisers by U.S. Snapchat Ad Spend in 2022



Media Ad Overview



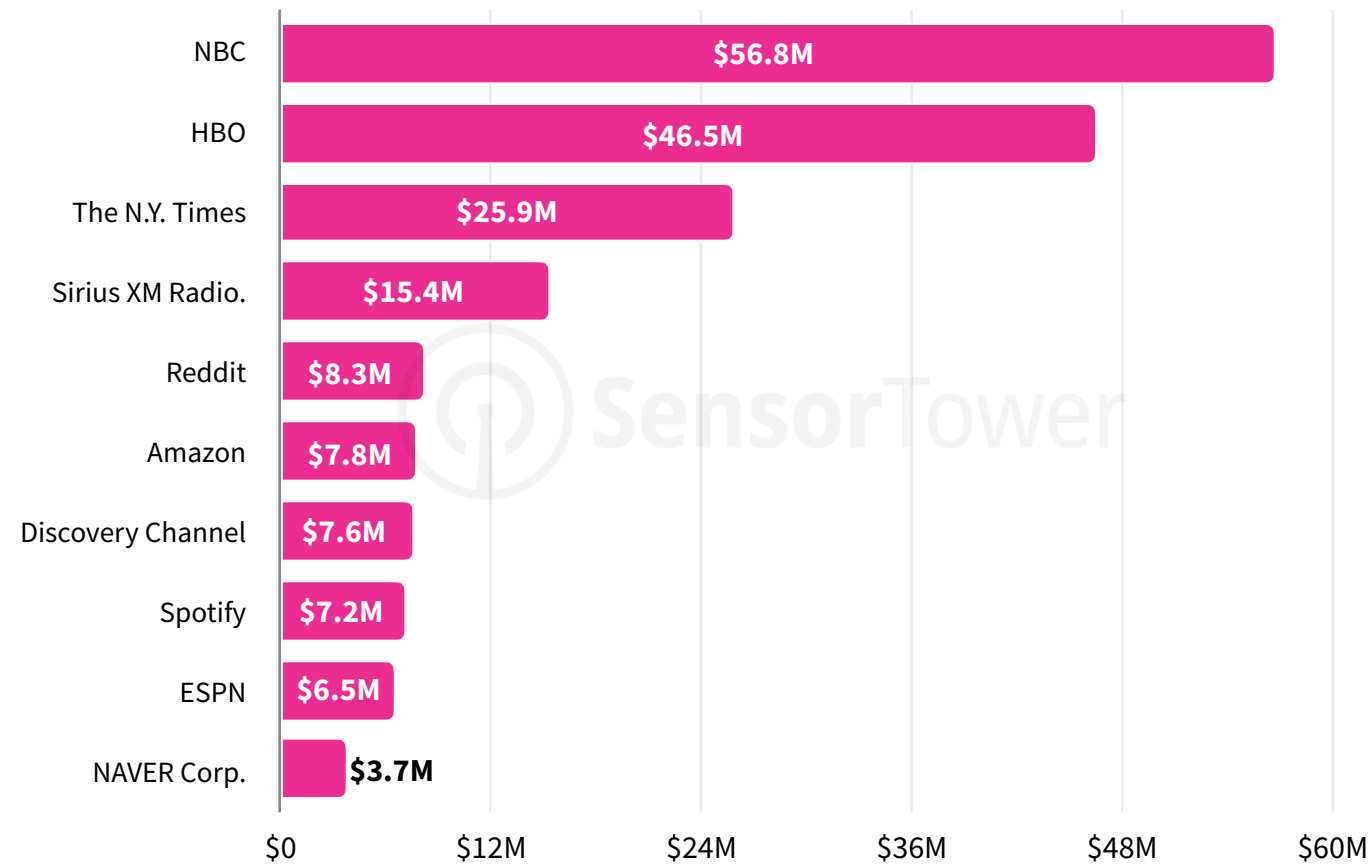
Streaming Services Were the Top Spenders for Media in 2022

Top Media Advertisers by Snapchat Ad Spend, 2022

NBC and HBO led in the Media category by focusing ad spending on their respective streaming services. Both advertisers spent over 95 percent of their Snapchat advertising budget on HBO Max and Peacock TV each quarter in 2022. NBC spent 99 percent of their Snapchat budget on Peacock TV from Q2 to Q4.

Sirius XM Radio, Spotify, and Amazon focused Snapchat advertising on audio-streaming services. Sirius XM Radio and Spotify allocated 92 percent and 99 percent of their total spending for 2022 on their respective music-based streaming platforms Pandora and Spotify. Amazon spent 99 percent of its total Snapchat budget for 2022 on Audible, a service that allows users to stream audiobooks and podcasts.

Top 10 Media Advertisers by U.S. Snapchat Ad Spend in 2022



Media Advertisers Gained Impressions During Months Surrounding New Streaming Content

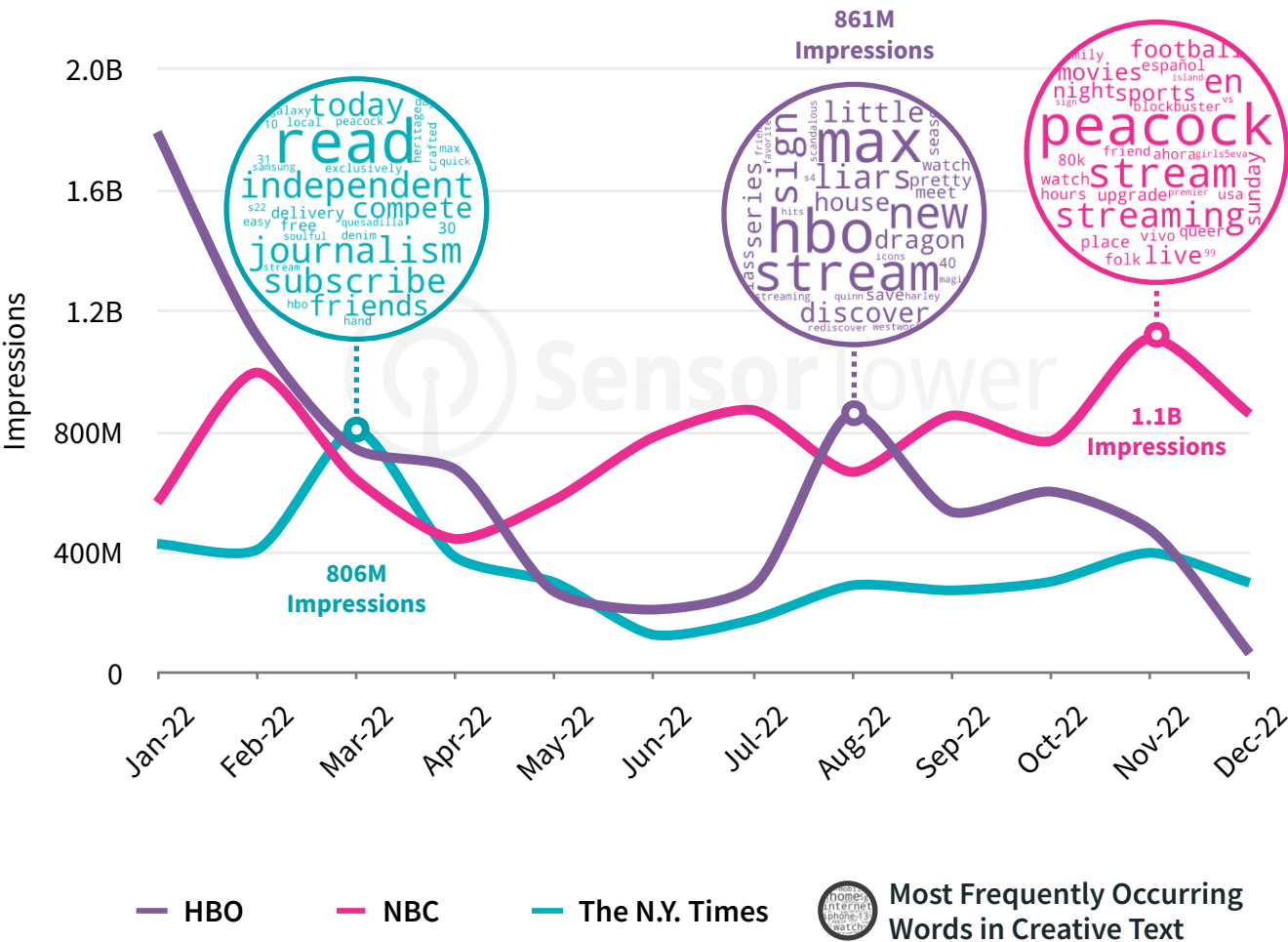
Monthly Snapchat Ad Impressions for the Top 3 Media Advertisers, 2022

NBC led in Media advertising in November 2022 with over 470M impressions from its Peacock ad campaigns, accounting for 42 percent of NBC’s total impressions for November 2022. Keywords such as “Sunday”, “streaming”, and “football” were featured to promote Sunday Night Football and movies as part of Peacock’s streaming services.

Creatives for the premiere of both Pretty Little Liars: Original Sin and House of the Dragon, accounted for 24 percent of HBO’s total impressions for August 2022. Despite being advertised for only 18 days in August 2022, the creatives for House of the Dragon generated 3 times as many impressions as Pretty Little Liars, which aired for the entire month of August.

Meanwhile, The N.Y. Times used Snapchat to promote subscriptions to its publication. Its most popular creative accounted for 43 percent of their total impressions for March 2022, through a post encouraging users to “subscribe today”.

Monthly Impressions from the Top 3 Media Advertisers on Snapchat in 2022



Arts & Entertainment Ad Overview



Arts & Entertainment Advertisers Spent \$146 Million on Snapchat Ads in 2022

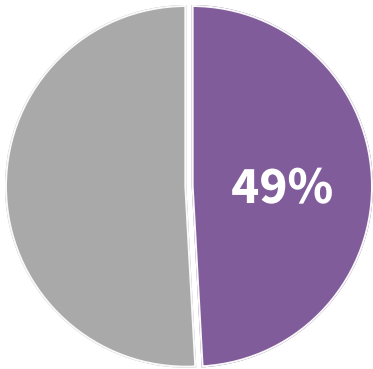
Top Arts & Entertainment and Movie Advertisers by Snapchat Ad Spend, 2022

Top 10 Movies by Spend in 2022

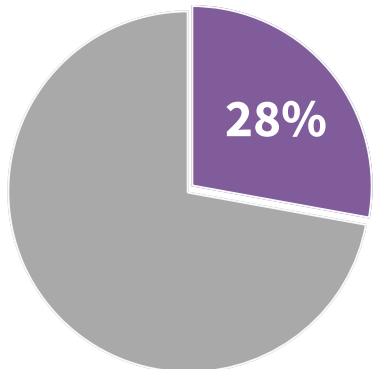
- 1 Minions 2
- 2 The Bad Guys
- 3 The Batman
- 4 Marry Me
- 5 Doctor Strange
- 6 Death on the Nile
- 7 Avatar
- 8 Elvis
- 9 Thor
- 10 Black Adam

Top 10 Arts & Entertainment Advertisers by Spend in 2022

- 1 Hulu
- 2 Disney
- 3 Amazon
- 4 CineMark
- 5 Ellation
- 6 Netflix
- 7 Fandango
- 8 SoundCloud
- 9 Caffeine
- 10 Fender Musical Instruments



49%
of Advertisers
were Movie Related



28%
of Arts & Entertainment Ad
Spending was from Movies

Note: Rankings are based on the highest Snapchat spending from 2022.



Snapchat was the Preferred Marketing Platform for the Top Spending Movies in 2022

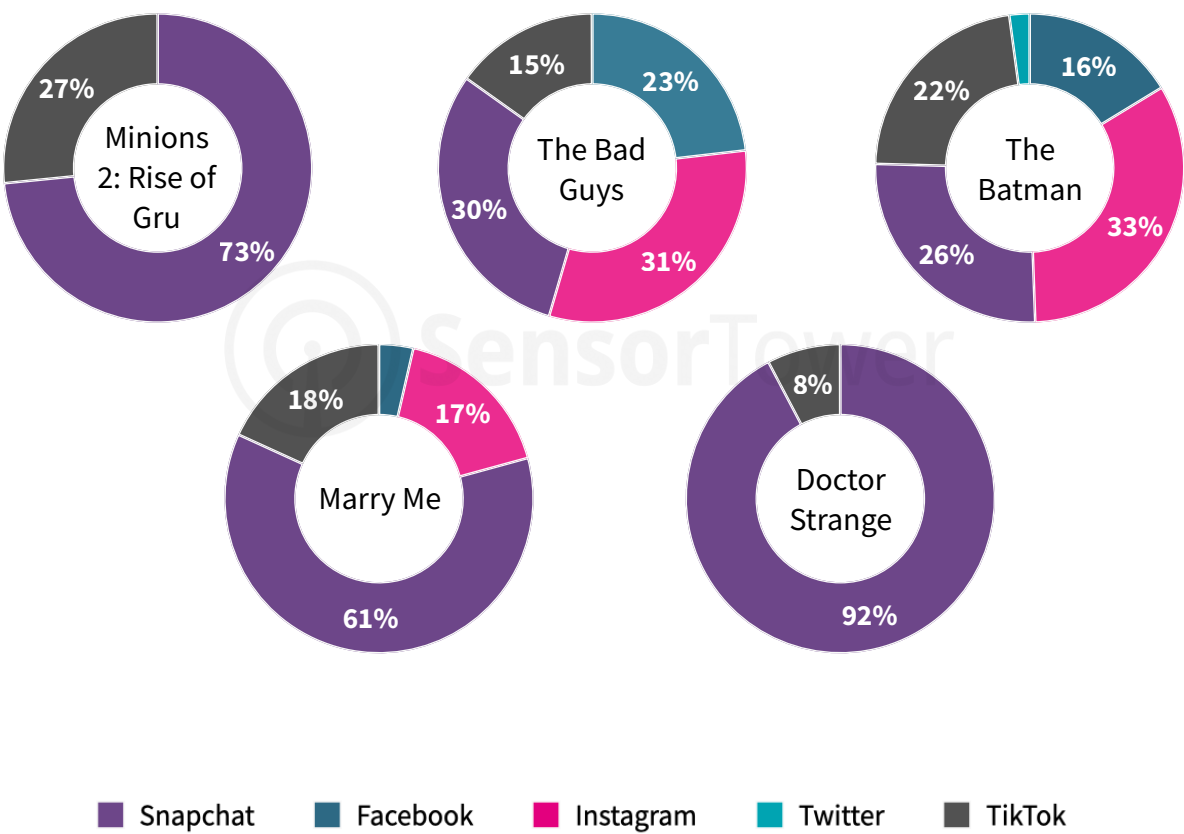
Ad Spend Share for the Top Movies, 2022

Among the top 5 movies, Minions 2, Marry Me, and Doctor Strange (2022) had the largest Snapchat spending shares. Marry Me had the shortest period of ad spending on Snapchat, lasting only one month from January 11 to February 15, and accounting for \$1.8M in spending.

Meanwhile, Minions 2, The Bad Guys and The Batman placed Snapchat ads for 6 months, the longest period out of the top 5 advertisers.

Note:
Top advertiser rankings are based on advertisers with the highest Snapchat spending in 2022.

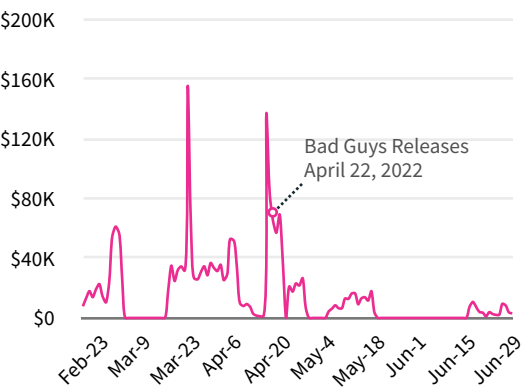
Ad Spend Share for the Top Movie Advertisers
Across Social Channels



Top Spending Movies Promoted On-Demand & Streaming One Month After Their Premiere

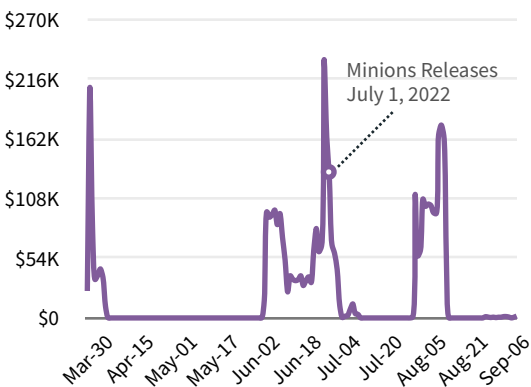
Monthly Snapchat Spend from the Top Spending Movies, 2022

The Bad Guys Snapchat Spending
February 23, 2022 to July 4, 2022



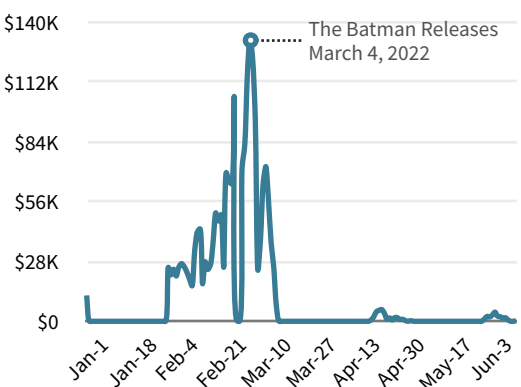
The Bad Guys aired Snapchat creatives two months before and two months after its release date. From February to March, Snapchat creatives focused on promotions for release date with March reaching over \$720K. After release, May saw increased ad spend for on demand viewing, reaching \$193K, while June showed a renewed focus on blu-ray, DVD, and digital advertising.

Minions: The Rise of Gru Snapchat Spending
March 30, 2022 to August 26, 2022



Advertising for Minions 2 began with trailers in March, with ad spend reaching \$232K. Following a brief pause, advertising in June consisted of Snapchat story posts announcing its arrival in theaters, with June 29 seeing the highest day of spending at \$233K. \$1.3M was spent on on-demand advertising in August, while September's creatives focused on physical copy promotions with \$8.4K in spending.

The Batman Snapchat Spending
January 1, 2022 to June 13, 2022



Unlike Minions 2 and The Bad Guys, The Batman saw its peak spending on the day of its release with over \$133K in ad spend. By April, Snapchat spending decreased to \$29K with an emphasis on HBO Max and digital. Meanwhile, June saw over \$21K in ad spend aimed at promoting The Batman on 4K Ultra HD and digital.



The Walt Disney Company Led Arts & Entertainment Advertising in 2022

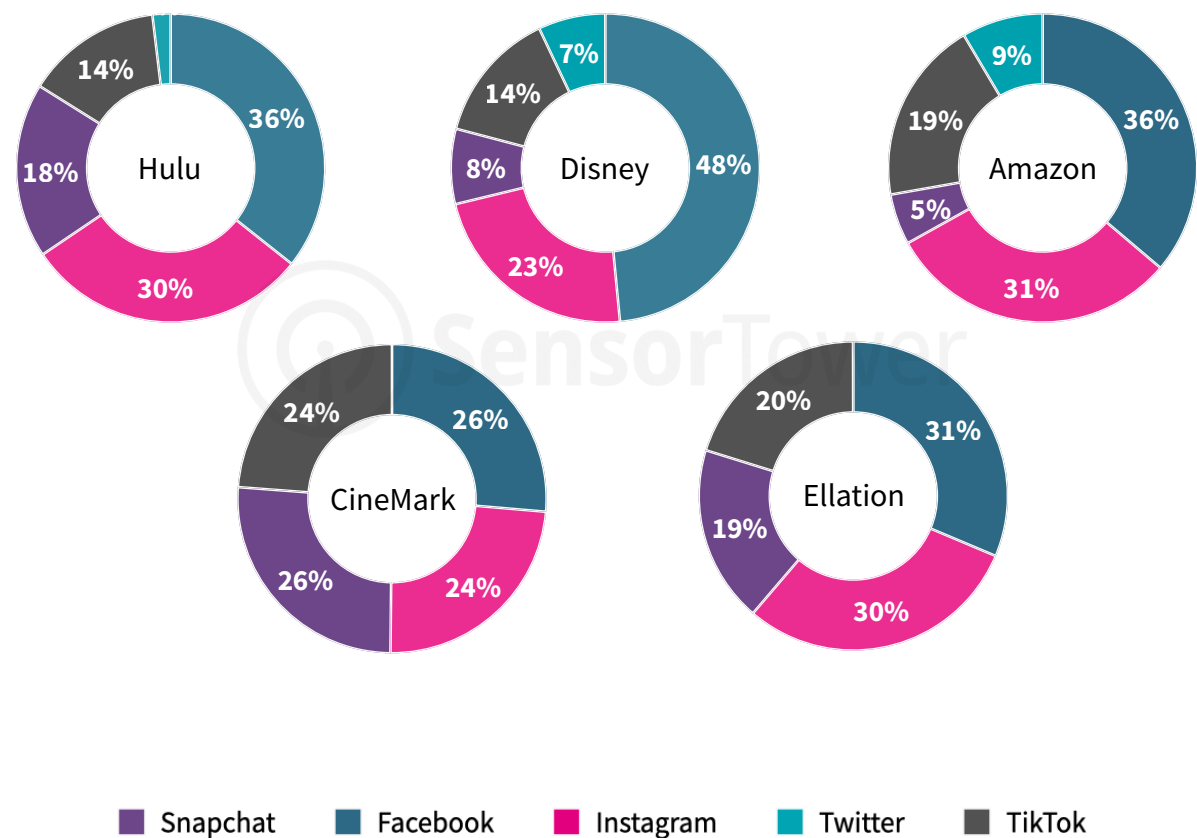
Ad Spend Share for the Top Arts & Entertainment Advertisers, 2022

The Walt Disney Company led in total Snapchat spending in 2022 with Hulu and Disney claiming the top two spots. Hulu and Disney accounted for 39 percent of Snapchat spend in the Arts & Entertainment category with a combined total of \$57.7M for 2022.

CineMark had the largest share of Snapchat spending across the top 5 Arts & Entertainment advertisers. Disney’s influence can be seen through CineMark as one of its popular creatives was a story post promoting Marvel Studios’ Thor: Love and Thunder, a movie owned by Disney, which generated over 29M impressions from a \$181K budget.

Note:
Top advertiser rankings are based on advertisers with the highest Snapchat spending in 2022.

Ad Spend Share for the Top Arts & Entertainment Advertisers Across Social Channels



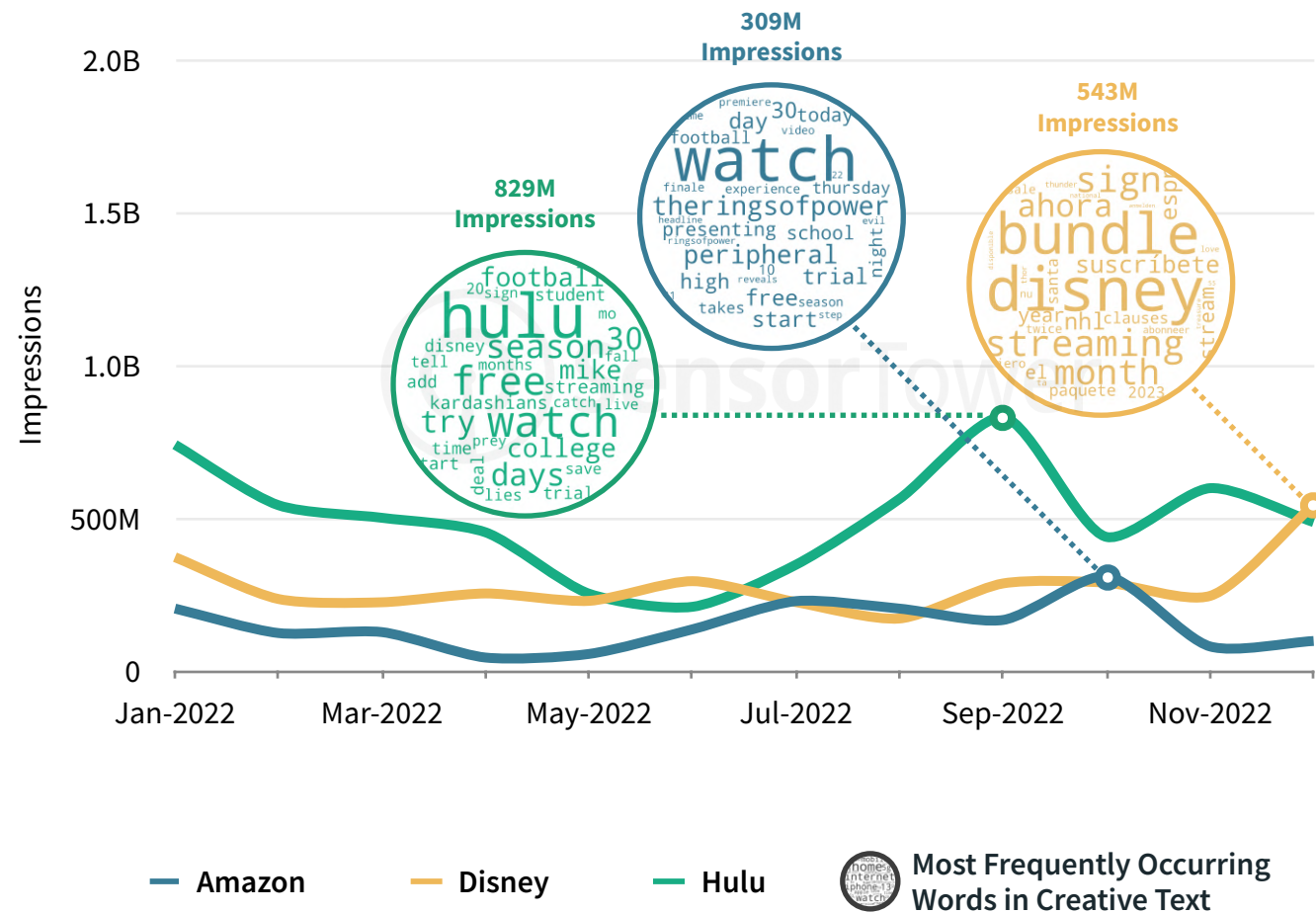
Advertisers Use Snapchat to Promote Deals on Their Streaming Services

Monthly Snapchat Ad Impressions for the Top 3 Arts & Entertainment Advertisers, 2022

Snapchat creatives from the top Arts & Entertainment advertisers featured deals and promotions from their streaming services. Twenty nine percent of Hulu’s impressions for September 2022 came from its most popular creative that encouraged users to “save \$20/mo. for 3 months.” Meanwhile, 14 percent of Amazon’s impressions for October 2022 came from creatives that promoted 30-day free trials on Prime Video. Disney creatives mentioning the Disney Bundle, a streaming plan between Hulu, Disney+, and ESPN+, accounted for 55 percent of Disney’s December 2022 impressions.

Monthly impressions grew during the release of new television series. Creatives promoting new shows such as The Kardashians and The Rings of Power made up 6 percent and 22 percent of impressions for Hulu and Amazon, respectively.

Monthly Impressions from the Top 3 Arts & Entertainment Advertisers on Snapchat in 2022



Telecom Ad Overview



Mobile Advertisers Dominated Telecom Advertising in 2022

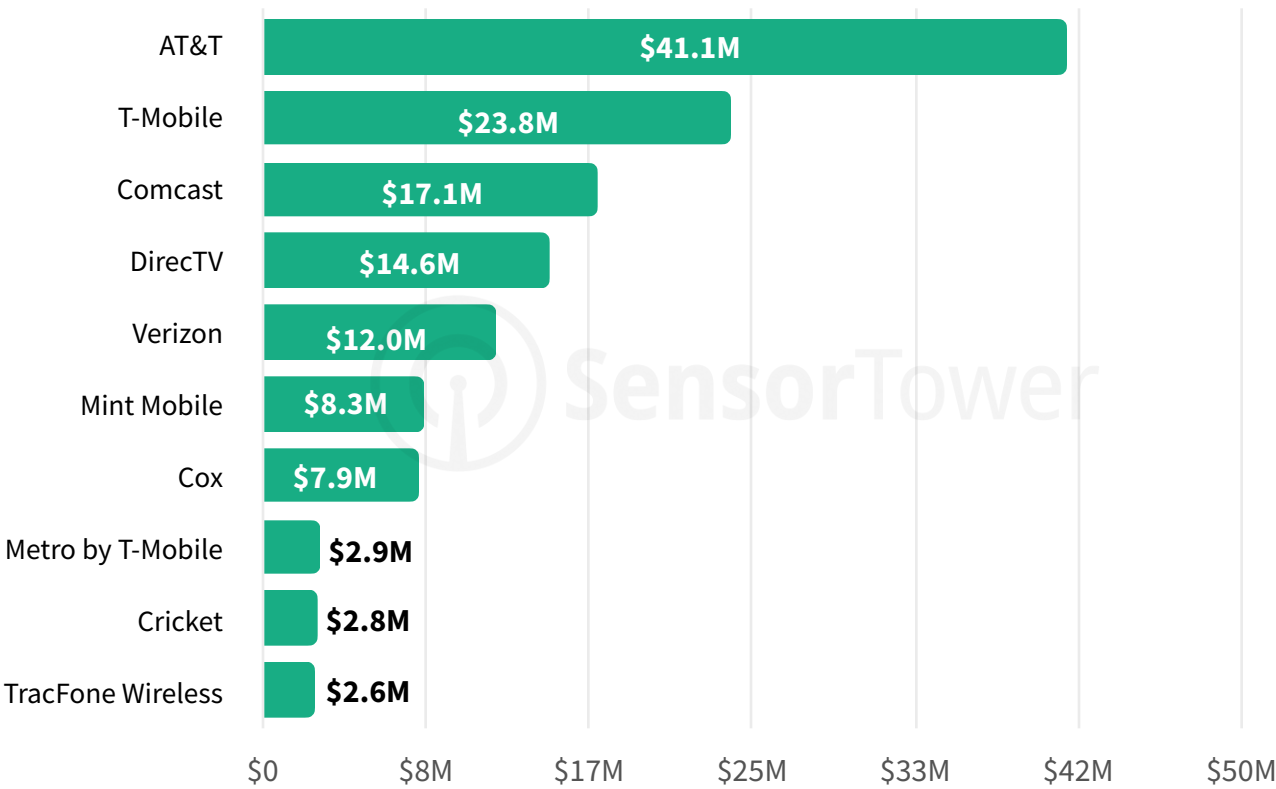
Top Telecom Advertisers by Snapchat Ad Spend, 2022

Mobile advertisers represented 9 out of the top 10 Telecom advertisers, accounting for over \$118M ad spending in 2022. Mint Mobile claimed its position as the fifth highest spender in Q4 2022 exceeding that of major provider T-Mobile.

General Telecom advertisers AT&T, Comcast, and Cox shared 49 percent of the top 10 Telecom ad spending. AT&T was the number one telecom advertiser in three quarters, while Comcast was in the top 5 throughout all of 2022, reaching its highest Snapchat spending in Q4 2022 at \$4.6M.

Note:
General Telecom refers to Advertisers who provide a package/bundle of services within the Telecom category. AT&T, Cox, and Comcast are examples of such Advertisers who provide Internet, TV, and Mobile services to customers.

Top 10 Telecom Advertisers by U.S. Snapchat Ad Spend in 2022



AT&T Gained in Impressions Over Competitors with a Focus on Snapchat

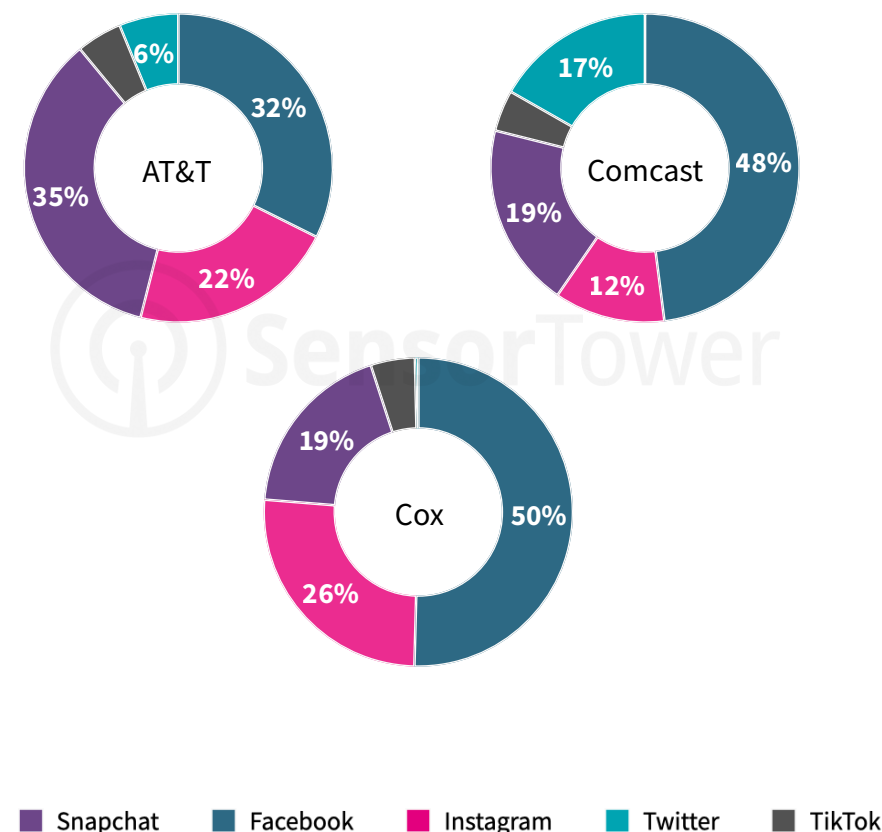
Ad Spend Share for the Top General Telecom Advertisers, 2022

AT&T was the only General Telecom advertiser to invest a majority of its spending through Snapchat. As a result, AT&T earned 6.6B impressions, gaining two times more impressions than Comcast and five times the impressions of Cox throughout 2022.

AT&T’s emphasis on Snapchat spending received significant gains with campaigns focusing on upgrades. With a budget of \$17.9M, AT&T generated 2.9B impressions through Snapchat creatives mentioning “Internet that upgrades everything”, “It’s time for something new”, or “Trade in and trade up.” Similarly, Comcast and Cox garnered 85M impressions and 122M impressions when both advertisers spent \$547K and \$721K, respectively, on Snapchat ads mentioning “switch”, “upgrade”, or “bring your own device”.

AT&T’s impressions lead demonstrates that advertisers can reach a wider audience by investing in social channels that are not frequently used.

Ad Spend Share for the Top General Telecom Advertisers Across Social Channels



Small Mobile Carriers Led Snapchat Spending Growth in Q4 2022

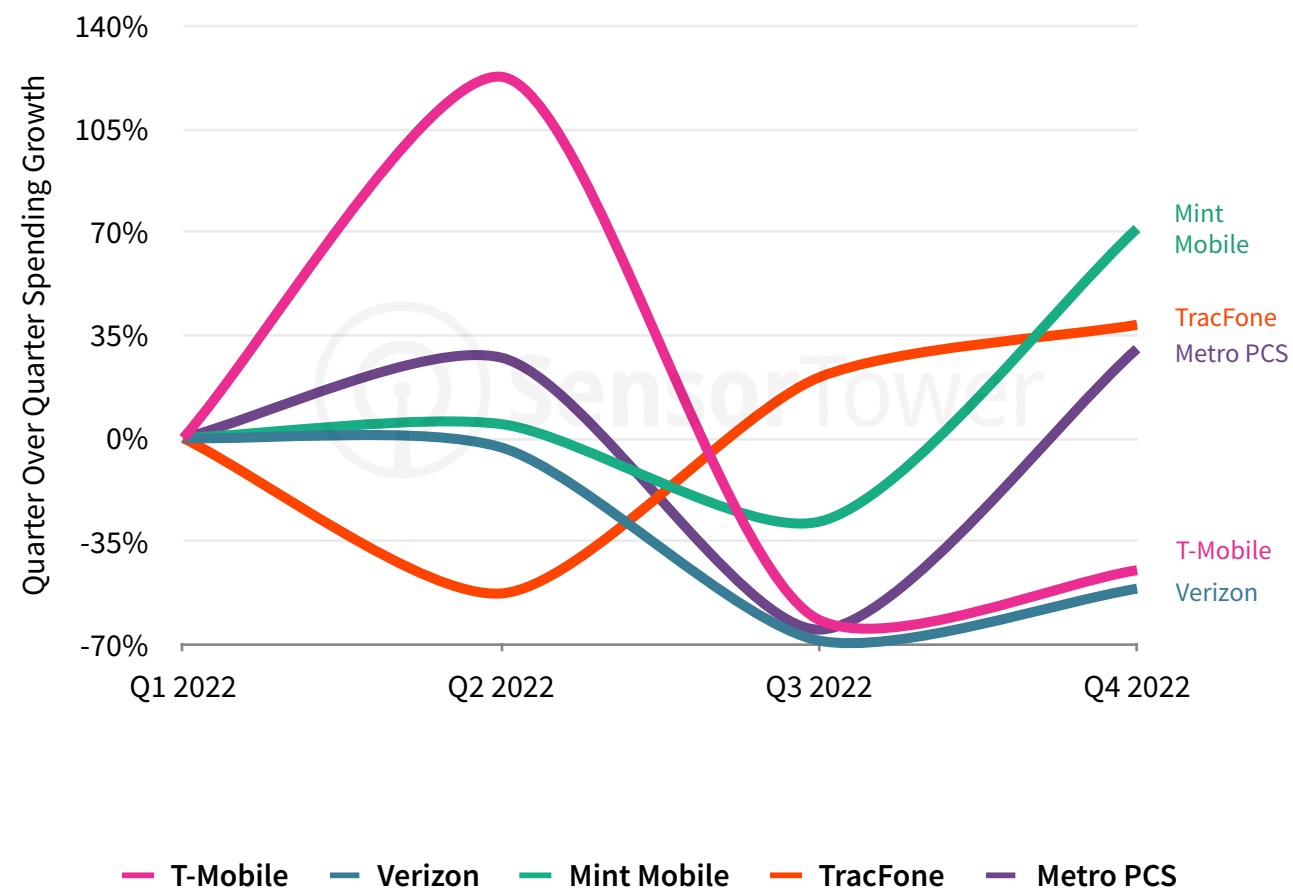
Quarterly Snapchat Spending Growth for the Top Mobile Telecom Advertisers, 2022

Mobile Virtual Network Operators (MVNO), companies that provide mobile services under a network of licensed operators, led in Mobile Telecom Snapchat spending growth in Q4 2022. Mint Mobile, TracFone, and Metro PCS were among the MVNO's that topped spending growth from major cellular providers T-Mobile and Verizon.

Mint Mobile grew 71 percent quarter-over-quarter in Q4 2022 while reaching the highest Snapchat spend among the top 5 Mobile Telecom advertisers. As a result, Mint Mobile gained 19M more impressions than T-Mobile and 281M more impressions than Verizon.

Along with Mint Mobile, TracFone made significant gains over major cellular providers. TracFone spending grew 38 percent in Q4 2022 while T-Mobile and Verizon both decreased 45 percent and 51 percent in the same period, respectively. TracFone's growth resulted to 1.5M more impressions than Verizon.

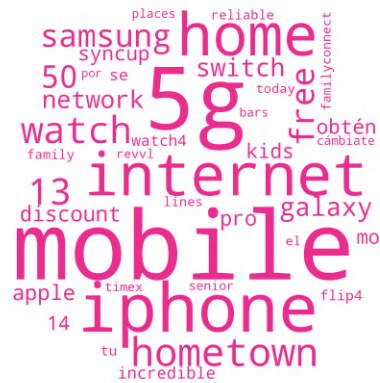
Quarter Over Quarter Growth by Spend from Mobile Telecom Advertisers in 2022



Mobile Advertisers Get Personal with Snapchat Creatives

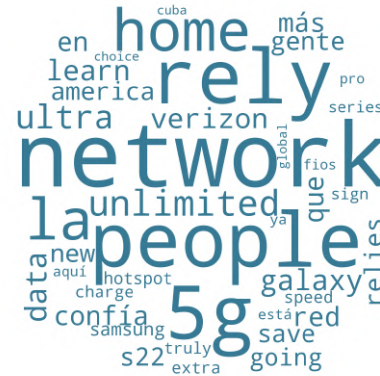
Commonly Used Words in Snapchat Creatives from the Top Mobile Advertisers , 2022

T-Mobile



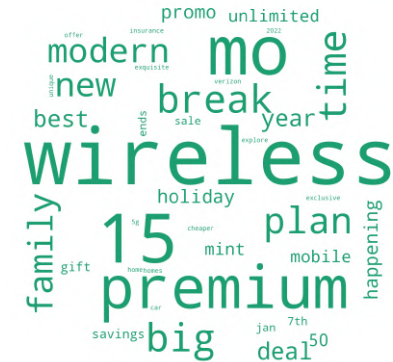
T-Mobile Snapchat ads in 2022 took a personal approach in their creatives. With words such as “hometown” and “home”, T-Mobile spent over \$1.4M on their Hometown Techover campaign, a limited time promotion offering deals and incentives in select markets in rural America.

Verizon



Verizon's message in their Snapchat creatives ensured that customers can depend on their services. With creatives such as "The network more people rely on", Verizon emphasized dependable services in 14 percent of their Snapchat ads in 2022, included words such as "rely", "people", and "network".

Mint Mobile



With a deal of 35GB of data for \$15/month, Mint Mobile promised customers that it was “time to break up with big wireless”. In particular, Mint Mobile’s creatives promoting “premium wireless for \$15/mo.” accounted for 56 percent of Mint Mobile’s Snapchat ads in 2022, totaling \$4.5M in Snapchat ad spending.



Computers & Consumer Electronics Ad Overview



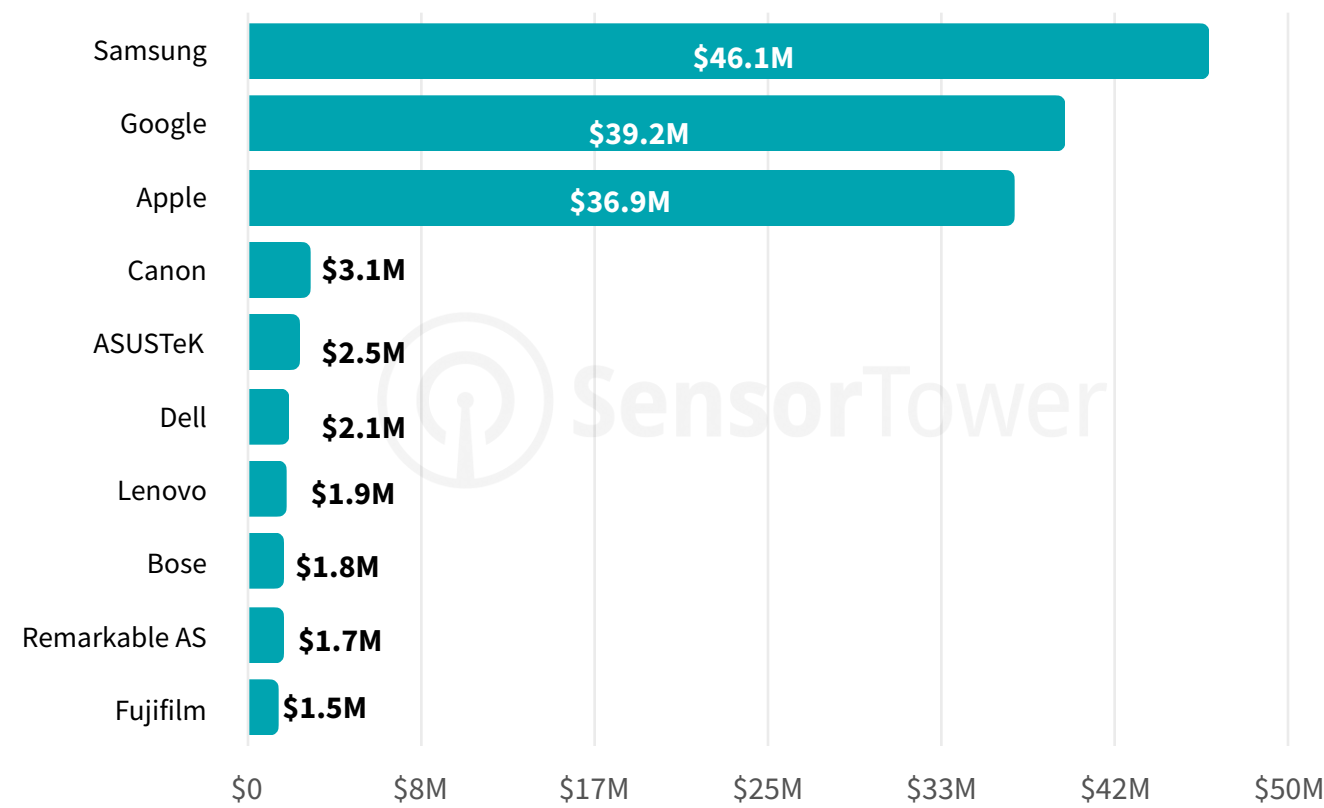
Large Tech Advertisers Carried CCE Snapchat Advertising

Top Computers & Consumer Electronics Advertisers by Ad Spend, 2022

Large tech advertisers Samsung, Google, and Apple collectively accounted for 89 percent of the top 10 Computers & Consumer Electronics advertiser spending in 2022. Samsung spent three consecutive quarters as number one until its replacement by Google in Q4 2022.

ASUSTek took the lead among Computer advertisers in Q1 2022 until it was replaced by Dell and Lenovo in Q2 and Q3. ASUSTek then reclaimed its lead in Q4 with a 30 percent quarter-over-quarter increase in ad spending to \$628K.

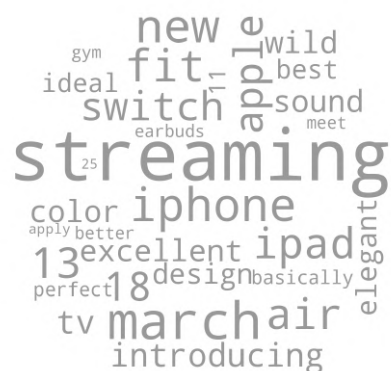
Top 10 Computer & Consumer Electronics Advertisers by U.S. Snapchat Ad Spend in 2022



Phones were the Highlight of Tech Events in 2022

Most Frequently Used Words in Snapchat Creatives from Consumer Electronics Advertisers, Surrounding Tech Events, 2022

Apple



Apple's event in March 2022 previewed new products such as the iPhone 13 and iPad Air, along with promotions encouraging viewers to switch to new iPhone 13 models. Apple spent \$1.3M in Snapchat advertising within one week of the start of March's Apple Event.

Note: Snapchat creatives between March 8, 2022 and March 15, 2022

Samsung



Samsung's Galaxy Unpacked event showcased new products such as the Galaxy S22 Ultra and Galaxy Tab S8. Samsung's \$983K Snapchat campaigns following the event highlighted promotions such as pre-ordering devices from the Galaxy series and saving 50 percent off with free shipping on select products.

Note: Snapchat creatives between March 8, 2022 and March 15, 2022

Google



Google I/O 2022 featured new Google Pixel lines such as the new Google Pixel 6a and Google Pixel 7. Despite the announcement, Snapchat creatives only featured promotions to shop for the Google Pixel 6 Pro and obtaining Google career certificates. Within one week of the I/O event, Google spent \$641K on Snapchat ads.

Note: Snapchat creatives between May 11, 2022 and May 18, 2022



Computer Advertisers Emphasized Gaming Products on Snapchat

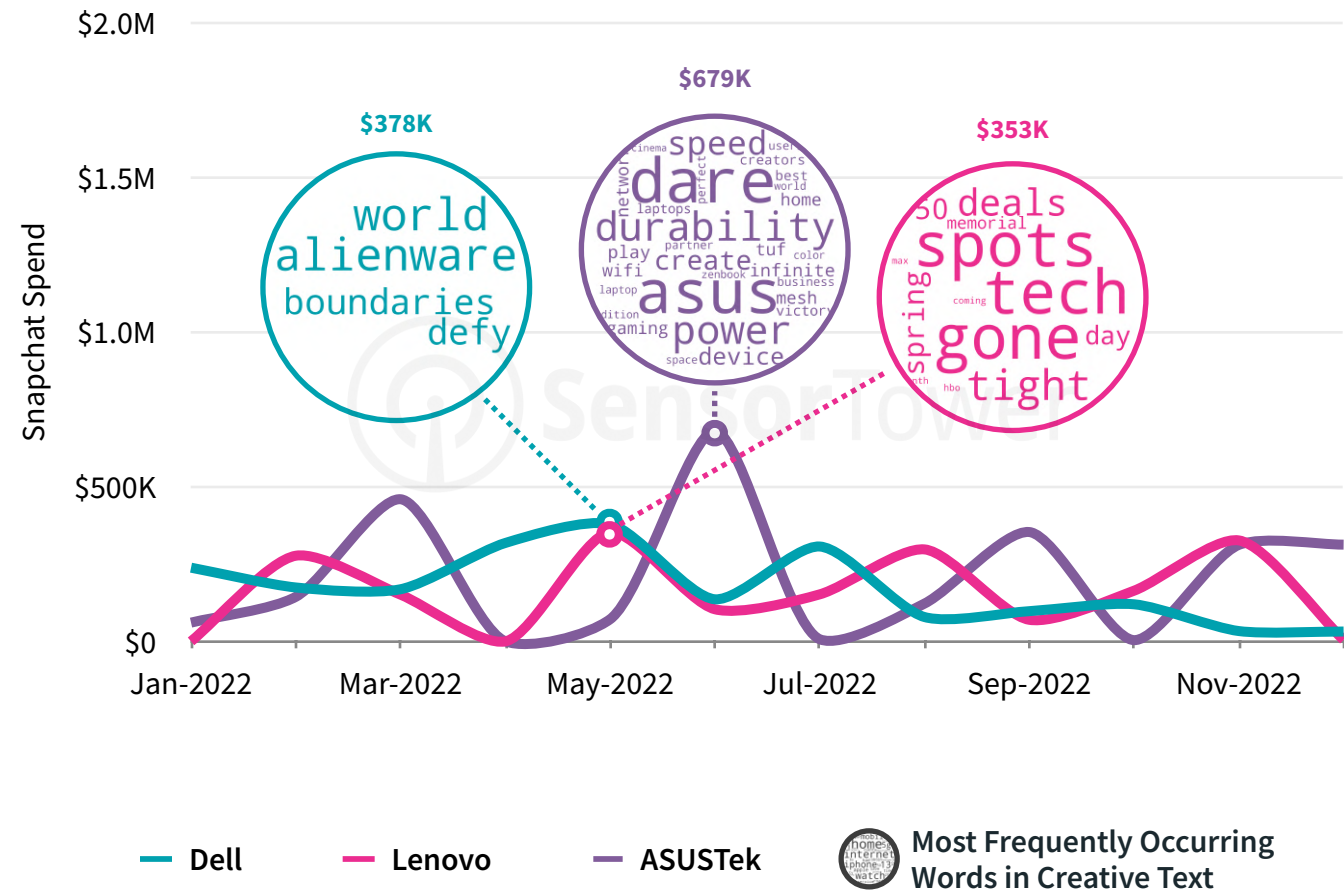
Monthly Snapchat Ad Spend for the Top Computer Advertisers, 2022

During months with the highest Snapchat spending, Dell and ASUS focused advertising on gaming. In particular, Dell highlighted their gaming brand, Alienware, by encouraging customers to “defy boundaries” in the “world of Alienware”, gaining them 63M impressions for May 2022. ASUS generated 113M impressions in June 2022 with gaming-inspired slogans such as “for those who dare”, “restocked & reloaded”, and “Power. Speed. Durability”.

While Dell and ASUS focused on gaming, Lenovo emphasized advertising sales events. Lenovo spent 57 percent of their total spending for May 2022 on creatives mentioning Memorial Day sales and Spring deals. As a result, Lenovo generated 33M impressions.

Note:
Computer Advertisers refers to advertisers who promote products associated with computers. Dell, Lenovo, ASUS, and Logitech are examples of such advertisers who market laptops, keyboards, mice, and other computer-related products to customers.

Monthly Spend from Computer Advertiser
Snapchat Creatives in 2022



Snapchat Advertising Conclusion



Conclusion

Snapshot Advertising in the United States

Market Overview



Snapchat saw steady spending growth throughout 2022. Q4 2022 was the best performing quarter for advertisers, totaling \$774M, an 8.4 percent quarter-over-quarter increase.

Media



Streaming services capitalized on Snapchat Media advertising. Among the top 10 Media advertisers, Snapchat was used to promote brands that offered streaming services through different mediums such as shows, movies, music, and podcasts.

Arts & Entertainment



Snapchat was employed for movie promotion throughout the release cycle. Advertising began with previews for the movie, leading up to its availability in theaters. One month after its premiere, Snapchat ads focused on on-demand access and physical copy promotions.

Telecom



Mobile advertisers represented Telecom advertising in 2022 and are continuing to grow. Q4 2022 saw growth in spend for smaller cellular providers as major provider ad spend declined. Mint Mobile spending grew 71 percent quarter-over-quarter in Q4 2022, topping growth from T-Mobile and Verizon.

Computers & Consumer Electronics



The majority of ad spending in the Computers and Consumer Electronics category was from a few large advertisers, with Samsung, Google, and Apple making up 89 percent of all spending in 2022.



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