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The Perfect MATCH

Addressable TV for Maximized Reach & Revenue

Finding *TRUE CONNECTION* is Harder Than You Think

For TV advertisers, the quest for audiences across platforms and screens is becoming increasingly challenging. With elusive audiences, missed connections, and even fraudulent players, it's like searching for a needle in a haystack for that Perfect Match.

A common strategy has been to chase audiences to Streaming/CTV, but despite its growing share of TV viewing, Streaming/CTV accounts for only 16.5% of all ad impressions. So, where can these real connections be made? How can advertisers find and engage with their true target audiences? The answer is Addressable TV.

In this report, we'll show why Addressable TV is the high-fidelity, high-precision solution that works alongside both Traditional TV and Streaming/CTV to maximize reach, reduce waste, and deliver better outcomes—making it The Perfect Match for your media plan.

Data Contributors

DISH Media partnered with Janus Strategy and Insights to help marketers better maximize their media planning to deliver incremental reach and revenue, with particular focus on the importance of utilizing deterministic Addressable TV. Data was analyzed from several sources including MRI-Simmons, Nielsen, DISH Media campaigns, ABCS Insights, Arima, and Innovid. An audience reach model was built for Traditional TV, Streaming/CTV, and Addressable TV, enabling estimation of reach across different budget allocations and penetration levels.

Definitions

For clarity and consistency, the following definitions will be used throughout this report.

Addressable TV

The ability to deliver targeted ads to specific households using deterministic identifiers, such as subscriber-verified data tied to a physical mailing address. Addressable TV allows brands to match audiences based on first-, second-, or third-party data across demographic, behavioral, or geographic attributes.

Note: IP-only targeting is not considered addressable, as it relies on probabilistic signals that are unstable and less precise.

Traditional TV

Broadcast and cable content delivered via wired cable, telco, satellite, or over-the-air distribution. This channel primarily relies on age/gender-based audience segments and broad reach.

Streaming/CTV

Ad-supported TV content delivered over the internet to a connected device or smart TV. These platforms may support demographic or IP-based targeting, but typically lack deterministic audience verification at the household level.

Key Takeaways

Deterministic Data Matters

Leveraging verified, household-level subscriber data delivers unmatched accuracy, measurability, and cost effectiveness, up to 2x higher than Streaming/CTV and 3x more than Traditional TV campaigns.

Addressable TV Outperforms IP Matching

While IP-based targeting rapidly degrades and struggles with accuracy, Addressable TV leverages authenticated data for nearly 4x match rates—ensuring scale, precision, and efficiency.

Addressable TV Tops Other Platforms in Driving Mid- & Lower-Funnel Outcomes

Including +15% lift in foot traffic and +9% lift in website visits vs. CTV/Streaming and 2x lift vs. Traditional TV.

Addressable TV Delivers a High-Value, Unduplicated Audience

Addressable audiences represent $3.7 trillion in buying power and have higher median HH income, home ownership and net worth. In addition, 31 million of them cannot be reached effectively by Streaming/CTV.

Addressable TV Finds Hard-to-Reach Light TV Viewers

Light TV viewers and households are often missed by both Traditional TV and Streaming/CTV. Investing in even a small amount of Addressable TV drives double, even triple-digit gains against light TV viewers.

Proven Incremental Reach & Revenue Growth

Adding Addressable TV to any media plan drives double- or even triple-digit gains. When modeled against benchmarks for 50+ advertisers across multiple verticals, the incremental sales revenue ranged from $74 million to $454 million—proving what advertisers risk losing without Addressable TV.

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Why Addressable TV?

Delivering Unique Value to Advertisers

Addressable TV brings together the best of both TV and digital: premium, brand-safe content combined with precise, data-driven targeting.

Built on verified subscriber identities—not modeled or inferred signals—Addressable TV gives advertisers confidence in who they're reaching and where their ads appear. This deterministic foundation reduces waste and drives stronger performance.

As marketers aim to do more than build awareness, Addressable TV makes it easier to suppress recent buyers, convert high-intent households, and deliver measurable outcomes.

The following sections highlight how this identity-based approach powers better audience matching, sharper targeting, and real business impact.
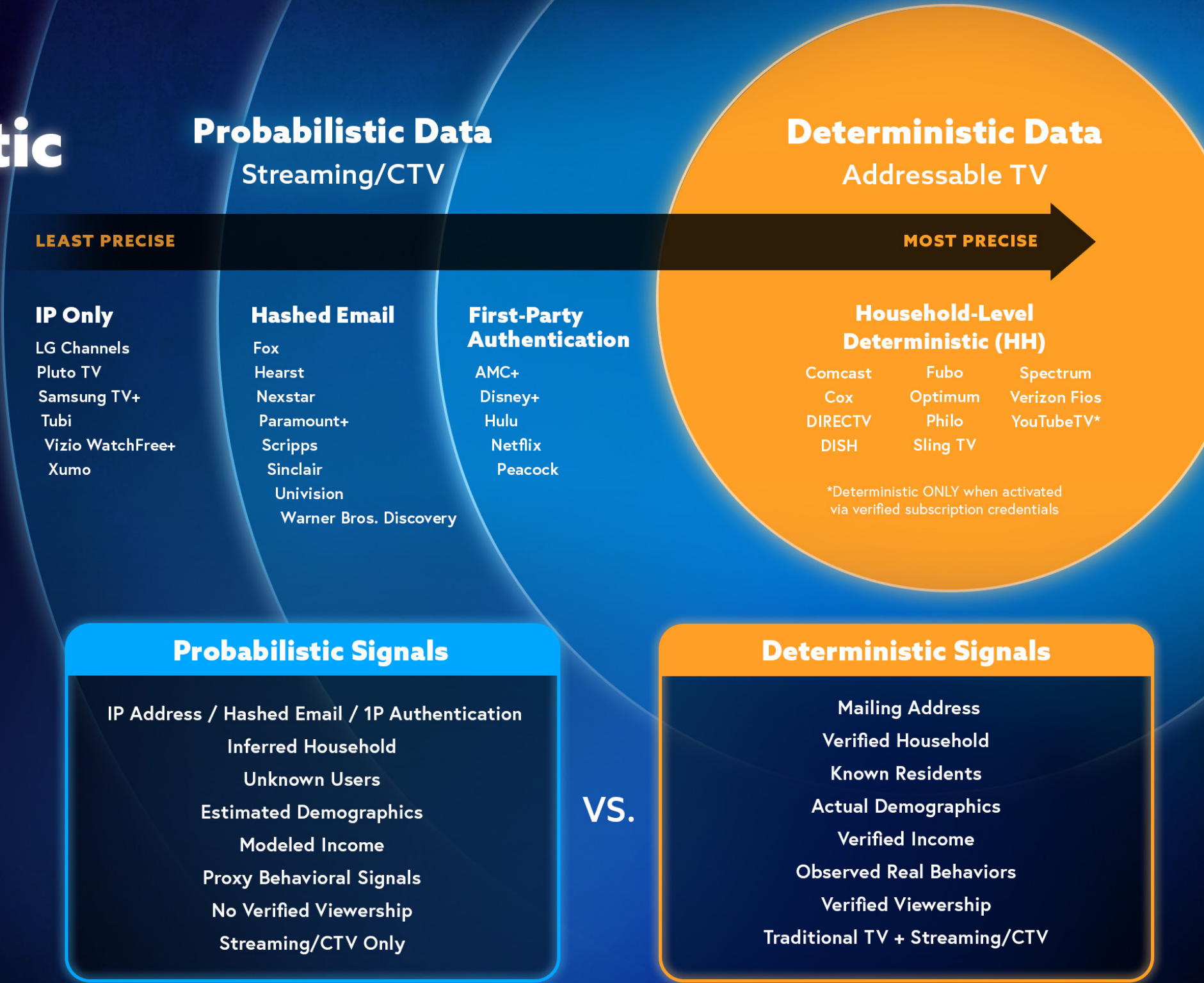
Differentiating Between Deterministic & Probabilistic Data

While many platforms claim "addressable" capabilities, not all addressable is created equal.

Deterministic addressable solutions are built on verified, household-level subscriber data, making them the most accurate and measurable option available.

By contrast, much of what the industry calls "addressable" is actually probabilistic addressable—relying on inferred, modeled, or IP-based signals that introduce uncertainty.

The chart on the top right helps categorize the key media players and data types behind today's addressable claims, grouping platforms by their core identity signal and confidence level.

Probabilistic Data
Streaming/CTV

Deterministic Data
Addressable TV

LEAST PRECISE →→→ MOST PRECISE

IP Only
- LG Channels
- Pluto TV
- Samsung TV+
- Tubi
- Vizio WatchFree+
- Xumo

Hashed Email
- Fox
- Hearst
- Nexstar
- Paramount+
- Scripps
- Sinclair
- Univision
- Warner Bros. Discovery

First-Party Authentication
- AMC+
- Disney+
- Hulu
- Netflix
- Peacock

Household-Level Deterministic (HH)

Comcast	Fubo	Spectrum
Cox	Optimum	Verizon Fios
DIRECTV	Philo	YouTubeTV*
DISH	Sling TV	

*Deterministic ONLY when activated via verified subscription credentials

Probabilistic Signals

IP Address / Hashed Email / 1P Authentication

Inferred Household

Unknown Users

Estimated Demographics

Modeled Income

Proxy Behavioral Signals

No Verified Viewership

Streaming/CTV Only

VS.

Deterministic Signals

Mailing Address

Verified Household

Known Residents

Actual Demographics

Verified Income

Observed Real Behaviors

Verified Viewership

Traditional TV + Streaming/CTV

Targeting Smarter with Addressable TV

Most Streaming/CTV platforms rely on probabilistic signals like IP matching, which frequently change and degrade in accuracy over time.

According to a new analysis, 86% of matches generated using probabilistic IP-based data, across six leading providers, failed to align with a valid postal address. This often resulted in multiple, conflicting household records for a single user, causing misfires in targeting and wasted impressions.
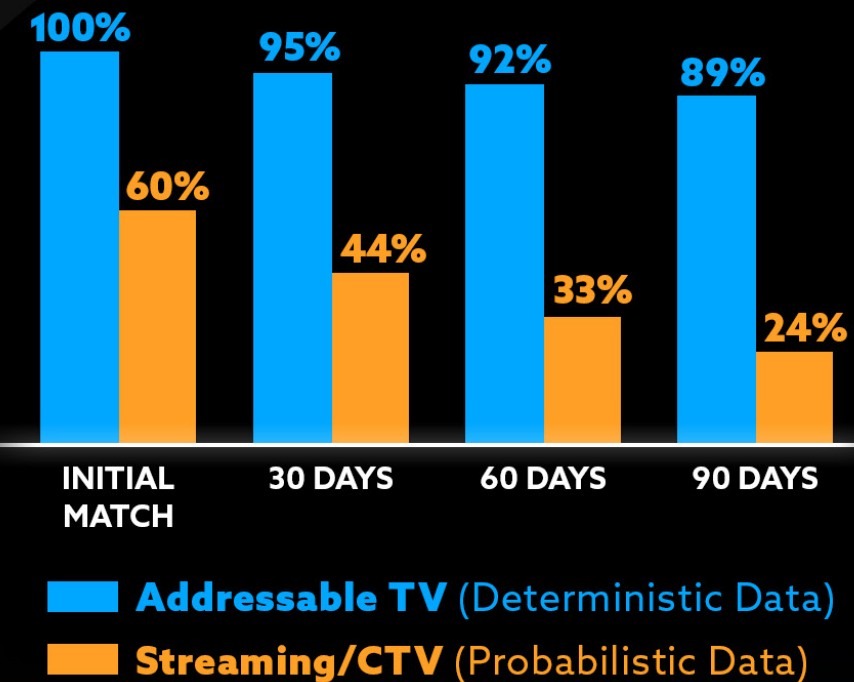
Addressable TV eliminates that guesswork with subscriber-verified household data tied directly to a physical mailing address, ensuring campaigns reach their intended audience with precision.

Addressable TV: 4x Accuracy
CPM Efficiency & Reliable Performance

IP Accuracy Erodes
Diminshed Effectiveness & More Waste

	INITIAL MATCH	30 DAYS	60 DAYS	90 DAYS
Addressable TV (Deterministic Data)	100%	95%	92%	89%
Streaming/CTV (Probabilistic Data)	60%	44%	33%	24%

■ **Addressable TV** (Deterministic Data)
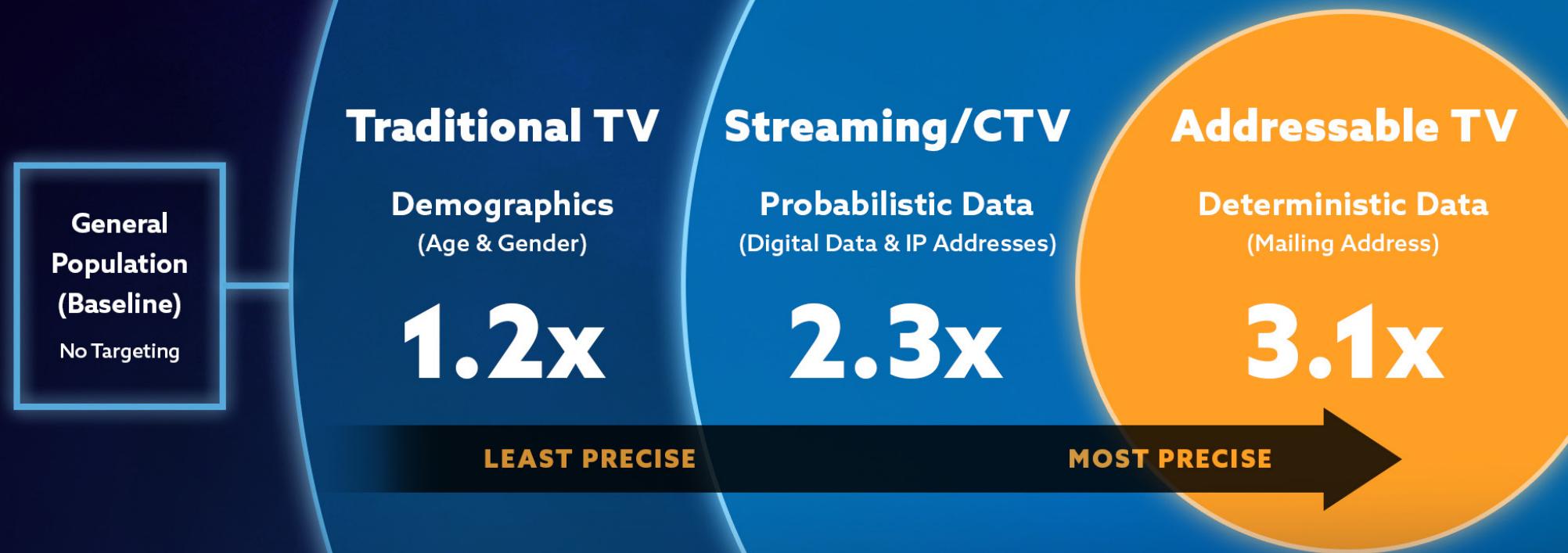■ **Streaming/CTV** (Probabilistic Data)

Maximizing Efficiency with Deterministic Data

The quality of data is a key differentiator for reaching the right viewer and driving results. Even before a single ad runs, platforms can be evaluated on targeting efficiency.

To benchmark audience quality (percentage of viewers in your target), more than 200 cross-platform studies were analyzed to establish performance norms.

This infographic illustrates the spectrum: from general population with no targeting, to broader demographic targeting, to precise household-level targeting with Addressable TV. Improved precision results in smarter media spend and stronger outcomes.

General Population (Baseline)
No Targeting

Traditional TV
Demographics
(Age & Gender)
1.2x

Streaming/CTV
Probabilistic Data
(Digital Data & IP Addresses)
2.3x

Addressable TV
Deterministic Data
(Mailing Address)
3.1x

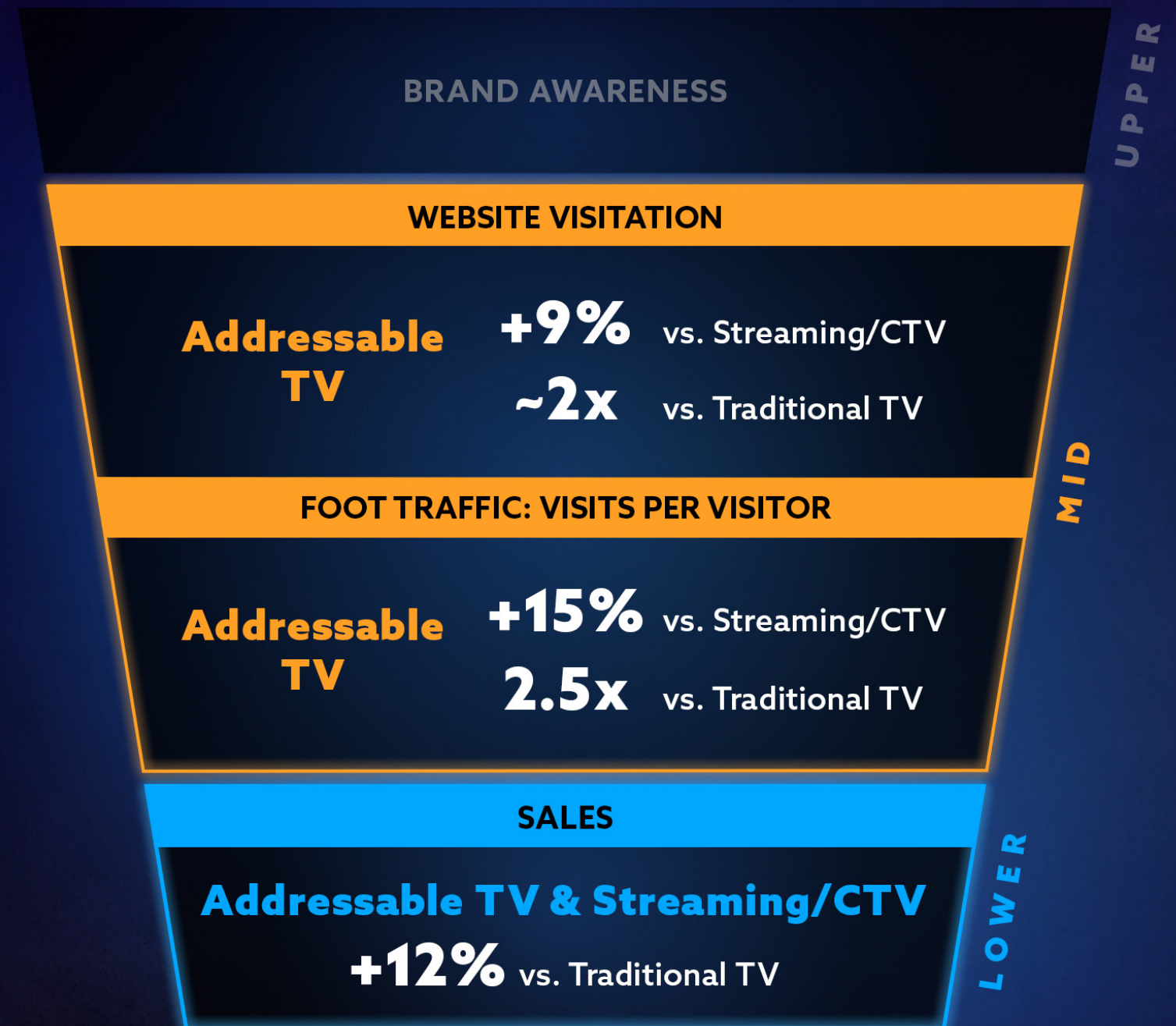LEAST PRECISE   MOST PRECISE

Driving Measurable Mid- & Lower-Funnel Outcomes

While Traditional TV remains a powerful tool for building awareness, often generating 2x the lift of other platforms, Addressable TV is the perfect complement for moving consumers further down the funnel and driving real outcomes.

Data-driven, deterministic targeting is the engine behind Addressable TV's performance. By accessing the right households with tailored messaging, advertisers can efficiently engage consumers throughout the purchase journey—boosting visitation, engagement, and ultimately sales.

This precision differentiates Addressable TV from Traditional TV and Streaming/CTV approaches, driving outcomes that directly impact the bottom line.

UPPER

BRAND AWARENESS

WEBSITE VISITATION

Addressable TV
+9% vs. Streaming/CTV
~2x vs. Traditional TV

MID

FOOT TRAFFIC: VISITS PER VISITOR

Addressable TV
+15% vs. Streaming/CTV
2.5x vs. Traditional TV

SALES

Addressable TV & Streaming/CTV
+12% vs. Traditional TV

LOWER

11

Capturing High-Value Audiences

Addressable TV connects advertisers with over 102 million adults by using authenticated, household-level data—reaching real people with real spending power.

These viewers represent $3.7 trillion in buying power and outperform both platforms in income, homeownership, luxury purchases, and net worth.

Yet 31 million of them can't be reached effectively through ad-supported Streaming/CTV. Don't leave them behind.

Skipping Addressable TV means missing the most affluent, actionable viewers and leaving results on the table.

Addressable TV Viewers
$3.7 Trillion in Buying Power
Across 10 Key Advertiser Categories

Addressable TV Viewers Lead in Affluence

	MEDIAN HH INCOME	OWNS A HOME	OWNS A LUXURY VEHICLE	HOME VALUE $400K+	NET WORTH $1M+
Addressable TV	**$93k**	**76%**	**9%**	**35%**	**24%**
Streaming/CTV	$91k	65%	8%	27%	17%
Traditional TV	$89k	69%	8%	30%	19%

Identifying Hard-to-Reach Light TV Viewers

Reaching beyond heavy and medium TV viewers is critical for fueling the marketing funnel and accessing high-value consumers who drive real spending.

Light TV viewers are often missed by Traditional TV-only or Traditional TV + Streaming/CTV campaigns, creating a costly gap in your brand strategy. About one in four light TV viewers do not stream at all.

Overlooking these audiences means leaving incremental scale and associated business growth on the table. A balanced media strategy that includes Traditional TV, Streaming/CTV, and Addressable TV ensures you connect with these high-value, hard-to-reach households.

Light TV Viewers
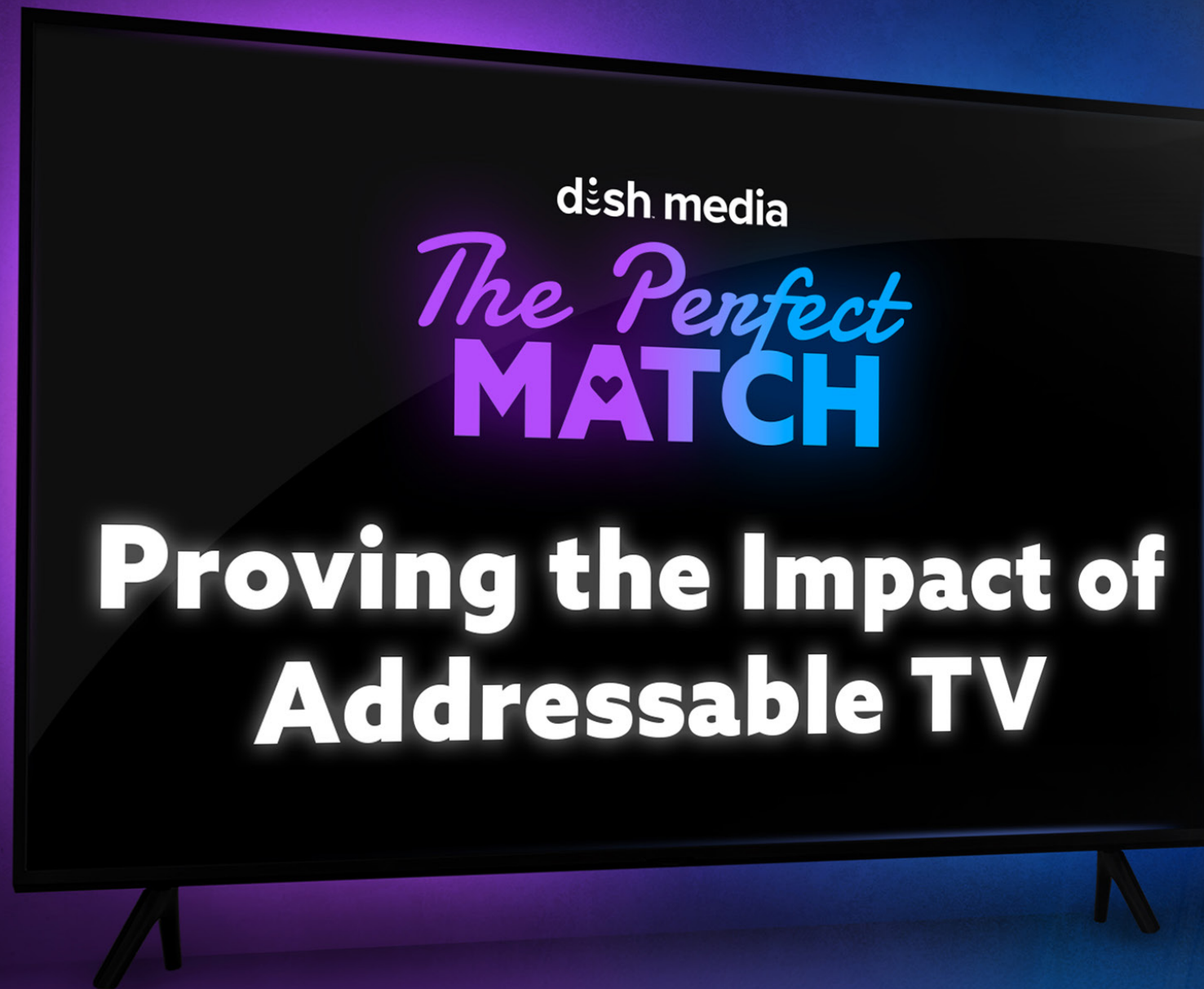
$3.4 Trillion in Buying Power

Across 10 Key Advertiser Categories

Light TV Viewers Hold Significant Category Spend

Children's Apparel
48% of $90B

Video Games
45% of $59B

Luxury Apparel
47% of $25B

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Proving the Impact of Addressable TV

Many media plans prioritize Traditional TV and Streaming/CTV, missing out on the reach, precision, and business outcomes that only true, deterministic Addressable TV can deliver.

This section provides clear evidence of the positive impact of Addressable TV and how even a small shift from Traditional TV or Streaming/CTV can drive double-digit gains in reaching both in-target and light TV audiences. It also demonstrates how those reach gains translate into measurable business impact.

SEE THE APPENDIX FOR METHODOLOGY DETAILS AND MODELED SCENARIOS ACROSS BUDGET AND PENETRATION LEVELS

Shifting Your Strategy Drives Measurable Impact

These two planning scenarios show how shifting media dollars to Addressable TV leads to meaningful lift in in-target reach—regardless of whether the dollars come from Traditional TV or Streaming/CTV.
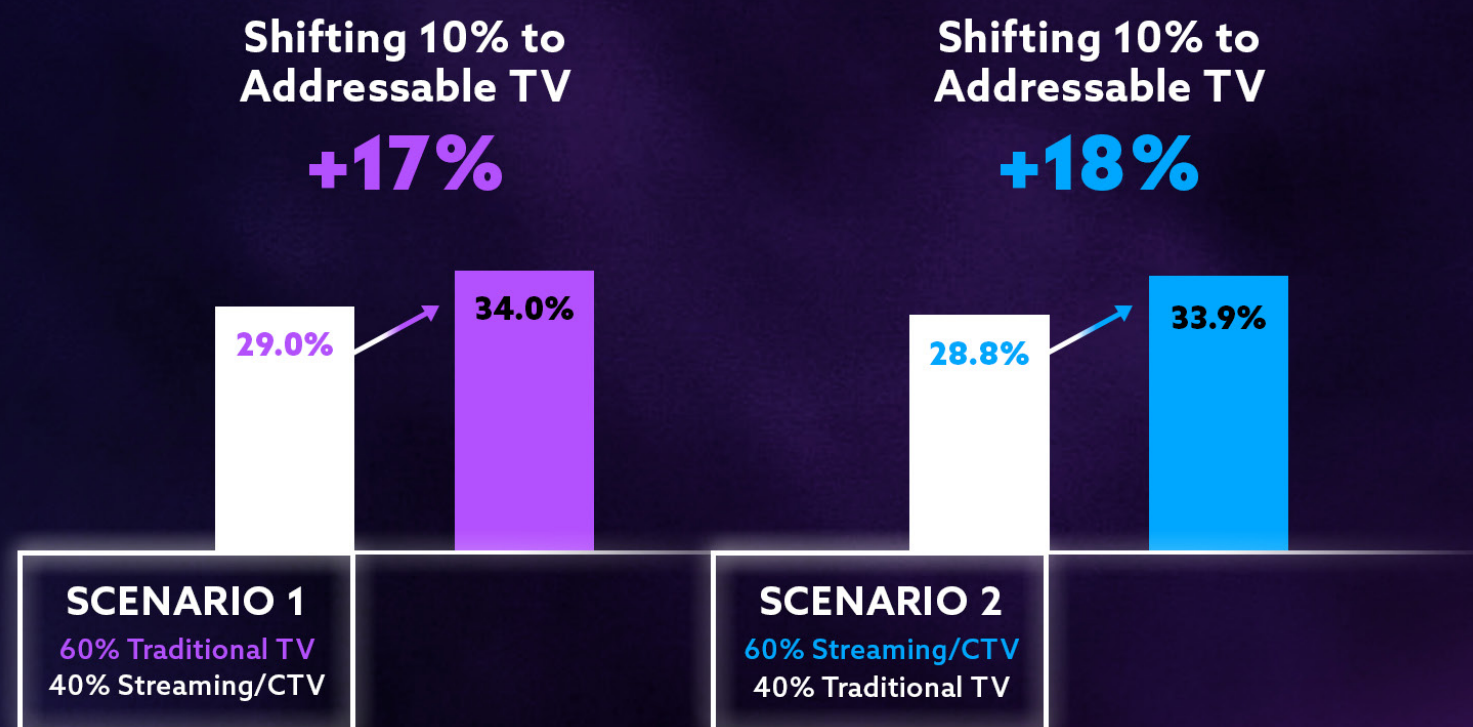
In Scenario 1 (left), a Traditional TV-leaning plan (60/40) shifts 10% of dollars to Addressable TV, resulting in a 17% lift in in-target reach.

In Scenario 2 (right), a Streaming/CTV-leaning plan (60/40) shifts 10% from Streaming/CTV to Addressable, producing an 18% lift in in-target reach.

This comparison highlights a clear takeaway: without Addressable TV, you're leaving measurable opportunity untapped.

In-Target Reach
$5M Budget | 15% Penetration

Shifting 10% to Addressable TV
+17%

29.0% → 34.0%

SCENARIO 1
60% Traditional TV
40% Streaming/CTV

Shifting 10% to Addressable TV
+18%

28.8% → 33.9%

SCENARIO 2
60% Streaming/CTV
40% Traditional TV

Expanding Reach with In-Target & Light TV Viewers

Your media plan's success hinges on reaching the audiences that matter most: your in-target consumers and elusive light TV viewers.

Reallocating just 10% to Addressable TV lifts reach across both segments. Gains are consistent whether the shift comes from Streaming/CTV or Traditional TV.

This example highlights multiple budget plans targeting an audience with 15% penetration, but even as the target broadens to 25% penetration (not shown, see appendix), Addressable TV continues to produce significant lift— proving its effectiveness across audience strategies.

Incremental Reach
Budget/Month | 15% Penetration

In-Target Viewer		Light TV Viewer
+27%	$500k Budget	**+136%**

Results from moving 10% from Streaming/CTV (100% Plan)

+18%	$5M Budget	**+38%**
+26%	$10M Budget	**+72%**

Average results from moving 10% from Traditional TV (60% Plan) or Streaming/CTV (60% Plan)

Translating Reach Into Revenue

The previous page demonstrated how reallocating just 10% of a media budget to Addressable TV drove meaningful reach gains across critical viewer segments.

But the impact doesn't stop at reach. That same strategic shift translates into tangible revenue outcomes.

A modeling analysis across 50+ advertisers in key verticals quantifies the revenue impact of reallocating just 10% of a media budget to Addressable TV.

The results are compelling: across sectors like auto, financial services, retail, QSR, telecom, and pharma, shifting budget to Addressable TV delivers incremental revenue that would have otherwise been completely missed.

Incremental Sales Revenue

Across 6 Advertiser Categories

Budget/Month | 15% Penetration

$500k Budget — **$74M**

Results from moving 10% from Streaming/CTV (100% Plan)

$5M Budget — **$102M**

$10M Budget — **$454M**

Average results from moving 10% from
Traditional TV (60% Plan) or Streaming/CTV (60% Plan)

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Next Steps for Addressable TV Success

Including Addressable TV in Every Modern Media Plan

As media strategies evolve, Addressable TV has become a critical lever for growth—delivering the scale, precision, and measurable results that today's advertisers demand. By prioritizing Addressable TV in media planning, marketers can unlock meaningful increases in sales and revenue.

Backed by deterministic, subscriber-verified data, Addressable TV offers unmatched targeting accuracy and transparency, ensuring every impression reaches real households, not just devices.
It fills the gaps left by Traditional TV and Streaming/CTV alone, reaching high-value audiences others miss.

It's no longer a question of whether to include Addressable TV. It's a question of how much you're willing to miss if you don't.

Key Advantages of Addressable TV

Deterministic Data at the Core
Build on verified, household-level subscriber data to ensure unmatched accuracy, measurability, and confidence in your addressable campaigns.

Precision That Outperforms IP Matching
Reach real households in-market for your product, not just devices. While IP-based targeting rapidly degrades and struggles with accuracy, Addressable TV leverages authenticated data for nearly 4x match rates—ensuring scale, precision, and efficiency.

Proven Performance Across the Funnel
Achieve measurable impact with Addressable TV, especially in mid- and lower-funnel outcomes such as consideration and conversions.

Access to High-Value Audiences
Capture light TV viewers and households missed by both Traditional TV and Streaming/CTV—including 31 million who can't be reached effectively through ad-supported Streaming/CTV.

Reach & Revenue Growth with Budget Shifts
Shifting a portion of your media budget to Addressable TV produces consistent double-digit gains in reach—especially among light TV viewers—resulting in significant, measurable increases in sales and revenue opportunity.

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Your *PERFECT MATCH*

Advertisers know Addressable TV delivers—but lasting success comes down to the right partner.

DISH Media unites deterministic data with premium, converged inventory across both Traditional TV and Streaming/CTV, making it easier to reach in-market households with precision and scale through a single, streamlined buy. Plus, DISH Media delivers unique audiences you won't find on other platforms.

Whether your goal is to capture light TV viewers, convert high-intent households, or simply maximize efficiency, DISH Media helps you make every impression count!

LET'S BUILD YOUR NEXT PLAN TOGETHER
DISHMEDIA@DISH.COM

Methodology & Sourcing

Methodology

2 Baseline Media Plan Activities

Traditional TV Centric (60% & 40% Streaming/CTV)

Streaming/CTV Centric (60% & 40% Traditional TV)

3 Budget Scenarios

$500k (Small)

$5M (Medium)

$10M (Large)

2 Market Penetration Levels

15%

25%

For each scenario, we modeled the impact of reallocating just 10% of spend to Addressable TV from either a Traditional TV– or Streaming/CTV–centric media plan (60/40 mix). We evaluated how these shifts influenced three key performance areas:

- In-Target Viewer Reach
- Light TV Viewer Reach
- Revenue Across Major Categories

Modeled Scenarios

	Incremental Reach Lift		
	In-Target Viewer	Light TV Viewer	Sales Revenue Across 6 Advertiser Categories
$500k Budget/Month			
Streaming/CTV (100% Plan) 15% Penetration	27%	136%	$74M
$5M Budget/Month			
Traditional TV (60% Plan) 15% Penetration	17%	40%	$90M
Streaming/CTV (60% Plan) 15% Penetration	18%	37%	$114M
Traditional TV (60% Plan) 25% Penetration	13%	31%	$53M
Streaming/CTV (60% Plan) 25% Penetration	14%	34%	$118M
$10M Budget/Month			
Traditional TV (60% Plan) 15% Penetration	26%	82%	$474M
Streaming/CTV (60% Plan) 15% Penetration	26%	63%	$434M
Traditional TV (60% Plan) 25% Penetration	20%	67%	$446M
Streaming/CTV (60% Plan) 25% Penetration	21%	58%	$435M

Sources

p. 2   **16.5% of all ad impressions are from streaming:** iSpot, June 2025.

p.3
1. Consumer survey data from MRI-Simmons, an MRC accredited market research company.
2. Nielsen Streaming Platform Ratings and national campaign reach and frequency reports.
3. Innovid CTV Insights Report 2025.
4. ABCS Insights, an outcomes measurement company collecting receipts from 23M HHs.
5. Arima, an independent provider of MMMs, cross-media planning tools, and industry norms for ROAS.
6. DISH Media Campaign Reach and Frequency Reports 2023, 2024, 2025.

p.8   **Infographic:** Evan Shapiro, Go Addressable, Addressable Table of Elements, 2025.

p.9   **86% of matches generate using probabilistic IP-based data—across six leading providers—failed to align with a valid postal address:** Truthset IP Linkage Accuracy Study – Preliminary Results, September 17, 2025, study commissioned by CIMM/Go Addressable.

Bar Chart: "A Guide to Best Practices in Planning and Buying Addressable Television Advertising" February 2024, study commissioned by CIMM/Go Addressable and DISH Media Internal data.

p. 10   **Targeting Infographic:** ABCS. Industry norms by platform. Based on 200+ studies.

p.11   **Funnel Infographic:** ABCS. Meta analysis of KPIs by platform based on 225 studies.

102M A18+ Reached by Addressable TV: MRI March 2025 Cord Evolution Study A18+ base | 102M A18+ reached by Addressable TV (MVPD) = Bases Cable/Satellite/Fiber Optic OR DTV Stream.

31.4M Incremental Viewers: MRI March 2025 Cord Evolution Study A18+ Base | 31.4M Incremental Viewers = 16.1M A18+ Linear Addressable did not watch ad-supported CTV in the past 30 days + 15.2 Mil A18+ Linear Addressable subs that are light streamers = (Cable/Satellite/Fiber Optic OR DTV Stream & Lightest Streaming Quintile) that viewed AVOD in the last 30 days.

p.13   **Audience Profile Infographic:** $3.7 Trillion: MRI March 2025 Cord Evolution Study A18+ Base | Addressable TV (MVPD) = (Bases Cable/Satellite/Fiber Optic OR DTV Stream) Share of category spending across 10 major categories (41.5%) applied to Total U.S. spending across those 10 categories ($8.8Trillion) = $3.7T. | 10 major categories = Pet Food, Clothing, Rx Drugs, Home Improvements, Credit Card Expenditure, QSR, Automobiles, Men's & Women's Health & Beauty Aids, Domestic & Foreign Vacations.

Profile Data: Source: MRI March 2025 Cord Evolution Study A18+ Base | Traditional Linear = Those who average any Traditional TV or Time Shifted DVR per week | Addressable TV= Cable/Satellite/Fiber Optic or DIRECTV STREAM viewers | Ad Supported Streaming/CTV = Those who viewed any ad-supported streaming services in the last 30 days.

p. 14   **Light TV Viewer Profile Infographic:** $3.4 Trillion & Category Spend: MRI March 2025 Cord Evolution Study A18+ Base | Lightest TV Video Quintiles (Quintile 4 & 5) share of total category spending (39%) across 10 major categories: Pet Food, Clothing, Rx Drugs, Home Improvements, Credit Card Expenditure, QSR, Automobiles, Men's & Women's Health & Beauty Aids, Domestic & Foreign Vacations. Lightest Quintiles (Quintiles 4 & 5) share of total category spending (39%) applied to Total U.S. spending across the 10 categories ($8.8 Trillion).

p.17   **In-Target Reach Bar Chart:** Reallocation Model: Based on Nielsen National campaign household R&F reports January 2025, Innovid CTV Insights Report 2025, and DISH Media campaign R&F reports. Base CPMs adjusted for match rates of Addressable TV (postal address) and Streaming (IP address) prior to application of targeting efficiencies from ABCS Insights industry norms by platform.

p.18   **Incremental Reach Table:** Reallocation Model: Based on Nielsen National campaign household R&F reports January 2025, Innovid CTV Insights Report 2025, and DISH Media campaign R&F reports. Base CPMs adjusted for match rates of Addressable TV (postal address) and Streaming (IP address) prior to application of targeting efficiencies from ABCS Insights industry norms by platform for target reach.

p.19   **Incremental Sales Revenue Table:** Revenue Impact Estimates: Arima. Modeled using ROAS benchmarks from 50+ advertisers across six key verticals (auto, financial services, pharma, QSR, retail, and telecom). DISH Media CPMs and targeting assumptions are applied to show the effect of reallocating 10% of spend to Addressable TV.